

Running Virtual Club Meetings



with Doug Gerlach
President, ICLUBcentral Inc.
October 2020



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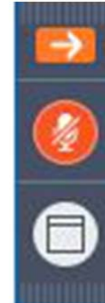


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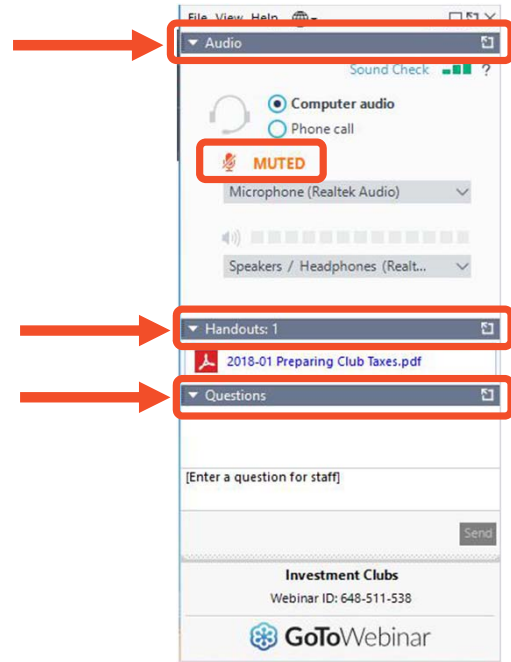


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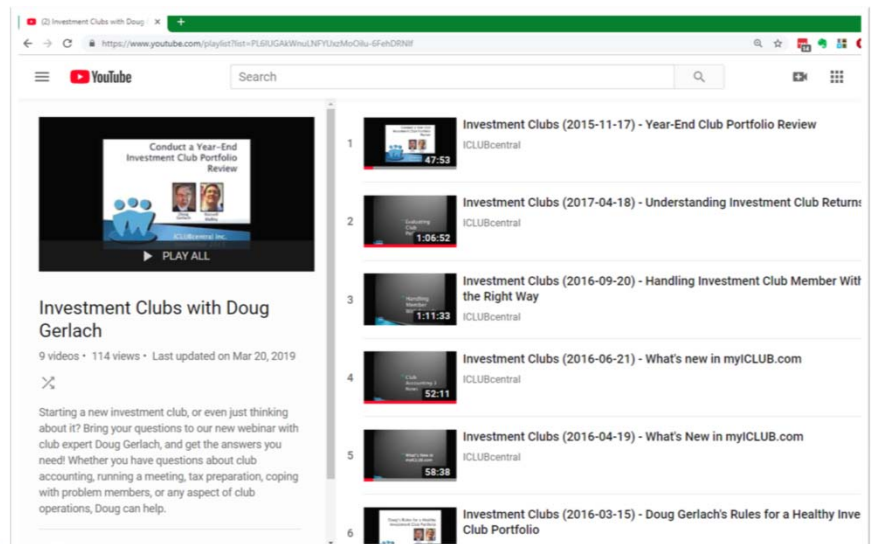
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More Clubs Moving to Online Meetings

- ▶ Ongoing pandemic has led many clubs to conduct meetings online.
- ▶ Variety of tools available to facilitate online meetings:
 - Zoom, GoToMeeting, Webex, Google Hangouts, Skype, FreeConferenceCall.com.
 - Tools work with smartphones, tablets, laptops, computers using all operating systems.



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Advantages of Online Meetings

- ▶ Reduces contact with other people.
- ▶ Eliminates travel, so can be time saver.
- ▶ Allows for continuing membership of members who move or other non-local members.
- ▶ Screen sharing works well for financial reports, minutes, portfolio reports, stock studies.
 - Meetings can be more productive than if only paper reports are distributed.



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Update Operating Documents

- ▶ If necessary, make sure partnership agreement/bylaws support online/remote meetings.
- ▶ Can be troublesome to update if documents seem to expressly forbid meetings not held in person.
- ▶ For most clubs, well-documented agreement to update bylaws is probably sufficient.



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Voting in Online Meeting

- ▶ Determine in advance how voting will be conducted.
- ▶ For small clubs, may be easy to conduct verbal vote.
- ▶ For larger clubs, may need to tally votes by roll call.
- ▶ Secret voting may not be possible.



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Types of Online Meeting Tools

- ▶ Conference call (audio only).
 - Easiest to set up, only phone required.
 - Not optimal for sharing reports & stock studies.
- ▶ Chat only.
 - Participants can type in messages to others.
 - Can be clunky & disjointed.
- ▶ Audio & screen sharing.
 - More complicated to organize.
 - Ideal for sharing reports & stock studies, or conducting real-time research on websites.
- ▶ Video, audio, & screen sharing.
 - Addition of video of participants adds fun & increase interpersonal nature of meeting.
 - Requires webcam-equipped computer or device.



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4 Types of Online Meeting Participants

- ▶ **Organizer:** sets up meeting, distributes sign-on information to members, starts & ends meeting.
- ▶ **Chair:** President or officer who runs business portion of meeting.
- ▶ **Presenter:** any member who presents information during meeting (secretary, president, treasurer, stock presenter, portfolio manager).
- ▶ **Attendee:** members & guests.



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» Meeting Preparation Tips



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Tips for Organizers

- ▶ If necessary, use Doodle's free poll option to schedule meeting times: www.doodle.com/free-poll.
- ▶ Create document for members with step-by-step instructions for installing any necessary software, joining a meeting, & guidelines for participating.



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Tips for Chair

- ▶ Online meetings can quickly run “off the rails” if not well-organized & well-run.
- ▶ Ask members for agenda items in advance.
- ▶ Create & share agenda in advance of meeting.
- ▶ Set aside specific times for questions & discussion.



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Tips for Presenters

- ▶ Make sure all information displayed on screen is large enough to be read & oriented properly.
 - Paper documents are tall, but computer monitors are wide.



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Tips for Attendees

- ▶ Review instructions from meeting organizer in advance.
- ▶ Install meeting software, create account if needed, test in advance.
- ▶ Consider getting computer headset instead of relying on computer microphone & speaker.
- ▶ Test hardware (speakers, headphones, camera) in advance of meeting.



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»» Practice Makes Perfect



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Schedule Practice Session

- ▶ Allows all members opportunity to get familiar with tools & functions, such as:
- ▶ Check audio/video settings.
- ▶ How to share a screen.
- ▶ How to highlight/make notes on screen.
- ▶ How to transfer screen control to another member.
- ▶ How to mute/unmute yourself.
- ▶ How to use chat function.



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Tips for Video Participants

- ▶ Video can be useful since non-verbal cues allow for better communication.
- ▶ Position lighting in your face, not behind you.
- ▶ Don't forget you're on video – people can see if you're not paying attention.
- ▶ Watch out for background action!
- ▶ Zoom in webcam to your face – others will see thumbnail, so can be hard for them to see you.



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» In the Meeting



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Meeting Tips for Organizers

- ▶ Can be useful to have 2nd monitor, display content on 1 & meeting tools on another.
 - Watch out if using 2nd computer to log into meeting – make sure audio is OFF (otherwise you can generate annoying feedback).
- ▶ Be ready to mute/unmute attendees.
- ▶ Be ready to provide tech support during meeting.
 - Instruct members to call/chat/text if having technical problems.



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Meeting Tips for Chairs

- ▶ Display agenda on screen at start of meeting & during transitions.
 - Resize text or window to make sure it's readable.
- ▶ Keep meeting moving along, but allow enough time for discussion & questions.
- ▶ Be ready to table item & discussions until next meeting.



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Meeting Tips for Presenters

- ▶ Be logged in to any websites that you want to display during meeting.
- ▶ Know how to switch windows (Alt+Tab).
- ▶ Close unnecessary programs even if running in background.
- ▶ Be mindful of displaying sensitive information on computer.
- ▶ When screen sharing, maximize windows to full screen & know how to enlarge text/windows.



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Meeting Tips for All Attendees

- ▶ Don't be in room with other people, children, pets, televisions, background noise.
- ▶ Headphones or headset can be much more efficient than relying on computer speakers & microphone.
- ▶ Don't show up 2 minutes before meeting is set to start.
- ▶ Use wired computer if available (instead of using wifi).
- ▶ Know how to maximize meeting window.
- ▶ **Mute yourself unless you are speaking.**



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>> Questions?



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Thank You!

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