

## VIRTUAL TEAM STARTUP CHECKLIST

### Pre-work

- Identify technology (or technologies) that all team members are familiar with and can use. (For the first meeting, this may be the telephone.)
- The team leader should schedule the first meeting at a time when all team members can attend.
- Prepare and distribute an initial agenda and any appropriate materials.
  - Materials to be distributed may include background information, a charge given to the team, the roster of team members, training material for the virtual platform, etc.

### The First Virtual Team Meeting

- The team leader (or meeting convener) provides an overview of the purpose of the team.
  - This should include how the team came to be, goals, timeline, and how members came to be on the team.
- Team member introductions
  - Name, affiliation, background (including areas of expertise and resources), reason for being part of the team, what they expect to get out of it, and anticipated effort (including any limitations or barriers to participation).
- Review the goals and products for the team
  - Is there general agreement on the team goals?
  - Does the current team have the people, resources, and time to accomplish the goals? (If not, what needs to be done to address shortcomings?)

### Team Operational Decisions (Team Operating Agreement)

- Operational decisions include determining how often the team meets, how the team will communicate, how work will be done, and what tools will be needed to accomplish these things in a virtual environment.

### Team Communication, Collaboration and Technology

- What are team members' preferred channels of virtual communication?
  - For scheduling team meetings
  - For one-on-one communication with other team members
  - For co-creating or sharing documents, products, and other "in progress" materials
  - For accessing resources and other archived items
- How and when will team meetings occur?
  - How often will the team meet? (This can be changed at any time.)
  - What is the optimal technology for team meetings?
    - Is there a need for visual sharing and co-creation during the meeting? (Various teleconferencing platforms allow screens to be shared, real-time editing, camera access, multiple active screens, meeting recording, etc.)
    - What technology is available to all team members?
    - What training/learning is necessary to allow everyone to participate?
  - How are team meetings organized?
    - Who sets them up?

- How will agendas, minutes, and other meeting features be organized?
- How does work get done between team meetings?
  - What work gets done by individual team members working alone?
  - What work is co-created?
  - Selecting and using co-creation technologies
    - Select a co-creation technology that matches how the team will accomplish work.
    - Learn to use co-creation technology. (Important features include: live updates when two or more people are editing a document at the same time, saved versions and history, live chatting while two or more people are editing a document, and notifications to team members when a document is edited.)
- Where and how are common resources and reference materials stored?
  - Other than materials in progress, what common materials and resources will the team need and create? (This may include references, documents, literature, agendas, minutes, links to online resources, and other common documents.)
  - What technologies are available for storing and sharing resources that allow easy access to team members on a variety of devices? (Devices include personal computers, tablets, smart phones, etc.)
  - How will this archive be organized and managed? (Identify folder and file naming conventions, appoint an archivist, assign review/edit permissions, etc.)