



Virtual Team Presentations: Segregation of Duties

Give a meaningful role to every team member. Imagine that your team of three is delivering a virtual new business presentation (a pitch). Here is a great way to divide up responsibilities. Send materials one day in advance if you want the presentation to be more of a conversation.

Speaker #1: Lead

This is the person who will open up the meeting and close the meeting.

1. Warm up room
2. Set the tone
3. Deliver strong opening moments (after brief instructions from Tech Host).
Practice this
4. Steer conversation. Pose questions and seek input from your team and your clients
5. Field all questions from the client or redirect to someone else to answer
6. Close the call with next steps

Speaker #2: Lead Back-up

This is usually the second voice heard from your side. This person knows the content well and could lead the meeting if Speaker 1 has an unforeseen issue

1. Warm up the room
2. Ask people for a round of introductions alphabetically. Name, role, and object in your space or Name, role, and what you are liking about virtual working. You can decide to ask the client side first or your side first. If you begin with your side, begin with the Tech Host
3. Monitor time
4. Track page numbers
5. Announce timing constraints
6. Give instructions for break. Mute the audio and turn off video
7. Read the room
8. Interject with questions that advance the topic or steer to the client side for their reaction



TECH HOST - Speaker #3 or 4 (This might be a good role for a more junior team member because of the level of control and responsibility)

1. Welcome people by name as they enter
2. Ask people to test their audio and write something in the chat room
3. Manage chat room for questions/comments
4. Show people how to give a thumbs-up, applaud
5. Teach participants the space bar and ALT-A for muting and un-muting
6. Teach participants the difference between Gallery and Speaker view
7. Check on cell phone numbers without faces to find out who is on their cell
8. Drive slides. Only flash slides for 30 seconds
9. Share screen for buyer websites (have preloaded), page flashes, polls
10. Give team members co-host responsibilities
11. Annotate. Stamp key points or numbers
12. Consider using the Spotlight feature when Speaker #1 and #2 first speak
13. Clear annotations on page turns
14. Privately write people about audio quality