

Effective & Efficient Energy Team Meetings

Regularly scheduled Energy Team meetings are a critical component of ensuring the longevity and effectiveness of your SEM program. Clear direction, transparency, and accountability are important in maintaining effective and efficient meetings.

BEFORE



Share Meeting Agenda

Send meeting agenda in advance and assign timeframes for each agenda item. If team members need to provide updates on their projects, be sure to clearly articulate expectations so they come prepared.



Confirm RSVPs

Make sure all Energy Team members RSVP to the meeting. Encourage attendance and hold individuals accountable. Consider bringing treats or other incentives to raise the excitement level for these meetings.



Confirm Meeting Objectives

Clearly outline the objectives of each meeting. The objective could be to finalize an energy project or increase awareness of your SEM program. Your Opportunity Register serves as a great place to track progress on projects.



Define Roles

Typically, the Energy Champion leads the meeting and assigns agenda items to team members. Assign a note taker to capture action items. Your Executive Sponsor should join on occasion to see what you have accomplished.

DURING



Schedule Next Meeting

Energy Team meetings are most effective when they occur on a monthly cadence. Find a time that works with everyone's schedules – consistent timing ensures a higher attendance.



Use the Parking Lot

Place off-topic discussions – even if it relates to the SEM program or Energy Team – into a “parking lot” and revisit them at the end of the meeting, time permitting. This will help keep the discussion from getting side-tracked and protect the time allotted for each agenda item.



Take Notes

Take detailed notes with discussion points and action items with assigned Energy Team owners.



Manage Time

Ensure that you start on time and end on time. Keep the agenda on track.

AFTER



Send Meeting Recap

Send a meeting recap (preferably on the same day) with complete notes and action items assigned to Energy Team members as appropriate. Comprehensive documentation of each meeting will help ensure follow-through on agenda items.



Follow Up on Action Items

Send an email to the Energy Team a week or so after each meeting to remind members of action items and to request status updates on projects. This ensures accountability and transparency on the team.

Translating In-Person Meeting Activities to Virtual Meeting Abilities

We know that many activities typical of an in-person meeting or event are challenging to pull off in a virtual format. With that in mind, we identified common activities of in-person events, and how to use a virtual meeting software including the features to create a digital experience.

	Zoom	GoTo Meeting	WebEx	Skype for Business	Google Hangouts	Microsoft Teams
Breakout Rooms For Group Discussion	Yes -Breakout room	Yes -Activities	Yes -Breakout session assignment settings	No	No	No
Back and Forth Engagement	Yes -Multi share	Yes -Q&A	No	Yes -Q&A	No	No
Recording Minutes	Yes -Cloud recording	Yes -Recording	Yes -Network based recording -Local recording	Yes -Start recording	Yes (G Suite subscribers only) -Record	Yes -Start recording
Identifying Features in a Presentation (i.e. on a map)	Yes -Annotate	Yes -Pen tool	Yes -Share a document	Yes -Whiteboard	No	No
Sharing Presentation Material	Yes -Screen share -Multi share	Yes -Screen share	Yes -Screen share	Yes -Present desktop -Present programs	Yes -Screen share	Yes -Screen share
File Sharing	Yes -Chat	Yes -Materials	Yes -File transfer	Yes -Add attachment (less than 30mb)	Yes -Chat -Google Docs	Yes -Files -Chat
Polling/Survey Responses	Yes -Polling	Yes -Meeting history	Yes -Manage Panels	Yes -Poll	Yes (G Suite Subscribers only) -@Polly	No (only through other apps)
Drawing Tools for Annotating	Yes -Annotate -Whiteboard	Yes -Pen tool	Yes -New whiteboard	Yes -Whiteboard	No (only through other apps)	No (only through other apps)
Tracking Attendance	No	Yes -Attendee report	Yes -My reports	Yes -Call history	No	No
Registration	Yes -Edit "My Meetings"	Yes -Share in "My Webinars"	Yes -Require attendee registration	No	No	No
Meeting Invitation	Yes -Invite	Yes -Invite	Yes -Add guest	Yes -Meeting invite	Yes -Send invite	Yes -Schedule a meeting
Group Editing of Materials	No	Yes -Annotate	Yes -Share a document/ whiteboard	No	No (only in Google Drive)	Yes -"More Options" in files