# SOP Template: Phone and Virtual Meeting Procedures

This SOP details **phone and virtual meeting procedures**, encompassing protocols for scheduling, initiating, and conducting effective remote communications. It covers guidelines for professional phone etiquette, use of video conferencing tools, managing participant engagement, handling technical difficulties, ensuring confidentiality, and documenting meeting outcomes. The aim is to promote clear, efficient, and productive virtual interactions aligned with organizational communication standards.

## 1. Purpose

To standardize procedures for scheduling, initiating, and managing phone and virtual meetings, ensuring professionalism and effective communication.

## 2. Scope

This procedure applies to all employees and contractors who participate in organizational phone calls and virtual meetings.

## 3. Responsibilities

- **Meeting Organizer:** Schedule and facilitate meetings, share agenda and relevant materials, document outcomes.
- **Participants:** Attend on time, contribute constructively, maintain confidentiality.
- **IT Support:** Provide technical assistance as needed for virtual meetings.

## 4. Procedures

### 4.1 Scheduling Meetings

- Send calendar invitations at least 24 hours in advance (longer for large or formal meetings).
- Include meeting agenda, objectives, time, duration, and access instructions (phone dial-in or video link).
- Verify time zones if participants are in different locations.

### 4.2 Initiating Phone/Virtual Meetings

- Test communication tools (phone or video platform) prior to meeting.
- Join the meeting at least 5 minutes early, especially if hosting.
- Ensure a quiet, appropriate environment and stable internet connection.
- Verify recording permissions and inform participants, if applicable.

### 4.3 Conducting the Meeting

- Begin with a roll call or participant introduction.
- Review agenda and meeting objectives.
- Practice professional phone/video etiquette:
    - Mute microphone when not speaking.
    - Speak clearly and avoid interruptions.
    - Use camera when required; dress professionally.
    - Limit distractions and background noise.
- Encourage active participation and manage time effectively.

### 4.4 Managing Participant Engagement

- Use direct questions or prompts to involve quieter participants.
- Utilize visual aids (screen sharing, slides) where helpful.
- Monitor chat or Q&A features for input from attendees.

### 4.5 Handling Technical Difficulties

- Provide backup dial-in numbers and technical support contact in invites.
- Assign a co-host to assist with technical facilitation.
- Pause or reschedule if major issues persist beyond 10 minutes.

### 4.6 Ensuring Confidentiality

- Do not record meetings or share materials without consent.
- Remind participants of confidentiality requirements at start of sensitive meetings.
- Store meeting notes and recordings securely and limit access as necessary.

### 4.7 Documenting Outcomes

- Designate a note-taker for action items and decisions.
- Distribute meeting minutes within 24 hours.
- Archive minutes and recordings according to policy.

## 5. Phone and Virtual Meeting Etiquette Checklist

| Task | Responsible | Status |
|------|-------------|--------|
| Prepare agenda and share with invite | Organizer | ☐ |
| Test technology before joining | All | ☐ |
| Start and end on time | Organizer | ☐ |
| Mute unless speaking | All | ☐ |
| Summarize action items before closing | Organizer/Note-taker | ☐ |
| Distribute minutes promptly | Note-taker | ☐ |

## 6. References

- Organizational Communication Policy
- IT Acceptable Use Guidelines
- Confidentiality and Data Protection Procedures

## 7. Revision History

| Date | Revision | Description | Author |
|------|----------|-------------|--------|
| 2024-06-20 | 1.0 | Initial SOP Creation | [Your Name] |