# TOP 10 CRITERIA & WORKSHEET

## What to Consider When Purchasing Meeting Software

## 1. Type of Meetings

Does your team have quick ad-hoc meetings, collaborative team meetings, client check-ins, webinars, trainings or a combination of all of these? Most meeting tools are designed for a specific purpose, so make sure you are seeking out the right tool for your needs.

## 2. Web Conferencing Features

Most groups expect to present documents, chat, and share their desktop with a web conferencing system. The number and types of features that exist are all over the board, and what you need depends on the types of meetings you will run. Review all of the options available and then decide what your team will use.

## 3. Audio Options

You may already have an audio solution that works for your core team (ex: Skype, chat, etc.)? If you do, how well does it work for external parties like clients or vendors? Dial in numbers usually work for everyone, but they're not always the most convenient. Make sure you have multiple options for different scenarios.

## 4. Meeting Productivity

The latest technology can do most of the manual housekeeping for you. Be sure to look for the latest meeting features like online agendas, easy group scheduling, shared notes, action items and instant email follow up.

## 5. Document Management

Sharing and presenting documents while in a meeting is a basic necessity. Making sure anyone who attends your meetings can get to those documents at any given time (before, during and after the meeting) is even better.

## 6. Reports

Do you need to track who attended your meetings and what they were assigned? Many systems do this for you, but some do not. Some also track who was early or late for every meeting, how engaged your participants were, and who completed all of their tasks on time.

## 7. Integrations

Meeting software can integrate with other services like time tracking, project management, document management, mailing lists, LMS, and CRM tools. Make sure the system you select connects directly to your other important business systems.

## 8. Mobile Friendly

These days, many people (including your customers) will join a meeting from a mobile phone or tablet.

## 9. Overall Ease of Use

Is the software you're vetting easy to use? Is it fast, and can you copy previous meetings to replicate work you've done in the past? Make sure everyone that will use the software can get up to speed without a lot of training.

## 10. Pricing

You should expect to pay something for a meeting service unless you use it only for yourself. Free versions tend to be geared toward single users, such as consultants, who may not have more that one team member or meeting organizer.

Did you know that there are many different meeting software pricing models? Here are a few things to watch for when comparing pricing for different vendors:

- **Audio**: Is some amount of audio included, charged by the minute, or is it priced by participant? Be sure to read the fine print!
- **Monthly costs**: Is pricing based on number of organizers or attendees?
- **Licensing**: Is there a one-time license fee, or is it subscription based?

Fill in the names of your top three meeting vendor choices and pricing.
Use an "X" for the vendors that have your team's desired features and compare them side by side.
To compare more options, use the associated spreadsheet.

| Meeting Vendor Worksheet | Vendor 1 | Vendor 2 | Vendor 3 |
|---|---|---|---|
| Vendor Name | Example: Lucid Meetings | | |
| $ Pricing | $25/month for 5 users | | |
| Meeting Type | Multiple | | |
| Web Conferencing Features | | | |
| • Document presentation | X | | |
| • Chat capability | X | | |
| • Screen sharing | X | | |
| Audio Options | X | | |
| Meeting Productivity | | | |
| • Online Agendas | X | | |
| • Group Scheduling & Invitations | X | | |
| • Shared Note Taking | X | | |
| • Action Items | X | | |
| • Instant Email Distribution of Notes | X | | |
| Document Management | X | | |
| Reports | X | | |
| Integrations | X | | |
| • Easy Integration Setup | X | | |
| Mobile Friendly | X | | |
| Overall Ease of Use | | | |
| • Fast and Easy to Connect | X | | |
| • Copy Previous Meetings | X | | |

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