

Best Practices Guide for ZOOM Meetings

Before the Meeting:

Things to do:

- ❖ Test your Audio and Video.
- ❖ Make sure to choose the correct audio input and output sources and levels.
- ❖ Make sure to choose the correct camera for the meeting if more than one option is available.
- ❖ Have the content you intend to share prepared ahead of time.
- ❖ Make sure you know how to share your screen.
- ❖ Lighting should come from in front of you or from the side to best light your face.
- ❖ Pay attention to hair and clothing – people can still see you.
- ❖ Think about your background - make it interesting but not distracting.
- ❖ Put your webcam at eye level or higher – experiment for best angles.

Hosting a Meeting:

Best practices:

- ❖ Mute your mic if others are presenting/speaking.
- ❖ Use “Gallery View” for smaller group/team meetings.
- ❖ Make Eye Contact - Try to look at your webcam versus the screen.
- ❖ Use the gestures and mannerisms that you would typically use in person.
- ❖ Share your screen only if necessary.
- ❖ Share specific Applications to control displayed content.
- ❖ Use “Pause” to freeze the view to the participants.
- ❖ Use “New Share” to seamlessly transition between shared applications.
- ❖ Use the Annotation tools to grab and direct attention.

Starting a Meeting:

Zoom offers you several ways to start both impromptu and your scheduled meetings.

- ❖ From the web portal.
- ❖ From the downloaded Zoom Application.
- ❖ From your mobile device.
- ❖ Your Calendar (if available plug-in is installed).

Joining a Meeting:

- ❖ If you are only a participant, click on the link sent to you by email.
- ❖ Or if you have the meeting ID, enter the ID in the zoom application.
- ❖ If the meeting is not yet started by the host, wait until the meeting begins.
- ❖ Use “Raise your Hand” option, if you need to interrupt.
- ❖ Use private chat to send messages to individuals.
- ❖ Use public chat option only if the message needs to be seen by all participants.

Best practices for ZOOM Webinar

Pre-Event Best Practices:

- ❖ Promote the event early and up to the start time:
Event promotion should start one month to two weeks prior to the event start date. Increase promotion frequency and tactics to include all viable channels as the date nears.
- ❖ Utilize all viable promotion channels:
For public facing events, take advantage of the power of social media like Facebook and Twitter. Always take advantage of message boards and forums as well as internal and private communications as it suits your needs.
- ❖ Set your duration with care:
Longer events should be managed consciously of attendees' schedules and attention. Recommendation in the industry is to never exceed two hours. Even with a one-hour event, we recommend at least 10 minutes be set aside for interactive activity.
- ❖ Plan a rehearsal:
Schedule at least 30 minutes with your presenters and stakeholders a few days prior to your event to review the technology, discuss roles and tasks, and finalize your content to make sure that your day of is as stress free as possible.
- ❖ Review the attendee report:
Download and analyze the attendee report to see who may be joining you and where from. Review their questions and comments to gear the presentation to trends that you may discover.

Live-Event Best Practices:

- ❖ Start early and start interacting:
Open your session at least 15 minutes prior to the start time to get yourself and your team prepared. Try adding some interaction early to motivate them to join early.
- ❖ Bring a buddy to help you:
Consider bringing a subject matter expert to assist you. Zoom allows you to make them a co-host so that they can help manage participants, chat, and Q&A.
- ❖ Use dual monitors:
With a second monitor, you can host the screen sharing on your primary display and move windows like your participants list, chat, Q&A, and polling to a secondary monitor which will give you a greater ability to track everything at a glance.
- ❖ Provide housekeeping:
If you want your session to be engaging and interactive, you have to use the tools to your advantage. Provide a brief housekeeping at the start of your event.
- ❖ Waste no time getting into your content:
Provide a brief, five-minute (at most) introduction to your event and dive right into the content. Content is what they are there to hear.

- ❖ Avoid “death by PowerPoint” – visualize your content:
Those text-heavy slides may seem meaningful and informative, but what they actually do is draw attention from the presenter’s verbal content. Replace those wall-of-text slides with images, single key terms that help to drive the content home.
- ❖ Encourage a discussion-based presentation:
Your moderator should be skilled enough to bring in questions that lead to discussion of topics of interest. If you’re hosting multiple presenters, ask them to co-present on a topic when possible.
- ❖ Always record:
Reach parties that could not attend, provide a chance for attendees to review the content. Start recording just after delivering your quick event housekeeping as that live interaction instruction is not useful to those watching a recording.
- ❖ Interact within the first few minutes:
Online event is that it is a synchronous experience for you and your audience. Treat it as you would an in-person presentation.
- ❖ Use frequent and varied interaction:
Use all of the tools at your disposal so that the interaction avoids becoming mundane. Five-minute interval is a good marker. Hand raising is also a quick and easy way to interact with your attendees.
- ❖ Use annotation to grab and direct attention:
You have a lot of options for drawing, highlighting, making lines and arrows, and even blocking out areas on your screen under the “draw” menu.
- ❖ Manage the aesthetics of your webcam view:
Lighting should come from in front of you and never behind you to avoid casting shadows on your face. One or two crane lamps set up behind your computer monitor and facing you will accomplish this nicely.
- ❖ Make eye contact:
Look at your webcam instead of your screen. This will give the effect of eye contact and visual engagement.
- ❖ Provide presenters with a final comment:
After you wrap up your Q&A portion of the event, turn it back over to your presenters for a final comment. They are the subject matter experts after all. If you are presenting solo, give yourself this opportunity.
- ❖ Leave attendees with a call-to-action:
Don’t miss this opportunity to promote any upcoming events that you are hosting or are involved with as well.

Post-Event Best Practices:

- ❖ Download the Q&A report and respond to unanswered questions:
Take some time after your event to review the report and respond to any unanswered questions via email. All questions including name and email of the asker will be represented in the report.

- ❖ Provide complete follow-up communication:
This is a good opportunity to reiterate your call-to-action and provide a link to the recording of the event, next steps to keep the conversation going, links to resources, and a brief FAQ based on questions received during the event.
 - ❖ Provide a follow-up survey:
Once your survey is completed, you may link to it in a follow-up email or send it separately. The suggestion in the industry is to keep your survey brief to encourage the highest possible response rate
 - ❖ Plan your next event:
Hosting your events on a fairly regular and ongoing basis will help you to develop and enhance your community network and their expectations.
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