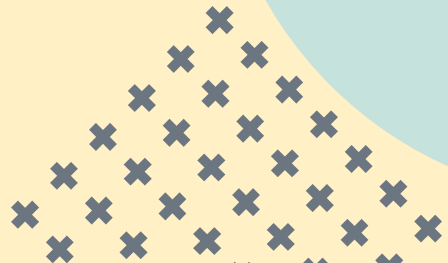




Empower
Success
Corps

Scheduling and Hosting Zoom Meetings



Virtual Etiquette



1. Join the Meeting early. This gives you time to solve any problems connecting.
2. Put your phone on mute until you are ready to speak. If you do not have a mute button, press *6.
3. DO NOT place your phone on hold! If you do, all of us will hear background music playing.
4. If you move around, have to adjust your computer screen, have to yawn, sneeze, eat or drink, turn off your computer screen.
5. Be an active participant.
6. Be courteous to others; allow them to speak.

Zoom Meeting

Audio only

With video



**NOT MUTING
YOUR MIC IS
THE NEW
REPLY ALL**

Becoming Zoomers is Fun

AGENDA



Welcome and Introductions

Zoom Meeting Platform

- ❖ Name
- ❖ Your expectations of today's session
- ❖ Type your expectations in Chat

- ❖ Zoom Etiquette
- ❖ Scheduling a Zoom Meeting
 - Meeting Topic/Date/Time
 - Meeting Options
- ❖ Hosting a Zoom Meeting
 - Host Controls
 - Managing Participant/Attendee Participation
 - Inviting Participant Interaction

Scheduling a Meeting

With Zoom Web Portal

Go to <https://zoom.us/> and sign in. Then click on the **Schedule a New Meeting**.

Schedule a Meeting

Topic:

Grant MacLaren's Zoom Meeting

Start:

Tue January 8, 2019

11:00 AM

Duration:

1 Hr

0 Min

Time Zone:

(GMT-08:00) Pacific Time (US and Canada)

Recurring meeting

Video

Host: On Off

Participants: On Off

Audio

Telephone

Computer Audio

Telephone and Computer Audio

Dial in from United States [Edit](#)

Options

List on Public Calendar [?](#)

Require meeting password

[Advanced Options](#) ▾

Calendar

Outlook

Google Calendar

Other Calendars

Schedule

Cancel

Registration

Required

Meeting ID

Generate Automatically Personal Meeting ID 624 712 1761

Meeting Password

Require meeting password

561108

Video

Host on off


Participant on off

Audio

Telephone Computer Audio Both

Dial from United States of America [Edit](#)

Meeting Options

- Enable join before host
- Mute participants upon entry 
- Enable waiting room
- Only authenticated users can join
- Breakout Room pre-assign
- Record the meeting automatically

Alternative Hosts

Example: mary@company.com, peter@school.edu

Save

Cancel

Start this Meeting

Topic My Meeting

Time May 25, 2020 07:00 PM Eastern Time (US and Canada)

Add to



Google Calendar



Outlook Calendar (.ics)



Yahoo Calendar

Meeting ID 821 8275 0696

Meeting Password ***** Show

Invite Link <https://us02web.zoom.us/j/82182750696?pwd=V0xiNDViRlM5S3lkUWY4cjZBUDJRUT09>

Copy Invitation

Video Host Off


Participant Off

Audio

Telephone and Computer Audio

Dial from United States of America

Meeting Options

- × Enable join before host
- × Mute participants upon entry 
- ✓ Enable waiting room
- × Only authenticated users can join
- × Record the meeting automatically

[Delete this Meeting](#)

[Save as a Meeting Template](#)

[Edit this Meeting](#)

[Start this Meeting](#)

Poll

Live Streaming

You have not created any poll yet.

[Add](#)

Want to invite view-only participants or broadcast the event to up to 10000 participants? [Convert this Meeting to a Webinar](#)



Zoom Host Meeting Controls



Meeting Topic:

Host:

Invitation URL:

<https://northwestern.zoom.us/j/838600094>

[Copy URL](#)

Participant ID:

11



Join Audio

Computer Audio Connected



Share



Invite Others

1



Security

2

3

4

5

6

7



Mute



Start Video



Invite



Manage Participants



Polls



Share



Chat



Record



Closed Caption



Breakout Rooms

End Meeting



8

Virtual Meeting Facilitation

Facilitator Self Awareness

- Maintain an attitude of welcome
- Attend to your own comfort and confidence

Group Culture

- Create & use communication agreements
- Promote group values of responsibility and engagement

Task

- Disseminate an agenda with clear outcomes
- Use precise verbal communication to compensate for lack of visual

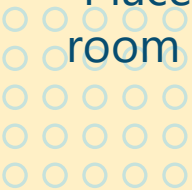
Group Process/Technology

- Maximize technology; test and rehearse to avoid the unexpected
- Use intentional strategies to encourage active participation

Controls for hosts and co-hosts

With meetings, hosts and co-hosts can control the following features:

- Mute participants
- Request that a participant unmutes
- Stop a participant's video
- Request that a participant starts their video
- Prevent participants from screen sharing
- Rename a participant
- Put a participant on hold if enabled
- Choose to play an enter or exit chime
- Lock the meeting to prevent anyone new from joining
- Place participants in waiting room or admit/remove participants from the waiting room (waiting room can only be enabled by the host)



Co-hosts Cannot.....

- Start live streaming
- End meeting for all participants
- Make another participant a co-host
- Start breakout rooms or move participants from one breakout room to another
- Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)

Co-hosts also cannot start a meeting. If a host needs someone else to be able to start the meeting, they can assign an alternative host.

Only the original meeting host can edit or add polls during a meeting. If the host or co-host role is transferred to another user, that user will only be able to launch polls already created.



Let's Practice



- Look at who else is here - Participants Pod
- Change your Name
- Share your ideas on the Whiteboard (**Organizational Health Assessment**)
- Share Your Screen
- Chat with Everyone
- Participate in a Break-out Session:
 - **Brainstorm how your team can improve communications and relationships with people who give you money, use what you create, help you meet your mission, and carry your message.**
 - **Select a spokesperson to report back to the main group**



Improving Your Audio Quality in Zoom

If you have been told that your audio is not intelligible in a Zoom meeting, try the steps below to troubleshoot and improve your audio quality.

Use earbuds or a headset.

Ensure your meeting participants can hear you by using earbuds or a **headset**; computer microphones may be too far away to pick up your voice clearly. Computer microphones also can pick up room noise and vibrations from your desk. Rustling papers in front of a laptop mic or tapping on your desk is enough to drown out other speakers in the meeting.

Work from a quiet location.

To the extent possible work from a quiet location where you will not be interrupted. Even when using a headset, loud background noises can interfere with your speaking voice.

Avoid echoes

We all occasionally repeat ourselves, but if every one of your words echoes in a meeting it will be hard to understand you. **To prevent echoes**, make sure you join your meeting via a single audio source, i.e. computer audio or a phone line but not both. Similarly, when a group attends a meeting make sure only one member is providing the audio for the meeting.

Don't call from the road.

Joining a meeting while on the road is not a good idea, not only for safety reasons! Road noise or transit announcements are enough to make you hard to understand.

Don't overload your device

Close any unneeded applications and browser tabs during your Zoom meeting.

Make sure your device meets the system requirements for using Zoom

- Review the requirements for **PC, Mac, and Linux** or **iOS, iPadOS, and Android**.
- In particular, ensure you have sufficient internet or cellular bandwidth:
 - Try switching from cellular to Wi-Fi or from Wi-Fi to a wired internet connection to increase the bandwidth available to you.
 - Turn off video and/or screen sharing in your Zoom meeting to preserve bandwidth for audio.

After you have made adjustments, you can check your internet connection, audio, and video at zoom.us/test.

Virtual Meetings at ESC

Topic	Description
Setting up a Zoom Account and Scheduling a Zoom Meeting	<p>This session covers Setting up your personal Zoom account and operating within your personal and/or organization’s Zoom account. Topics include:</p> <ul style="list-style-type: none"> • Your Zoom Password • Changing Your Meeting Settings • Your Zoom Meetings (View, Edit, Start, Delete) • Account Profile • Customizing Your Profile
Creating Meeting/Training Content (Building interactivity throughout the meeting/training)	<p>This session will cover setting meeting/training objectives and goals, meeting duration, determining meeting/training content and how participants will see and interact with the content. Tools may include design documents, storyboarding, PowerPoint.</p>
Meeting/Training Preparation	<p>This session will cover the preparation that goes into facilitating a successful Virtual Meeting or Training. Topics include: Setting up your virtual meeting room in advance; testing features of your virtual room with a small team, conducting a walk-through session</p>
Conducting Meetings <ul style="list-style-type: none"> • Facilitation • Role Modeling • Team Facilitation • Producer Role 	<p>This session will focus on participants taking turns facilitating a portion of a meeting. Participants will select a topic and create 3-5 minutes of content; develop objectives, methodology to address each element of the content. Participants will use multiple features to include participant interactivity.</p> <p>The Producer role will also be discussed. Some meeting/trainings are so complex that a second person who serves as a producer (admits attendees, manages the platform by sharing screen and other content, assisting attendees privately) may be necessary.</p>

Topic	Description
Advanced Zoom Features <ul style="list-style-type: none"><li data-bbox="126 407 492 478">• Whiteboarding in Break-out Rooms<li data-bbox="126 485 363 520">• Live Streaming	This session will focus on Advanced Zoom features such as enhancing the use of break-out rooms, enabling and using live streaming, adding videos and other media to your Zoom meeting/training.



Best Practices Guide to Virtual Meetings


EXECUTIVE SERVICE CORPS
SOUTH FLORIDA

presents

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Introduction

As nonprofits, businesses, and individuals struggle to make the leap from in-person to virtual meetings- especially now in the face of social distancing- we decided to put together this comprehensive best-practices guide to help you.

Maybe you worked for a large company that had a tech support team or perhaps you had an administrative assistant who set up your

video conference calls in the past, so you didn't have to do it yourself. Perhaps you're of an age where "that technology stuff" is for young people. You've managed to get comfortable with conference calls, but this video meeting rigamarole is way more than you can deal with. You may also consider yourself technologically-challenged.

Well, get over it, and come along for the ride!



How To Access Virtual Meetings

Your Device

There are three basic ways to access virtual meetings:

- your mobile phone
- your tablet
- your computer



In all three cases, you'll need an internet connection (more on this later). For all three devices you'll need to have a camera or a **webcam**. Unless you've got an old flip-phone without a camera, any Android phone or iPhone made in the last 10 years will have a rear-facing (facing the user) camera.

While many **tablets** have rear-facing cameras, some don't- you'll need a rear-facing camera so that other people can see you while you're looking at them on your tablet's display.

Most modern notebook computers have built-in webcams (web camera), and some desktop computers may have a webcam built into your monitor. If your computer doesn't have a webcam, you can purchase one separately. Most likely, it will plug into one of your computer's USB ports as a "plug-n-play" device, which means that once you plug it in, it will pretty much install itself with very little technical know-how required.

Meeting with a co-worker using her tablet.





We highly recommend you use your computer for virtual meetings, if possible. One of the advantages the technology allows for is **screen sharing**. This means that people who are in a virtual meeting can literally share their

screen, displaying important information for the other attendees to see. This is much better experienced when looking at a large computer monitor, as opposed to the small screen on your phone. But if you don't have a computer with a webcam, don't sweat it- you'll still get a lot of benefit from joining a virtual meeting using the video capabilities of your phone.

Speaking of phones, most of the virtual meeting applications will allow you to join a meeting by choosing to use only the audio function of your phone- in essence, a teleconference call. ***Don't cop out and use your phone to join a virtual meeting without video just because you don't want to take the time to learn how or because you're having a bad hair day!*** While it's not the same as an in-person meeting, it's a much more personal experience than a phone call- you can see the other people in the meeting, and you'll see when they're about to say something, so you won't interrupt or talk over them unwittingly (unless you choose to do so).

Now let's connect!

How To Access Virtual Meetings

The Connection

Your internet connection plays a big part in the user experience—not only for you, but also for the other meeting participants. If you have a poor connection, your video will be unclear, and there may be dropouts and delays.

The goal is to get as close to an in-person meeting experience as possible.

To accomplish this, ***make a commitment to use the best possible technology you have available, which includes your internet connection.***



The best connection depends on which device you're going to use to join a meeting. *If you're using a phone or tablet, you'll have two choices: Wi-Fi or cellular data.*

Choose Wi-Fi.

If you do join a meeting via Wi-Fi, make sure you're within close proximity of your Wi-Fi router and disable any other Wi-Fi devices that may be on the same network. Video and virtual meetings use a lot of data, so you want to make sure your Wi-Fi network has as much bandwidth available as possible.

For the best and most reliable virtual meeting experience, use your computer with an ethernet connection, which means your computer is accessing the internet by plugging into your network with an RJ45 ethernet cable.

Sure, if your computer has Wi-Fi, you can sit out on your porch to join a meeting, but the connection will be less reliable, and the other participants will hear all the birds tweeting, dogs barking, and weed-whackers whacking, all of which creates more distractions and background noise for the other people in your meeting. And if

How To Access Virtual Meetings

The Connection (continued)

you're not near your home's Wi-Fi router, your connection will also suffer the further away you are from your router. Our advice: suck it up and join the meeting from your desk if your computer can connect to the internet using an ethernet cable.

And if you're using your laptop, plug it into the wall- a low battery can adversely affect the video quality.

Wow, that's a lot of information to absorb!

Let's take a break and watch a short video about best practices for virtual meetings.



Don't forget to come back to read the rest of this e-book after you watch the video!

How To Access Virtual Meetings

The Apps (Applications)

In order to participate or “join” a virtual meeting, you’ll need to use that meeting’s “app” or application. All the apps will allow you to use your device’s browser, like Google Chrome, Microsoft Edge (formerly Internet Explorer), or Apple’s Safari. However, we highly recommend that you download the application to your device (phone, tablet, or computer) for the best user experience.



Because of their dominance in the market, virtual meetings or videoconferencing are often referred to as Zoom meetings. However, there are many other virtual meeting apps that are also popular. What the different apps have in common is

- They will allow you to host meetings with a large number of participants (some more than others).
- Meeting participants can share their device’s screen for presentations or collaboration.
- Most offer a dial-in option for people to join the meeting by phone without video. Participants may need to join from a landline or a mobile phone because they’re traveling or have a poor internet connection.

Now, for a few of the most popular and best virtual meeting apps right now.



How To Access Virtual Meetings

The Apps (continued)

zoom

Zoom is widely considered to be the gold standard of virtual meeting applications. It's user friendly and has tons of features. It allows multiple participants to share their screens. You can choose a background behind your image so other participants don't have to see the pile of laundry on the floor behind you. Zoom offers offline chat/messaging with other meeting participants, and you can raise your hand electronically to let the moderator know you'd like to speak. You can also record a meeting, and much more. Considering how much it has to offer and its' ease of use, Zoom is reasonably priced, starting at about \$15/month. There's also a free version, but it's limited to meetings no longer than 40 minutes for more than two participants.



Google Meet (sometimes referred to as Hangouts Meet) comes in at a close second to Zoom. It's a more robust and business-oriented version of the original Google app, Hangouts. It doesn't have all the bells and whistles that Zoom offers, but it has everything most people need, and you can get it for with a basic G-Suite account, which is only \$6/month. *Note:* if you're using a pc with Windows 10, there isn't a dedicated app to download as Meet is browser-based. However, you can create a Meet shortcut with an icon on your desktop through both the Chrome and Microsoft Edge browsers. The older version of Google Meet, Google Hangouts, is also a viable option for video meetings. However, participants won't be able to join the meeting by dialing in from their phone like they can with some of the more sophisticated apps..

How To Access Virtual Meetings

The Apps (continued)



Skype has been around forever and many of us have forgotten all about it, so it's easy to overlook as a viable option. Microsoft purchased Skype a few years back

and will probably phase it out in favor of their new virtual meeting app, Microsoft Team. Still, they've made improvements to it, and the quality is right there with Zoom and Meet- *and it's free!* One of the biggest changes is that you can now access Skype meetings through a shared link- you no longer have to know your meeting participants' Skype handles to invite them to connect. Participants don't even have to have a Skype account and can now sign in as a guest.

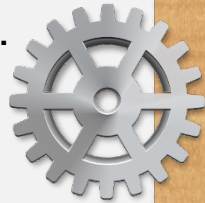
There are tons of other applications people are using for virtual meetings, such as GoToMeeting, Freeconferencecall.com, Blue Jeans, Team Viewer, House Party, among others. **If you're attending a virtual meeting, you'll use whatever app the meeting host is using.** If you're hosting a meeting, find an app that meets your organization's budget and technical requirements (and don't forget to factor in it's ease of use).



It's almost time
for your meeting!

Before Your Meeting

- ✓ **If you're using a browser on your device to join the meeting, *Install the video conferencing application your meeting will be using.*** Familiarize yourself with the app, and spend time testing your audio and video settings well before the meeting. Each app will have a settings area (*usually a little gear icon*) to set up and test your audio and video settings. Don't wait until the last minute to do this. If you've never used the app before, or if you're using a different device, do it at least several hours before the meeting so you're ready to go when the meeting starts.



- ✓ **Find a quiet, comfortable space with few distractions** to join the meeting.

- ✓ **Shut down any applications or programs you're not using** and end any processes your computer is running. Having your computer do a backup to the cloud when you're about to join a virtual meeting is a bad idea. Video and virtual meetings use a lot of your device's resources- **turn off anything you don't need to help your device run faster.**



- ✓ **Wear a headset with a built-in microphone-** it will minimize echo and ensure you can hear everyone and they can hear you. If you don't have a headset, turn your speaker volume down to 50% of maximum or below.

- ✓ **Learn where your application's mute button is and be ready to use it.** As a general practice, the meeting's moderator will ask everyone to keep their microphones on mute unless speaking.



During Your Meeting



✓ Again, **keep your microphone muted** unless you're speaking. If you want to speak, let the moderator know by raising your hand, sending a message in the chat feature, or raising your hand electronically through the app.

✓ **Be aware that other people can see and hear you.** Adjust your webcam so it frames your face and be aware of how you look throughout the presentation (just like you would for an in-person meeting). Raise your webcam or elevate your notebook computer (with the built-in webcam) so that it's not showing you from the chin up. Use good lighting that you face toward and try to keep the room behind you neat and not too bright (lower the shades, close the curtains, etc.). And remember, meeting participants will be able to see if you're texting or doing other things that show you're not paying attention during the meeting.



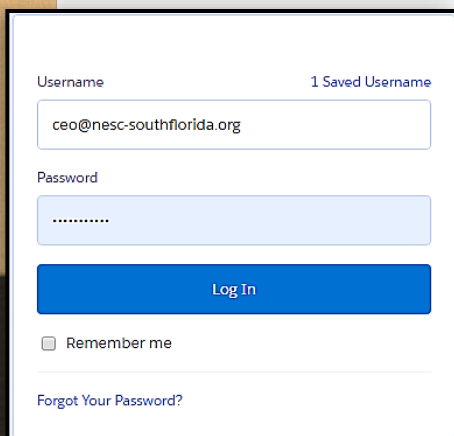
✓ Just like an in-person meeting, **don't interrupt other people when they're speaking.** If you're looking at your device's display, you'll be able to take your visual cues from the other participants just like at an in-person meeting. When you want to speak, raise your hand physically (or using the app) so your host can call on you in turn. You can also let the host know you would like to speak through the chat function of the app (assuming it has one).



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Hosting Your Meeting

If you're hosting or are the facilitator for a meeting, make sure your meeting is secure by creating a password (if your application allows.) Your participants will use it when they sign in, to prevent unwanted people from crashing your meeting or taking it hostage by displaying inappropriate material. This is now being called Zoom bombing. Other best practices for meeting hosts include:

A screenshot of a meeting login form. It features a 'Username' field with the text 'ceo@nesc-southflorida.org' and a '1 Saved Username' indicator. Below it is a 'Password' field with a masked password '.....'. A blue 'Log In' button is positioned below the password field. At the bottom left, there is a 'Remember me' checkbox and a 'Forgot Your Password?' link.

- ✓ **Logon to the meeting at least 10-15 minutes beforehand.** This will give you a chance to assist any participants who are experiencing problems joining the meeting.
- ✓ **Prepare and distribute an agenda** before the meeting.
- ✓ **Remind participants to mute their microphones** when they're not speaking. and communicate to them how to let you



know when they want a turn to speak (using the app's raised-hand feature, raising their hand or using the app's chat feature are a few of the ways).



- ✓ If you're planning to record the meeting, **tell the participants you're going to record it and why** (most of the apps will prompt you to do this anyway). It's illegal to record people without their consent.

That's it- you're on your way to becoming a virtual meeting pro!



EXECUTIVE SERVICE CORPS SOUTH FLORIDA

Executive Service Corps- South Florida (formerly National Executive Service Corps of South Florida) is a nonprofit 501(c)(3) organization dedicated to contributing our extensive management expertise to help resource-constrained nonprofits.

Our consultants are retired C-Suite executives with real-world operational expertise; not your typical consultancy employees a few years out of college. They have provided organizational leadership, planned growth, and mastered changes for some of America's top companies. As part of the NESCSF team, our consultants can help you address your organization's biggest challenges at a fraction of what other consultants charge.

For information about how we can help your organization [click here](#) or call us: 954-406-8549.

Thanks for downloading and reading our e-book!

Joel Greenbaum
President & CEO

P.S. A special thanks to Christina Lowe, intern extraordinaire, for her help in researching the information for this e-book.

COVID 19 Pandemic- We're Here to Help!

If your organization is experiencing challenges due to the COVID 19 pandemic, we may be able to help- *free of charge!*

To address the needs of our community, we're available for impact-type projects pro bono in response to this health crisis. [Tell us about the challenges you're now facing](#), and one of our senior consultants will follow up with you to see how we can help.

