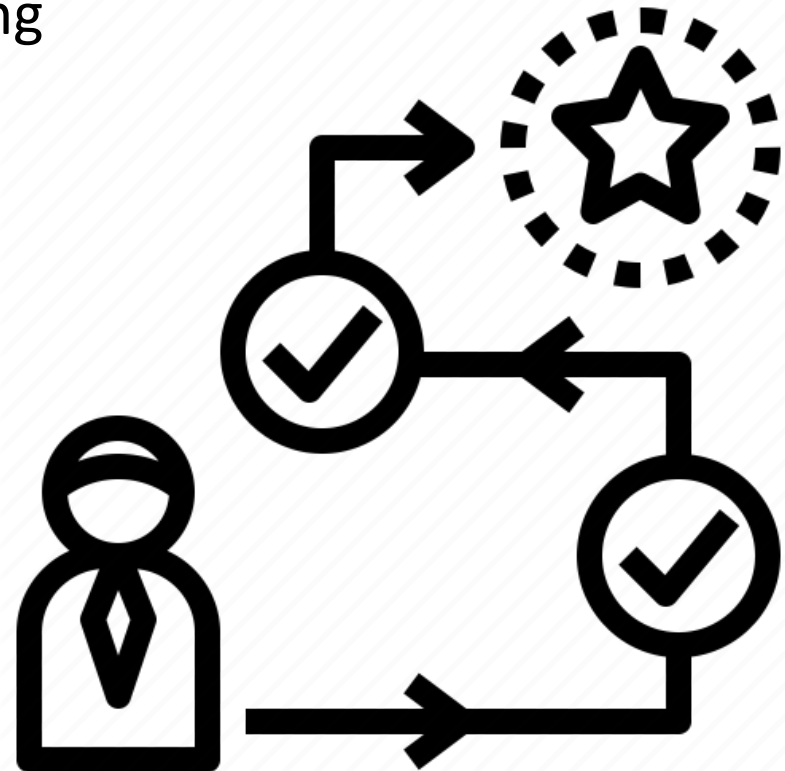


# How to Have More Engaging Zoom Trainings/Meetings

Janet McIntyre, VP of Programs and Training  
Meghan Maloney, Volunteer and Programs Manager  
for ESC-US  
8/20/2020

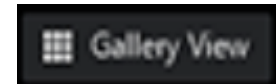
# Road Map for Today

- Tips to consider pre-meeting
- Tips during the meeting
- Tips to consider post-meeting

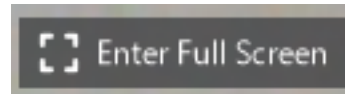


# What You See on Your Screen Now

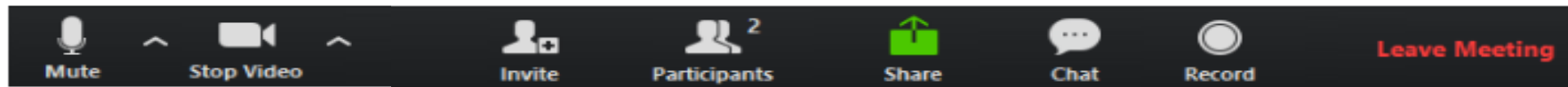
- Upper right corner: **Gallery View** or **Speaker View**
  - Gallery View: small pictures of everyone on the call
  - Speaker View: enlarges whoever is speaking



- Upper right corner: **Enter Full Screen**



- Across bottom:



- **Mute** – click mute yourself; click again to unmute
- **Stop video** – you can stop all of us from seeing you
- **Invite** – invite others to join the call
- **Manage participants** – can see a list of who is on the call
- **Screen Share** – shows whatever is on your screen
- **Chat** – send a message to the whole group, or to an individual
- **Record** – the host, with permission, can record the call for later use
- **Reactions** – hands clapping or thumbs up
- **Leave Meeting** – allows you to exit the meeting, at any time

- 1) Send a reminder e-mail with link and Zoom Guidelines. Confirm if meeting will be recorded (ask for consent, varies state to state) a day before.
- 2) Ask people to log in 5-10 minutes early to test out audio/tech issues and greet each other; start meeting no later than a couple of minutes after start time.
- 3) Make decisions about locking the room, waiting room, using virtual backgrounds.
- 4) Create polls before the meeting.
- 5) Close all extraneous apps and background programs you do not plan to use. Load up documents you are presenting ahead of time.
- 6) Do a run-through 1-2 days in advance and designate particular roles for facilitating.



## Guidelines for Zoom Meetings

### Before Joining

- Close unneeded applications on your computer or phone to keep the video optimally functioning.
- You might want to use a headset with an external mic for best hearing and speaking capabilities
- Choose a well lit area (preferably where the light faces you) so that the camera can capture the video image clearly.
- Position your camera so it is focused at eye level. This helps create a more direct sense of engagement with other participants.

### During The Meeting

#### Identifying yourself

- Fill out your name in Zoom to make it easier to identify you and interact with you.
  - Click on participants at the bottom of the screen. It will open a list of all active people in the meeting.
  - Click on "rename" next to your name to do so. Include your pronouns along with your name.

#### Joining the meeting

- If you don't have video capabilities you can still join by phone with the number provided in the invitation.
- Join at least 5 minutes before the meeting start time to work out any technical difficulties and/or to connect with folks prior to discussing the meeting's agenda.
- Please mute your video (on the lower left of the screen) if you are eating, scratching, talking with someone else in the room, you leave the room, or anything else that might be distracting to others.

*This avoids background noise and distractions for others.*

# Zoom Security Tips FOR HOSTS

## 1) Publicly posted meeting links are VERY PUBLIC

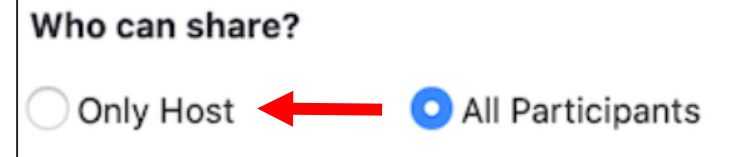
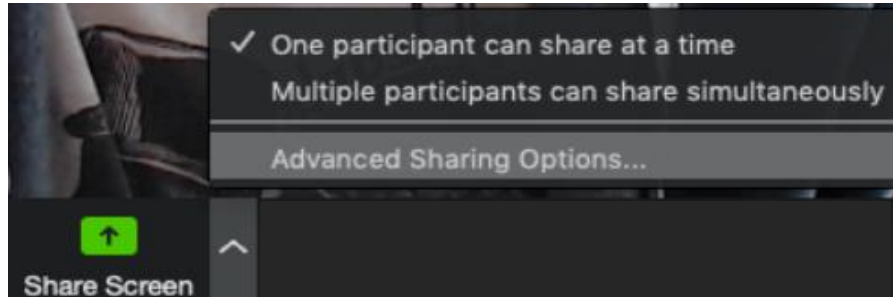
- Send your meeting link/invitation as privately as possible

## 2) Lock the Meeting

The image shows a screenshot of the Zoom meeting interface. At the top, there are several icons: a green checkmark labeled 'yes', a red 'X' labeled 'no', two left-pointing arrows labeled 'go slower', two right-pointing arrows labeled 'go faster', three dots labeled 'more', and a grey square labeled 'clear all'. Below these are three buttons: 'Mute All', 'Unmute All', and 'More'. A red arrow points from the 'More' button to a dropdown menu. The dropdown menu contains the following options: 'Mute participants on entry', 'Allow participants to unmute themselves' (checked), 'Allow participants to rename themselves' (checked), 'Play enter/exit chime' (checked), and 'Lock meeting' (highlighted with a red arrow). At the bottom left, there is a dark bar with three icons: 'Invite', 'Manage Participants' (highlighted with a red box), and 'Share Screen'.

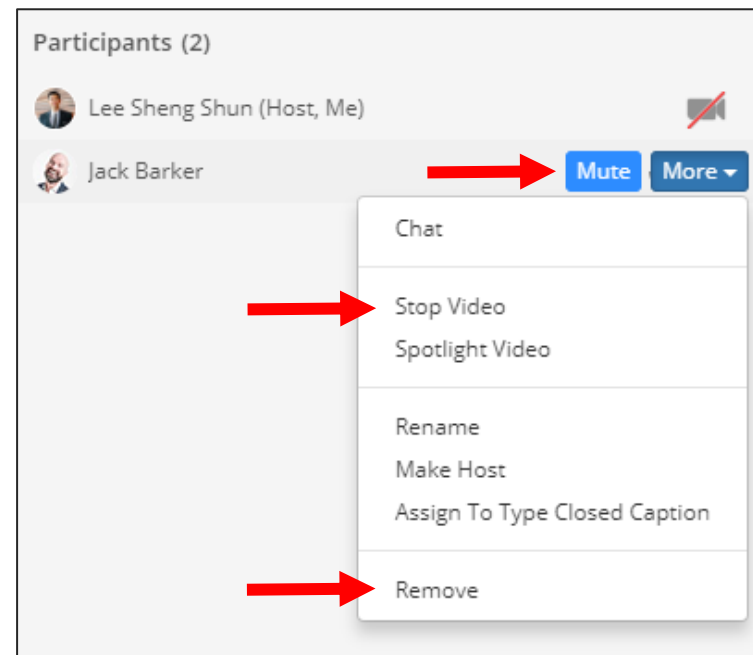
# Zoom Security Tips FOR HOSTS

## 3) Manage Meeting Settings - Screen Sharing



## 4) Manage Participants

- Mute, Video, and Remove



# During the Meeting Tips

Start a **group text chat** to coordinate logistics behind the scenes

Review **Zoom Guidelines**; don't assume everyone read it in advance

If **recording**, remind them now as you sought permission previously

**Mute** everyone; they can unmute when they speak

**Renaming**: adding org names, pronouns



# During the Meeting



How to use **Chat** to Engage and Disengage



**Pinning and Spotlighting** for focus on the speaker in a large group



Encourage use of **“Reactions”**



**Raising Hand** – virtually and in reality – benefits to both!



For breaks, everyone should **Mute & Stop Video**



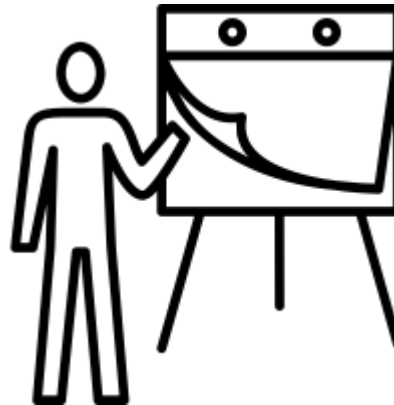
Use upbeat music when people first log in before the program starts or use it at the breaks when folks have muted/stopped their camera.

## Fun ways to Engage:

- Activities you choose will depend on size of group and whether the group is a reoccurring group or whether it's a single occasion. Are you building rapport with an existing group that will reconvene over time (staff, cohort, board) or is it a one-time workshop where participants will likely not see each other again?
- Self-intros w/ check-in question & pass the baton (manageable number)
- Self-intros using Chat for name, location, organization, & answer one question (large group)
- What have you done?
  - Wear a favorite/silly hat
  - Show 'n Tell: bring an object or choose an object in arm's reach
  - Contest for best virtual background
  - Bring your pet, child, or partner to work (or the video) for a quick hello
  - Draw or write down a number 1-10 how you're feeling at start of meeting, everyone holds up to show, and once again at the end
  - Put folks into Breakout Rooms at the start for self-intros and a quick activity, come back to Main Room and one person from each Room uses chat to share

## When you don't have a Flip Chart:

- Use Word Doc to take notes and Screen Share
- Google Doc can be interactive and fun and chaotic in main room or breakout rooms. Result is a product the group co-created.



## 2 Effective Engagement Tools:

- **Polls** – get a pulse reading; seek input/feedback; provides some anonymity
- **Breakout Rooms:**
  - Participants love them and can't get enough!
  - Great for networking (random) and also for team work (intentional)
  - Typically 20 minutes, will depend on purpose & # in each room
  - Do the math in advance and know when it's on agenda – be ready
  - Be clear on activity in Room. Give clear instructions, whether they are to report back, how they must self-facilitate or not.
  - Type instructions into Chat, type messages into rooms
  - Give a two-minute warning so they can get ready to close
  - Party hop and check in on folks

# Post Meeting Tips

- 1) If doing a feedback form, have the link ready and drop it in the chat about 10 minutes before the meeting ends.
- 2) If recording, allow enough time to have the video convert. Upload to a third party site to share the link to participants.
- 3) Send materials/handouts/presentations/feedback form 1-2 days after.
- 4) Debrief with facilitators immediately after the meeting ends. Make sure to "lock" the meeting and remove participants still in the room.
- 5) Celebrate! :)

Hello, ESC affiliates!

I am very pleased to follow up on Janet McIntyre and Meghan Maloney's excellent presentation yesterday on delivering effective Zoom presentations. I am deeply indebted to them and to David Factor for sharing his excellent staff's expertise with the rest of us! This was the most heavily intended Peer Affiliate Call to date. We had 19 attendees. I hope everyone found the information as useful and interesting as I did. **Below you will find the evaluation form which I would greatly appreciate everyone completing.**

[https://docs.google.com/forms/d/e/1FAIpQLSf0vvGV\\_eyEb\\_QQ8M9ngOeqE\\_NFus3ixKsWR4u8Le4j8jHHFg/viewform](https://docs.google.com/forms/d/e/1FAIpQLSf0vvGV_eyEb_QQ8M9ngOeqE_NFus3ixKsWR4u8Le4j8jHHFg/viewform)

**And here is the recording of the Zoom meeting. I watched it again and got even more out of seeing it a second time**

[Recording of Zoom Training](#)

## Before Joining

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## During The Meeting

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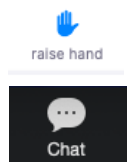
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- Please mute your video (on the lower left of the screen) if you are eating, scratching, talking with someone else in the room, you leave the room, or anything else that might be distracting to others.

*This avoids background noise and distractions for others.*

### Communicating

- Be sure to mute your mic (lower-left of your screen) as soon as you sign on and whenever you are not speaking.
- If you want to speak, physically raise your hand or use the "raise hand" feature that is available at the bottom center of your screen.
- Ask questions and make comments silently if desired using the "Chat" feature (also on the bottom and center of your screen).
- If you are joining by phone, please speak up and remember to unmute yourself.
- We encourage you to keep your camera on for the duration of the meeting to be fully present.



### Breakout Rooms

- At points in the meeting, you may be invited to join a smaller group to continue your conversation.
- You may need to wait 1-2 minutes for others to join you so please be patient as others figure out the technical issues to get to the breakout room.
- You are always able to come back to the main "room" if you are done in the small group or have questions. There should always be a host/facilitator waiting to welcome you back or answer questions.
- Each group should assign a facilitator to ensure everyone gets a chance to speak when doing a larger debrief in the main room.
- When joining a breakout room by phone, you do not need to do anything to join. Once the host starts the breakout rooms, you will be notified that you have been added to the breakout room.

## Guidelines for Zoom Meetings

- When joining the breakout room by phone, you will be able to mute and unmute like you can in the main session.
- If joining over the phone, you will be notified when the host has ended the breakout rooms and that you will be returning to the main room in 60 seconds. Press # to join the main room immediately.
- Breakout rooms will never be recorded.

### **Stepping temporarily away from a meeting**

- If you need to step away from a breakout room for a moment, be sure to click out of the breakout room and not leave the meeting completely.
- At any point you temporarily step away from the meeting, please mute your mic and turn off your camera (or mute your phone)

### **Leaving a meeting completely**

- Remember to sign out or "leave the meeting" when the session is finished.
- If possible, please leave a quick comment that you are leaving the meeting before the scheduled end time.