Zoom Meeting & Webinar — The Basics and Best Practices

In this resource you will find the following:
- Zoom resources
- Information about selecting Zoom meeting versus webinar for your event
- Best practices when using Zoom
- Draft agenda and housekeeping talking points

Zoom Resources

If you are new to Zoom, check out Zoom's video tutorials and information about Meetings & Webinars.

If you're hosting a Zoom meeting, we recommend you watch:
- Meeting Controls
- Breakout Rooms

If you're hosting a Zoom webinar, we recommend you
- Read Roles in a webinar
- Review Managing participants in a webinar
- Watch All About Zoom Webinar starting at minute 33:00

Zoom Meeting vs. Webinar

Feature	Large Meeting	Video Webinar
Size	100, 200, 300, or 500 video participants	50 video panelists. 100, 300, 1000, 3000, 5000, or 10,000 attendees (minus # of panelists)
Registration	Yes	Yes
One time or recurring events	Yes	Yes
Designate a co-host (to help manage event)	Yes	Yes
Green room (for panelist prep)	No	Yes
Option to mute all attendees upon entry	Yes	Automatic (attendees can't be heard unless host turns on their audio)
Mute/unmute individual or all participants	Yes	Automatic
Lock mute/unmute	Yes	Automatic
Turn off participant/attendee video	Yes	Automatic (attendees can't be seen unless host turns on their video)
Lock screen sharing	Yes	Automatic
Put attendees on hold or remove them	Yes	Yes
Polling to facilitate organized discussions	Yes	Yes
Video Breakout Rooms	Yes	No
Group and one-on-one chat	Yes	Yes
Q&A	No	Yes
Integration with your CRM and marketing automation tools	No	Yes
Reporting of registrants, attendees, and chat	Yes	Yes (and includes Q&A)

Chart from Zoom blog [*Virtual Event Showdown: Large Meeting Vs. Video Webinar*](#)

- Meetings allow attendees to see and talk to each other. Videos can be turned off and on, and all attendees can use the chat box. Zoom meetings can create a community atmosphere and enable relationship building across the NCJW network. This format also allows for interactive conversations and trainings. Breakout rooms are only available in the Zoom meeting format.
- The Webinar mode is best for large gatherings where the focus is on the panelists and presentation. Attendees do not have video and microphone enabled unless the host turns on their audio or video. Attendees can submit questions via a Q&A function, the chat box, or registration form. The host can enable the chat function to allow attendees to message only "panelists" or "panelists and attendees." The Webinar mode is an additional cost to your subscription.
- ***It is important to select the preferred format when creating the Zoom link.*** You cannot turn a meeting into a webinar format or vice versa and use the same link.

Best Practices When Using Zoom

Enable appropriate settings in your Zoom account:
- Log into your Zoom account and review all the Zoom settings. For instance, if you'd like to use breakout rooms or allow for others to be a co-host, you have to select that setting in your account prior to creating the meeting.

How many people should "staff" a meeting:
Small meetings should include two NCJW staff/volunteers running the "back end":
- One person to run the technical side such as recording, supporting attendees, muting people when needed, and one person to run the meeting/stay on top of speakers/answer substantive chat questions.
- If the call is less than 15 attendees and is a regular meeting, one person should be sufficient.

Larger meetings or webinars should include multiple staff/volunteers to run:
- Zoom host and technical team: ensure all speakers have arrived, share screen when appropriate, ensure appropriate lines are muted/unmuted, record the event, remind speakers when they are up next.
- Welcome & tech support team: welcome participates in the chat & invite them to introduce themselves, monitor the chat and Q&A, respond to requests, and help attendees with tech issues.

Practice and consider your set up:
- Set up a practice session with all speakers and behind the scenes teams prior to the event.
- Be sure to test speakers' wifi or internet in the practice session. If available, use wired internet for best quality. If a speaker's internet is unstable, we recommend they turn off their video to improve their audio.
- Panelists should minimize distractions and be situated in a quiet location during the webinar. Plan to put your phone on mute or vibrate; shut off notifications or close programs on your computer that make noise.
- Practice sharing your screen, showing a video, or experimenting with "active speaker view" and "gallery view."
- If possible, schedule your practice session for the same time of day as your event since natural light changes throughout the day.

When sharing a video/audio through share screen mode:
- Be sure to select "Share Computer Sound" and "optimize Screen Share for Video Clips"

Ensure consistency and professionalism
- Use the NCJW branded presentation. Add the slides of your speakers, their org's logo, etc. (good to have this as back up in case the speaker's video isn't working)
- Open the meeting by introducing NCJW and close it with a "take action" component about how to get more engaged in NCJW.

- Start and end on time. To respect attendees' time, start when the meeting is scheduled to start.
- Make sure the 'entry/exit chime' is turned off so it doesn't interrupt the call. The option to do this is under the menu on 'manage participants.'
- Invite participants to introduce themselves in the chat if it will help you stick to your agenda times.

Select "all participants are muted on entry."
- The option to do this is under the menu on 'manage participants.' You can also choose this option when creating a meeting.
- Let participants know they are muted.
- Let participants know how to ask questions and who to contact if they need additional support.

If using webinar format:
- The host has to manually promote people to panelists or co-host. We recommend that panelists sign on 15 minutes before the call to set up. Right click their name under attendees and select 'promote to panelist.'
- The host is able to select "hide all non-video participants" when clicking the little blue box with three white dots in the top right corner of a video for options. Someone's video has to be turned off in order for it to be an option. It must be the host that selects this setting for this view to be what participants see. Other panelists can select this setting, but it will only be a personal setting for them. Tip: Practice this prior to your event and have someone in the attendee mode confirm what they see.
- The panelists and host see a different view than the attendees. We recommend assigning someone as an attendee to let you know if something is off. Alternatively, you can sign in from a second device and keep an eye on the display seen by attendees.
- As a host, you can determine what the attendees see. Under "manage participants > panelists > options" you can selection either 'view host mode', 'gallery view', or 'active speaker'.
  - Host mode: they will see what the host sees, allowing you to change your view knowing it will change it for everyone watching.
  - Gallery view: best for conversations and panel discussions.
  - Active speaker view: best for PowerPoint presentations and screen shares.
- You can temporarily unmute a participant to ask a question or speak. Right click on their name and select 'allow to speak.'

Template Agenda and Housekeeping Talking Points

Introductions/ Opening
- Hello everyone and welcome to today's NCJW webinar/event: [name of webinar]. I'm [NAME, PRONOUNS AND TITLE HERE] and I'll be managing this training and running the backend tech side today. We're so excited you are able to join us today.
- Introduce NCJW as an organization.
- Before we get to our incredible speakers, I want to share a few housekeeping notes.
- *Housekeeping for Zoom meetings:*
    - This call is being recorded.
    - All participants have been muted. OR To mute your line, click the microphone option on your screen so it has a red line through it.
    - If you are joining by phone, you can mute and unmute your line by dialing *67.
    - For questions (from participants) in the chat, please introduce yourself with your first and last name, NCJW section (if appropriate) and pronouns.
    - For questions, please use the chat box for your questions. If you're on your cell phone, please email your question to:_____.
    - For any technical assistance, please reach out to:_____. Please note that we'll have limited technical assistance during the call.
    - We'll be sending out the recording and any handouts or resources mentioned in the follow up email to everyone who registered.

- *Housekeeping for Zoom webinars:*
    - You'll notice everyone's mics are muted and cameras are turned off. This is intentional to keep the focus on our speakers today.
    - Please reach out to _____ at _____ or write in the chat if you are experiencing ongoing technical issues, but please note our limited capacity to address issues while the webinar is running.
    - We are recording the webinar and will upload it to our website.
    - And, we are offering a live caption feature on all of our webinars. You can access this feature by clicking on "caption" at the bottom of your screen.

- We're thrilled to have [name] join us this month to teach us how to [skill being taught]. They come from (Provide 2-3 sentences about the person's background and credentials.)
- Now I'm going to kick it over to [name] to get us started.
- *Tip: Remember to mute yourself once you turn the webinar over to the facilitator.*

Speakers/Panel:
- Determine your format. Do you want one speaker at a time, a panel of speakers, or interview style.

Q & A
- Use pre-emailed questions, chat function, and/or Q & A box depending upon Zoom functions.
- Determine if you will answer questions throughout or only at the end of the event.

Closing
- Call to action
- The follow- up they can expect from NCJW:
    - ○ Follow up email that includes an evaluation and call recording
    - ○ PPT slides
    - ○ Anything else promised on the call/webinar

Template "Day of" Checklist:

24 hours - Day of:

- ❑ Send reminder email 24 hours beforehand or morning of
- ❑ All aspects of training ready to go
- ❑ NCJW staff/volunteers prepped on roles and responsibilities

During meeting/webinar:

- ❑ All speakers' tech needs met
- ❑ Record number of participants
- ❑ Record names of people on call, where applicable
- ❑ Mute people who are not supposed to be unmuted
- ❑ Track questions in the chat or Q&A
- ❑ Check email for people having tech issues

After meeting/webinar:

- ❑ Follow up email prepared to send out with recording and resources
- ❑ Survey ready to send out
- ❑ Recording on website
- ❑ Drop all call data in tracking spreadsheet