

Your Guide to Effective Zoom Meetings

The purpose of this guide is to teach you how to host effective virtual meetings via Zoom.

Before we begin, head over to [Zoom.us](https://zoom.us) and go review the different types of plans.

TYPES OF PLANS

Below, you can review the features and benefits of every plan Zoom offers. I recommend most organizations go with the “Pro” option because it has all of the features most organizations need and is the most economical.

Once you decide which plan is right for you, click either “Buy Now” or “Sign up, It’s Free” and follow the on screen prompts to complete your sign up process.

Basic	Pro	Business	Enterprise
Personal Meeting	Great for Small Teams	Small & Med Businesses	Large Enterprise-Ready
Free	\$14.99 /mo/host	\$19.99 /mo/host	\$19.99 /mo/host
Sign up, It's Free	Buy Now	Buy Now	Contact Sales
Host up to 100 participants	All Basic features +	All Pro features +	All Business features +
Unlimited 1 to 1 meetings	Includes 100 participants Need more participants?	Includes 300 participants Need more participants?	Enterprise includes 500 participants Enterprise Plus includes 1,000 participants
40 mins limit on group meetings	Meeting duration limit is 24 hrs	Dedicated phone support	Unlimited Cloud Storage
Unlimited number of meetings	User management	Admin dashboard	Dedicated Customer Success Manager
Online support	Admin feature controls	Vanity URL	Executive Business Reviews
+ Video Conferencing Features	Reporting	Option for on-premise deployment	Bundle discounts on Webinars and Zoom Rooms
+ Web Conferencing Features	Custom Personal Meeting ID	Managed domains	
+ Group Collaboration Features	Assign scheduler	Single sign-on	
+ Security	1GB of MP4 or M4A cloud recording	Company branding	
	REST API	Custom emails	
	Skype for Business (Lync) interoperability	LTI integration	
	+ Optional Add-on Plans	Cloud Recording Transcripts	
		+ Optional Add-on Plans	

{ TECHNICAL ASPECTS OF ZOOM }

Once you are logged in, you (the host) have two options for starting a meeting:

1. **Host a meeting** – Start a meeting at that very moment and invite guests via the menu at the bottom of the screen.
2. **Schedule a meeting** – Schedule a meeting for a specific time on a specific date. Once you enter the details of your future meeting, copy the invitation details, and then simply email the invitation to those you want to invite. To find your future meeting (scheduled meeting), click on the link you're given by Zoom and show up early because the meeting doesn't start until the host (you) arrives.

[SCHEDULE A MEETING](#) [JOIN A MEETING](#) [HOST A MEETING ▾](#)

Host a Meeting

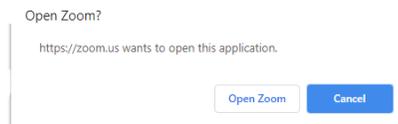
To host a meeting right now, click the drop down arrow next to “Host a Meeting” at the top of your screen. Here you can choose to start a meeting right then, with “video on,” “video off,” or “screen share only.”

[HOST A MEETING ▾](#)

With Video On
With Video Off
Screen Share Only

Once you make your selection, the Zoom application window will appear. I recommend hosting your meeting with “video on.”

You will be prompted to open the Zoom meeting application that will be on your computer, iPad or your phone. If you don't have the application already installed, you will be prompted to download it and you'll need to follow the download instructions.



Launching...

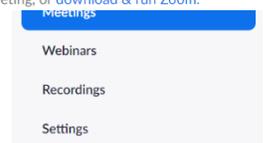
[SCHEDULE A MEETING](#) [JOIN A MEETING](#) [HOST A MEETING ▾](#)

Schedule a Meeting

1. To schedule a meeting for some time in the future, click the “SCHEDULE A MEETING” button at the top of your screen, click “Meetings” on the menu at the left of your screen. Either option takes you to the same page.

Please click Open Zoom Meetings if you see the system dialog.

If nothing prompts from browser, [click here](#) to launch the meeting, or [download & run Zoom](#).



2. Next, fill in the details of your meeting.

- **Topic Name**
- **Description (optional)**
- **When (date/time)**
- **Duration of meeting**
- **Time Zone**

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

3. **Recurring meeting:** If you want to schedule a meeting that reoccurs every week/month/etc., check the box next to “recurring meeting” to automatically schedule multiple meetings identical to this one.

4. **Registration (not necessary):**

- If you’d like to require your attendees to “register” for your meeting, check the “registration” box. Scheduling a meeting with registration will require your participants to register with their email, name, and custom questions. Requiring your participants to register for your meeting also enables you (the host) to generate meeting registration reports if you want to download a list of people who registered.
- Note: It is not necessary to use this feature. This can also be done over email, which I recommend for your first few times using Zoom anyway. If you use Zoom’s feature, you should send a follow up email to make sure participants received the registration.

Registration

Required

5. **Meeting ID:**

- I recommend selecting the radio button next to “Generate Automatically.” At the end of this “schedule a meeting” process, Zoom will automatically generate your meeting details and will create a custom link that your participants will click to join your meeting when the time comes.
- This saves them the hassle of them trying to remember your unique Personal Meeting ID and typing it in on their own.

Meeting ID

Generate Automatically

Personal Meeting ID 564-063-7744

6. **Meeting Password:**

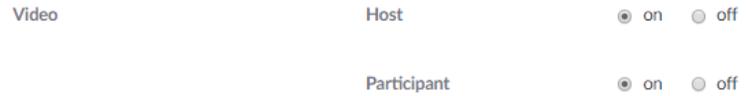
- For the most part, requiring a meeting password is unnecessary. Without it, your participants can easily join the meeting without being stopped by a required password before entering the meeting room.
- However, if you want to add an extra layer of security (which may be important for your type of business), requiring a meeting password is a great feature.

Meeting Password

Require meeting password

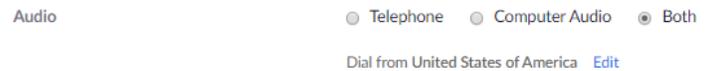
7. Video:

- **Host:** I recommend selecting the radio button next to “on” so that when you enter the room, your video camera is already turned on. Setting this option to “on” also gives you access to share your screen (your desktop) during your meeting if need be.
- **Participant:** The same goes for participants’ video settings. If you want to give your participants the option of showing their face or sharing their screen with the rest of the group, turn this setting to “on” (recommended).



8. Audio:

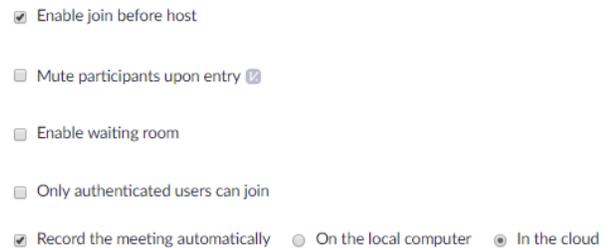
- I recommend selecting the radio button next to “both” so that you give your participants the ability to call in to the meeting if they aren’t near their computer at that time.



9. Meeting Options:

- **Enable join before host:** Generally, a meeting won’t start until the Host has entered the meeting room and if participants want to join the meeting a little bit early, they will be notified that they can’t enter the meeting until the host has joined first. This is why I recommend being a few minutes early to your meeting (as the host) so that others can get into your meeting a little early too.
 - You do, however, have the option to “enable join before host” which would allow your participants to enter the meeting room before the host (but they will still get a message that the host is not in the meeting yet.)
- **Mute participants upon entry:** It’s unnecessary to mute participants upon entry at the beginning of the call, however for late comers, it may avoid disruption.
- **Enable waiting room:** This option is unnecessary and I suggest leaving this box unticked. The waiting room is a room that participants have to sit in before entering the meeting. This is an unnecessary step, especially if somebody joins your meeting late. Late joiners will enter the waiting room and you (the host) have to manually take them out of the meeting room and enter them into the meeting. If you’re in the middle of a presentation, it can cause disturbance for you.
- **Record the meeting automatically:** This is a great option especially if you have people that can’t make it to the meeting but you want to share the meeting with them afterwards. If you choose not to record the meeting automatically, you always have the option to record the

Meeting Options



meeting from the meeting room. However, if you're like me, you might forget to manually start the recording from the meeting room.

- 10. Alternative Hosts:** If you want to assign alternative hosts for your meeting, enter their email addresses in the text box. This may be a good option for you if you (the main host) to have a back up should you be late or have a last-minute conflict.

Alternative Hosts

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

When you are done choosing your meeting settings, click "save" at the bottom of your screen.

Save

Cancel

Inviting Attendees to your Scheduled Meeting

You will then be directed to another page where you can manage the details of your meeting, add the meeting to your Google, Outlook or Yahoo calendars, and invite your attendees.

Topic	My First Zoom Meeting
Time	Mar 17, 2020 02:00 PM Pacific Time (US and Canada)
Add to	 Google Calendar  Outlook Calendar (Ics)  Yahoo Calendar

At the bottom of the page, you can also "delete this meeting", "save this meeting as a template" to use again in the future, or "edit this meeting" if you notice anything you want to change before finalizing/scheduling your meeting. But first, let's go over how to invite attendees to your scheduled meeting.

Delete this Meeting

Save as a Meeting Template

Inviting Attendees to your Scheduled Meeting

- In the middle of the page you will see a section called "Invite Attendees".
- Click the "Copy the invitation" button and your meeting details will generate in a pop up box.
- Click the blue button at the bottom of the pop up box that says "Copy Meeting Invitation" and the details will be copied to your clipboard.
- Click "Cancel" to close out the pop up box to return back to that page.
- Next, paste the invitation details into any email that you want.

Invite Attendees

Join URL: <https://zoom.us/j/899785289>

 Copy the invitation

Copy Meeting Invitation

Meeting Invitation

Vanessa Encarte is inviting you to a scheduled Zoom meeting.

Topic: My First Zoom Meeting
Time: Mar 17, 2020 02:00 PM Pacific Time (US and Canada)

Join Zoom Meeting
<https://zoom.us/j/899785289>

Meeting ID: 899 785 289

One tap mobile
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 929 205 6099 US (New York)
+1 253 215 8782 US
+1 301 715 8592 US

[Copy Meeting Invitation](#) [Cancel](#)

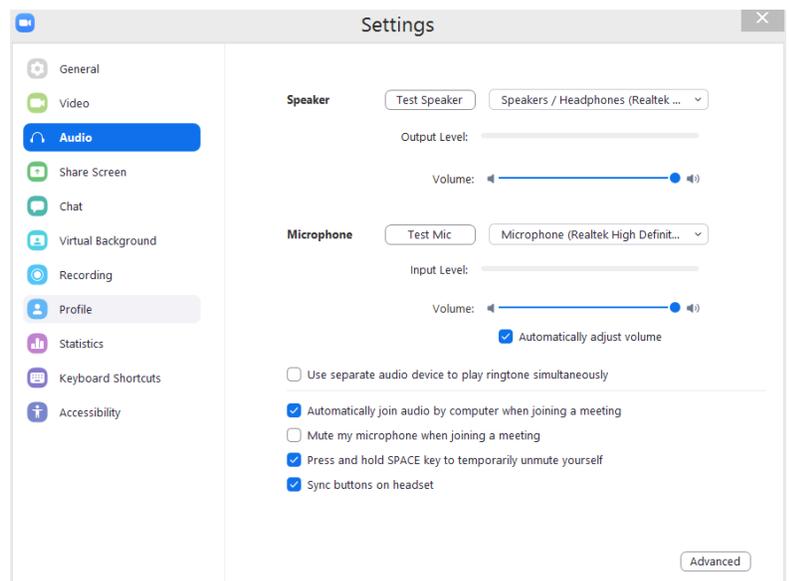
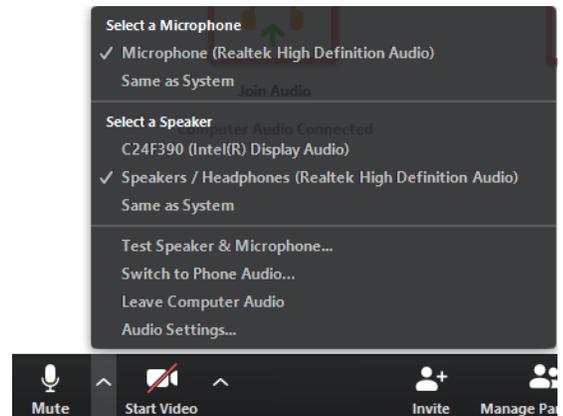
- When you are finished, click "Start this Meeting" at the bottom of the page. You will be prompted to open in the Zoom meeting application that will be on your computer, iPad or your phone. If you don't have the application already installed, you will be prompted to download it and you'll need to follow the download instructions (also mentioned above under "Host a Meeting").

- Once you start your meeting, the Zoom application window will appear. When this happens, you're ready for your meeting! Go ahead and log out. **Then, click the link you generated in your invitation to start your meeting at the scheduled time.**

{ TECHNICAL ASPECTS TO KEEP IN MIND DURING A MEETING }

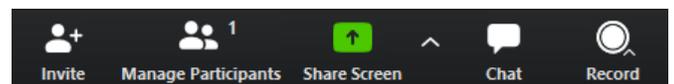
Video/Audio Settings

- If your camera isn't already enabled, click "Start Video" at the bottom left of the window so that the red line going across will disappear. Same goes for audio. Click the microphone button to mute/unmute yourself.
- Click the dropdown arrow next to audio or video to see secondary options for choosing the correct camera/microphone. Typically this should all work automatically and you won't have to change anything.
- In the event that you need to change your audio/video settings or want to double check that they are working properly, click the drop down arrow, then click "Audio Settings."
- In the Audio Settings, you can test your speaker and mic to make sure they are working correctly. Click "Test Speaker" and/or "Test Mic" and follow the on-screen instructions.



Invite

- Even after your meeting has started, you can still invite participants but clicking the "invite" button at the bottom of your Zoom application window. A pop up box will appear where you can enter email addresses, copy the URL to your meeting, or copy the invitation and paste it in an email to send to someone else you want to add to the meeting.



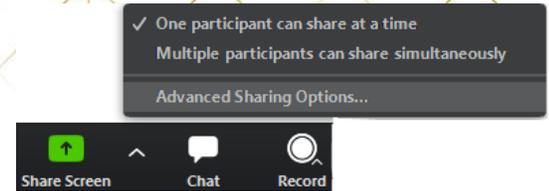
Share Screen

- You can share your screen with your meeting participants if you want to show them something from your computer. Click the green "Share Screen" button and a popup window will appear. Here you can select a window or application that you want to share. If you have multiple computer screens, select the screen you want to share. Alternatively, you can share specific documents or even share a virtual whiteboard where you can use your cursor to draw.

- Then click “share” at the bottom of the pop up window.

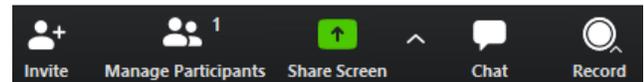
Share Screen Settings

- Click the arrow next to the Share Screen button at the bottom of your Zoom application window. Here you can manage the settings of this feature.



Record your meeting

- To record your meeting to your computer or to the cloud, click the record button at the bottom right. Try to remember to do this right at the start of your meeting so you don’t miss anything!



Chat

- There is a chat menu on the bottom of the screen. I suggest enabling the chat feature so that attendees can instantly chat the entire group if need be. You can also privately message individuals if you need to tell them something only they need to know (i.e. “we can’t hear you”).

Manage Participants

As the host, you can manage all participants in your meeting.

- Click “Manage Participants” at the bottom of the Zoom application window.
- Here, you can mute an individual by going to their square and muting them on the right drop down menu. This avoids the “who can I hear typing right now” conversation that can take minutes to get through – especially since the person who is typing likely isn’t paying attention to who is talking.
 - After introductions and initial questions, it is smart to “mute all” attendees (except for speaker) so that the Host/speaker is able to deliver important information without background noise distractions.
 - I suggest announcing that you will be muting everybody’s microphones before you do it so that it doesn’t turn into a mute/unmute challenge because the attendee doesn’t know why their mic keeps going mute.
 - However, even when you “mute all,” attendees can still unmute themselves when they have something to say. I suggest announcing that you’re going to mute everyone before you actually do it so that attendees aren’t confused as to why they are muted.

{ MAKING ZOOM EFFECTIVE AND PERSONAL }

Aside from the technical aspects of Zoom, it’s important to make your meetings effective and personal.

Appearance

Show your face if possible. It really adds to the intimacy of the meeting.

Make sure you're set up to be seen clearly on video by facing a light source. If the light source is behind you or on the side of you, you risk being in a shadow.

Pro Tip: If you are on a laptop, prop up your computer with books so the camera sees you straight on instead of under the chin.

Pro Tip: Create a background with your logo in Canva.com (free to nonprofits) and then upload it to Zoom in the "video settings" section. Photo dimensions should be 1920 x 1080 pixels.

Effective Meetings

- 1) Ask questions in advance and give participants slides and materials to view in advance.
- 2) By asking questions in advance, you have the opportunity to personalize the content (and thus more deeply engage your listeners) before the meeting starts (we should do this with in person meetings anyway)!
- 3) Use your mute controls to make the meeting smooth.
- 4) If the meeting is small enough, go around and make introductions. Sometimes people just need to tell you they have a headache before they can focus, ya know?
- 5) Breakouts—I find breakouts are tough to do with Zoom rooms and it also requires an expensive add-on or upgrading to a "business plan." Instead, I recommend scheduling smaller Zoom calls at staggered times and then a meeting for everyone to come together and review.

Recording

You have more potential than you realize with Zoom recording. Some organization may need to put entire training sessions, new employee onboardings, etc. online. If this is you, I recommend recording to your computer (not the cloud) and then uploading those videos into a learning portal. Teachable.com is reasonably priced and provides the ability to categorize Zoom calls by modules with handouts.

Happy Zooming!