The Trainer's Guide to

zoom

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How to Use This Guide

This guide is designed to provide technical tips & tricks and best practices advice for virtual training conducted via Zoom. It is suggested that you use this guide to help enhance your understanding of the Zoom platform, gain confidence in your facilitation skills, and improve upon the learner experience.

While the tips & tricks in this guide are invaluable, they will not provide you with a complete training experience. For access to a bank of hundreds of virtual (and in-person) training activities go to www.soapboxify.com. Soapbox is an all-in-one presentation creation tool that allows you to enter some basic information about your training (length, audience, objectives) and in a matter of minutes will provide you with a complete facilitator guide, slide deck, handouts, and activity instructions. Sign up today for a free 10-day trial to experience how Soapbox will revolutionize your training programs.

Basic Feature Overview

Webcam & Voice

Overview

The most basic features of Zoom are the webcam and voice features. Users are prompted to enable their microphones and cameras upon logging into a zoom meeting. Every participant has the option to mute/unmute at any time as well as the ability to turn off/on their camera at any time.

Adult Learning

Adult learners need multi-sensory learning experiences. For virtual instructor led training (VILT) this means asking your participants to enable their cameras during training sessions. Also, adult learners need to be involved in their learning, which includes planning learning experiences with feedback and interaction, both of which are most effective on camera.

Limitations

When logging onto Zoom, users may be prompted to choose their audio source or enable their webcam.

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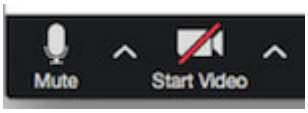
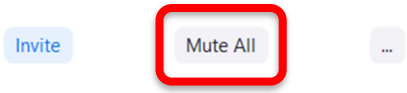
How to Turn Your Webcam/Voice On and Off



Host/Co-Host/Participants:
Use the *Mute* (microphone) button to control your microphone.
Use the *Start Video* (camera) button to control your webcam.

Mute All

The host and co-host can mute all participants. This is helpful to enable as people are signing in to hide loud background noises. Furthermore, for meetings with a larger number of participants (10+), it is best to mute all participants while the facilitator is speaking so that everyone can hear.



Hosts/Co-Hosts
Click *Participants*, then *Mute All.*

Best Practices

- **Mute people upon entry.** In meeting settings, enable the ability to mute participants upon entry prior to the start of your session.
- **Ask people to turn on their cameras.** At the start of your session, ask your participants to turn on their cameras. Provide a brief explanation of why you are asking them to do so.
- **Gallery view vs. speaker view.** By default, Zoom users will see speaker view, which means that the person currently speaking will he shown on their screen. If participants would like to see the webcam view of all participants, anyone can click the gallery view button in the top right corner.

Back-Up Plan

If the webcam and/or voice are not working, try signing off Zoom and back in again. If that does not solve your problem, try a computer restart.

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Screen Share

Overview

Screen sharing is another basic Zoom feature that is easy to use and can be used in a variety of ways to enhance learning. Screen share can be used to present PowerPoint slides, show a webpage or video, or to show a document.

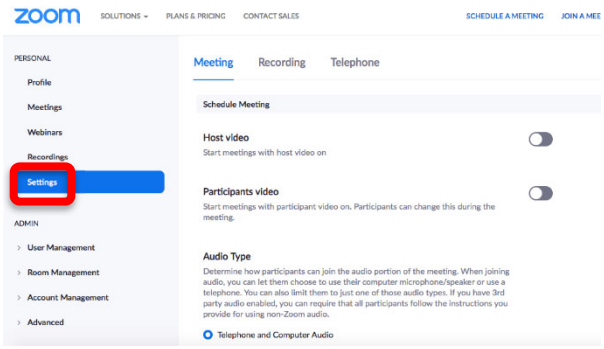
Adult Learning

Adult learners need learning experiences that appeal to all their senses, including delivery techniques that meet the needs of audio, visual, and independent learning preferences. Using the screen share feature is one important method through which you can engage your learners.

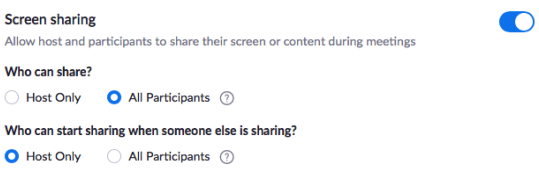
Limitations

You do not need to give permission for users to screen share, though you can prevent users from being able to do so. If you do not want participants to be able to share their screens for some reason, you may disable it in Zoom settings. Zoom participants on all device types will have the ability to screen share (unless you disable it).

How to Enable or Disable



Host
In your Zoom account, click *Settings* in the toolbar on the left side of your screen.



Scroll down the page until you find the settings for Screen Sharing. Modify the settings to meet the needs of the session.

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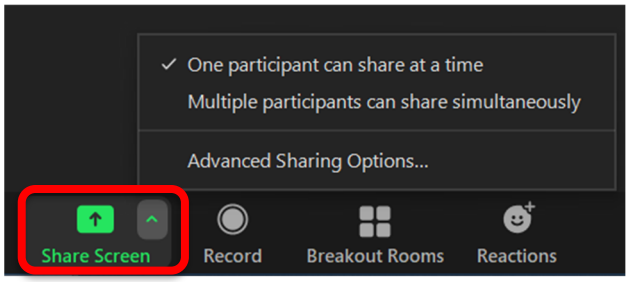
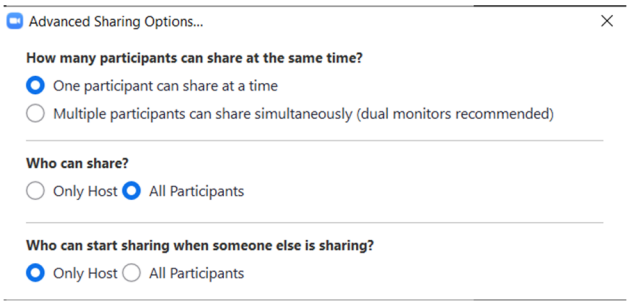
How Screen Share



Host/Co-Host/Participant
Click *Share Screen*. Depending on your device, you will then be prompted to decide if you would like to share your desktop, a whiteboard, or another application.

Best Practices

- **Participants can use screen share in breakout rooms to display conversation questions or to complete a task**. When participants are in a breakout room, they do not have the ability to see the host/co-hosts screen share. Instead, one of the participants of a breakout room can share a handout, document, or webpage for their group to be able to discuss during a breakout session. Be sure to clearly explain this to participants prior to launching them into the breakout session and ensure that they have all the documents necessary to screen share with their group.
- **Share only the application that you want participants to see.** Zoom gives you the ability to pick the application that you want to share when you screen share. Sharing only that application takes away possible distractions such as a desktop background photo, multiple open applications, or producer/facilitator controls.
- **Advanced Sharing Settings.** There are some advanced sharing settings worth looking into if you plan to have your participants screen share.



Host/Co-Host
Click the arrow to the right of the *Share* button. Then select *Advanced Sharing Options*. From here you can decide on the best sharing settings for your session.

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Back-Up Plan

It is a good idea to share all your materials with your producer prior to the start of the session so that they can take over screen sharing a PowerPoint or document if you have technical issues in trying to screen share. It is also a good idea to have back-up activities in mind if your planned screen share does not work. For example, if you are planning to show a video but you cannot get the video to play, you could instead tell a story that drives home the same point.

Chat

Overview

Chat is another basic Zoom feature that all participants have access to regardless of their device. Participants can chat with the entire meeting group or to privately chat with individual people within the meeting group.

Adult Learning

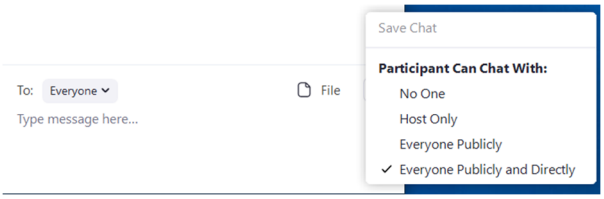
Chat is a great tool by which to allow adult learners to participate in their learning experience actively and practically to learn by doing. Facilitators can ask questions for participants to share how they can apply their learning to their lives. Further, the chat feature allows participants to practice and be involved in the learning experience through feedback and evaluation.

Limitations

If for some reason you do not want participants to be able to chat, the host can disable the chat feature. Also, in the meeting controls the host can disable the private-chat feature if you do not want participants to have the ability to private chat people (instead they would only be allowed to chat people within the main meeting group chat). Keep in mind that it is helpful for participants to be able to privately chat message the producer with any technical issues, so it may be useful to keep this feature enabled with most audiences.

How to Chat

To access chat, click the *Chat* button on the main toolbar. If the chat icon is orange, it means that someone has posted a message to the chat window. In the drop-down, be sure to select if you want to chat with the whole group or someone privately.



Host/Co-Host
In your chat box, you have the option to modify the settings of who participants can chat with.

You also can save a copy of the chat log by clicking *Save Chat*.

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Best Practices

- **Explain to participants the difference between group chat and private chat.** If you have both features enabled, be sure to explain to participants that there is a difference between the group chat section and the private chat section. Nothing is quite as awkward as a message going out to the group that was meant to be private.
- **Tell people to private chat the producer with technical questions.** Technical difficulties can really cloud up the group chat window and take away from the purpose of your session. At the start of your session, tell participants to private chat the producer with any technical problems they may encounter during the session.
- **Have your producer manage the chat room.** It is best practice to have your producer manage your chat room instead of having the facilitator attempt to do so. When asking a question to the group, tell participants that you would like them to respond in the chat window. After a few moments, ask your producer to share aloud some of the things that participants shared within the chat window. This gives the producer the ability to read responses while the facilitator is talking. The producer can then filter out responses that should be shared aloud to the group. This is especially important with large groups when the number of responses coming into the chat window will be numerous.
- **Additional messaging options.** Click the ellipses button (3 horizontal dots) next to a message to access additional options such as starring a message for quick access in the future, editing, or deleting.
- **Respond with a message thread.** To respond to a chat message in thread, click the speech bubble next to a message. This will keep responses organized in a group.
- **Respond with a reaction.** To respond to a chat message with an emoji, click the emoji button next to a message.

Back-Up Plan

If chat is not working for some reason or you are feeling overwhelmed by the amount of talk in the chat window, you can always unmute some or all participants and ask people to verbal respond to questions or to elaborate on something that they shared in the chat window.

Breakout Rooms

Overview

Breakout rooms are a way to have small group conversations or work time in a virtual environment. Like participants in a training room working together at a table, breakout rooms allow for the facilitator to put participants into individual meeting rooms with partners or small groups for as much time as they would like. At the conclusion of the breakout room session, the facilitator or producer can bring groups back together as a large group with the click of a button.

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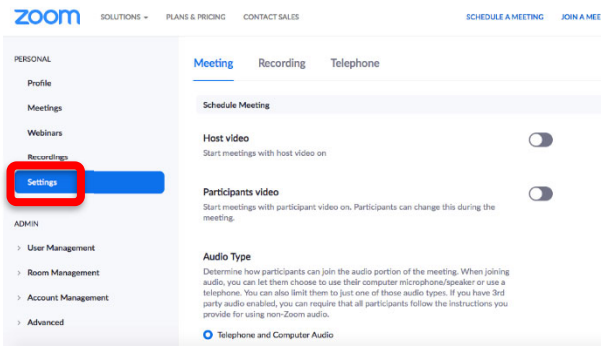
Adult Learning

Breakout sessions allow adult learners the opportunity to practice what they have learned (and get feedback) and to share the relevance and applications of their learning by having small group conversations.

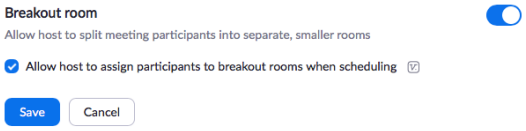
Limitations

- Breakout rooms are an advanced feature on Zoom, meaning that you need to activate the breakout rooms feature in settings prior to the session starting to utilize the tool.
- You can have up to 50 breakout rooms in a session.
- Only the host will be made aware of requests for help during breakout rooms, which is another reason why it is best practice to have the producer in the role of host.
- If a meeting is being recorded, only the main room will record (not breakout rooms) regardless of which room the host is in.

How to Enable



Host
In your Zoom account, click *Settings* in the toolbar on the left side of your screen.



Scroll down the page until you find the setting to enable Breakout Rooms. Click *Save.*

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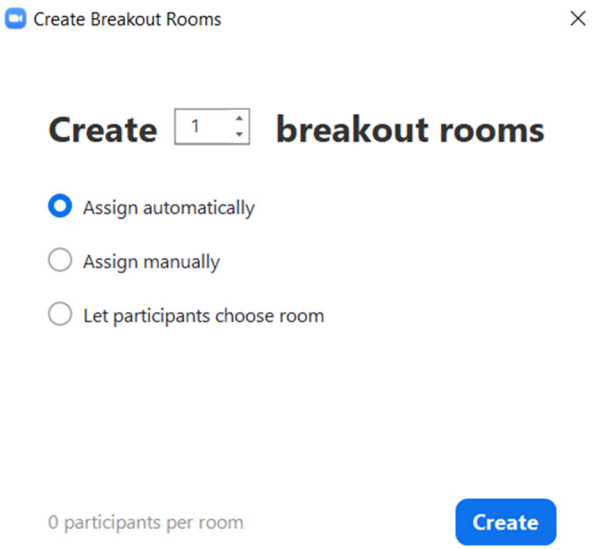
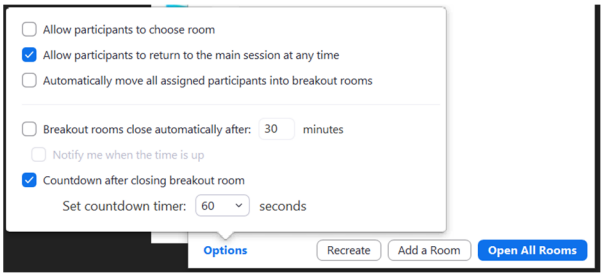
How to Set-Up



Host
Click *Breakout Rooms*. You will be prompted to decide if you would like to sort participants automatically or manually into their breakout rooms. You will also have the option to decide on the number of breakout rooms you would like to have. Click *Create.*



After creating breakout rooms, click the options icon to view additional breakout room features:

- Allow participants to choose their own breakout room.
- Allow participants to return to the main room at any time.
- Auto close breakout rooms after any number of minutes.
- Set a countdown timer.

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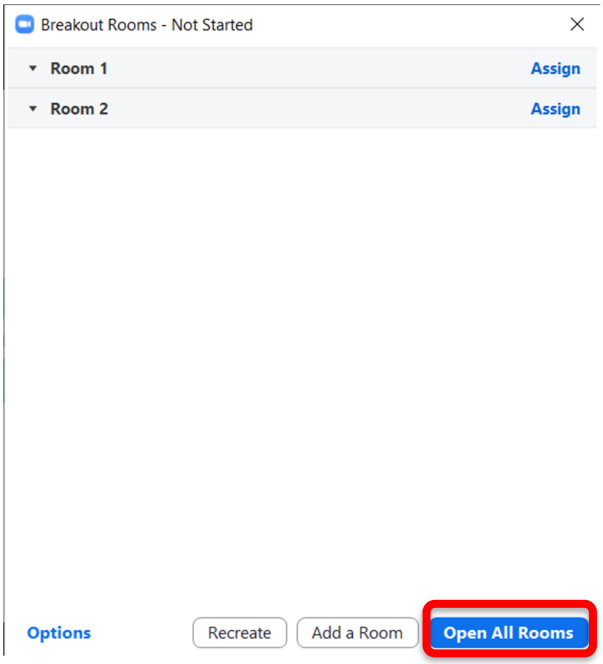
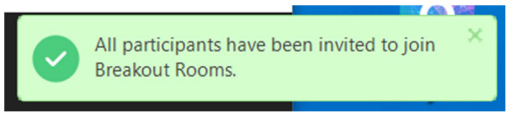
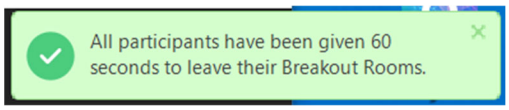


Once everyone is sorted and you are happy with your breakout room settings, click *Open All Rooms* to begin breakout rooms.



You will be notified that participants have been invited to join their breakout rooms.

You may click the button to *Close All Rooms* at any time. This will immediately bring participants back to the main room (unless you have set a countdown timer for their return).



If you set a countdown timer, you will receive a notification that participants have been told to wrap up their conversations and return to the main room.

Note: If participants do not opt to return to the main room before the timer is up, they will automatically be put back in the main room when the timer ends.

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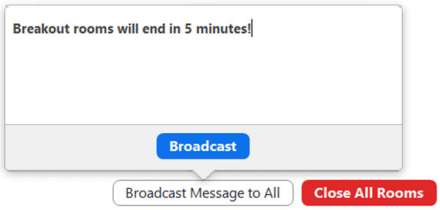

Click *Broadcast Message to All* to send a message to all breakout room groups. This message will appear as a pop up for participants. You may send as many broadcast messages as you would like during a breakout room session.

Note: This feature is a helpful way to remind participants of discussion questions, provide additional activity instructions, or give timing warnings.

Best Practices

Before launching breakout sessions:

- **Prepare participants for what is about to happen.** For participants who have not used breakout sessions before, the unknown can be a little scary. It is important to explain what is about to happen and to give clear directions for what they should be accomplishing within their breakout room.
- **Unmute participants.** Oftentimes participants will not know how to unmute themself or will struggle to do so. One way to alleviate this potential hazard is to unmute all participants before you launch them into their rooms.
- **Point out the help button to participants.** Tell participants that if they have a problem or question while in their breakout session, there is a button they can click to ask for help. If participants click this button, the producer will be notified via pop-up message and will have the option to join the room to help or answer a question.
- **Explain screen share and annotation options.** The facilitator screen share will not be visible to participants once they enter their breakout room. However, while in a breakout room any participant will have the ability to screen share or share a whiteboard for the group to collaborate on using the annotation tools.
- **Give participants all the materials that they will need.** The facilitator screen share is not visible while participants are in a breakout room. If you have directions for group time or questions that you would like participants to discuss while in their breakout sessions, you will need to share handouts ahead of time. A second option would be to drop into each breakout room and share a handout link in the group chat. Another feature that producers may utilize is the "broadcast message" tool within breakout rooms. Using this tool, you can send all groups a message that will pop up on their screens when they are in their breakout rooms. It is important to practice with this feature if you plan to use it as there is a limited character count available for broadcast messages and the message only stays on participant screens for a limited amount of time.

During breakout sessions:

- **Drop-in to check on groups.** Host and co-hosts can drop-in to each room. Utilize this feature to help groups who feel stuck, get conversations back on track, or ease-drop on

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topics to tell the larger group about things you overheard that you think the whole group would benefit from hearing at the conclusion of breakout rooms.

- **Respond to help requests.** You may have one or more groups push the help button to request help during a breakout session. You will be prompted by a pop-up message to enter the room to assist the group. Before doing so, it is important to notify your co-hosts that you will be leaving to help a group as it can appear to your co-hosts that you have dropped off the call entirely. After you have assisted the group asking for help, you will have an option to click a button to return yourself to the main room.
- **Call participants back with a warning count down.** Zoom offers the ability to call participants back to the main room with a warning countdown. You can set the countdown to any time that you would like. It is a good idea to give participants a warning that lasts for a few moments to wrap up their conversations. At the end of the countdown, participants will be automatically returned to the main session.

Other things to keep in mind:

- **The breakout session chat is different from the group chat.** The chat feature in breakout rooms is separate from the main group chat. This means that anything shared in the group chat prior to launching breakout rooms will not be accessible to participants during breakout sessions. Groups will have their own breakout group chat feature available to them while they are in their breakout session.
- **You can leave breakout rooms open for the duration of your session.** If you will have participants entering breakout rooms at multiple points during your session, you have the option to leave breakout rooms open for the whole session. This allows participants to jump in and out of breakout rooms, as necessary.
- **Late arrivals.** If an attendee has been pre-assigned to a breakout room and joins the session while breakout rooms are already in progress, they will automatically join their assigned breakout room (they will not be put into the main room unless they have not yet been assigned to a breakout room group).
- **Host controls from within a breakout room.** A host can admit someone from the waiting room while they (the host) are inside of a breakout room working with a group.
- **Move one or more participants to the main room.** A host/co-host can assign one or more participants back to the main room without closing breakout rooms for all participants.
- **Self-select breakout room.** If enabled, participants can have the option to self-select their own breakout room.

Back-Up Plan

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If you have a few people who are unable to enter their breakout room because of technical difficulties, you can use the main session as a mini "breakout room" for this group. Simply explain to people that they will be forming their own group in this main room and ask them to progress as planned. If you have a catastrophic technical difficulty, and you cannot launch breakout rooms as planned, be prepared with a backup activity such as having a large group discussion as opposed to small group discussions.

Polls

Overview

Polling is a tool that is easy to set up and utilize to enhance your session. As a host or co-host, you will have the option to launch a poll with the click of a button during your session. Participants will experience a multiple-choice question popping up on their screen. After all participants have answered, the producer has the option to share the poll answers with the group. You can set up multiple poll questions to use during your session as a pre-test, knowledge check, to gauge opinions, to take attendance, or to use as an assessment tool. You will have the option to download a report of poll responses after the session.

Adult Learning

Polls are invaluable to training sessions as they are a great method by which to gather learner feedback. Participants can be involved in the learning process and to provide feedback and consultation. Polls are also a way by which to give participants control over their learning, to gather evaluations, to check for understanding, or to allow participants to make decisions.

Limitations

Polling is an advanced feature on Zoom, meaning that you need to activate the polling feature in settings prior to the session starting to utilize the tool. All participants will have the ability to participate in polls, however hosts need to be using the desktop version of Zoom to manage polls. 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. Best practice is to set up and test all polls prior to the start of the session.

How to Enable

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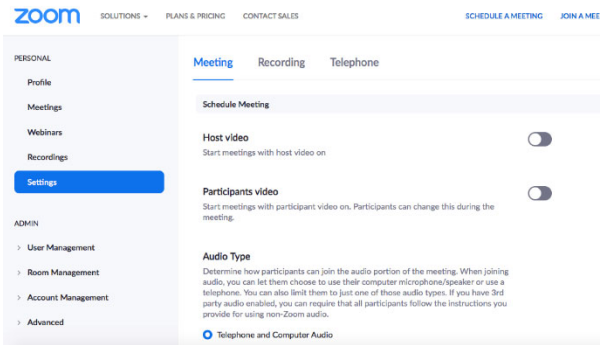
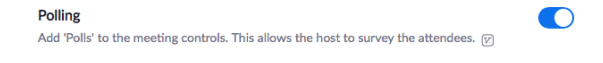
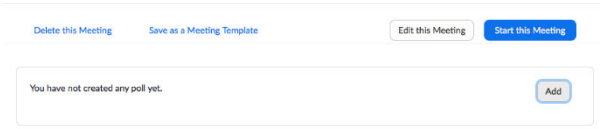


Host
In your Zoom account, click *Settings* in the toolbar on the left side of your screen.

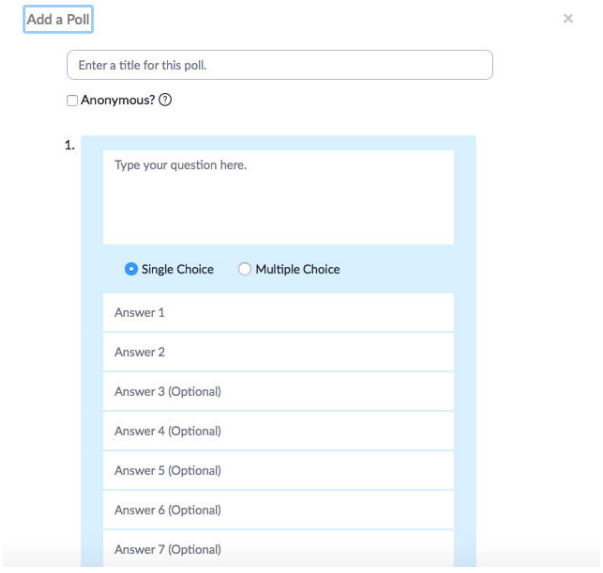


Scroll down the page until you find the setting to enable Polling.

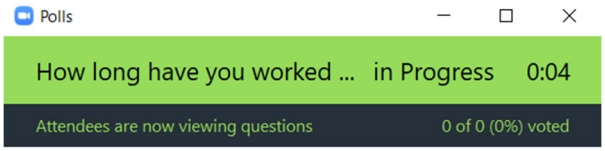
How to Set Up



At the bottom of the meeting information page, you will find the section to add polls.



You can title your poll (only you will see this), decide if you would like it to be anonymous, and decide if it should be a single choice or multiple-choice question.



While the poll is in progress, you will have the ability to see what percentage of your participants have voted in the poll as well as their answers.

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Best Practices

- **Practice launching polls prior to the start of your session.** It is important to set up all your polls prior to the start of your session and to log in and practice launching your polls. Make sure that you have someone else logged in to validate that they are seeing the poll that you have launched to participants.
- **You can conduct polls anonymously.** If you want participants to be able to answer a question anonymously, you can click the option for anonymous responses when setting up your poll.
- **You can create single choice or multiple-choice questions.** When you are creating your poll questions, you will have the option to allow participants to select multiple answers or to force participants to choose a single answer.
- **Both the host & co-host can launch polls.** Both the host and co-host will have access to this feature. However, best practice is that the producer will manage all polling.
- **Host & co-host are unable to vote in polls.** Keep in mind that the host and co-host are unable to vote in polls. If this is an issue for you, you can login on a second device as a participant to participate in polls.
- **You have the option to broadcast poll answers to the group.** When you close a poll, you have the option to broadcast the answers to the group. If you show poll answers, participants will be able to see what percentage of participants picked each answer. There will not be names associated with answers if you choose this option.
- **Host & co-host can decide if panelists are able to participate in polls.** If you have panelists designated on your meeting, you will have the option to choose if you would like them to participate in the poll.
- **You can have a max of 25 polls per session.** You can create up to 25 polls per session! Polls can also be re-launched multiple times if you want to re-take a poll or if you want to practice launching polls prior to the start of your session.
- **Webinar reporting.** During or after your session, you will have the ability to download a report of the poll results. However, there are some limitations to what you can see on this report.
  - If registration was turned on and the poll was not anonymous, it will list the participants' names and email addresses.
  - If registration was not on, it will show the results, but list the users as "Guest".
  - If the poll was anonymous, it will show "anonymous" for the participants' names and email addresses.

Back-Up Plan

If your polls do not launch as planned, you should be prepared to ask Participants to respond to your question aloud (using voice) or via the chat feature. If you are planning to use the poll feature as an assessment you can ask Participants to chat their responses to you using the private chat feature (so that other Participants cannot see their responses).

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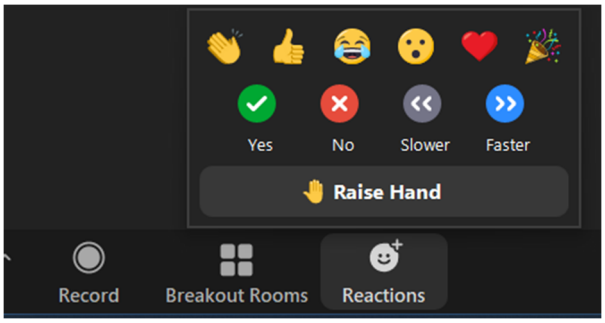
Reactions

Overview

If enabled, participants can click these nonverbal indicators (emojis) at any point during your session and they will display to all participants in the corner of the participant video screen and on the participant list.



Host/Co-Host/Participants
Click the *Reactions* button to see the options.

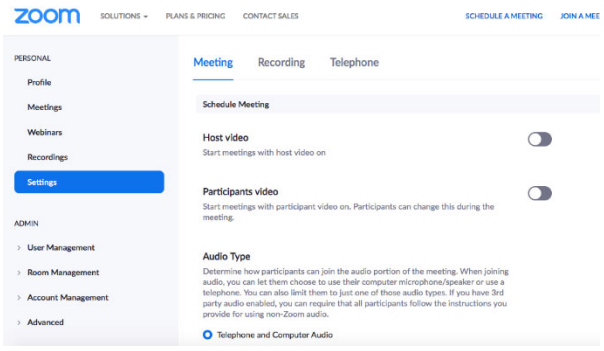
Adult Learning

Effective adult learning programs allow for participant feedback and consultation. Reactions are a simple way for participants to be involved in their learning process.

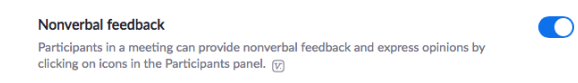
Limitations

This is an advanced feature on Zoom, meaning that you need to turn on reactions under message settings if you would like participants to be able to use them.

How to Enable



Host
In your Zoom account, click *Settings* in the toolbar on the left side of your screen.



Scroll down the page until you find the setting to enable Nonverbal Feedback.

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Best Practices

- **The host can clear responses at any time.** If responses become overwhelming or you would like a clean slate to ask a new question, the host can clear participant responses at any time.
- **Reactions can work like a poll.** If you would like to ask a yes or no question to participants, reactions are a great way to go. They are also helpful to gauge understanding at any point during your session by asking participants to click thumbs up or thumbs down to indicate if they understand the content or directions.
- **Tell participants about reactions at the start of your session.** If you point out the reactions at the start of your session, it can be a great tool for people who have questions to raise their hand or to warn you about running short of time.
- **They may become distracting.** It is important to know your audience when deciding if you want to enable reactions. It can be distracting to learning to have coffee indicators or thumbs up signs appearing every few moments. Talk with your producer about how you would like reactions to be managed if you decide to include them in your session.

Back-Up Plan

If reactions are not working for someone or if you forget to enable them prior to the start of your session, an easy back-up plan is to have participants chat share their answer. If your group size is small, you may also allow participants to share answers to a simple question verbally.

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Annotation/White Board Tool

Overview

You can use annotation tools on a shared screen or whiteboard. Annotation is an advanced feature, meaning that you need to enable it in session settings prior to the start of your session if you plan to utilize the feature. Using the annotation tool, participants and host/co-hosts will have the option to write free hand, type on screen using a text feature, use a stamp, and an eraser.

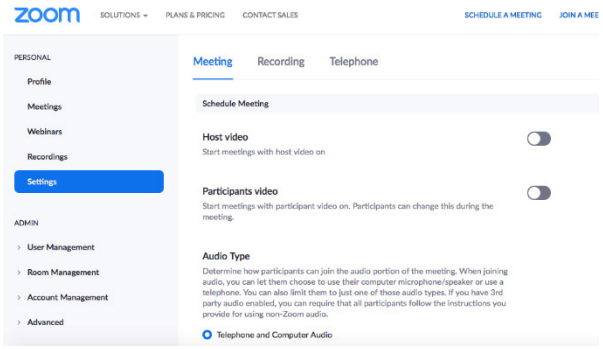
Adult Learning

Annotation tools allow adult learners the opportunity to learn by doing and draw upon their past experiences to aid in their learning. It is also a great method by which to involve participants and give them the ability to practice something new.

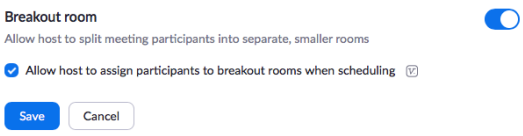
Limitations

You need to enable annotations if you plan to utilize them during a session. You can also disable participant annotations. It is important to know that Chromebook users will not be able to launch a whiteboard or to use annotation tools. In addition, iOS users will not be able to launch a whiteboard, but they are able to use the annotation tool.

How to Enable



Host
In your Zoom account, click *Settings* in the toolbar on the left side of your screen.



Scroll down the page until you find the setting to enable Breakout Rooms. Click *Save.*

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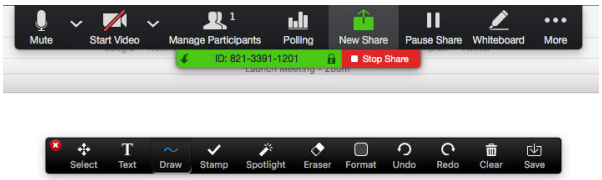
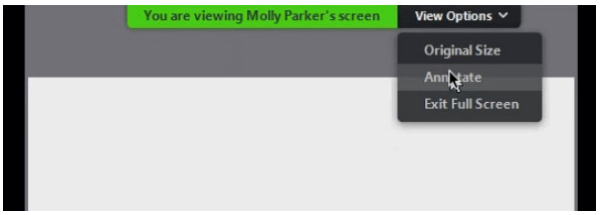
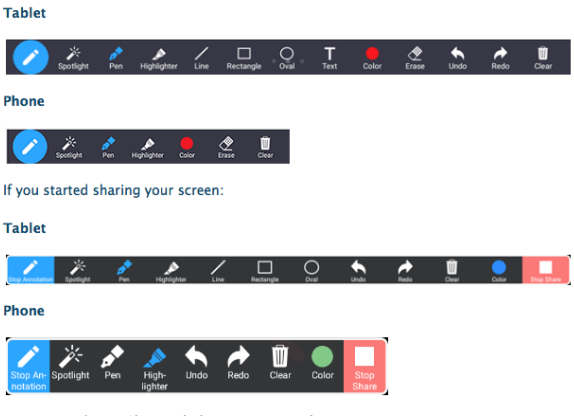
How to Use



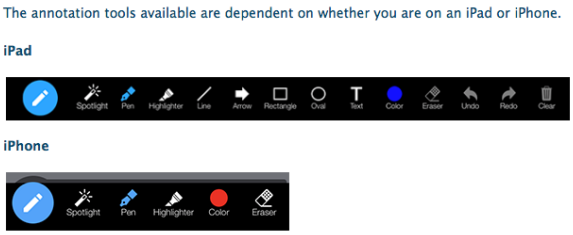
Host/Co-Host
Click *Share*. Decide if you would like to share a Whiteboard, Slides, or other Application. Zoom will automatically launch your Annotation Toolbar.



Participant
Slide your mouse to the top of your screen and click *View Options*. Then click *Annotate*. Your Annotation Toolbar will appear.



Mobile/Tablet Participant - Android
Participants can access annotation tools by selecting the pencil icon (shown in blue).



Mobile/Tablet Participant - iOs
Participants can access annotation tools by clicking the pencil icon (shown in blue).

Features

- **Mouse.** The mouse can be used by participants to point things out or identify something on the screen.
- **Text.** Participants or facilitators can add text to the screen to brainstorm, answer questions, vote, etc.

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- **Draw.** The drawing tool can be used to write freehand, point something out, draw a graph, etc.
- **Stamp**. The stamp tool can be used as a voting mechanism or to identify something.
- **Erase.** Each participant can erase any annotation that they add to the screen or whiteboard. The host/co-host can clear all drawings from the screen or whiteboard.

Best Practices

- **Clear all.** The producer should be aware of the "clear all" option and have the annotations toolbar pulled up for any session where you are allowing participants to use the annotation tools. This will enable the producer to clear all drawings that accidentally get added to the screen at the wrong time (which can be a big distractor to participants).
- **Know your audience.** It is important to consider your audience when deciding if you are going to enable annotation tools for your session. Participants can accidentally add annotations to the screen at the wrong time, type inappropriate things, or draw pictures that you don't want on your screen.

Back-Up Plan

If annotations are not working for someone or you forget to enable annotations prior to your session, you can always ask participants to use the chat feature as a means by which to collaborate during the activity.

Other Notable Zoom Features

Instructions for Use

Rename yourself.

In the Participant panel, click the *More* button to rename yourself.

Note: You may need to enable Participants renaming themselves in meeting settings.

Send a message to Participants in the waiting room.

In the chat panel, select the dropdown and change to *Everyone (in Waiting Room)* to message Participants in the waiting room.

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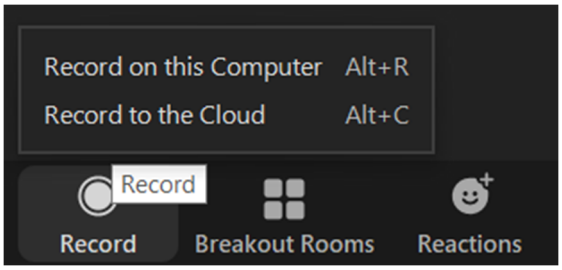
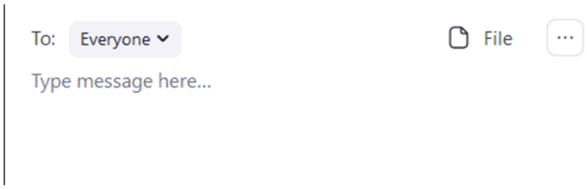


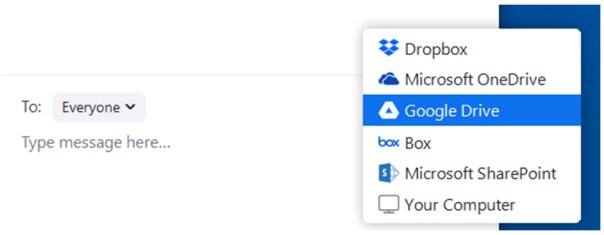
Record meetings.

Click the *Record* button on the toolbar. You may choose to record to your computer or to the cloud.



Use file share to share documents or materials.

In the chat panel, click the *File* button.

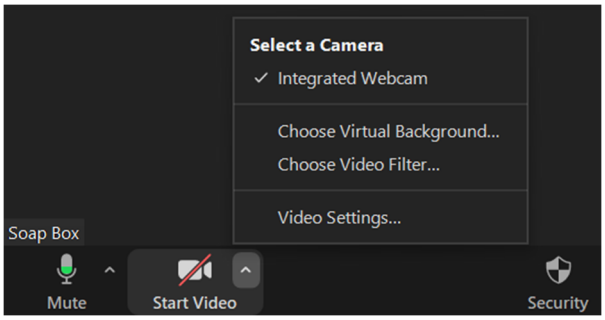


Choose which application you would like to share a file from (or share from Your Computer).

Note: You may need to enable File Sharing in meeting settings.

Enable translators for Participants of various languages.

Enable interpretation in meeting settings. You will be asked to provide email addresses for translators to assign them to the role.



Use virtual backgrounds.

Click the arrow next to the *Start Video* button. Select *Choose Virtual Background.*

Note: Virtual backgrounds may need to be enabled in meeting settings.

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Producer Role

Overview

The Producer is the unseen Presenter. Their job is to take care of the administrative and technical aspects of the session to free up the Presenter to focus on content delivery. It is important to select your Producer carefully. A successful Producer is one who knows the platform well, who has the technical expertise to be able to help Participants who are having problems, and someone who can jump into the role of Presenter in the event of a technical problem.

Limitations

Upon signing into the meeting, the registered host (the username by which the meeting was created under) must assign a co-host by clicking manage participants. The registered host can also give away "host" permissions to another participant. There are no limits on the number of co-hosts you may have in your meeting, but there can be only one host. Best practice is that the producer should take the role of "host" and the facilitator should take the roll of "co-host" because Zoom allows only the host to start waiting rooms, start/end the meeting, be made aware of calls for help during breakout rooms, and assign co-host responsibilities. To host or co-host most effectively, you should be on the desktop version of Zoom. Be aware of the following device limitations:

- You need to use the desktop client for Mac, PC, Chrome OS, or Linux to access the host/co-host tools.
- You need to use the Zoom mobile app for iOS or Android to access the host/co-host tools, though facilitating or producing through a mobile advice is not advised.

Job Responsibilities

- **Admit people.** If you selected to enable the waiting room when you created your session, you will need to admit people to the room once you are ready to begin your session. Zoom will prompt you to admit all participants (or select participants) who are in the waiting room.
- **Launch polls.** If you are using polls in your session, you will need to launch polls at the appropriate time. In the control bar, select polls. Use the drop down to make sure that you are launching the correct poll. Then click "launch poll" to broadcast your poll to participants. When you end the poll participants will no longer be able to answer. You will also have the option to broadcast poll results to participants if you would like.
- **Answer chat questions.** It is important to keep an eye on the chat box during the session and to respond to questions or help requests, as necessary.
- **Launch breakout rooms.** If you are using breakout rooms during your session, it will be the role of the producer to set up and launch breakout rooms. You will need to select if you

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would like to sort participants manually or automatically, launch rooms, and call participants back from their rooms.

- **Answer help calls (breakout rooms).** The breakout room feature has a help button that participants may press to summon you into their room. Be prepared to enter breakout rooms to assist people as necessary.
- **Record your session**. If you would like to have your session recorded, it should be the responsibility of the producer to make sure they enable the recording feature at the start of the session.

Best Practices

- **Practice.** The most important thing for a successful session is for the facilitator and producer to practice together. Ensure that all features are enabled and set up and run through the entire presentation together to ensure that each person knows their responsibilities during the session.
- **Be on hand as a back-up facilitator.** If your facilitator has an unstable internet connection or has a computer crash, it is important to have the slides and lesson plan pulled up on your own computer and ready in the event that the producer needs to jump in as the facilitator. Make sure that you understand the learning objectives and activities to continue the session if your facilitator experiences technical difficulties.
- **Be on camera**. Best practice is that the both the facilitator and producer will be visible on camera.
- **Introduce producer and explain their role at the start of session.** It is important that participants are introduced to the producer at the start of the session and told that they should reach out to the producer if they need help at any point during the session.
- **Tell participants how to contact the producer if they need help.** The best way for participants to reach out to the producer with technical problems is through a private chat message.
- **Check-in with your producer periodically during your session.** It is easy to get into the flow of presenting and forget to check-in to make sure that everything is going alright. Make a point to check in with your producer periodically throughout your session. You may choose to do this verbally or through a private chat message.

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Structure

Pre-Session Activities

People will always arrive at the session early. It is a good idea to have something for Participants to do when they arrive at your session. This gives Participants the opportunity to get comfortable with the tool and can also be a means by which to share content. Possible activities may be playing a trivia slide deck or doing a pre-session activity such as answering questions or playing a game.

Starting Your Session

- **Begin with "housekeeping" items** to set expectations and help Participants get comfortable with the tools being used. You can use icebreaker or anchor activities as a means by which to teach Participants how to use a tool to accomplish this seamlessly.
- **Include breaks, as necessary.** If your session is to exceed one hour, you may need to consider adding a break. Add breaks to VILT sessions as often as you would to an in-person training session. You may consider planning for "working breaks" prior to a breakout session or activity using the annotation tools. Ask Participants to prepare for the activity prior to taking their break. This will provide for an opportunity for people who need more assistance to get it while not holding up the session.

Post Webinar

It is best practice to send out an evaluation after your session. This is also a good opportunity to send out handouts or resources that were shared during your session.

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Practice

Pre-Session Checklist

Prior to starting your practice session:	
▢	Send your meeting invite ● Pay careful attention to the settings that you pick for your meeting such as enabling waiting rooms and muting all participants upon entry
▢	Enable necessary tools ● Annotation tool ● Breakout rooms ● Feedback indicators ● Polls
▢	Set up polls ● Are they single choice or multiple choice? ● Do you want participants to be able to answer anonymously?
▢	Check your meeting settings ● Do you want to disable private chat? ● Do you want to disable annotation? ● Do you want to enable a waiting room?
During your practice session:	
▢	Test your microphone and camera ● Presenter: Can your Producer see and hear you? ● Producer: Can your Presenter see and hear you?
▢	Launch your slides ● Can your Producer see them? ● Can you view your slide notes?
▢	Decide how you are sharing your handouts ● Are you sending them prior to the session or after the session? ● If you want participants to get handouts during the session, you can share via a link in the chat section ○ Note: some devices will not be able to send/receive a document via the chat section during a Zoom session
▢	Run through your entire session ● Is the timing correct? Do you need to cut or add anything?
▢	Discuss with your Producer what their responsibilities are for each activity

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	● How will you communicate with one another during the session? ● What are the back-up plans if something goes wrong? ● Where do you anticipate people struggling with the technology? How can you be prepared to alleviate some of this stress?
▢	Have the Producer practice launching polls, running breakout sessions, and clearing annotations and feedback indicators. ● Can you view the poll that the Producer launched? ● Are you able to broadcast the poll results? ● Are you able to access a breakout room and come back from the breakout room? ○ Tip: Have family members or co-workers join your session to send off to breakout rooms ● Are you able to broadcast a message to breakout room Participants? ● Are you able to respond to a help message from breakout rooms? ● Are you able to clear annotations that Participants add? ● Are you able to clear all feedback indicators?
▢	Share the lesson plan and slides with your Producer so that they can take over in the event of a technical disaster

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Handouts

Handouts are a useful addition to any session. Prior to a VILT session you need to consider how you will be sharing handouts.

Sharing Before the Session via Email

There are a few possible downsides to this method:

- Participants might not attend your session if they receive the handouts in advance.
- Participants could not receive the email or not get it prior to the session, causing a struggle during the session to get everyone on the same page.

Sharing During the Session via File Share

The most effective way to share handouts during a session is using the File Share feature. Access the File Sharing feature in the Chat panel. It is possible that some file types may not be shared via this feature, or that Participants joining the session from certain devices may not be able to open these shared files. It is a good idea to have a backup plan for sharing materials during (or after) your session.

Sharing During the Session via Chat

This may be a helpful method if Participants are not able to access files shared via File Share. If sharing a handout via the chat, use a link for the document. There are a few possible downsides to this method:

- Participants do not have access after the session to the chat. If they forget to open it during the session, they could miss the opportunity to receive the handout.
- Handout links can get lost in a busy chat or not seen by some participants.
- Technical difficulties can cause people to not be able to open handout links.

Sharing After the Session via Email

You may decide to share your handouts for the first time after the session OR to combine sending handouts after the session with one of the options listed above. It is a good idea to combine a session evaluation in your post-session handouts email.

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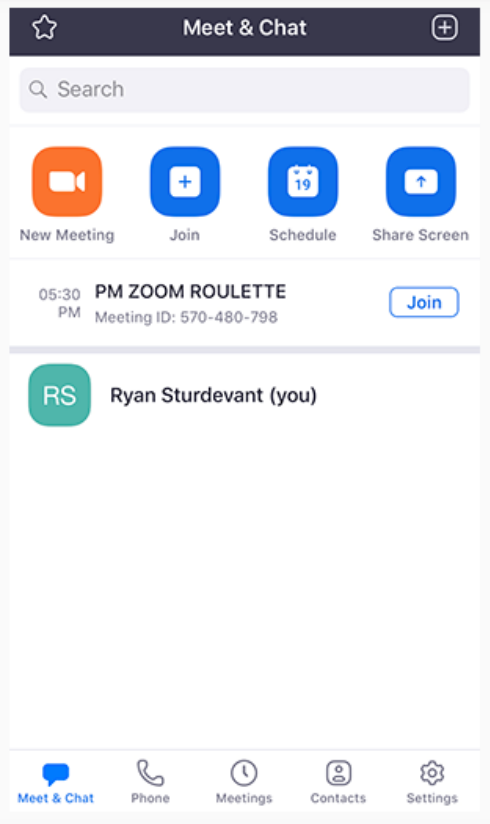
Tablets & Cell Phones

Overview

It is important to know how things look and how to use the features on each so that you can help participants when they get stuck.



Mobile users can access Screen Share, join a meeting, or access settings through the Zoom app.

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Taking Attendance

If you would like to take attendance on Zoom, you have a few options:

Use a Poll

Poll results are recorded and available after the session. If you conduct a poll and all participants answer, you will have a record of who was present. However, some participants may have an unrecognizable screen name which can make this method difficult at times.

Have Everyone Chat Share

You can request that all participants chat their name and the answer to a question as a way of taking attendance. Chats are recorded and available for download at the conclusion of your session.

Use Reports

Zoom Pro, Business, Enterprise, or API account users have access to a Reports feature which will automatically record session attendance. Only account owners or admins will have access to these reports. Account owners or admins with the designated Zoom accounts may access the Usage Report 30 minutes after a meeting has ended. To do so, sign into Zoom on the web. Click *Reports*, then *Usage*. Find the session that you would like to check attendance for, and then click on the *Participants* link. You may choose to export this report to your computer.

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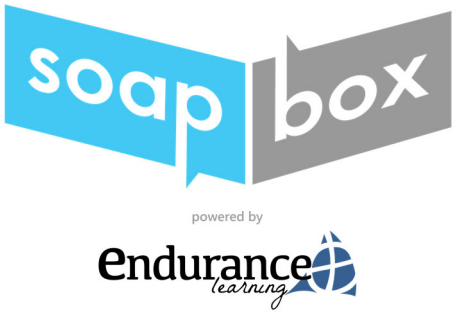
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