Zoom Master Procedures
Guidelines and Best Practices

Overview and Purpose

This document covers administrative procedures and not the use of technology. Ensure that you have a Zoom account (Professional level or better) and that you as a Zoom master is trained and confident with managing the technology.

The TM Zoom master is the Toastmaster that sits in the background handling the following:

- Create the Zoom meeting or ensure that the meeting was created earlier
    - Create/managing the waiting room >> Place in the description box (400 char)
        i. Join the meeting with your real name so people know who you are (you might need to explain how to rename or do it for them)
            1. If you don't see the Participants list on the right hand of the Zoom window, click on the Participants button the bottom middle of your Zoom screen.
            2. Hover your mouse over your name in the "**Participants**" list on the right side of the **Zoom** window. Click on "**Rename**". Enter your real name and click on "OK".
        ii. stay on mute when the speaker is talking (be ready to mute people that accidentally unmute or do not comply)
- Get list of attendees from Presenter (Eventbrite) at least 24 hours before event if waiting room is enabled
    - The Eventbrite invitation system should have been created by the Presenter.
        - You may need to instruct the Presenter how to use Eventbrite
          https://www.youtube.com/watch?v=lZ0T4xrSgfM   (how to use Eventbrite)
        - Add a new column to the attendee list provided by the Eventbrite manager. Name it 'Attendance'. In that field enter a Yes for those in the waiting room.
- We strongly recommend having a Zoom Master to manage the technology and participants so the presenter/speaker can focus on content. For smaller informal sessions the presenter may choose to fill both roles.
- Be prepared with
    - An agenda for the meeting (share it in advance with all the participants)
    - List of participants (if it is a closed meeting)
    - Any shared files (PowerPoint, pictures, video)
- Ensure that you have given the Presenter the Zoom credentials for the Zoom event
- Both the Zoom Master and presenter should ensure (by testing in advance)
    - Good audio quality with no distracting background noise
    - Good video quality with proper lighting and background
    - Good Internet connectivity (reliable and fast enough to support video conferencing)
    - Have a technology backup (e.g. Zoom loaded on your smart phone or tablet)
    - Setup Zoom Poll (if any) to be used during the presentation
    - Check if you would be recording the meeting and get necessary consent
- For meetings use the waiting room and admit those on the participant list. Be ready to quickly remove anyone that is there to disrupt the meeting.
- Continue to monitor the waiting room for late comers. You may also have to remind any late comers to rename themselves.
- The Zoom Master should
    - Open the Zoom call 10 - 15 minutes prior to start
        - Let the Presenter into the main room first. Ensure that the presenter has the ability to share screen. As Zoom master you can enable this privilege for the presenter
    - Watch the waiting room and admit people to the meeting
    - Welcome the participants
    - Encourage attendees to show video but mute themselves.
    - Make any announcements to the guests requested by the Presenter
    - Cover basic meeting rules, we would suggest:
        - Stay on mute when the speaker is talking (be ready to mute people that accidentally unmute or do not comply)

- Join the meeting with your real name so people know who you are (you might need to explain how to rename or do it for them)
- Suggest participants go to speaker view
- If using screen share, suggest they use the side by side view to see the screen and speaker
- If the presenter is taking questions at the end, ask participants to use the raise hand function or type the question in the chat
  - o Introduce the speaker
  - o Record the meeting if the presenter request and deliver the recording file afterwards. If recording make sure your screen is set to SPEAKER VIEW.
  - o Share content (slides, etc.) as the speaker request
  - o The creation and the managing of the Breakout rooms (if required)
    - Providing instructions to the TMs waiting in the breakout room
      - Ensuring that the TMs are displaying their real names before they enter the meeting room
      - Unmute their mics and turn on their video
  - o Moderate the Q&A session
    - Note the order in which hands are raised and questions come in by chat.
    - In the order they are received, ask the next participant with a raised hand to unmute themselves and present their question.
    - Read out any questions received by chat. Monitor the chat and let at appropriate times let the presenter know that there is a question. Perhaps you can have a conversation with the presenter beforehand and work out how the presenter would like to monitor chat questions/comments
    - Follow-up outside of the call with any questions that may not have been addressed (e.g. due to time or off topic questions)
  - o Give the presenter a 10 minute heads up - 10 minutes before the end of meeting.
  - o Close the meeting thanking the speaker(s) and participants for attending. Remind them of the date/time/details of the next session
- ➢ Post meeting check
  - o Reports (downloadable csv file)
    - Zoom Web Portal → Reports → Meeting
      - Meeting registration reports
      - Poll reports for meetings
    - Zoom Portal → Reports → Usage
      - Attendance for viewing meeting participants
  - o Recordings
    - Zoom Portal → Recordings
    - You have 2 options to record locally or in the cloud. You can share the recording with participants or specific users.

Tips and Best Practices
- ➢ Double check Zoom Meeting Settings (2 settings)
  - o Zoom Web Portal and
  - o Desktop Client settings
- ➢ Test your audio and video as you join
- ➢ Use a USB connected headset
- ➢ Mute microphone when not speaking
- ➢ Position webcam at eye level and make contact as much as possible

Help / Reference
1. Zoom Help Center (https://support.zoom.us/hc/en-us) → Getting Started → Training → Zoom Meetings Training
2. Keep in handy the Zoom Meetings Training Reference Guide (https://support.zoom.us/hc/en-us/article_attachments/360047188071/Zoom_Meetings_Training_Reference_Guide.pdf)