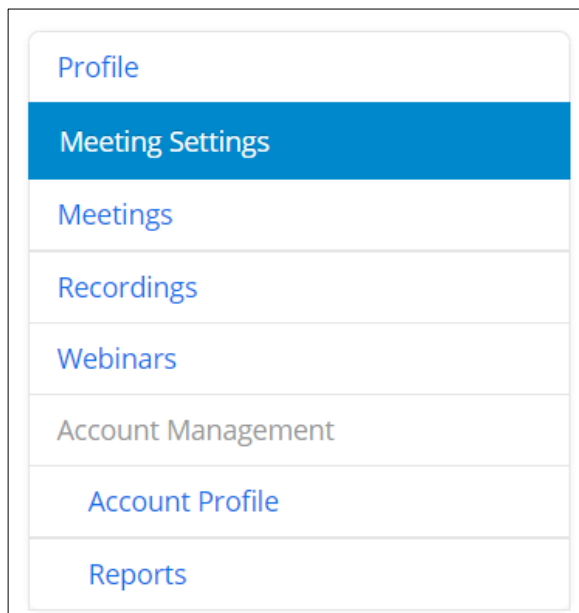


Virtual Platform Checklist for ZOOM

Zoom is a powerful online meeting tool that can be used to create engaging virtual training. To create an effective learning experience, become familiar with the features and options that are available. Features themselves do not create engagement. It is how they are used that makes the difference!

Listed below are the most common features used to create and deliver an online learning event. Also included are some tips on settings within your Profile to help you have a successful Zoom session. Please note that a Basic Zoom account differs in features availability from the others: Pro, Business, and Enterprise. This checklist is created referencing the features from a Business account.

My Profile



When to use:

Ensure your meeting settings for the meeting, the recording, and the telephone are adjusted to your liking prior to running your Zoom sessions.

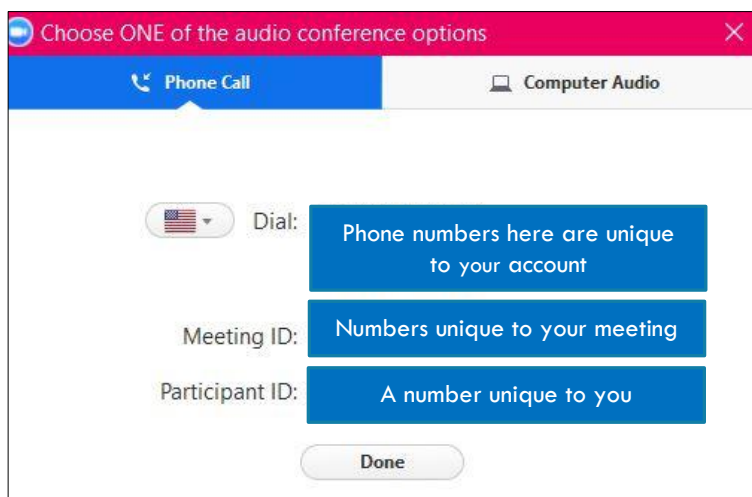
Login

- To your Zoom > My Account
- Click Meeting Settings
- Read through each option and decide what settings suit you
- Repeat this process for Recording and Telephone

My practices:

- I prefer to set Host Video and Participant Video to "off" as a default. This way there are no surprises! Webcams can still be turned on when everyone is ready.
- I do not "Mute participants automatically" in my training sessions. I only use this setting when I run webinars.
- I confirm all interactive features listed in this checklist are enabled including: annotation, chat, polling, and breakouts to list a few.

Audio Option One: Phone Call



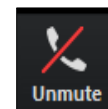
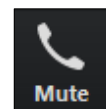
When to use:

Always require attendees to join audio, whether it is VoIP or a teleconference. Make sure they not only join, but have a clearly audible connection/line, that they eliminate background noise, use a hands-free headset, and can control the mute and unmute themselves.

How to connect to audio using Phone Call

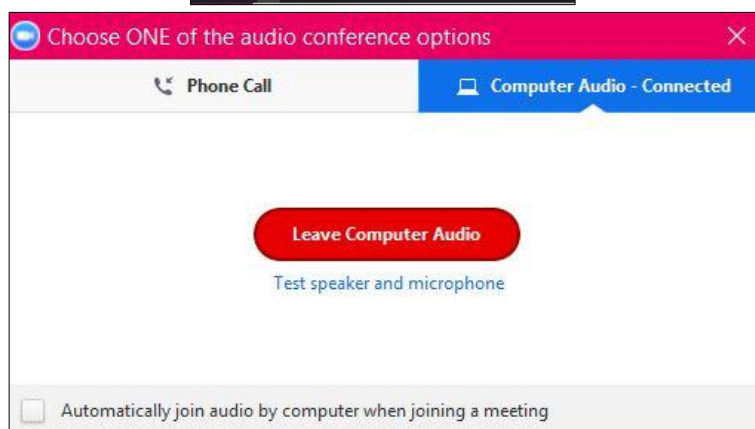
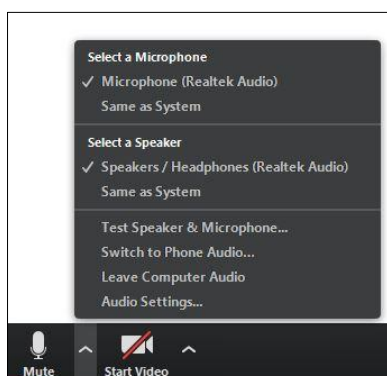
- Choose the appropriate teleconference number to dial into from your location. Note the country can be changed if it is included with your account.
- Enter the meeting number and then press #
- Enter your unique participant ID and press #

- Press the phone icon on the bottom left of the Zoom window to **Mute** and **Unmute** yourself as necessary.



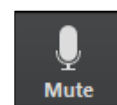
Note: Attendees usually need help understanding how to connect to the audio. Be prepared with a slide or send them the information in advance.

Audio Option Two: Computer Audio



How to connect to audio using Computer Audio:

- Click Test speaker and microphone to ensure your device is working properly. Walk through the steps to confirm or identify any problems.
- Confirm your headset is the one checked for both Microphone and Speaker.
- Click Join with Computer Audio.
- Press the microphone icon on the bottom left of the Zoom window to **Mute** and **Unmute** yourself as necessary.



- Click the drop down to the right of the microphone icon to adjust any settings or to switch to the phone for audio instead.

Notes:

IMPORTANT → Avoid causing echoes and feedback by using a high-quality headset with a microphone and noise cancellation when connecting to the computer audio. I use the brands Logitech and Plantronics. Choose the best headset for your computer and your style.

Once connected to the computer audio, the option to Leave Computer Audio appears.

Which headset? Logitech's ClearChat H390

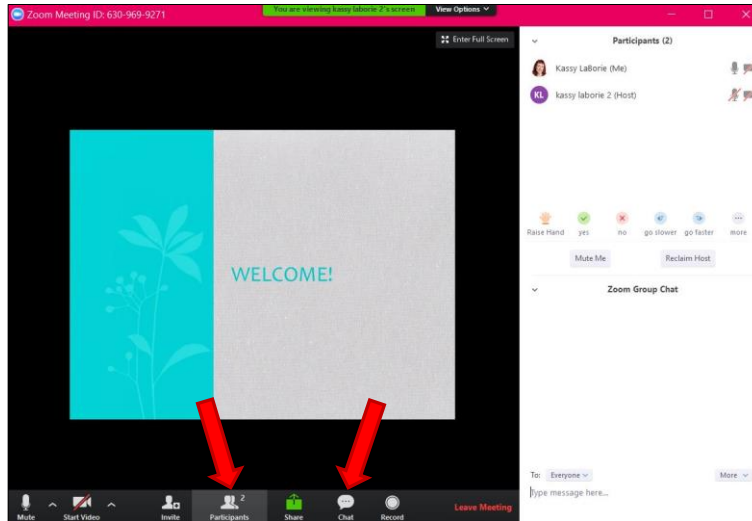
This is consistently my favorite USB headset for computer audio. It is affordable, comfortable, and it works!

<https://www.logitech.com/en-us/product/stereo-headset-h390>





Arrange Your Screen



When to use:

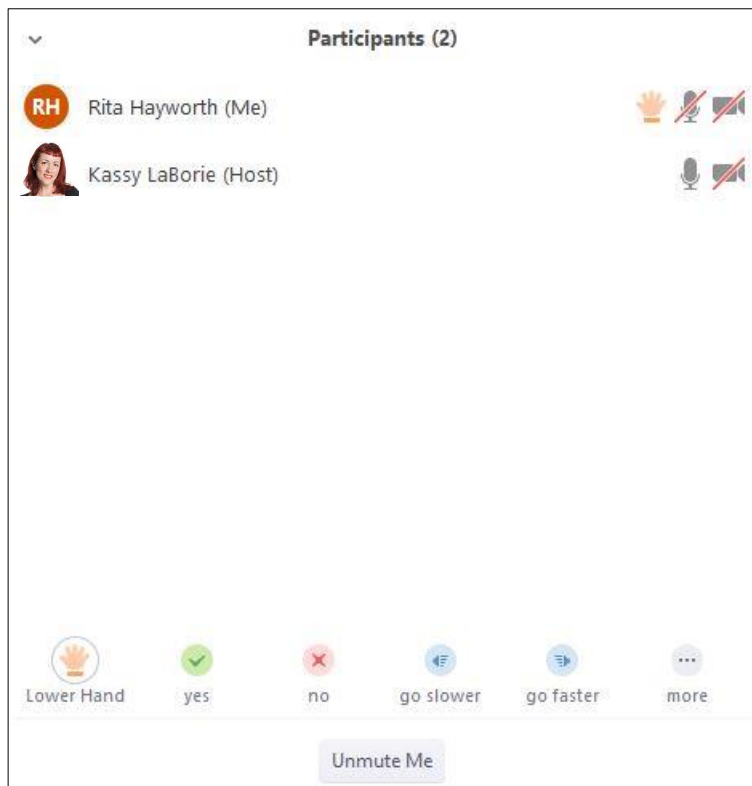
I always arrange my screen so I can see the participants panel and chat panel at all times. It does not default to showing this, so it is the first thing I do upon starting my session.

How to activate:

- Place your cursor at the bottom of your Zoom screen to get the toolbar to appear.
- Click on Participants and Chat.
- Arrange them on the screen where it is most comfortable for you to see the action on these panels at all times.

Note: Guide your participants to do the same with their screens so they can use the features on these panels to interact with you and one another at all times. These two panels are your key to reading the non-verbal communication of your virtual participants.

Participants Panel



When to use:

Participants Panel is your key to who is online, how their audio is connected and what feedback they are providing throughout the session. Focus more here than on your slides to engage your audience!

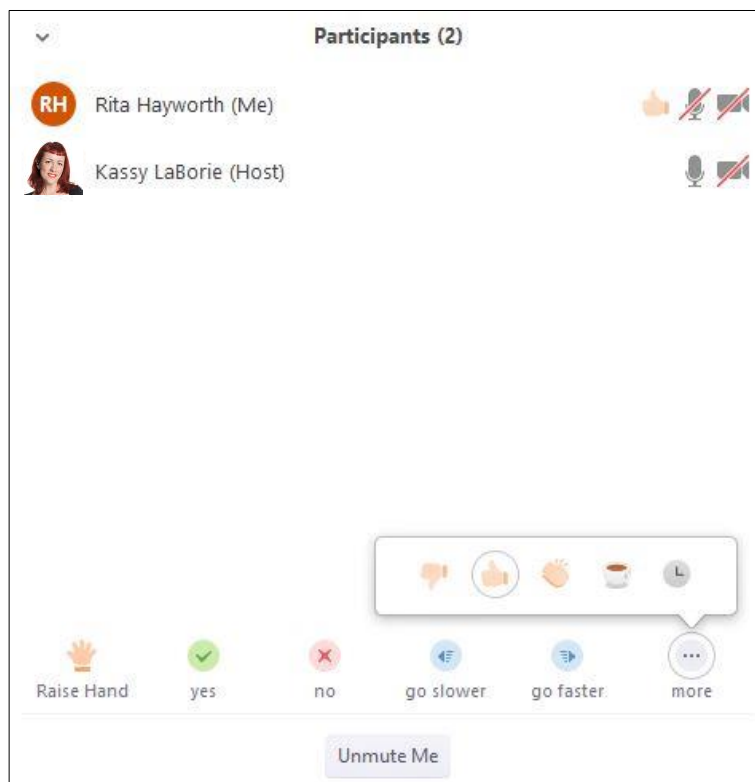
How to activate:

- It is enabled by default. You need to maximize it to see it and minimize it, move it around your screen and close it using the 3 buttons in the top left corner.

Note: You will see a person's name appear first, and then either a phone or microphone icon. If there is no icon, look for a phone number as this is likely the person with no icon next to their name. This means the person dialed into the teleconference without referencing their participant ID number. Have the person hang up and dial in again, entering their participant ID number when they call back in. You'll need this so that breakout sessions will run smoothly.



Feedback



When to use:

The feedback tools are a simple and highly effective way to check in with attendees. This is your online connection to the types of non-verbal cues they give during in-person events. Encourage attendees to click the green check any time they are nodding their head in agreement. For example, tell them:

“Give me a green check if...”

“Let’s applaud your colleagues’ efforts!”

How to activate:

- Feedback is available by default from the bottom of the Participants Panel.
- Show participants where to locate them and request they click on the options as needed.
- Use the feedback yourself as a way to model the type of interaction you request from participants.

Chat

Public chat



When to use:

Chat is one of the main methods of communication in the virtual classroom. Do not underestimate the power of this simple tool as it can be your main lifeline! Use it for commentary, questions and conversations. Create “**chatversations**”! Send links through chat to quickly provide online resources to participants.

How to activate:

- The chat panel is included by default.
- “Everyone” chat is a public chat, seen by all people in the session.
- Adjust the level of chats available to participants from your Meeting Settings in your Profile. Enable all chat options for the most effective level of interaction. (Chat and Private chat)



Private chat

Zoom Group Chat

From Me to Everyone:
Hi there! I'm excited to begin our program today!

From Me to Kassy LaBorie: (Privately)
What is the scheduled break time? Thanks!

To: Kassy LaBorie (Privately) More

Type message here...

Note: Have a Private chat by clicking on the dropdown next to Everyone. Select the name of the person you wish to privately chat with. You will see “privately” in parentheses to indicate who the chat is being seen by.

Tip: Instruct participants to have a one on one conversation in private chat with an assigned partner. This works well for brainstorming, sharing, and debriefing learning.

Share File in Meeting (from Zoom Group Chat)

Zoom Group Chat

To: Everyone More

Type message here...

Save chat
Share file in meeting

When to use:

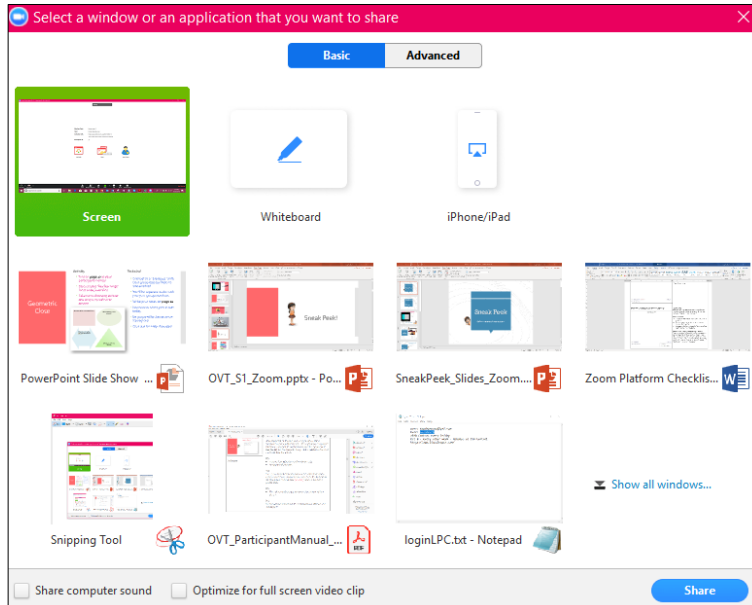
Handouts and manuals can be easily provided to attendees using Share File in Meeting. Share class materials for quick access as needed.

How to activate:

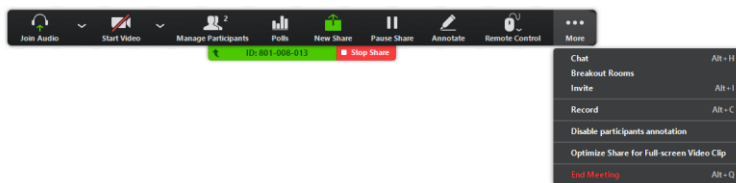
- In a Zoom Group Chat, click More > Share file in meeting.
- Browse your computer for the file to upload. Double click to add it.
- Attendees click to download the file to save them locally to their own computers.

Note: I usually make participant files available before the session has started, but this feature allows you to share files in the moment if it is appropriate. An example would be if a group worked on a case study or prepared a presentation. They could quickly share it to everyone using this feature, eliminating the need for an email afterwards!

Share Screen



Access the panels and Stop Share



Tip: Be sure to click on **More...** to access more options and panels

When to use for PowerPoint files/visuals:

Share screen to your prepared PowerPoint files for presentation and interaction with your participants. Create .ppt files and visuals with enough blank space for *annotating (whiteboarding)* answers to questions, thoughts, and ideas. These files can be annotated upon for increased interaction and engaging activities. Use compelling images rather than words, and ask your participants to respond using the chat, the feedback, and the whiteboard tools.

How to activate:

- Open PowerPoint and have your file ready to present.
- Click Share > Screen > Share.
- Note you can share a “portion of your screen” instead if you click on Advanced.
- Click to your .ppt file and run the show.
- Don't forget to arrange your Participants and Chat panels so you can see them.
- Note you have the option to also share computer sound, as well as to optimize for a full screen video clip if you plan to share media files or sites.

Note: See Whiteboard Tools / Annotation tools below to allow participants to collaborate on a shared file.

TIP: Develop the slides to be annotated upon so they become the “working space” for the session.

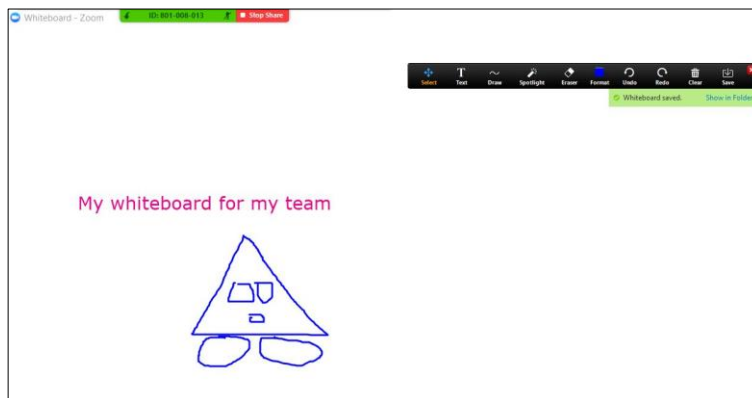
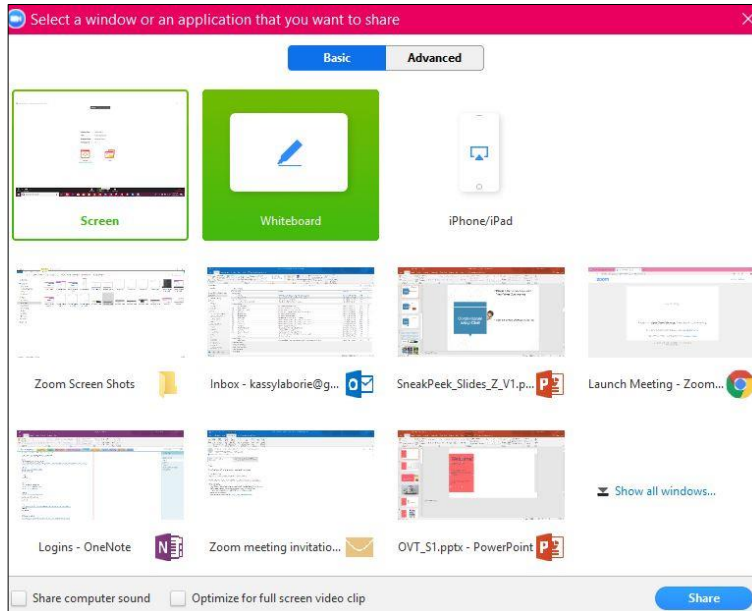
When to use for software/system training

Software and systems training is often conducted live online using screen sharing. Allow attendees to view the entire desktop, a portion of it, or even a web page since the person presenting controls the navigation of it. Think of it as if others are looking over your shoulder as you present from your computer. They see your mouse, and if you are desktop sharing, any popups you may get. Be careful!

Attendees do not need the software on their computers to view it from yours. For hands-on training however, ask attendees to open their own applications and toggle between the Zoom window and their application as you demonstrate the steps.

Activation is the same. Follow the steps above.

Share Whiteboard



When to use:

Use this tool for collaborative activities like brainstorming and creative thinking. Remember that **whiteboard is a verb**. Whiteboarding/annotating answers and ideas is one of the most effective ways to gauge participation levels. It not only provides immediate responses, but it is also easy to save results of the screen and refer to them at a later time.

How to activate:

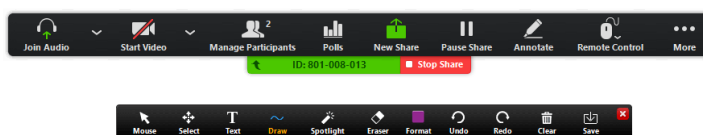
- Click Share > Whiteboard > Share.
- Use the annotation toolbar to collaborate.
- Click Save > Show in folder.

TIPS:

- Remember, create PowerPoint slides with enough blank space to provide participants with enough room for whiteboarding their ideas!
- Have participants type their names on the whiteboard space prior to typing a response. This is called “claiming their real estate” and will keep them from typing over one another. Move as necessary.
- Zoom creates a default Zoom folder on your computer. All saved files will be in this folder. I’ve created a shortcut on my desktop to this folder so that it is always easy to find!

Note: See Whiteboard Tools/ Annotation Tools below for directions on how participants activate their annotation toolbar.

Whiteboard Tools / Annotation Tools



When to use:

Encourage “Annotation” to allow participants to collaborate and write their ideas and comments on the files shared or on a whiteboard. Design slides and activities to include this engaging feature.

How to activate:

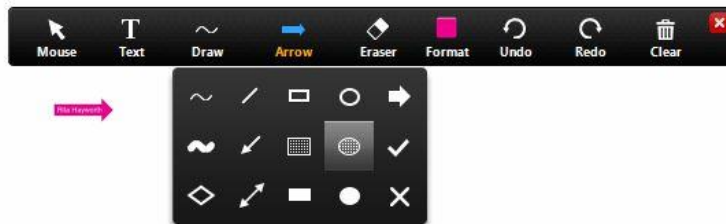
- Login to your Profile on the site.
- Click Meeting Settings.
- Enable Annotation.
- Once you share your screen or a whiteboard, float your mouse pointer to reveal your toolbar.
- Click on Annotate or Whiteboard.
- The annotation toolbar will appear.



Participants annotation view:



There are many options available!



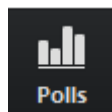
- Use your text tool, pointer, drawing tools, etc. to type and draw on your slides or a blank whiteboard.
- Save the annotations as necessary.
- Clear all the drawings.
- Close the annotation toolbar.
- Click to the next slide or stop sharing the whiteboard.

Note:

Participants click on View Options > Annotate to enable their annotation toolbar



Polling (not included with a Basic account)



You have not created any poll yet.

[Add](#)

Adding a poll:

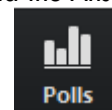
When to use:

You can survey attendees with prepared questions and answers using Polling. Create the polls in advance for each session or do it inside a session using the polling panel. Poll files can include one question, or many on the same file. The answers can be multiple choice or multiple answer.

Remember to respond appropriately to the answers and build your comments and discussion into the training experience. Avoid polling just to “get interaction.”

How to create and activate:

- In advance, click on the scheduled meeting and scroll to the bottom. Click Add next to “You have not created any poll yet.”
- Type the Questions and the Answers and Click Save.
- Click Polls.
- Add one now, or launch one that is prepared
- Launch the Poll.
 - Choose from the drop down if you have more than one poll prepared.
- Click End Polling.
- Click Share Results.





In session Host's view:

- Click Stop Share Results.
- Re-Launch Polling is an option.
- Close the polling panel.
 - The panel might keep re-opening on your screen, but it does not re-open for the participants until you click re-launch or open polling.

Note: The polling results can be found in your Meeting Reports

Breakout

Host's view:

When to use:

Working in small groups with other online participants is an effective and engaging way to apply key learnings from any training event. Use breakouts for activities like role plays, problem solving, and case studies where teams work together to create solutions and share ideas.

How to activate:

- Click Breakout Rooms from the toolbar.
- Decide if you want to Manually create them yourself, assigning who you choose for each room, or automatically if you want Zoom to decide for you.
- **Automatically?** Decide the number of people per room and click Create Rooms.
- **Manually?** Add the rooms and click Assign to assign the participants to the rooms.
- Click Open All Rooms when you are ready.
- Click Join to visit rooms.
- Click *Broadcast a message to all* to send a message.
- Click Close All Rooms to bring everyone back. It will take 60 seconds.
- Participants can Leave Breakout Room when they want.
- They can Chat, Ask for Help, and Share their Screens and Whiteboards.



Automatically

Breakout Rooms - Not Started

Breakout Room 1
1

Rita Hayworth

Recreate ^
Add a Room
Open All Rooms

Manually

Breakout Rooms - Not Started

Breakout Room 1
Assign

Recreate ^
Add a Room
Open All Rooms

Notes:

- Only a Host can start breakouts. Co-Hosts can join and move between them but must be added to a breakout by the Host first.
- If Participants Ask for Help, it “invites” the Host to the breakroom. A Host can join at the request or click “later” and come in at another time.

TIP: Create a slide in your visuals that includes two sets of instructions for all breakout activities:

1. Activity instructions.
2. Technical directions.

Refer to the example activity below:

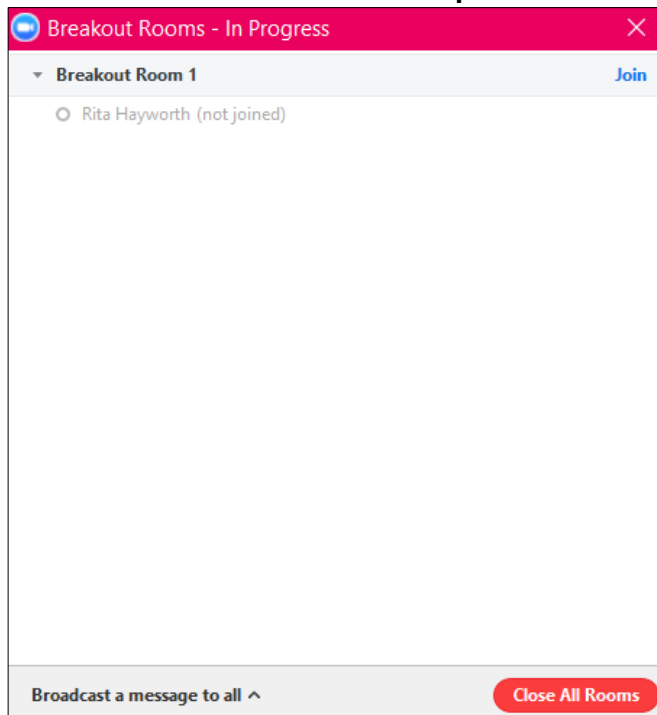
Take charge! Scenarios

Instructions

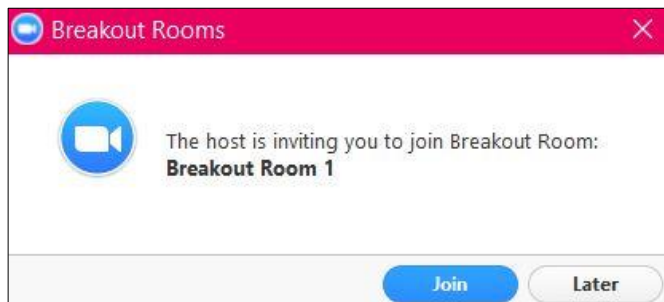
- Discuss in your small group what you will do for each of the scenarios in the space provided.
- Take notes on the table
- You will have ____ minutes to work
- Pick a spokesperson to report back during debrief

How it will work

- Each room has separate audio and a whiteboard
- We will call time alerts and call you back for debrief
- If you have questions at any time, send a chat message to Host

The Host's view once rooms are open:**Participant views of breakouts:****Asked to Join**

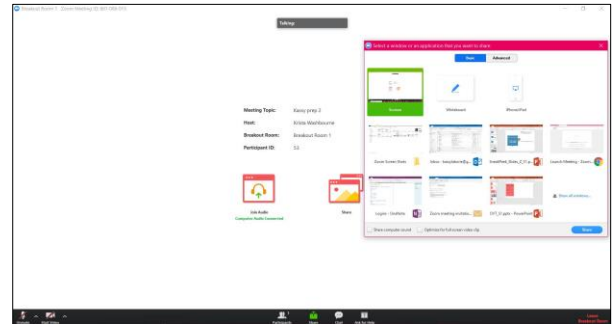
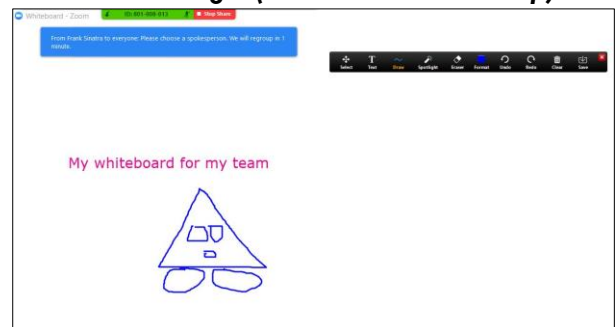
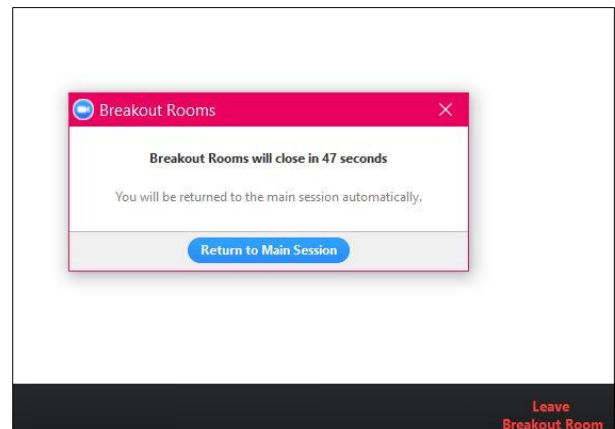
If they click Later, they can click Join Breakout Session from their toolbar...later.



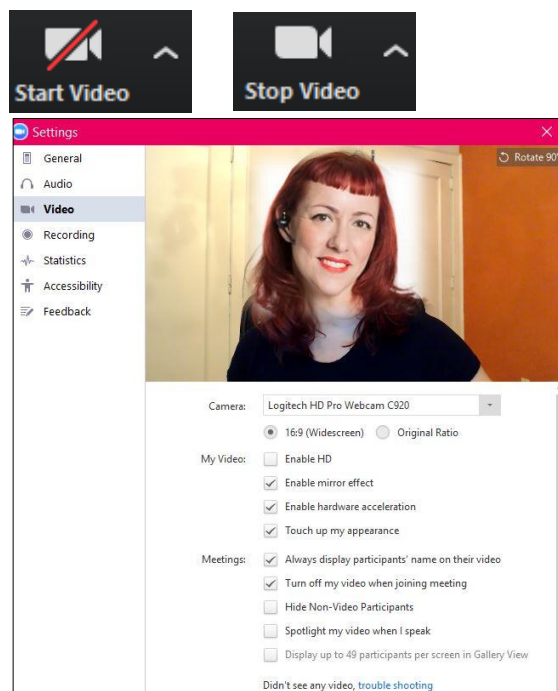
Continued to the right →

Once they join:

- Their audio automatically switches into their breakout.
- They can share their Screen and Whiteboards.
- They can open the Participants and Chat panels.
- They can Ask for Help and invite the Host to join them.

**Drawing upon a whiteboard and receiving a broadcast message. (the blue box at the top)****Alerting them their breakout is ending. They can click return to come back sooner.**

Webcam/Video



When to use:

Using a webcam personalizes a live online learning event. It works well for introductions or any time that seeing a person or an object would be helpful for learning to occur.

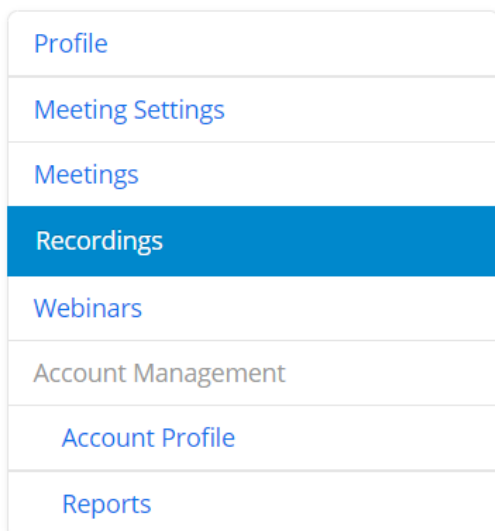
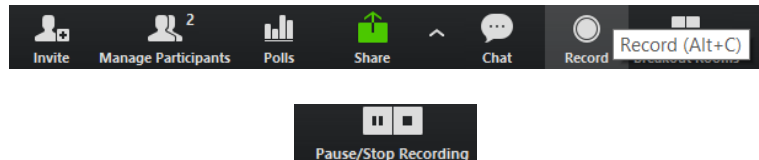
How to activate:

- Click Start Video and smile. 😊
- Click Stop Video.
- Adjust the settings by clicking on the drop down.

Note: Pay attention to your lighting and what is behind you that will appear on camera. Be sure your face is centered and look into the camera when speaking.

TIP: Prepare participants ahead of time before asking them to be on a webcam. No one appreciates the surprise!

Recording



When to use:

Make recordings of your learning events to provide attendees with an archive of the activities for reference and review. It's also helpful for people who arrive late, or leave a session early. By watching the recording, they do not miss out on any of the session discussion or activities.

How to activate:

- Click the Record button.
- Click Pause and Stop Recording as needed.
- To access the recording link or to download it as an .mp4, login to your profile and click Recordings.
- Click Share to send copy the link to the clipboard.
- Click More... to download an .mp4

Note: When you copy the link to your clipboard, simply paste the link into an email or a document by pressing Ctrl > V

TIP: Recordings of interactive online training are not a replacement for that learning event. Avoid thinking that a recording will impact learning in the same way it did for those who attended live. It does not replicate the live interaction. Most people do not watch a recording for more than 10 minutes.