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Resource Guide for Virtual Meetings ...with Zoom

Checklist for a Virtual Meeting

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When to Use Virtual Meeting Technology

Use virtual meeting technology as an alternative to in-person meetings.

Video calls help personalize the conversation and engage participants. When possible, opt for using the technology over phone calls or written communication for anything emotional or confusing. It's easier to read body language, pick up context cues, and respond appropriately.

Always provide an audio dial-in option.

As technical constraints may limit someone's ability to join using a video, offer joining by audio-only, as an option. You can strongly encourage participants to join using video if they have the tools to support that.

Remember:

Technical constraints include not having a webcam and having a limited-bandwidth internet connection, among others.

Getting Set Up for a Virtual Meeting

Note: This section contains helpful tips for both hosts and participants.

Practice using the video meeting technology before running the meeting.

Familiarize yourself with Zoom features (see last section of this document).

Ensure you have a strong-enough internet connection.

Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. People need the ability to participate via audio, but make it clear that participating with video is preferred where possible.

Test the Audio.

Before your webinar begins, check that your speakers and microphone are working properly.

Consider your optics when using a camera.

It is helpful to raise the camera to eye level and have it parallel to where you are seated.

- Avoid the 'nostril-cam'!

It is best to arrange lighting so that it is in front and aiming toward you, or to sit facing a natural light source.

- Lighting behind you hides your face, creating the “witness protection” look. You may also want to create some depth by having something besides a blank wall behind you.

Helpful Tip:

When scheduling a meeting, hosts may set participants' video initially to “Off” when participants join the meeting. This allows participants to test their video when first joining the meeting, and then turn their video cameras on in the meeting only when they are ready.

Minimize background noise.

Try to aim for a quiet place. If in a louder environment, use a headset with a microphone to reduce background noise. Turn off the ringers/alerts on your phones and other devices, along with e-mail and instant message alerts. Hosts can opt to “Mute all Attendees” and only take questions via the Chat box.

Be mindful of your attire.

Consider your meeting’s purpose and audience.

Identify partners who can help fill meeting roles.

This applies to Zoom hosts and is especially relevant for large and/or important meetings. You can also combine roles below.

- **Co-host:** A meeting host may assign the role of co-host to another meeting participant. The co-host is then able to share in many of the hosting privileges for that meeting, such as managing participants. A co-host can also help address technical problems and take on other Zoom-related tasks so your meetings run more smoothly.
- **Alternative host:** If you would like your meeting helper to be able to start a meeting for you, consider using a similar role called alternative host. This role not only has all the same powers as a co-host, but also can start a meeting. For more information about Zoom roles, see the “How-to-Zoom” article web-links [Host and co-host controls in a meeting](#) and [Roles in a meeting](#).

Important:

The host and co-host/alternative host must be on the same Zoom account in order for the co-host/alternative host roles to function.

- **Moderator:** Consider assigning a meeting moderator to monitor and respond to group Chat.
- **Coordinator:** A meeting coordinator can help you keep track of time and take notes.

Keep in Mind...

As a host, it is best to alert participants in advance of your meeting to set aside time to complete many of these ‘Getting Set Up’ steps before they join your meeting. This will help them be prepared to participate on time.

Designing the Meeting

You can tailor the design of your meeting to ensure they are as effective and engaging as possible. While the below design suggestions are applicable to both virtual and in-person meetings, some are especially important to virtual meetings, as highlighted below.

Build in more planning time.

Successful virtual meetings typically take longer to plan and may require more support.

Establish meeting length.

Consider scheduling meeting for 45 minutes or less, if possible. Recognize that you may not be able to address as much in a virtual meeting as in an in-person meeting of the same length.

Create an engaging agenda.

Include topics, timeframes, and facilitators to help foster engagement and to stay on track. Plan for a participant check-in and for discussions. Minimizing the length of presentations also helps maintain engagement.

Be intentional about meeting activities.

Plan to conduct activities such as ice-breakers and brainstorming that work for all, regardless of location or method used to join. Being inclusive is just as important in virtual meetings, as it is in in-person meetings.

Select materials (including agenda) to send ahead and/or to show on the screen.

Display visuals to help explain a key concept, show detailed data, or share a model. In general, visuals should be used sparingly to maintain engagement.

Identify and coordinate with facilitators and any support partners.

Getting Started

Give yourself some breathing room.

It is best to establish your connection at least 5-10 minutes before the start time. This will also allow others to join early and be prepared for the meeting to start on time.

Welcome and identify participants at the meeting.

You should be able to see who is present; however, if only phone numbers appear on the screen, invite those participants to identify themselves.

Ask participants to share a brief check-in.

If applicable and time allows, ask participants to share a brief check-in. This helps people feel connected and can uncover emotions that can affect how people show up.

Provide context and specifics of the meeting.

Share purpose/goals of the meeting, along with brief background to support participation.

Establish or review ‘Rules of the Road’

Doing so helps to minimize distractions and allows for a more respectful and productive meeting.

As a host, consider providing the following “Rules of the Road” to your participants, either in advance of, or at the very beginning of the meeting:

- Join by video, if possible, to enhance engagement
- Mute yourself, unless speaking, to reduce noise and feedback/audio interference
- Engage in the conversation; offer input and ideas
- Try to be present and avoid multitasking
- Identify yourself before you speak
- Raise your hand, or use Zoom features to participate, such as the Chat and the Hand icon. The Zoom features are especially important for larger meetings.

Important:

For larger meetings (greater than 10 participants), it is recommended that hosts enable the “mute participants on entry” meeting setting. This can help reduce audio interference due to excessive background noise generated from multiple participants’ audio at once. For very large meetings, hosts can also restrict participants from unmuting themselves.

Creating Engagement and Inclusion

Ensure everyone has access to materials needed for the meeting.

Sharing meeting materials with participants in advance of your meeting will allow those using audio and those running into tech issues to participate effectively.

Consider disabilities of participants (including situational ones, such as using a mobile device) and adapt practices to be inclusive of all.

Provide verbal descriptions of any visual tools you are using; avoid complex Zoom features that may be tricky for those using mobile devices or screen readers; announce what you are seeing in Chat for all to follow along. Offer alternative ways to respond or participate.

Be sure participants have an equal opportunity to engage.

Invite participants to speak up and do this more than once during the meeting. The moderator can also encourage specific people through sending personal Chat messages. In addition, consider encouraging all to offer input or feedback after the meeting.

Engage through using questions and Zoom features (See final section for more ideas).

Take a Poll or ask a question frequently to keep personal connection going. For large groups especially, invite participants to respond by using the Hand or Chat feature. Be explicit and invite a specific person to respond, or if multiple hands are raised, tee-up responses by saying, "Let's start with Maria, and then we'll hear from Will and Joe." Asking open-ended questions to a large remote audience will often result in "dead air" and/or multiple people talking at once.

Invite questions.

Ask participants to use the Hand or Chat features at any time. This allows you to determine when it is best to respond, whether in-the-moment or later in the meeting.

Gauge interest or enthusiasm for something.

Encourage participants to send a Thumbs Up or Clapping Hands (Reactions "tab") to communicate their perspective. Alternatively, participants can use Yes or No buttons (Participants "tab").

Keep in Mind...

This type of meeting is most successful when it moves at a slightly slower pace than a typical meeting due to the possibility that there may be a two-to-three-second delay for most systems to communicate. If you're leading the meeting, make sure there are sufficient pauses after asking a question.

Closing the Meeting

Communicate key decisions.

Identify next steps, and responsibilities or assignments.

Do an assessment of the meeting.

Ask “what went well?”, “what could we have done differently?” or, “what could we do differently next time?”.

Sharpening your Facilitation

Add vocal variety to create more engagement and impact how you are received.

Keep in mind that attention spans may be shorter in this type of meeting.

Vary your rate of speech.

Slow down when you are sharing something very important.

Consider volume and what it conveys.

Speak at a 5-6 volume out of 10. Dropping your volume takes authority away from your voice. Also, too low volume can send a message that you don't believe what you are saying.

Add pitch or melody.

When you add more melody to your speech, what you say becomes more memorable, which can result in greater influence.

Pause.

Pausing gives people an opportunity to think about what you've just said, and for the message to be received given technology delays. Injecting pauses also helps you get rid of fillers and non-words (e.g., ums, ahs, etc.).

Address challenging meeting behaviors by using preventions and interventions.

Use the strategies presented in the **“Addressing Challenging Behaviors in Virtual Meetings”** document, to address behaviors.

Familiarize Yourself with Zoom Features – How can these Zoom Features be Useful?

Meeting Security Best Practices

To enhance meeting security and help avoid Zoombombing, it is recommended that the host follow these Meeting Security Best Practices:

- Use an auto-generated Meeting ID, rather than your Personal Meeting Room ID, when scheduling a Zoom meeting
- Always use a Meeting Password when setting up your Zoom meeting
- Enable the Waiting Room feature

For additional security tips, see Zoom's [In-meeting security options](#) web article.

Waiting Room

Use when you want control over when participants are allowed into the meeting. In addition to the waiting room being a security feature listed above, using it adds formality and a bit of time.

Virtual Background

Use to replace what's behind you with an image. The host or participants may want to avoid showing their surroundings (e.g., a messy kitchen).

Remember:

Not all meeting participants may be able to use virtual backgrounds. Virtual backgrounds are not necessarily available on all computers or mobile devices.

Mute Participants Upon Entry

Use when you want a more formal start to the meeting. This allows the host to control conversation from the start and minimize audio interference. As previously indicated, consider using this meeting setting feature for larger meetings, usually greater than 10 participants.

Record Meeting (Should you use this?)

Please follow the guidance from Compliance, as described below:

Important:

The recording feature of Zoom should NOT be used, especially in situations where Protected Health Information (PHI) or other confidential information could potentially be discussed. If you have a specific situation where you believe recording may be necessary, please reach out to Compliance or Legal.

Host Video

For specific situations where you have cleared with Compliance or Legal the option to record during your meeting, you may consider using host video if you want to record only the host and not the participants. You may want to share this version with participants or with those unable to attend.

Closed Caption

Use when participants would benefit from having closed captions.

Share Screen

Use to share documents, screens or other visuals that the group needs to see at the same time. Before the call starts, consider using this feature to post an inspirational quote or image, a funny cartoon or a question for participants to consider when they join the meeting (e.g., your check-in question of the day).

Whiteboard

Use as a virtual flipchart to illustrate something for the rest of the group to view and/or to invite participants to write on the board.

Chat

Use to promote group participation; invite them to ask a question, respond to one or comment in Chat. Use for pairs discussions, where private messages can be shared. This is also a helpful tool for the host or moderator to check in privately with a participant (e.g., "You seem quiet today. Are you OK?").

File Transfer

Use to exchange files with participants through the Chat function.

Reactions

Use to get a quick sense from the group about how they feel about something (e.g., Thumbs Up and Clapping Hands).

Polls

Use to accelerate decision-making and gain consensus. Also, utilize to test ideas or perspectives.

Breakout Groups

Use for having small group discussions