SecretariatCentral

How to for Zoom Webinar

CONTENTS

For optimal viewing ensure you have the latest version of Zoom downloaded to your presentation computer: https://zoom.us/support/download.

PART A: INSTRUCTIONS FOR CHAIRS, SPEAKERS & MODERATORS

Speaker Technology Requirements

- Laptop or desktop computer.
- You should not be presenting from your cell phone.
- An internet connection – broadband wired or wireless (3G, 4G/LTE or 5G). An Ethernet cable/ hardline connection is highly recommend during presentation.
- A headset is recommended for optimal audio, although a phone or speakers and a microphone (built-in or USB plug-in or wireless Bluetooth) also work. Test sound output strength in advance.
- A webcam — built-in or USB plug-in.
- A timer – having a timer running can help you stay on track!

Supported Browsers for Zoom

Windows: IE 11+, EDGE 12+, Firefox 27+, CHROME 30+
Mac: Safari 7+, Firefox 27+, CHROME 30+
Linux: Firefox 27+, CHROME 30+

Technology: Problem Solving

Technology does fail and it is important to be prepared for a worst-case scenario, such as the loss of internet connection or computer failure during a presentation.

- Test the presentation software in advance and ensure you have the latest version downloaded.
- In the event your sound fails, please be prepared to dial in to the meeting using a landline or cellphone while staying on video to present slides. Take note of the instructions in your invitation. This way, attendees will be able to hear you and you can still participate in Q&A.
- If joining audio by phone, ensure your laptop is muted so that you do not get feedback. When you need to mute yourself, use the mute button on your phone. If you joined audio with both your computer and phone, you can leave computer audio by going to the microphone in the bottom left corner and clicking the arrow next to it. You can then select 'Leave Computer Audio'.
- Recommendation: Pre-record your slides in advance, with voice over using video, and ensure the Secretariat and/or Chair have a final slide deck. Worst case, these can be presented live by the Chair or Moderator and your presentation can be paused for Q&A from attendees.

Tip: Pre-recording your presentation can be done using a free Zoom account. *(See Appendix D for more information.)*

Accessing the Webinar

- As a Speaker, Chair or Moderator, you will be sent an email in advance with a "Panelist" link for accessing the webinar. You must access the webinar through **this link only** and not another registrant's link so that you are able to access the practice session, sharing capabilities, and are easily identifiable.
- IF you accidently log in using a registrant's link instead of the panelist link, either leave the meeting and log back in using your panelist link (sent via email) or using the Chat function, send a message to 'All Panelists' notifying them you are online and Secretariat can switch you over to a panelist.
- If this is your first time using Zoom, you will need to download the application first. See ***Appendix B*** for instructions.

Developing Your Presentation

- Engaging a virtual audience is very different from an in-person event since the attention span of your audience is limited so we want to ensure they are involved and feel engaged! It's important to connect at a personal level with your audience right away. Make sure you that you address the audience so that they feel acknowledged!
- **Tip: Virtually reset your audience <u>throughout</u> the presentation**! To avoid zoom burnout create a slide deck that encourages participation and engagement! Use concepts like ice breakers, personal stories with visual tools, wellness breaks, games and jokes throughout your presentation to engage your audience and preserve their attention!
- Avoid death by PowerPoint; use powerful imagery and change what your delegates are looking at every few minutes so they stay engaged.
- **Be prepared!** Have a script and notes ready in advance so that you can reference this during your presentation, should you need it.
- When sharing audio or video clips, embed them directly into your PowerPoint presentation for more seamless transitions. Click here for further information on embedding videos.
- If you will be using a single monitor to present, a good trick is to set your PowerPoint presentation to present in a window rather than full-screen so you can already be in presentation mode before sharing your screen, and can still easily access your desktop tool bar if needed. Click here for instructions.
- If you want to use Zoom Polling for a fun way to engage your audience, this is
- possible. Please email events@secretariatcentral.com to discuss needs and format further.

Tips and Best Practices

Set-Up for Presenters Using Video

It is important to consider where the best spot to present from will be, ensure that you have good lighting and have thought about the ideal place to connect and set your laptop so that you feel confident on camera!

- Ambient light or a light centered over your presentation computer will be the most flattering.
- Try choosing a spot near a window if possible, but avoid back lighting, harsh shadows or a dark space.
- Play with your camera angle and ensure you are centered on the screen. It is generally more flattering to have your webcam at eye level so avoid looking down or up at your lens! Try out your camera positioning in advance so that you feel comfortable and confident. Ideally, from mid-arm/shoulder to the top of your head are visible on screen!
- Look at the lens of the webcam when speaking! This is "eye-contact" for your attendees!
- Set up in a location with minimal to no background noise.
- Consider your video background and ensure it is not distracting and cluttered.
- Ensure your appearance is in line with an in-person presentation!
- Set up a timer that you can easily see as you are presenting. This will help you stay on time.
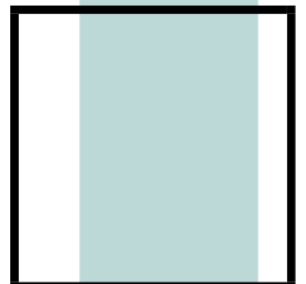
Screen-Sharing

See ***Appendix C*** *for instructions on how to share your screen.*

- NEVER choose 'Share Desktop'. Make sure you are sharing only your presentation or specific document.
- Have any files or webpages you will be sharing during your presentation open and ready to go before joining the webinar for seamless transitions.
- Close any windows you will not be using during your presentation so your presentation is easier to locate.
- Turn off notifications such as email to minimize distractions.
- If you have access to a 2nd monitor that you can connect to, it is useful for staying organized (ex. you can have your presenter notes and Q&A open on your 2nd monitor while still viewing the presentation). This is not a requirement but can be useful.
  Tip: *Put your presenter notes on the monitor that you will be speaking to (or ensure your webcam is positioned correctly) so you are "looking" at your audience.*

- If you will be sharing a video or audio clip as part of your presentation you will need to share your computer's sound as well as your screen otherwise participants won't hear anything but you speaking. After you select the screen you will be sharing, check "Share computer sound" before clicking "Share Screen" (see below) or https://it.umn.edu/services-technologies/how-tos/zoom-share-computer-sound-during-screen#Sharing-Computer-Screen-and-Audio
- For more information on how to Screen share a PowerPoint presentation, [click here](#).
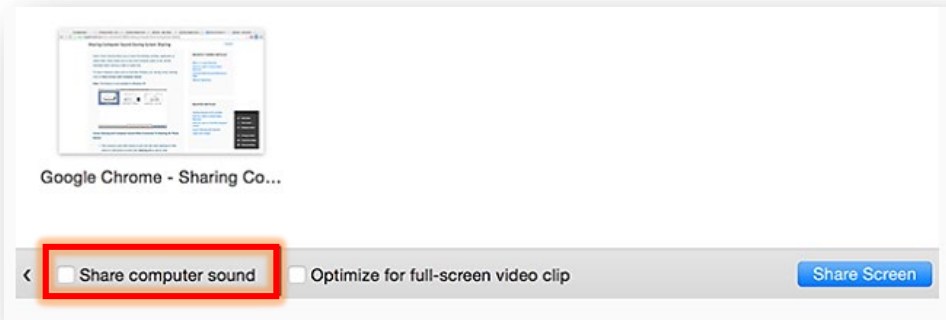
Key Reminders for Speakers, Chairs and Moderators

Before the webinar:

- ✓ Cellular devices/ringers are turned off.
- ✓ You're in a quiet space.
- ✓ Close any open windows/applications that you won't be using during your presentation (it will be easier to identify the screen you want to share!).
- ✓ Mute all notifications on your device.
- ✓ If calling in by phone for audio, mute your computer speakers.
- ✓ Clean your webcam lens! A foggy lens or specs of dirt will be distracting for attendees.

During the webinar:

- Mute yourself when you are not speaking / Unmute before you start speaking.
- Turn off your video when you are not presenting / Turn video back on when you are presenting (if there are multiple speakers in the session, all speakers can leave their video on – only the active speaker will be visible.).
- Always make sure you share only your presentation and not your desktop.
- Stop screen-sharing when you are done so the next person can share.

Transitions

- The speaker should screen share their presentation title slide during the moderator introduction to their talk so they are ready to go without delay.
- Before starting the presentation, the speaker should confirm with the moderator that sound and presentation are OK. Once the moderator gives an indication that all is well – the moderator can turn off their video.

- If the presentation was not shared successfully and/or there are sound issues, the moderator must note to the audience that there are technical issues and to please be patient as we work through this to problem solve (i.e. – Secretariat Central will pull up speaker slides in the event they are unable to share them; or a speaker may have to call in on a land line – but this could cause a few moments of delay time). Ideally, we want to avoid dead air so the moderator could be prepared to fill this time with conversation or not (for example, another meeting chair could turn on their video and there could be discussion about what is coming next and/or what we have learned so far) – but if that is not possible it is ideal to acknowledge any dead air time. If possible, Secretariat will also pull up a slide to acknowledge technical issues.
- Moderators and speakers should pay attention to their chat boxes for any messages related to technical issues at this time; as Secretariat Central will stay off of sound and only communicate via the chat tool. As soon as all issues are resolved, the presentation can resume.
- When the moderator manages questions and answers (Q&A), it is recommended they turn their video back on.

Zoom Webinar – Navigating the Webinar and Interactivity Tools!

There will be a practice "dry run" of the presentation which will include Secretariat Central, Chairs, Moderator and Speakers, as appropriate. Please ensure you plan to attend this important session! All participants will need to log-in using their panelist link at this predetermined time prior to the live webinar.

For the live session, please ensure you are logged in at minimum 30 minutes prior to the start of the webinar so that your audio can be tested privately before the webinar is broadcasted. If you are not scheduled to speak until later in the day, you can sign off, but must be logged back in **at least 10 minutes prior to your scheduled time** to present and identify yourself privately to the Secretariat using chat so they know you are back online.

Webinar Roles Defined

The roles below may differ depending on the size of the meeting, or be held by multiple people. In some cases, one person may be responsible for multiple roles. Regardless, it is important the roles are defined by planning committee members and communicated to Secretariat Central so that everyone knows their role during the live webinar. This will ensure a smooth presentation!

Secretariat Central

Secretariat Central's role is to manage Zoom (or other presentation software) and ensure that the session is set to record and problem solve technical glitches.

Meeting Chair

The Meeting Chair will kick off the meeting by welcoming attendees and will announce housekeeping notes (including information on when/how questions will be answered), thank sponsors and introduce sessions. They are responsible for ensuring the meeting flows and transitions with ease.

Session Chair

A session with multiple speakers may have a Session Chair, who may or may not be involved in the presentation of content. It should be determined if the Session Chair or a Moderator will handle introductions, launch polling (if applicable) and transitions between speaker and assist with monitoring speaker timing to ensure the session ends on time. If there is a Session Chair, there is often not the need for a moderator.

Speaker

The speaker is responsible for running their presentation from their own computer. The speaker needs to determine during the practice session when they will be answering questions and whether they will moderate their own questions or prefer the moderator to assist them by reading out Q&A. Speakers will review unanswered Q&A post presentation to answer some questions post. It is critical sessions start and end on time; the speaker is responsible for monitoring their time. Use of a phone or computer timer is recommended to help with this.
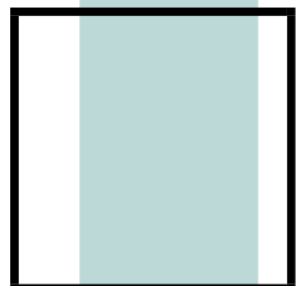
Moderator

The moderator will handle reading out Q&A from attendees, if desired by the speaker. The moderator will need to assess which questions are important to answer live (and mark these questions as such), and what could be answered by the speaker after the session *(See Appendix C for instructions.)* If applicable, the moderator will also be in charge of launching polls when cued by the speaker. It is critical sessions start and end on time and the moderator plays an important role in managing this. Keep an eye on the time and notify the speaker when their time is up.

Task	Secretariat Central	Moderator	Meeting Chair	Session Chair	Speaker
Recording	Will ensure session is recording	<u>Very Important:</u> do not change recording settings			Not Applicable
Broadcasting	Will broadcast when everyone is ready to go live	<u>Very Important:</u> do not hit "Broadcast"			Not Applicable
Chat	- Monitor and resolve any technical issues or inappropriate comments. Direct participants to the Q&A if they ask questions for panelists.	Can respond in Chat discussion if appropriate	Can respond in Chat discussion if appropriate	Can respond in Chat discussion if appropriate	- Can respond in Chat discussion if appropriate
Q&A	-	Assess which questions are important to answer live and read them out during designated Q&A time		Assist with moderating Q&A	- Moderate your own Q&A OR answer questions read out by the moderator/chair live (determine in advance) Post-webinar: answer any questions not answered live
Raised Hands *can be disabled in advance – recommended*		Unmute and mute attendees with their hand raised for live questions (when speaker is ready)			-
Presentations					- Provide a copy to Secretariat Central in advance as backup Share and run presentation
Timing		Keep an eye on the time and notify speaker if they go over		Keep an eye on speaker timing	- Keep an eye on timing

Resource: https://support.zoom.us/hc/en-us/articles/360000252726-Roles-in-a-webinar

All of the above roles will be sent a private link in advance to the Webinar to join as a "Panelist". This will ensure they have screen-sharing capabilities. The meeting chair and any role that will need to launch polls will also be given "Co-Host" status by the Secretariat after joining.

Please note: none of the above roles are able to ask questions in the Q&A. Speakers can be switched to "attendee" status after their presentation is complete so that they can participate if they wish.

PART B: APPENDIXES

Appendix A: Presenter Deadlines

Dry Run/Q&A	Week of *(date and time TBC)*	A dry run will be scheduled the week of the webinar. Speakers, Moderators and Chairs should plan to be available for this. <u>This is an important session since transitions are not intuitive virtually</u>.
Final PowerPoint Presentations	2 business days	Final PowerPoint presentations are due no later than 2 days prior to the live meeting or webinar.

Please email final PowerPoint presentations and a PDF version to events@secretariatcentral.com.

The email subject line should indicate the time and date of your presentation, as well as the presentation title and if it is part of a multi-speaker presentation. *If you do not receive confirmation of receipt within 24 hours, please follow up as the presentation may not have been received.*

Ex. Tuesday, May 4th, 2020, 11 a.m. ET, Title ABCD Part 1 of 3

Appendix B: Accessing Zoom for the 1st Time: Step-by-Step Instructions

For optimal viewing ensure you have the latest version of Zoom downloaded to your presentation computer: https://zoom.us/support/download.

Instructions

On your computer, click on the Zoom link that was emailed to you (it will look something like this: https://zoom.us/j/123456789).

When entering a Zoom meeting for the first time from a computer you will need to download a small application file. Give yourself enough time to complete this before starting the practice session.

This process is easy to complete on all commonly used browsers. Visit the Zoom Download Center here: https://zoom.us/download to download the Zoom Extension for needed for your specific web browser. The example below is shown using Google Chrome.
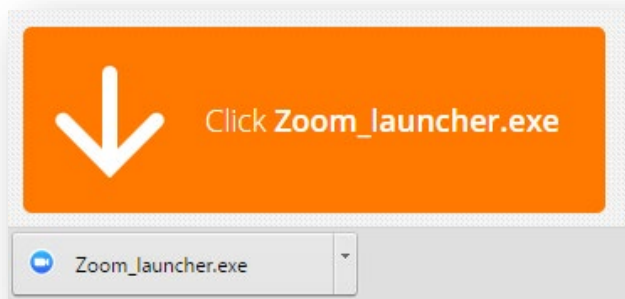
Google Chrome should automatically download the file and point to it as shown above (Similar process for other browsers). Clicking on the Zoom_launcher.exe file will install Zoom, there will be a short pause before a blue progress bar appears indicating the installation.

If an 'Application Launcher' or 'External Protocol Request' box appears simply tick the '*Remember my choice...*' option box and then click 'OK'.
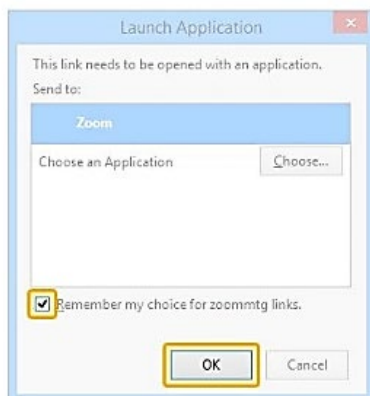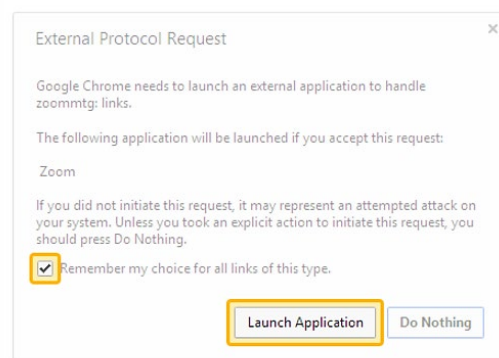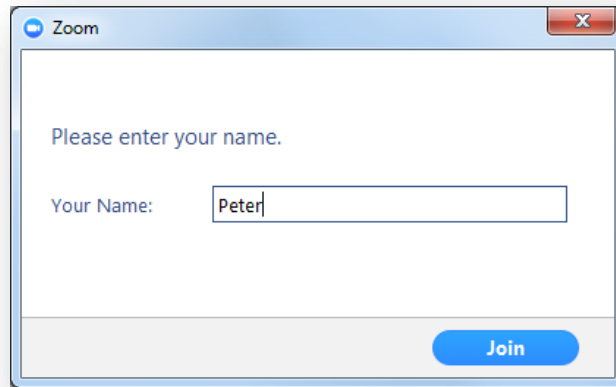
Just before entering the meeting you will be prompted to enter a display name. This name is simply to identify you in the meeting. First and last name is **REQUIRED**.
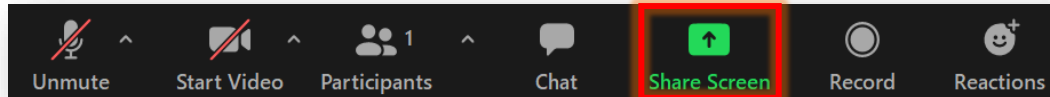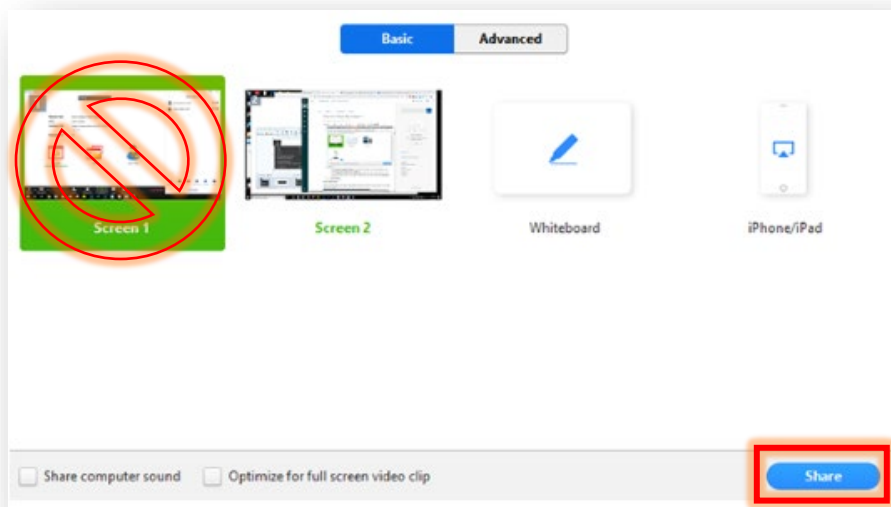
Appendix C: Visual Tools

How to Screen Share

1. In the Zoom menu, click the green "Share Screen" or "New Share" button in the tool bar.

2. Select the screen you want to share. NEVER choose to share your desktop (the 1st screen option, *or 1st and 2nd if using 2 monitors*) or you will share your taskbar, pop-ups, everything! Choose the specific file you want shared and then click 'Share'.

3. Pause Share / Resume Share: If you pause your shared screen it will freeze the view for attendees even if you continue to move throughout the document. Remember to click "Resume Share" before continuing.
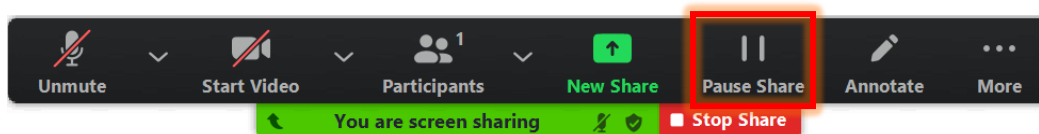

4. You must stop sharing your screen before another presenter can share theirs. When you are done your presentation, click "Stop Share".
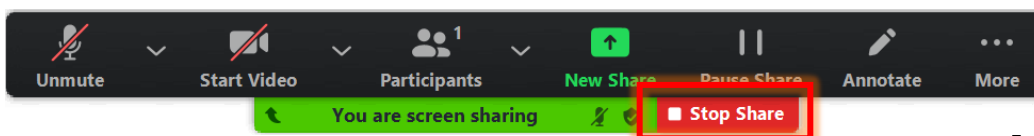
Chat

Participants will be directed to use the Chat function for general discussion, noting any technical issues and for asking questions. Speakers are not required to monitor the chat but are welcome to use it. Moderators must monitor chat for questions to read out during the Q&A period. To open chat, click the "Chat" button in the tool bar.
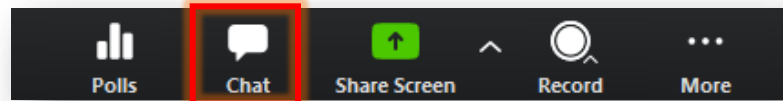
If you are sharing your screen, you may not see the Chat button in the tool bar so click "…More" then "Chat" to open the window.

If you are sent a message in Chat while the Chat window is closed, a notification will pop up over the Chat button.

You can send a message to all attendees or privately to an individual by clicking the dropdown menu next to "To:"
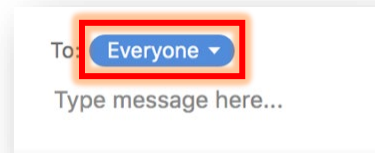

Q&A

Participants will be directed to ask questions for the panelists using the Q&A function. To moderate and answer questions. Click the "Q&A" button in the Zoom menu.
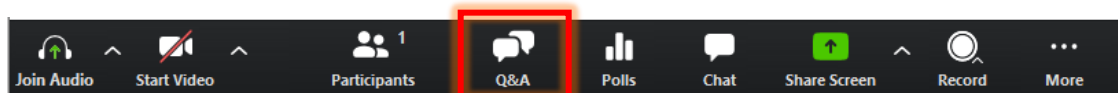

Find the question you would like to answer and select whether to "type answer" so all participants can see it, or "answer live" live and read out and answer the question. After clicking "answer live" and reading out the question, you need to click off that the question has in fact been answered so it is removed from the list.
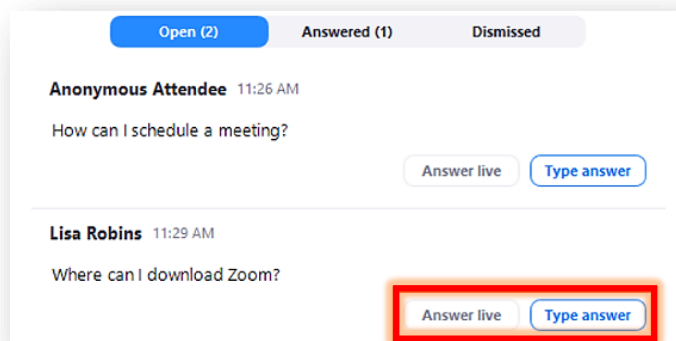
You can also "Dismiss" questions that are inappropriate, have already been answered, or aren't actually questions by hovering over the question and clicking on the "Dismiss" icon that appears.
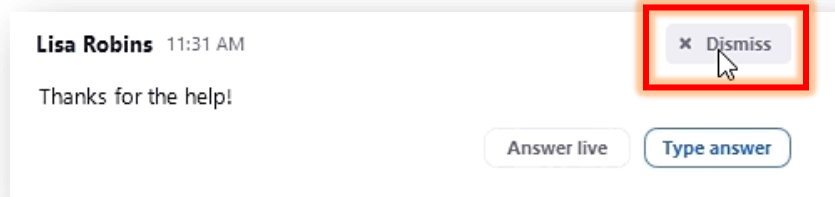
If multiple participants upvote questions, a little thumbs-up will appear with a count of votes. Questions with the most votes will be moved to the top of the list. These questions should be given priority. (If no one upvotes, questions are sorted oldest to newest.)
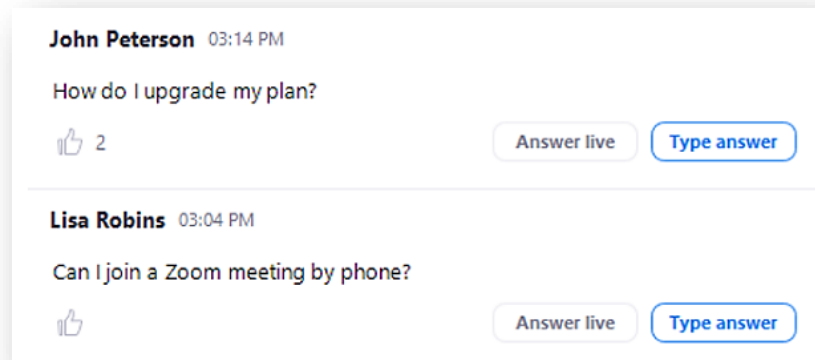
Appendix D: Pre-Recording Your Presentation with Voice-Over

You can choose any video or screen recording application you are comfortable using, provided it allows you to record your PowerPoint presentation with voice-over and the end file can be in an MP4 or MOV file. It is highly recommended you use Zoom for the pre-recording due to ease of use. Don't forget to keep the Tips and Best Practices in mind while presenting—treat your presentation as though you are speaking to a live audience! Please note: we caution the use of PowerPoint with voiceover due to issues with converting files to MP4, however, it is still possible to record this way.

Regardless of platform, **pre-recordings must be sent to events@secretariatcentral.com as an MP4 or MOV file**.

1. Create a Zoom account at https://zoom.us/, if you don't already have one. (Basic accounts are free!)
2. Start a meeting for yourself.
3. Share your video by clicking "Start Video" (if applicable) and ensure that you are clearly visible and your microphone is unmuted.
4. Share your PowerPoint presentation by clicking "Share Screen".
5. When you are ready and your slideshow is in Presentation Mode, click "Record".
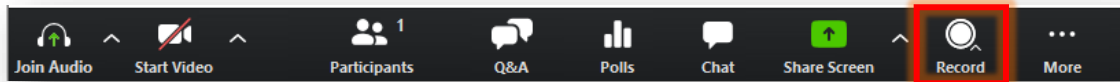
6. Start presenting. You can pause or stop your recording by hovering over the "...More" button.
7. The recording will save when you end the meeting. You will receive a prompt asking where to save the recording. Select your preferred location. Zoom recordings save as MP4 files.

We recommend you do a short test first before recording your full presentation to ensure it is working properly and that your audio sounds good.

Please note: Secretariat is not responsible for editing/auditing your recording. Recordings sent to Secretariat will be shared as they are.

For more information on using Zoom, visit their Help Center, which has tons of useful tips and information.