

VIRTUAL MEETINGS

ZOOM EVENT PRODUCER - PRO TIPS

BEFORE THE EVENT

1. Use the [Zoom Event Production Checklist](#) in the Steward Resource Toolkit to guide your conversation with the meeting planner(s).
2. **Avoid dual roles** whenever possible (i.e. producer should not also be taking minutes), since producing an event on Zoom is often complex, as well as requiring significant computer processing resources.
3. **Create a robust production script.** Use formatting to indicate what's what. For instance, you might use italics for a script or speaker notes, and bold for actions.
4. **Practice!** Remember that Zoom is always changing. Make sure you know how to do the things you might need to do in the meeting such as:
 - > rename participants
 - > manage polls
 - > open and manage breakout rooms (including the Options menu settings)
 - > screenshare (various types – video with sound, screen, application, whiteboard)
 - > lower hands and clear feedback
 - > mute participants
 - > annotate
5. Test your **tech setup/layout** in advance. What windows do you need open during the meeting? How will you place them all on your screen(s) to be able to access what you need when you need it? What view options will work best for this meeting?
6. Secure a **copy of materials** to be presented if you might need to share screen as backup.
7. Check close to the meeting that you've **updated to the most recent version of Zoom** and if there are any updates, check for changes to functionality that will affect your meeting.

DURING THE EVENT

1. **Name yourself with your role**, if appropriate. (e.g. [producer] Kitara, she/her)
2. **Wait room management**
 - > Consider sending chat messages to people in the waiting room letting them know they're in the right place, when you plan to open the meeting, etc. Participants will only be able to see messages that were put in the chat after they entered the wait room, so you might need to send the message several times.
 - > Unless you need it enabled for security, disable the waiting room after you've admitted everyone so you don't leave people waiting there while they should be in the meeting.
 - > Note that if you have anyone in the waiting room when you disable it, they will NOT automatically be moved into the meeting, you must still admit them manually.

VIRTUAL MEETINGS

ZOOM EVENT PRODUCER - PRO TIPS *continued*

3. Chat Management

- > Pre-draft text if there are things you know you will want to place in the chat (e.g. links or activity instructions).
- > When addressing an individual in the main chat, use the “@” symbol and their name so it’s clear who you’re addressing (e.g. “@Gurdeep I agree with you”).
- > Provide a few words of context to structure the chat. This might be to add context to what you’re saying in the chat (e.g. “yes, I agree with these changes”), or to provide structure to the general discussion (e.g. “Activity Question: Which option do you prefer?”).

4. Polls

- > Create polls in advance of the meeting whenever possible.
- > Know who can create polls (at the time of writing, only the meeting creator can create polls), and confirm that they will be in the meeting if in-the-moment poll creation might be needed.

5. Breakout room management

- > Determine whether breakout room assignments will be made in advance or during the meeting. If during the meeting, determine how assignments will be made (e.g. a certain number of participants per room).
- > Place activity instructions into the chat prior to opening breakout rooms. Having activity instructions in the chat can help prevent confusion, but text placed in the chat in the main room will be visible to participants in their breakout rooms only if the text is placed in the chat before breakout rooms are opened.
- > If the event has multiple co-hosts, a single person should be designated for creating breakout room assignments to avoid duplicating work and creating conflicting assignments. Note that each co-host’s breakout room assignment menu will not automatically update with another co-host’s changes until rooms are opened.

6. Sharing screen

- > Ensure you’ve downloaded any necessary documents in case you need to share screen. Having them on your hard drive as opposed to in the cloud helps prevent connectivity issues. If there are a lot of documents that will need to be shared for a given meeting, consider creating a folder for that meeting on your desktop for easy access.
- > If you are showing a video or an audio file while you’re sharing screen, ensure you enable “share sound” (bottom left corner) before you press “share.”
- > Consider using the “new share” function rather than exiting a screenshare and starting a new one.

AFTER THE EVENT

When possible and as appropriate, debrief with the people who were running the meeting. If you are the meeting creator, you might need to pull registration and/or attendee reports.