

How to Manage a Zoom Room like an Expert

Overview

Whether you choose to manage the event on your own as facilitator or you have a co-facilitator, coordinator, or TA to assist, here's a list of tasks to help you get prepared. Depending on the topic and your comfort as facilitator, it can be hard to contribute and play all those roles, so delegate where possible. It's difficult for one person to smoothly run all the parts of a large meeting or learning session.

Consider whether you need someone to:

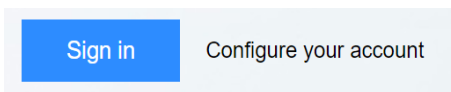
1. Create the ZOOM meeting space and invite attendees?
2. Manage attendee list and share pre- work materials or agendas?
3. Setup and launch ZOOM during your session?
4. Take notes?
5. Manage participants in the ZOOM chat space?
6. Who will manage ZOOM participants that need help with audio?
7. Who will present the PowerPoint?
8. Do you need more than one computer or an additional person's help to conduct the meeting smoothly?
9. Is there more than one person presenting? How will you manage this?

This is where assigning a coordinator comes in.

Facilitator/Coordinator/TA Tips for Managing the Zoom Room

Visit: <https://ucalgary.zoom.us/>

a. Select:



b. You'll be brought to the U of C Central Authentication Service log in box. Enter your credentials as usual.



- c. You'll be sent a code to your phone to enter and you'll click verify when you've done that.
- d. You'll be asked to stay signed in. In most cases, it would make sense to select to the question, 'do you want to remain signed in' as it will reduce the amount of times in a day you will be asked to sign in.
- e. Now you are signed in to your ZOOM account

Roles for a Coordinator/TA

Getting Started

1. Set up the meeting invite.
2. Send invites to participants.
3. Manage RSVPs/attendees/keeping a 'sign in' sheet.
4. Prepare participants by sending all accompanying documents and materials to participants in advance (agenda, handouts, articles being reviewed).
5. Alert participants to being invited to a Zoom meeting and to watch for the invitation in their in boxes.
6. Remind participants to set up an account if they wish. Note: A Zoom account is not required to participate in a meeting.

Beginning of the meeting

1. Coordinator/TA can assign host role to the facilitator so that the presenting options will be available to them in the app.
2. Set up breakout rooms for presenters if required, assign participants to rooms and manage any logistical questions.
3. Ensure and alert participants to any tech etiquette and assist with issues. Do they need to mute/unmute? Turn their cameras on?

During the meeting

1. Frequently check in with remote participants via chat function, individually and as a group.
2. Monitor participants continued attendance, both for accreditation purposes or to identify trends/drop-offs.
3. While facilitator is presenting and lecturing they may not have the ability to watch for cues from the participants.
 - o Cue the presenter that a participant is attempting to speak.
 - o Manage hand raising/questions in the chat room and alert (privately) the facilitator to the questions or comments.
 - o Watch timing and alert facilitator to wrap-up times or agenda items.
4. Coordinators/TAs can assign a lead for each breakout room, to prevent conversation from lagging.
5. Manage any questions/requests for materials in the breakout rooms.

Ending the meeting

1. Notify participants of next steps, if relevant.
2. Alert participants if they should expect an email of documents or where they can find the Zoom recording, if you will be making it available.
3. Close the meeting verbally at the end so ZOOM participants also get closure with facilitator.
4. Share recording of the meeting and all materials with the participants afterwards.
5. Follow-up with the facilitator to identify any opportunities for improvement in the next session (do they want more time reminders? Do they want to keep all questions to the end of a session? etc.).