

# The Virtual Presenter's Guide to Using Zoom's Meeting Tools

updated September 2023

This guide is designed for virtual presenters, trainers and facilitators who use Zoom Meetings. It includes some of the most commonly used features of Zoom for interactive virtual meetings, presentations and other live online learning sessions.

This guide is not a complete comprehensive guide to what Zoom can do. This guide may also not be 100% accurate, due to software upgrades, available add-ons to the software, and/or my own shortcomings.

Also note that there is often more than one way to do the same thing. So you might discover a shortcut or different method of using Zoom. This guide is meant to be a useful document, so please also add your own tips, tricks, and techniques to your online training toolbox.

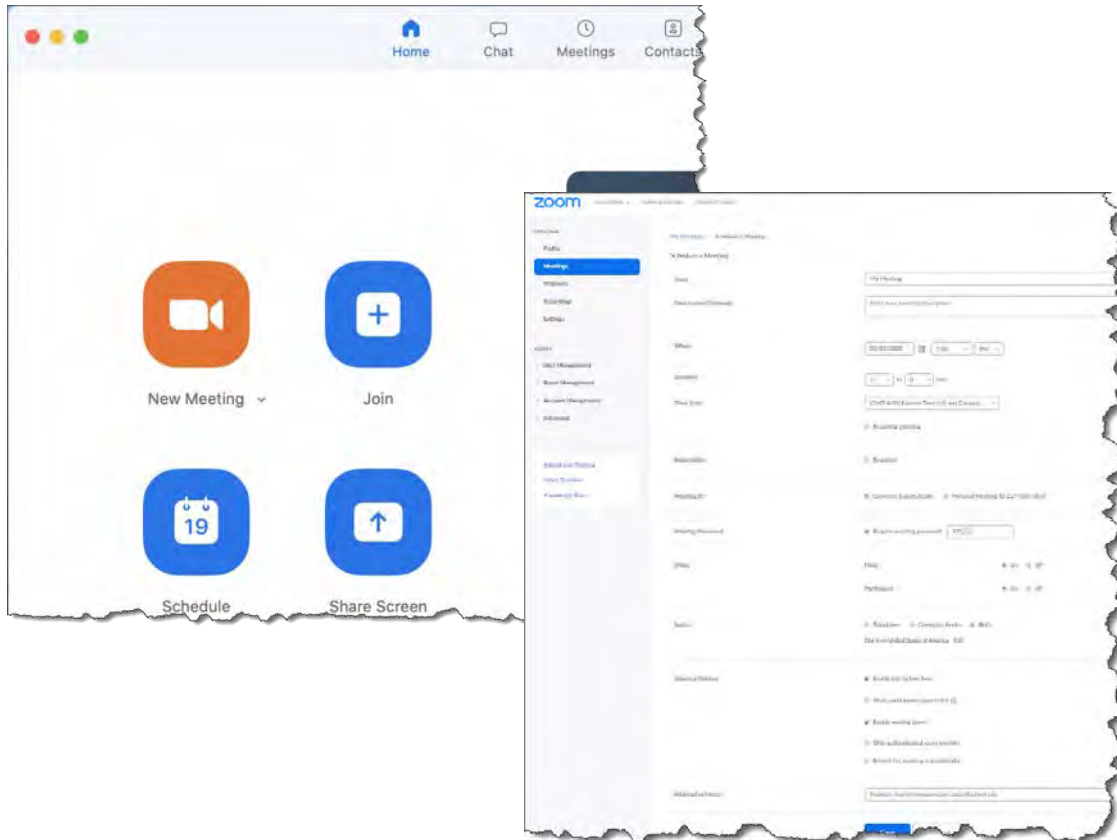
There's always more to learn!

Enjoy!

Visit [www.cindyhuggett.com](http://www.cindyhuggett.com) for more information about online facilitation and presentation skills training.

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# Set Up a Zoom Meeting

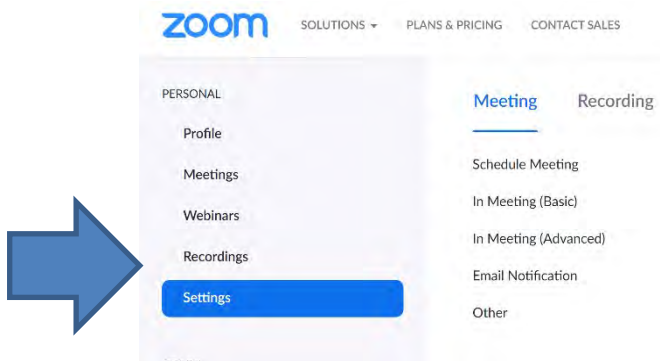


There are many ways to schedule a new Zoom meeting. You can use the Zoom app, calendar extensions, or by logging into your Zoom meeting account ([www.zoom.us](http://www.zoom.us)) on a browser.

When creating a new meeting, the website option includes the most comprehensive list of available options, including:

- Scheduling a recurring meeting
- Having video on or off by default at the start of the meeting
- Connecting audio by telephone, computer, or both
- Muting or unmuting participants automatically upon entry
- Setting a custom password for your meeting
- Using a “waiting room” to approve admission to attendees

# Meeting Settings

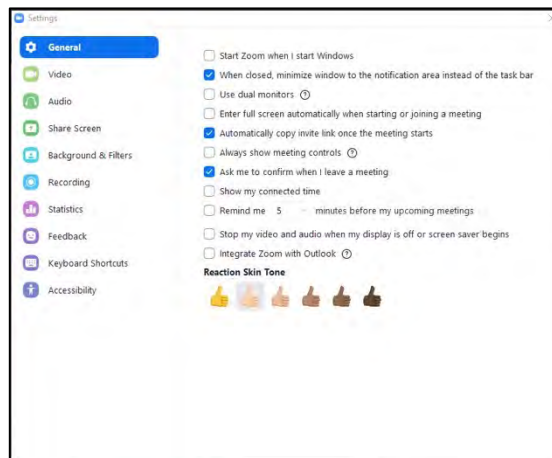


To make use of many Zoom tools for interaction and engagement, they need to be activated in your settings. Use the “In Meeting (Basic)” and “In Meeting (Advanced)” options to activate tools such as:

- Allowing chat and private chat
- Enabling in-meeting file transfers
- Permitting poll questions
- Enabling annotation tools and whiteboards
- Turning on “nonverbal” feedback
- Using breakout rooms

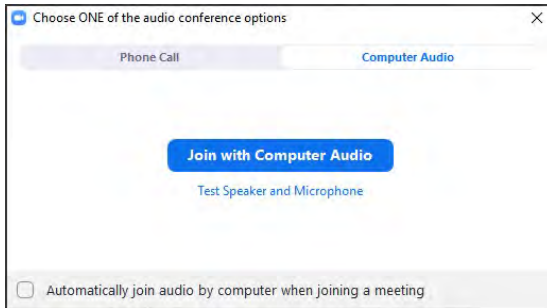
And more! Be sure to review all of your meeting settings in your account (found via browser window) to have the options and tools you need for interaction.

If you use the Zoom app, you can access some (but not all) of these settings using the Gear in the top right corner, then choose “View More Settings.”

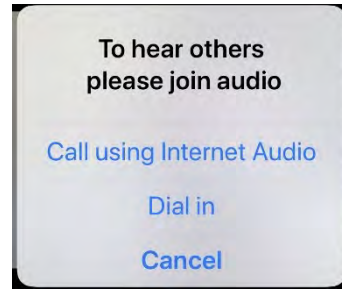


# Connecting Audio

Upon starting or joining a Zoom meeting, you should be prompted to connect your audio. Depending upon the meeting settings, you can choose to connect by computer/internet audio or by phone.



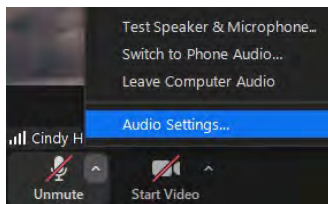
on a laptop/desktop



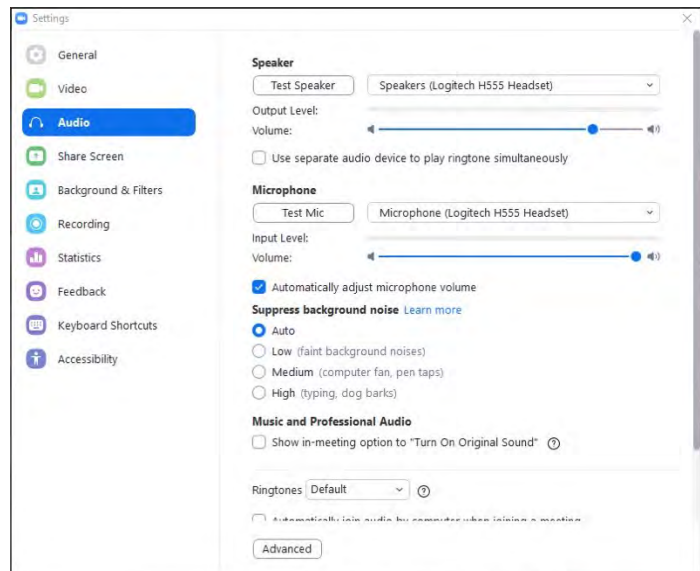
on a mobile device

Notice the "Test Speaker/Microphone" option in the dialog box. It's a good idea to use this feature to check your audio settings in advance.

If you would like more granular control over your audio connection, once you join the meeting, select "Audio Settings" from the menu:

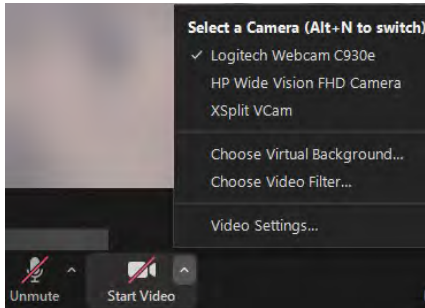


Also, notice the "Unmute" (or "Mute") button available in the Control Bar



# Using Video (Webcam)

While joining the Zoom meeting, you can enable your video (Note that the settings may automatically turn on your camera upon joining. You can change this option in your Zoom profile.)

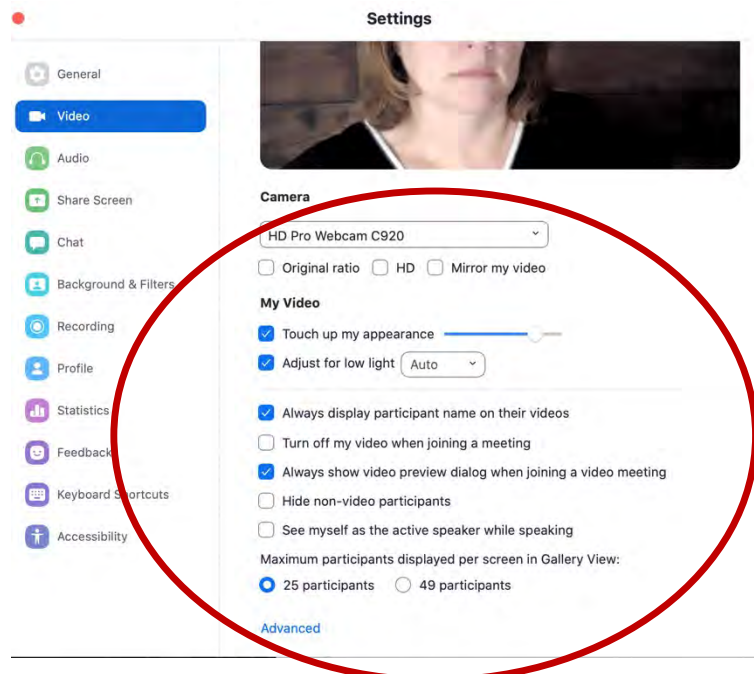


If you have multiple cameras, you can choose which one will be used.

You can also change your video background and/or add filters. You may also prefer to display a custom avatar, which matches your facial movements.

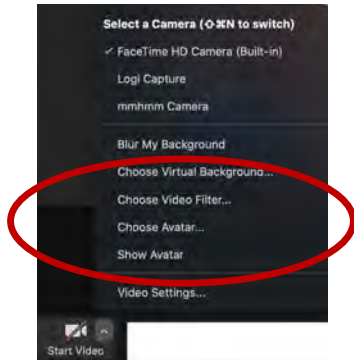
You can use the "Start Video" and/or "Stop Video" buttons to control when your webcam is visible to others. I highly encourage you to start your video and embrace being on camera. Use the "Video Settings" option to enhance your video with "Touch up my appearance" and "Adjust for low light."

Notice the other video options, such as whether or not non-video participants are displayed in the gallery view.



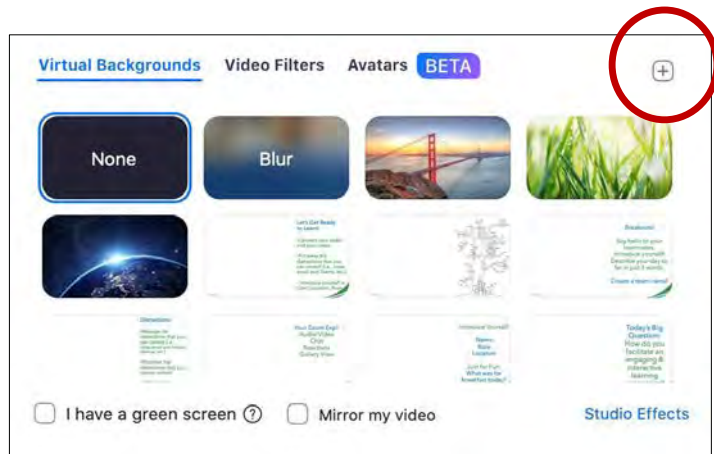
# Using Virtual Backgrounds

If you would prefer to blur your background, or use a virtual one, you can make that selection from the menu bar. You can also apply virtual filters to create enhanced camera images.



From the video menu on the toolbar, select "Choose Virtual Background"

In the Virtual Backgrounds dialog box, select from the built-in choices, or use the + sign in the upper left corner to add your own.



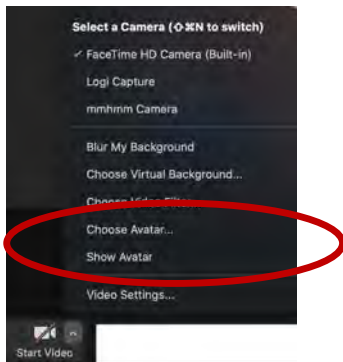
Note that virtual backgrounds use additional internet bandwidth, so they may not be a good option if you have a slower connection.

Also, notice the "Video Filters" tab at the top. You may also see "Avatars" at the top, as well as the "Studio Effects" in the bottom right corner. These enhanced options allow you to fine tune your on-screen appearance.



# Using Video Avatars

If you would like to display yourself as an avatar in your on-screen camera window, you can choose a built-in avatar or create a realistic one. You can also apply virtual filters to create enhanced camera images.



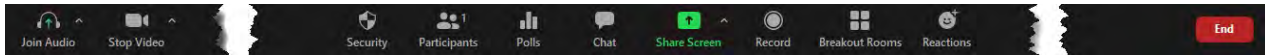
From the video menu on the toolbar, select "Choose Avatar" to select one or "Show Avatar" to display your already-customized one.



Avatars use artificial intelligence to read your facial expressions. Your face will move in sync with your head, your mouth will open when you talk, and your eyes will blink open and closed. You can use an avatar to express yourself without actually being on camera. They can give you a much-needed camera break while still actively participating in the video gallery.

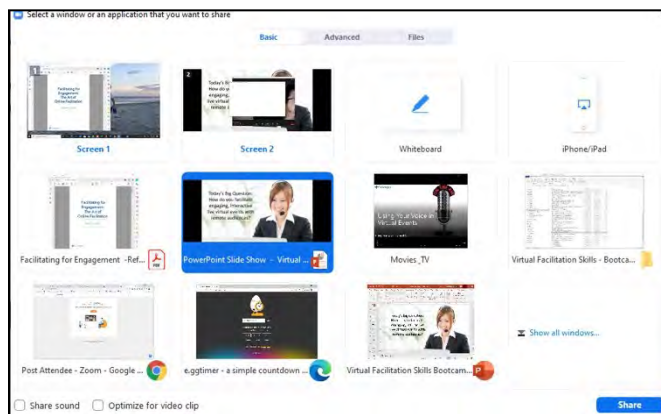


# Sharing Documents and Screens



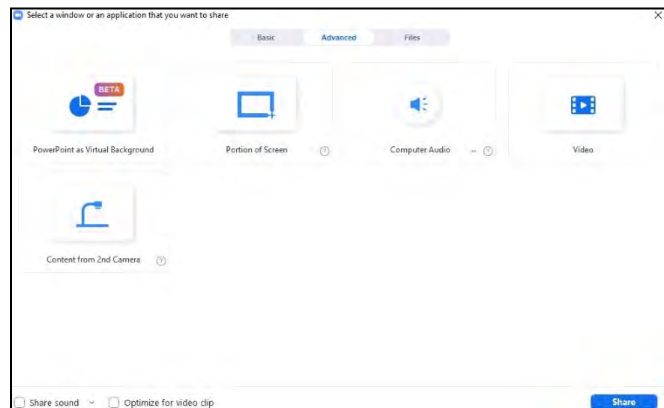
Once in the Zoom meeting room, use the Control Bar at the bottom of the screen to run your event.

To share a document, video, or other application, click on the Share button and then select your open file or application. **Note that the file or application must already be open on your screen to be visible in this box. Also, remember to select "Share computer sound" if you are sharing a media file.**



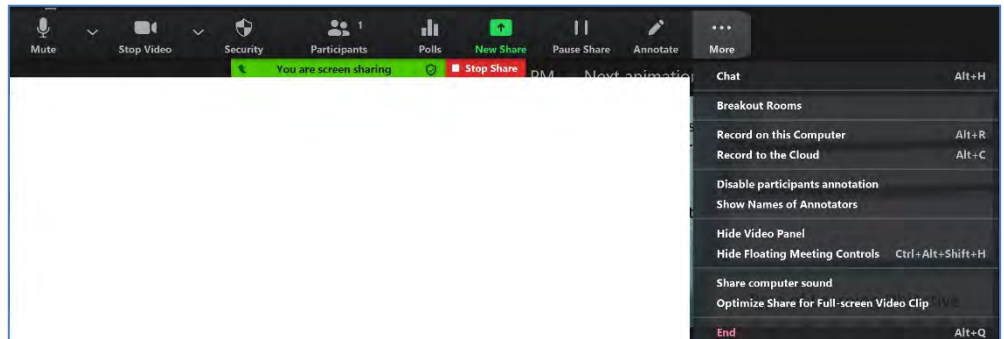
For more sharing options, choose the Advanced tab. Here, you can share:

- slides as a virtual background
- a portion of your screen
- sound only (to play music)
- video (pre-recorded videos)
- content from a 2<sup>nd</sup> camera (like a document camera)



# Tips for Sharing Documents and Screens

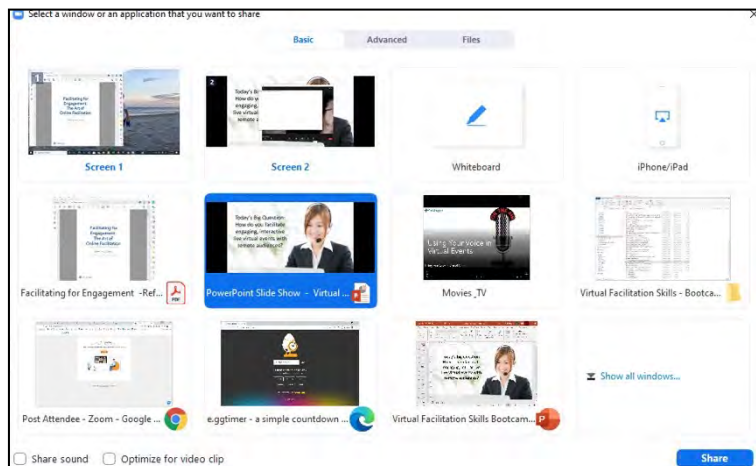
When sharing your screen, the control bar moves to the top of your screen. This is where you'll find several options that you may use while presenting.



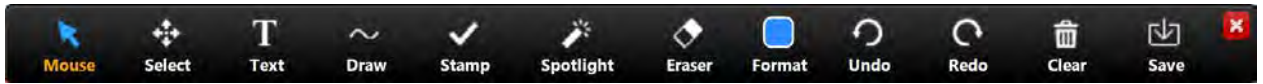
When you are finished sharing your screen or document, choose Stop Share (red button at top of screen.)

OR

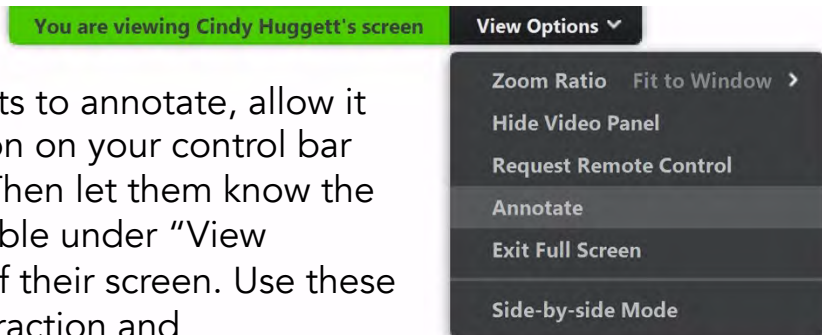
To easily switch to a different document to share (such as switching to a web-based countdown timer or to show a video), choose the "New Share" button on your Control Bar. This will re-open the Share dialogue box and allow you to seamlessly switch from your first shared item to the second shared item.



# Annotate



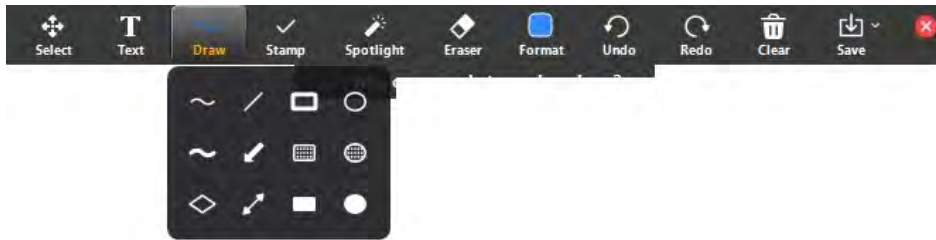
Use the annotation tools to draw on screen. As a presenter, you can use these tools to highlight areas of your screen and draw attention to them. For example, to highlight a word or draw a box around something.



If you want participants to annotate, allow it by choosing the option on your control bar menu while sharing. Then let them know the Annotate bar is available under "View Options" at the top of their screen. Use these drawing tools for interaction and engagement. See below for an example that asks participants to type on screen:



# Tips for Using Annotations



Many of the tools in the annotation bar have additional choices in a drop-down sub-menu. For example, you'll find several lines and shapes underneath the Draw button. And choices for text formatting under the Format button. Explore all of the annotation tools available to you.

When using the Annotation tools, remember that you (and/or participants) are drawing on the presenter's screen. That means the annotation marks persist until you erase them. In other words, if you circle a portion of the screen, the circle remains visible until it's erased.



As the presenter, if you'd like to draw or highlight without needing to erase, use the "Vanishing Pen" option. Its on-screen marks will automatically disappear after a few seconds.

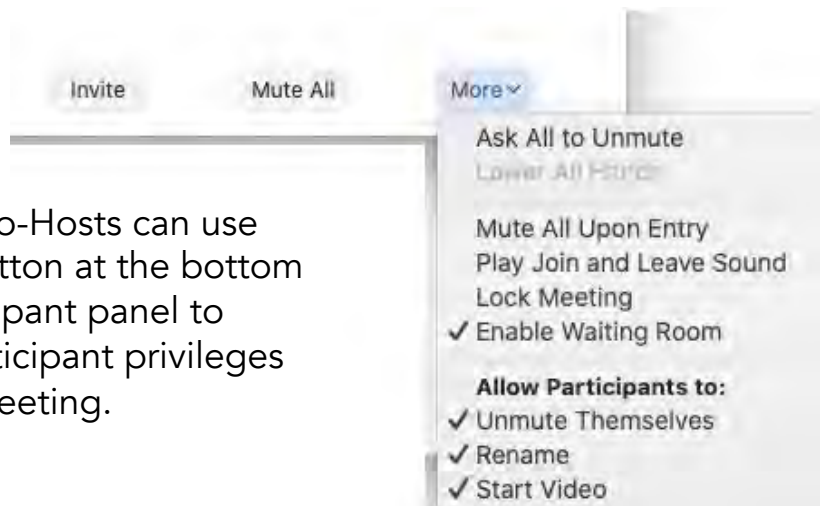
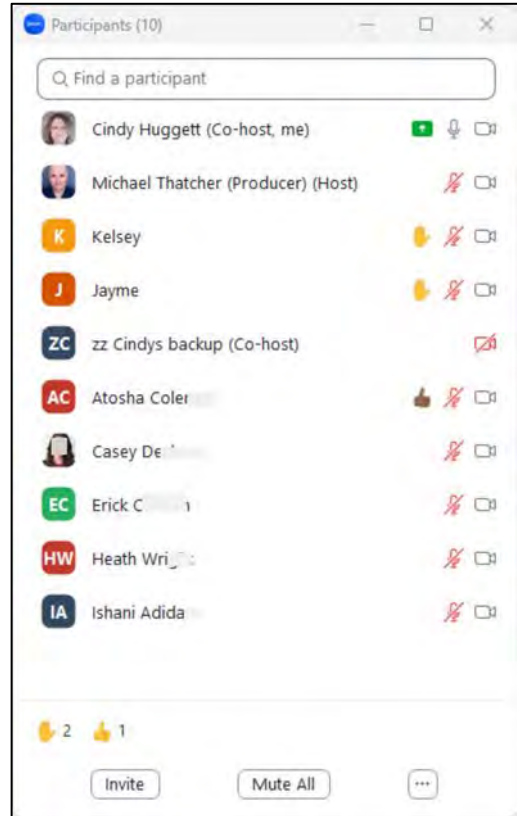
After using the annotation tools, if you want to save the on-screen images, choose Save. And be sure to use the "Clear" button to remove the annotations. Finally, click on "Mouse" to regain control of the screen and/or to be able to move to your next slide.

# Participant Panel

Use the Participant panel to manage details about the meeting attendees.

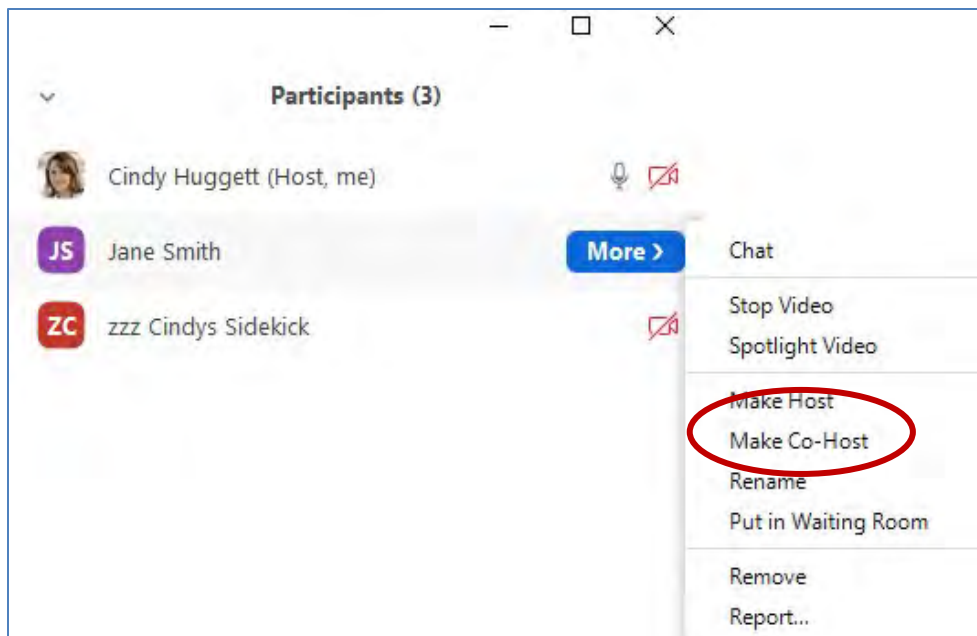
This list tells you their audio status (computer or telephone, muted or unmuted), video status (webcam on or off), and their current feedback status (i.e. raise hand).

A photo will appear next to an attendee name if they have added a photo to their Zoom profile, and are logged into Zoom when entering the room.



Hosts and Co-Hosts can use the More button at the bottom of the participant panel to manage participant privileges within the meeting.

# Partnering with Co-Hosts



If you are partnering with another facilitator and/or a producer, and you have enabled the co-host option in your meeting settings, then you can promote any participant to “Co-Host.”

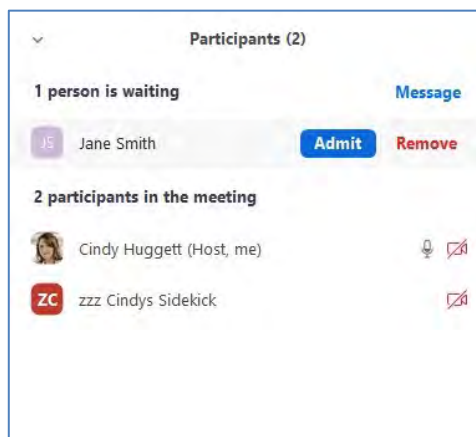
Having a Co-Host allows you to share administrative tasks during a meeting. A Co-Host could start and stop polls, assist with muting/unmuting participants, and admit participants from the waiting room.

It's possible to have more than one Co-Host, which is especially helpful if you have a large number of participants.

# Using the Waiting Room



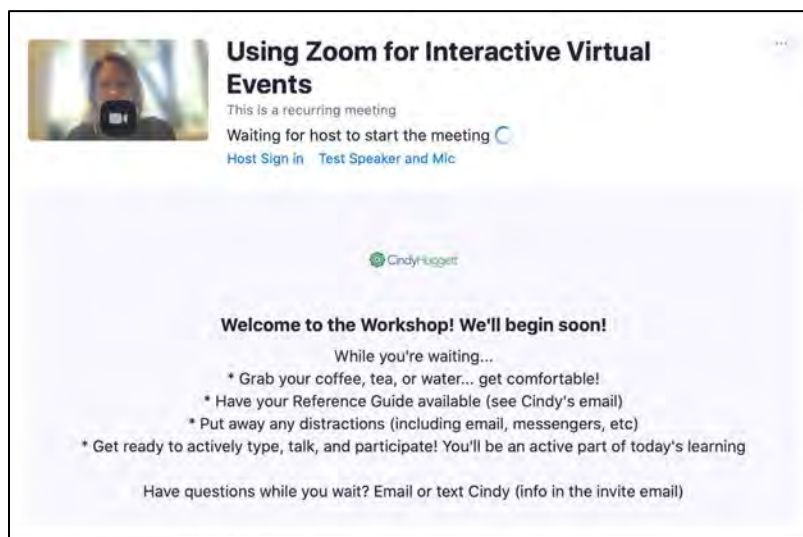
If you have enabled the Waiting Room, when a participant joins, they'll pause in a lobby-like area until you admit them to the room.



Hosts and Co-Hosts already in the Zoom room will see the names of who is in the waiting room. You can choose to "Admit" or "Remove" them. If multiple people are waiting to join, you'll also see a choice to "Admit All."

You can customize what message (video or text) that people see in your waiting room. These options are available in the Meeting Settings.

Here is an example of my waiting room message:



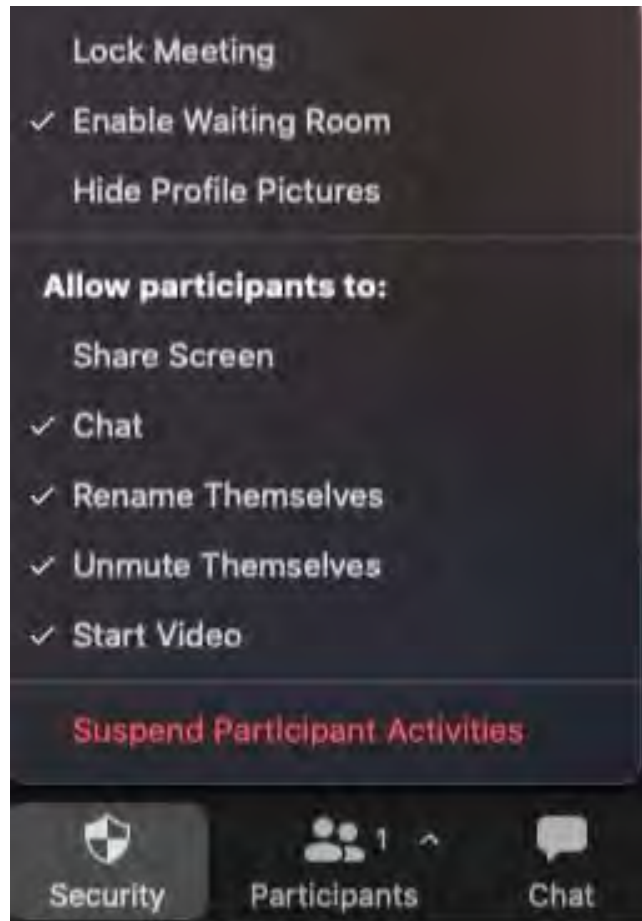


# Security Settings within a Meeting

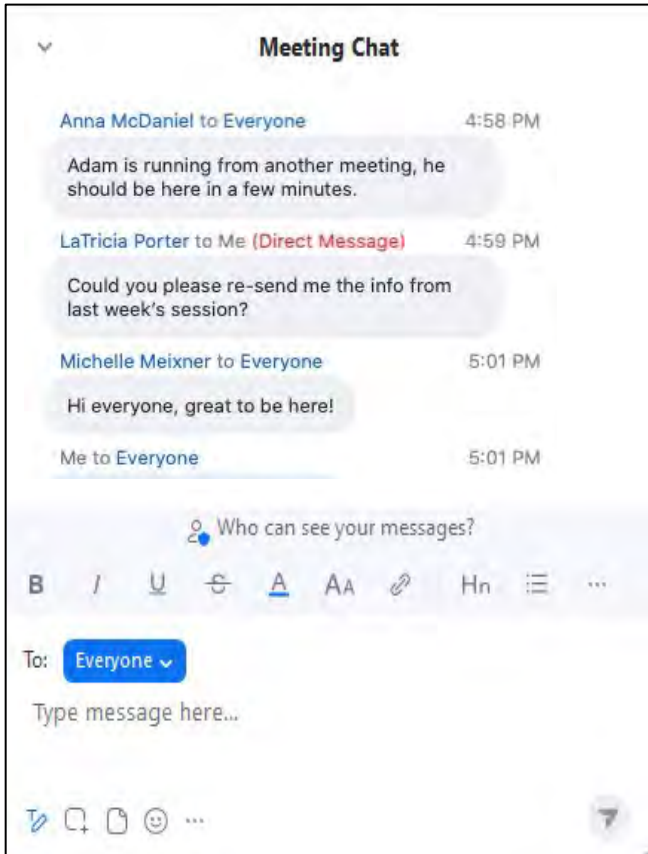
The Control Bar includes a Security button visible to Hosts and Co-Hosts.

Use it to update and/or change meeting security settings as needed.

Notice the "Suspend Participant Activities" option which can be quickly used if needed.



# Chat



Use Chat to communicate with and gather input from your audience.

If you allow it, attendees can send messages that are visible to everyone, or send private messages directly to other attendees and/or the Host.

You can also use Chat to "File Transfer" a document to participants (if this feature is enabled in the Meeting Settings). Simply click on the File button in Chat, choose the document you wish to share, and it will appear for download inside the Chat window. This is helpful for sharing reference materials or other supporting documents.

# NonVerbal Feedback / Reactions

Gather nonverbal feedback and input from your audience by using the Reactions button found on the Control bar.

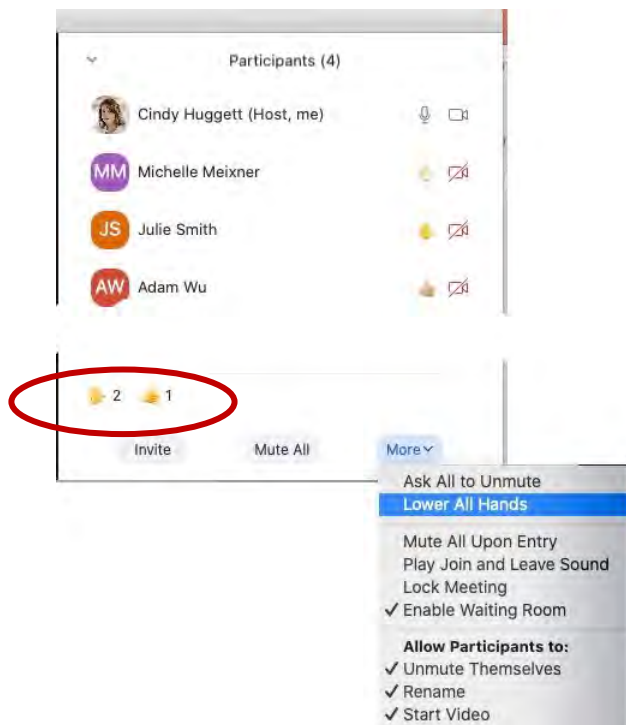
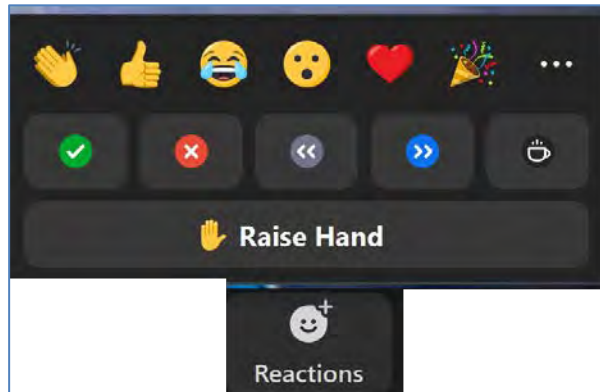
These reactions will show up in the corner of their video screen and next to their name in the Participant panel. Note that *hand gesture recognition*, if enabled, will automatically choose some reactions.

The emoji reactions stay visible for 5 seconds and then disappear.

Clicking on the ... in the upper corner will reveal more emojis to choose from.

Non-verbal feedback, such as Raise Hand, Yes, No, Slower and Faster, stay selected until removed by the participant or the Host/Co-Host.

Hosts and Co-hosts can see a summary of the reactions at the bottom of the Participant Panel. They can also remove the feedback using the option found underneath "More".

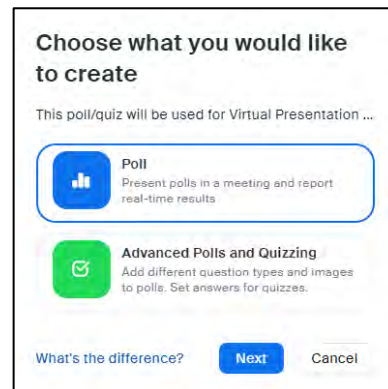


# Polling Setup

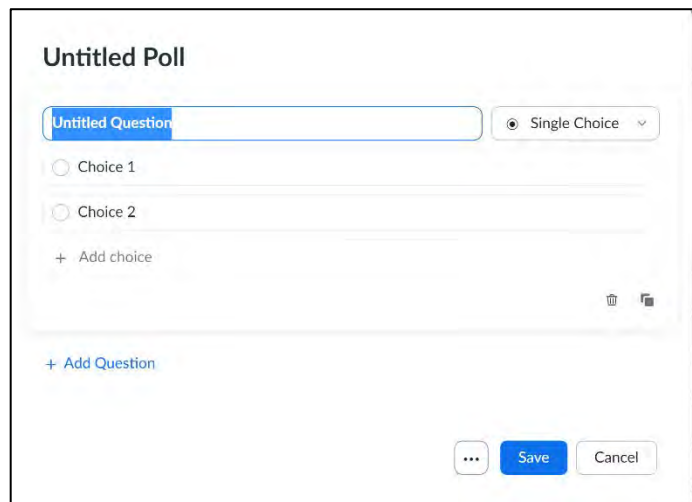
To have polls available in your Zoom meeting, be sure to enable polling in your meeting settings. Then, add poll questions to each meeting in advance in your meeting setup screen using "Create".



If the "advanced polling and quizzing" option is enabled, you'll be prompted for the type of poll to create.



Notice that basic polls can be "Single" or "Multiple" choice. You can also have more than one question per poll.



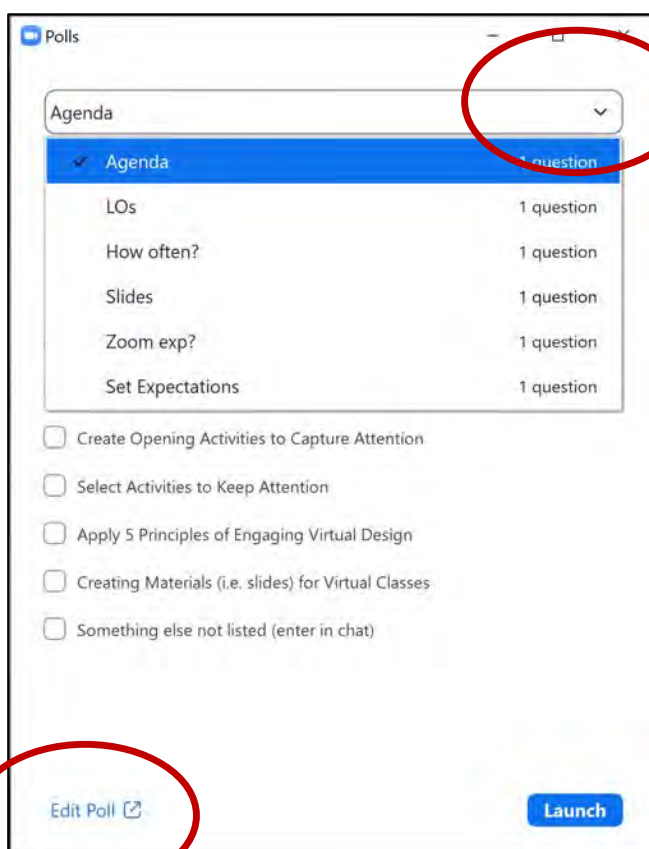
# Using Polls in Meetings



During your Zoom meeting, select Polling from the Control Bar to open the Polls dialog box.

If needed, you can Edit the poll prior to launching it by selecting the Edit button in the bottom left corner. (Use this with caution, as it's a best practice to plan out your polls in advance.)

Select the poll question you want, then click Launch Poll.

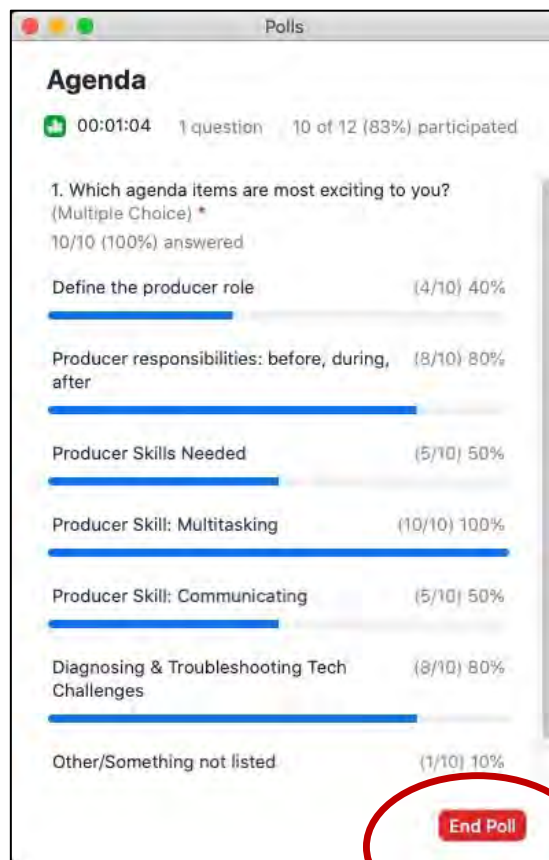


# Using Polls in Meetings

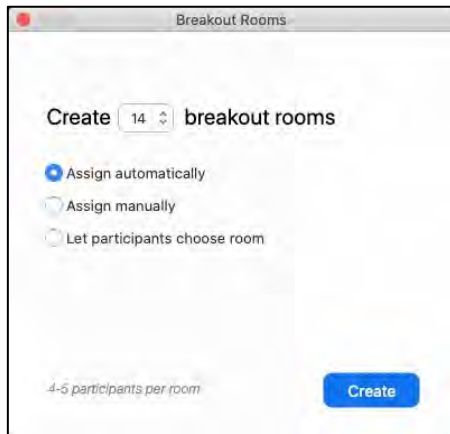
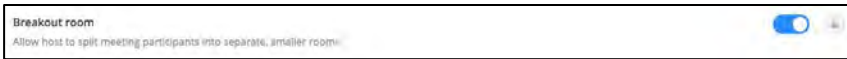


Once a poll is launched (use the Launch button in the bottom corner), you'll see real-time results on screen as participants respond.

Once finished, click on End Poll. You'll then be prompted to "Share Results". (Usually, a Host will choose to Share Results). When finished, choose "Stop Sharing" then close the Polls window.



# Setting up Breakouts

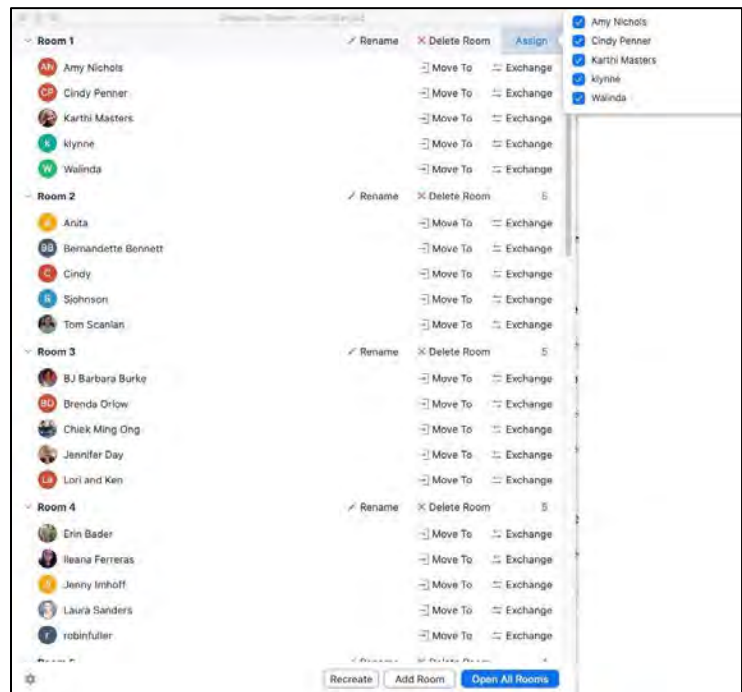


First, ensure breakout rooms are enabled in the Meeting Settings (Advanced).

Once inside the Zoom meeting, a Host or Co-Host can click on the Breakouts button on the Control Bar to set them up. You can:

- Let Zoom automatically assign attendees
- Manually assign attendees to a room
- Let attendees choose which room they wish to join

If you choose to assign attendees, the Host can do that after choosing "Create." In addition, if attendees were automatically assigned, you can rearrange them into different rooms.





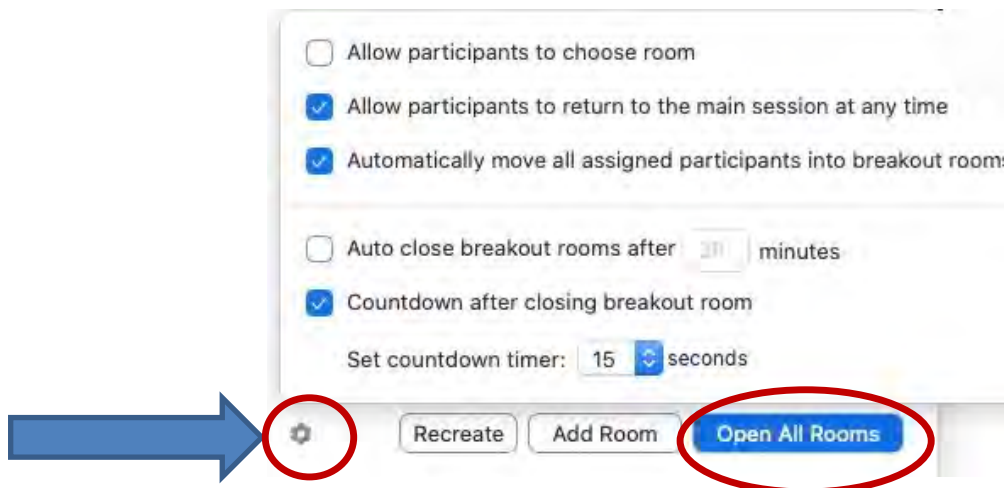
# Setting up Breakouts, cont.

Use the gear in the lower left corner to choose various Breakout room options.

Allowing participants to choose their own room gives them control over selecting which breakout room to join. You can also decide if attendees can return to the main room, and whether or not assigned participants will be prompted to join a room or automatically moved.

If you select “auto close breakout rooms after .... minutes”, then attendees will see a countdown timer at the top of their screen throughout the activity. At the end of the prescribed time, Hosts and Co-Hosts will see a message asking if they want to continue or end the breakouts.

When it’s time to start the Breakouts, choose “Open All Rooms.”



# Managing Breakout Rooms

Once the breakouts have started, the Hosts and Co-Hosts can see who has joined each room by the green dot next to their name.

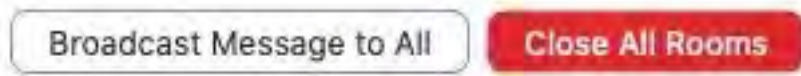
To communicate with attendees in the breakouts (such as to send instructions or timing reminders), choose “broadcast a message to all” and type in a note such as “*Please remember to select a spokesperson for your group.*” This message will appear on screen for all attendees in each breakout.

You can also broadcast a voice message to breakout rooms.



If a Host or Co-Host would like to join a breakout room in progress, simply click on the Join button. You can leave that breakout room and join other rooms as needed, simply by following the on-screen prompts.

When it’s time for the Breakout Rooms to end, click on the “Close All Rooms” button at the bottom of the breakout dialog box, and all attendees will return to the main room.



# Tips for Using Breakout Rooms

As the meeting facilitator, let participants know what to expect for the breakout activity. Be detailed about the instructions, the expected timing, and any other needed information.

You can share a document (such as activity instructions) to the breakout rooms in the same way you share any other document. Choose Share and select the box, "share to breakouts".

It's helpful to assign a room leader, tasking them to lead the group discussion, scribe notes, keep track of time, or other activities. You can simply verbally announce the team leaders' names before opening the breakout rooms.

Inside a breakout room, attendees will have access to the Zoom Control Bar, where they will be on webcam, can share screens, take notes on a shared whiteboard, use chat, and so on. In other words, they will have access to Zoom's meeting tools. If they take notes on a shared whiteboard, it's important for them to SAVE (on the Annotation toolbar) before returning to the main meeting, to ensure the notes are stored and available for sharing.

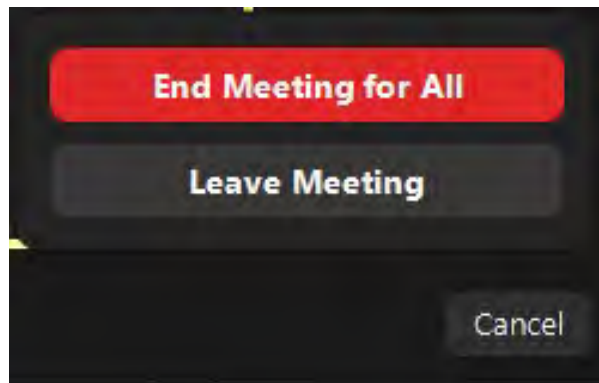
If the breakout activity has a set amount of time, use the timer settings prior to opening the rooms. You'll be prompted with a dialogue box at the end of the prescribed time:



# Ending a Zoom Meeting



When the meeting is over, choose the End button on the Control Bar. You will be prompted to either End Meeting for All, or to Leave Meeting. If you leave the meeting, you will be prompted to assign another Host so that the meeting will continue. If you End the meeting, it will conclude.



# More Resources

Need technical information about using Zoom? Visit the Zoom blog and/or Zoom help pages found here:

<https://support.zoom.us/hc/en-us>

Need to upskill your trainers, presenters or facilitators in using Zoom or other platforms? Consider Cindy's workshops, including:

- [Creating Interactive Online Training Using Zoom](#)
- [Virtual Presentation Skills for Modern Leaders](#)
- [Designing Interactive Online Learning](#)

Plus many more! These workshops are available on a private basis for organizations. Contact me ([cindy@cindyhuggett.com](mailto:cindy@cindyhuggett.com)) for more information.

## About Cindy Huggett, CPTD

Cindy helps organizations and training professionals move to the virtual classroom. She teaches facilitators how to engage remote audiences, and designers how to create interactive online events. She's written six books on virtual training including [The Facilitator's Guide to Immersive, Blended, and Hybrid Learning](#), [Designing Virtual Learning for Application and Impact](#), and [Virtual Training Tools and Templates: An Action Guide for Live Online Learning](#). Find out more and contact Cindy on her website: [www.cindyhuggett.com](http://www.cindyhuggett.com)

