

50 Top Tips for Running Effective Zoom Meetings

“The quality of everything we do depends on the quality of the thinking we do first.”

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Introduction

Many people are discovering online meetings for the first time, and for some it's a smooth transition – for others, less so.

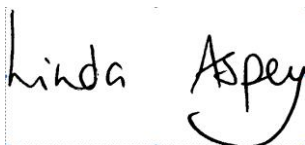
We have been working online for many years, bringing remote teams and groups together, planning and delivering international events, and coaching our UK based clients whilst they are working overseas. We particularly love the flexibility, inclusivity and diversity that online gatherings can bring.

All our meetings and events – co-located or online - are based on a foundation of Nancy Kline's 10 Components of a Thinking Environment® – either explicitly or implicitly - which are invaluable for agreeing and working within a set of agreed principles. See an article about how it works with teams, published in Coaching at Work Magazine here: [Think Well, Think Together](#)

The best meetings are ones that people look forward to coming to, when they're there they give their best to, and at the end, are glad they came. Online meetings are no different. It sounds simple yet small things can get in the way of meetings being productive, enjoyable and fully connecting experiences for all.

Because unless they are deliberately spontaneous, most successful meetings rely on three key elements: **good preparation**, **good participation**, and **achieving the desired outcomes**. Whilst these all overlap, in our experience, if you put thought and effort into the first element – preparation – the rest will more easily follow.

So over the next few pages, you'll find our experiences condensed into 50 tips that we hope will help you to become easeful, skilled, polished and professional when running your own online meetings.

A handwritten signature in black ink that reads 'Linda Aspey' with a smiley face drawn at the end.

Linda Aspey
Managing Director

NB The term “meetings” has been used throughout this guide which is intended to include trainings and workshops. Our preferred platform is Zoom, although these tips could well apply to others. Zoom Webinars are not covered although some of these tips will be relevant.

50 Top Tips for Running Effective Zoom Meetings

Good Preparation

1. Get a free or paid Zoom account

Free Zoom accounts allow you to meet for unlimited periods 1:1, and for 40 minutes for groups from 3 to 100 people. If you go on longer you can close and sign into a new meeting. If you have a paid Zoom account you can have meetings for as long as 24 hours (great if you are doing a Hackathon!), plus you can record the meeting. See more info on plan type and [pricing here](#).

2. Prepare new Zoom users

There is a [simple guide](#) here and [a more detailed one from Zoom here](#). Ask people to test they that can open the software before the call and to arrive 5-10 minutes before the advertised start in case of technical issues. In fact, some people like to ask people to arrive to all meetings 5-10 minutes early. People joining by Smartphone or other handheld device usually have a similar experience as those joining by PC or Mac, although it varies from device to device, particularly with what they can see and do on their screens.

3. Encourage everyone to get their workspace set up well

Online meetings work better when people can hear and see each other, with a good internet connection, a well-arranged space, with no bright light (natural or electric) behind or above them, and with their device or computer positioned so they can look into the camera or at the screen without looking right down (generally not a good look!) or right up.

4. Set the features you want participants to be able to access

You can adjust settings in many ways, for example, so that participants can use the whiteboard in the large meeting and in Breakouts or share their own screens. See more later in this guide about “muting”, whiteboard sharing and more. There are many user settings that you can [read about here](#).

5. Enlist someone to help you as an administrator

There’s a lot to do when hosting a meeting – admitting people from the waiting room (including latecomers and those who drop out when their connection drops), handling slides, Breakout rooms etc. It’s invaluable to have an admin to take care of those for you – and to do a rehearsal together.

6. Make it as secure as you can

We understand that it is more secure to generate a new meeting ID for each meeting than it is to use a Personal ID. Zoom now defaults to require meeting passwords and having a “waiting room” – you will get an alert on your screen to tell you they are waiting – you can let them in one by one or wait until there are several and select “admit all”. Here’s a [useful article from Zoom](#) on security settings. Recently there has been a spate of people (innocently) getting into meetings to which they weren’t invited, as well as a huge rise in trolling. Here’s [an article to help you](#) to reduce the risk of intruders.

50 Top Tips for Running Effective Zoom Meetings

7. Decide who it's for

Is this meeting for a group of people you already know in some way, or for a segment of the population, or the wider public? This early decision will affect a lot of your planning.

8. Be clear about the purpose, desired outcomes, the potential needs and the benefits to all

- a) What they want / need for themselves
- b) What you want / need for them
- c) What you want / need for you

You may not always know what they want or need but you can make a best guess and build your content around yours and their needs and wants. It's important not to bombard people with activities and visuals – sometimes less is more, and engagement is key.

9. Decide the type of meeting – a workshop, a one-way presentation, a conference?

Zoom meetings can have up to 100 people, webinars can have many hundreds. Is it to include group coaching, Breakouts, other presenters, guest panellists? This might be your chance to rethink what you would normally do – especially if you are reducing or even eliminating some of your usual costs or meeting venue constraints.

10. Factor in people's different time zones or personal circumstances

If you need to think about people in different time zones, remember that in the UK we currently have British Summer Time (BST) which is an hour ahead of GMT. At the time of writing this (April 2020 during the Covid-19 crisis) the timing of meetings can impact on colleagues working from home (who are trying to fit in personal commitments too) so it may be something you might want to consider with them.

11. Factor in interpreters or hearing/ visual support helpers where relevant

Interpreters and support helpers will need to have their own Zoom invitation by email so they can log on and you can assign them to the people they will be working with, for example in Breakout groups. See more later in this guide on Breakout groups.

12. Make online meetings shorter than co-located ones

It's generally better for online meetings to be shorter than if you are meeting in person, unless you have plenty of long and short breaks for stretching legs, coffee and food – and sometimes, networking. More than 90 minutes without a break is too long for most people.

50 Top Tips for Running Effective Zoom Meetings

13. Tell participants if they need to do or prepare anything before the meeting

If they do, is it a requirement or optional? It's good to be clear if it's a requirement as the success of the meeting might depend on their pre-work.

14. Decide if you want to record it for future use or live stream it

If you plan to record it and involve people in the main discussion, it's fair to let them know before so they can opt out if they wish. You can just record the parts with you speaking though, for sharing afterwards. You can change where the Zoom recording stored from the Cloud (by default) to locally if you wish; however this will mean that there will be no backup of the call in Zoom. Have a test run at recording and storing it to be sure. For more on [live streaming see here](#). **Breakout groups are not recorded.**

15. Prepare your visuals

Online meetings benefit a lot from good visuals – they engage different learning styles and personal preferences, can tell powerful stories and convey big messages better than lots of words. Use simple slides, clearly laid out, with plenty of space and not too crammed with text (although you can use more text than you would do a conference presentation because people will be able to read the slides on their screens). You can get some great free professional level photos from sites like www.unsplash.com.

16. Build in some Polls

Polls are a great way to check levels of experience or familiarity with the topic, get input, gauge sentiment on a topic, find differences and commonalities, and so much more, and you can use several during a meeting to break things up and provoke discussion.

17. Prepare your Poll questions in advance – in the right order

To create a Poll (or several), set this up in advance. Choose your questions, your scoring / scaling range, and whether you want the Poll to be anonymous or show people's names. It's best to write your Polls up firstly in a document and decide the order you want you use them because once you have entered them into the Zoom polling software you can't change the order of questions during the meeting itself.

18. Think about what else you can share to view

You can also share videos, web pages, spreadsheets, word documents, pdfs, even pages of Kindle books (within reason, otherwise you may be infringing copyright). The key thing is to test, test and test before you share. And as mentioned before, not to bombard. Keep it simple where you can.

50 Top Tips for Running Effective Zoom Meetings

19. Have all your “shares” ready on your desktop

Have everything you plan to share open and lined up before the meeting starts so you don't have to hunt around in your computer or show people the whole of your filing system!

20. Close everything you're not planning to share

Before the meeting starts, close everything else that's open on your desktop – it's easy to click on the wrong thing when you share your screen and find you've shared your bank statement or shopping list. Or worse!

Good Participation

21. Send the agenda around before the meeting where possible

When we design meetings we involve some or all participants wherever possible – it engages them early. If it's a team meeting you can invite them to agree any key questions in advance so they've had time to think about them or contribute their own questions. If it's a public meeting then prior involvement in setting the agenda may not be as relevant – but it's still worth considering.

22. Create an inviting meeting title

Your title and meeting description need to be clear, succinct and very inviting; it can be disheartening when there are more presenters than participants! Some platforms have a limit to the number of letters / characters in the title, for example Facebook has a limit of 64 characters.

23. Get it out to the right people

If the meeting is for a known group then an email from you may be all that's needed to invite people, or if you are in the same organisation, your normal shared calendar. If it's not an organisational one, you could share it on Linked In, Facebook pages and groups, via Twitter, Instagram, Eventbrite, Meet Up (which you have to pay to use), your regular newsletter or CRM mailing list. Or one of many online event platforms.

24. Look after people who are joining by phone rather than internet

Those dialling in via a phone line (whether mobile or landline) won't be seen or be able to see others or the on-screen visuals. You can send them your slides in advance if you know they won't have visuals but if they're joining by phone because of last minute technical issues, there's not much you can do apart from be sure to include them in discussions and encourage others to do the same.

50 Top Tips for Running Effective Zoom Meetings

25. Protect the phone details of those joining by phone

Their telephone number will show rather than their name, which they cannot change. As host you can – just click the dots at the top right of their on-screen box and ask what they would like it changed to (e.g. their name, nickname or initials).

26. Have everyone on mute at the start

This will allow people to get settled - from then on you can let them manage their own mute function or keep control of it, as you wish.

27. Start the meeting with a “Check in” Round

People haven't “arrived” at a meeting until they have spoken. Start with a Round or two for the whole group – if the group is too large for that to be practical, you can ask for just one thing in one sentence and no more, for example, their name and where they are located right now. Or ask them to use the Chat Box. It's surprising how many meeting chairs and hosts don't apply this basic principle of engagement and courtesy – either co-located or online. All voices need to be invited otherwise some may contribute far more or far less than others for the rest of the meeting. Or if it's a big group do a Poll or set up Breakouts (see next page) into smaller groups so they can do Check-in Rounds there.

28. Outline the agenda, purpose, timings and what you want participants to do

People new to the technology will relax as soon as you say there is nothing technical they need to do! Being clear on the time, what breaks you will have, and what the purpose and desired outcomes are, are other key elements to the meeting's success. Outlining these at the beginning sets a purposeful tone.

29. Establish the group agreements early

What “ground rules” do you want? Making explicit how the group can work best together is critical to an effective meeting, particularly if it's the first one for a new group.

If time is tight you can put key points on a slide, check that people agree, and invite them to add anything. If you have more time, and the group is small, ask them what they would like to agree. Most vital are the behavioural ones around listening, not interrupting each other but in return for that, being succinct when they speak, sharing the time between the participants, being attentive when someone is speaking, and not multi-tasking. Equally, agree what you all expect around confidentiality – can people share materials or content after the event, can they take photos of slides or of the whole group on screen? Checking these out is vital.

And vitally, when do you want to take questions? As you go along or at set times?

If it's a regular group meeting you only need to do this in detail once – you can simply refer to it next time or pick out some key points.

50 Top Tips for Running Effective Zoom Meetings

30. Invite people to use “hand signals” and “reactions”

As mentioned, you can invite people to ask questions as you go along or at set times.

All questions can be useful so people can flag up when they have a question or don't understand something, but the human brain can see any kind of interruption as a threat – including hand signals – which can take the person speaking (and everyone else's attention) off track. So it's a good idea to agree when you *don't* want people to ask questions.

It's important though not to silence hand signals too much – if someone doesn't understand and can't ask about what's been said, they won't find it easy to move forward with the rest. This is particularly important for people on the Autism Spectrum (that's 1 in 100 people). You can ask at the start of the meeting if anyone needs you to pause for regular questions and this will reassure them that all needs will be met.

“Reactions” are two cartoon hand icons that people can use to clap or give a “thumbs up” to what's being said if you don't have time or need for verbal input.

31. Ensure you also do what you have asked the group to agree to do!

If you don't, it won't set a productive tone. If you anticipate that you are going to need to deviate in some way, for example, you may need to stop someone from talking when you manage the time, say so. If you have agreed with the group that they don't take screenshot photos and then you take one to promote the next event, that may not go to go down well.

32. Accept that there may be interruptions

In an ideal world online meetings would be free from interruptions – but right now during Covid-19, people are working online full time from home, and children, animals and deliveries can all too easily interrupt, despite best efforts. So you might need to be more relaxed than usual and set an atmosphere of acceptance for the unexpected. This is new to a lot of people and they may forget to unmute and mute themselves; so do be tolerant or as host, retain control of muting!

33. Ask participants to stop their video if they leave their screen

If they absolutely must leave their desk, or if they have interruptions they can't avoid, ask them to “stop video” temporarily. It can be very distracting for other participants when someone is wandering around whilst everyone else is trying to pay attention.

34. Invite participants to use the Chat box

People can ask also questions in the Chat box, as well as share links to files and web pages, and message everyone or just you or another person. You can save Chat Box content on exiting the call to a specific place on your PC if you wish, otherwise it will automatically save to the Cloud.

50 Top Tips for Running Effective Zoom Meetings

35. Be careful what you share in the Chat Box and with whom

If you want to send a private message via Chat Box remember to choose just that person or it will share to everyone!

36. Check the Chat box regularly

As the host or presenter, when you are in full flow, it's easy to miss comments in the Chat box. You can either train yourself to check regularly, or if you have an administrator, assign this as one of their roles.

37. Get savvy with slides

Getting your slides to show in the right way takes just a little bit of practise. To show the full slide view you need to click on "Slideshow" and choose "Start from beginning" or from "Current slide". However whilst you do this, as the host, you won't be able to see the controls or the Chat Box so you can make the slide view on your own screen smaller. See [here for the various options](#) for sharing single or dual screens (where you have a 2nd screen).

38. Use the Whiteboard function

You can use the Whiteboard in a similar way to a "real" one although you need to have a mouse on your device for the best user experience. Check your Whiteboard settings in advance- if you allow participants to access it you can find unexpected lines and annotations appearing when they are just moving their mouse after inadvertently clicking on the Whiteboard.

39. Have lots of "Breakouts"

These are a great way to involve people – it breaks the monotony of one person's voice, gives more potential for an exchange of ideas, and critically, gets people thinking for themselves. You can set questions, assign tasks to groups and more. See here for more details on [setting up Breakouts](#).

40. Work out how many people you want in each Breakout group - and who

If your groups are too big (say 10 people) then the quieter people may not speak, just as they may not in a face to face meeting. If the groups are too small you potentially limit the diversity of views. On the other hand, if you want to encourage particularly deep thinking and listening, assigning people into groups of 2 (aka Pairs) will do the job well. And if you have too many groups and plan to get feedback from each one of them, this can take a long time. So it's finding a balance. You may not know the whole group size until the meeting starts so often you just have to go with the flow.

50 Top Tips for Running Effective Zoom Meetings

41. Put questions for Breakouts into the Chat Box (or send them round in advance)

Once people go into Breakouts they won't be able to see your slides – you can however cut and paste the questions into the Chat Box. Have these typed up and in an open Word or similar document on your desktop ready to cut and paste when they go into Breakouts; it's tricky to copy from the slide and paste into the Chat Box – the text will be too large and it generally won't work well.

42. Build in social Breakouts

Breakouts don't only have to be for discussion groups or to get refreshments or visit the loo - you can use short Breakouts for casual chats too, just like would have in the office around the coffee machine.

43. Be generous with Breakout time

Less than 15 minutes is generally too little for anything more than a hello. The amount of Breakout time needed versus whole group discussion will of course depend on the group purpose – it's worth remembering that people come to a meeting to connect so do build in time for genuine interaction. You can set the Breakout duration in advance under settings and set a message to go automatically to all that the Breakout rooms will close in the next X minutes or seconds. You can also send manual reminders or messages whilst the Breakouts are in progress – choose "Broadcast a message to all", type in your chosen (short) text, and press enter.

44. Consider pre-assigning people into specific Groups

If you wish you can pre-assign people into groups – for example, you might want those in existing teams to work on a task. If so, you can set this up before the meeting – go to Settings / Personal / Meetings / Meeting Options and scroll down until you get to "Pre-assign people to Breakout rooms". Select this and then you can create rooms and add people by their email address or import in bulk from a CSV file.

45. Show interesting videos

Videos are another great way to share interesting content that engages. Get the chosen video (s) URLs lined up in separate tabs on your browser in advance so when the time comes to show your video, select "screen share", select the video you want to share, and click on that. It will take you to the browser. At this point you will not be in full screen (otherwise you would not have been able to get to the controls). So now you can make the video full screen view and start it, and make sure you check the "share sound" and "optimise for video" tick box in the [share dialogue menu or box](#). Test it before the real meeting. Trying to show videos from links in slides, in my experience, is not very reliable, for some unknown reason.

50 Top Tips for Running Effective Zoom Meetings

46. Don't wander off when videos are showing

Be sure, if it's on You Tube, not to leave your desk whilst the video plays. If it freezes people will be left watching a frozen page, and if you're not there at the end to stop it, You Tube will automatically play the next video in its catalogue and that may be completely unrelated to the subject under discussion!

3: Achieving the Desired Outcomes

If you have done all the above, you will be well on the way to achieving the desired outcomes.

47. Summarise as you go

Ensure you, or the participants, summarise any decisions, next steps, actions, owners and timescales, either as you go along on each item, or if it's a training course, what people have learned and what they plan to do to use that learning.

48. Consider loose ends

If you haven't covered everything that you planned to cover, agree when, how and by whom outstanding issues will get addressed. You can also signpost further resources.

49. Finish with a closing word in a Round or Chat Box

As at the start, you can do this either in the large group or smaller groups if the whole group is too big, or you can ask people to type into the Chat Box a word to say what their key takeaway is, how they feel, what they have most appreciated about the session, or to summarise what they have achieved together today.

50. Write down your key learnings

Each time you host a Zoom meeting you'll probably learn something new. Write down your learnings so you can incorporate them into the next one.

Good luck!

If you would like to explore how the Thinking Environment can help to make your online meetings more effective for your team, group or whole organisation, contact Linda for an exploratory discussion.