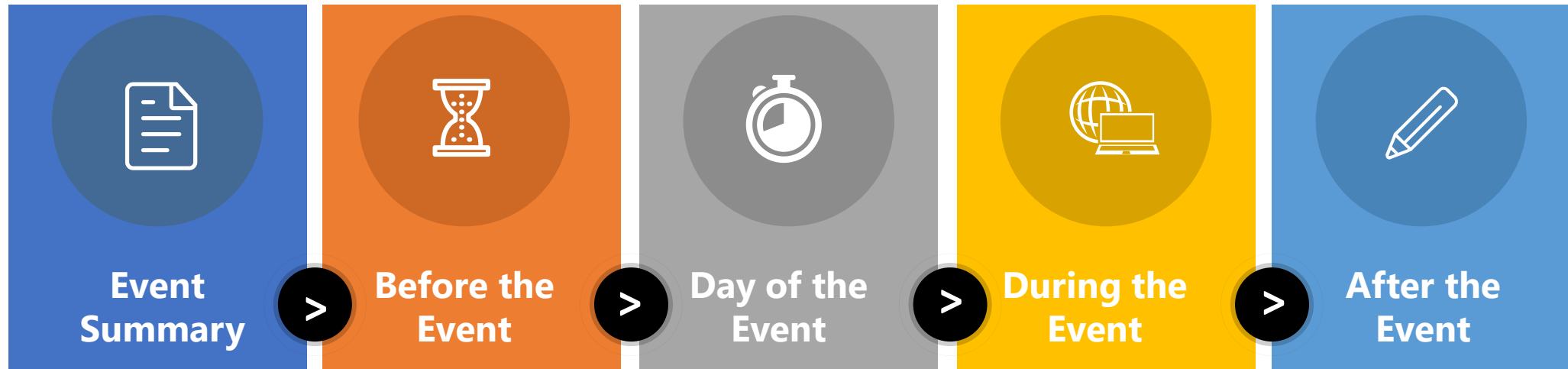




CHECKLIST

2020 Exchange | Zoom Meeting





Key Roles

Who: Roles & Responsibilities

1. **Facilitator/Presenter** – Confirms the date and time. Helps create event session description, slides and any co-facilitators.
2. **Producer** – Schedules pre-event meeting with session facilitators, manages Zoom during the session, and after the event shares feedback and suggestions for creating Moment Video Vignettes.
3. **ELE Admin** – Manages Zoom Meeting ID set-up, [Upcoming Event Calendar](#), Registration List. Post-event multimedia will be posted on [Insights](#).



Pre-Session Decisions

Who: ELE Producers

1. Determine roles
2. Share Team Contact Info (Phone / Text / Email)
3. Determine team norms
4. Create Producer notes
5. Confirm with Client that all participants will be joining using own accounts versus logging in on one account in a conference room. This impacts Break Out Rooms and Polling.

EVENT SUMMARY



Event Title: **Virtual Learning Leadership Summit 2020**

Description: **19th Annual ELE Chicago Exchange 2020**

Date(s): **Oct 7, 2020 - Oct 8, 2020**

Start Time (Keynotes): **1 pm Oct 7th & 9 am Oct 8th** (Central Time)

(All Presenters, Producers, Moderators, and Co-hosts should log in 15 minutes prior to event time)

Will you require registration prior to joining the event?

Presenter(s): See **Working Agenda**

Producers: **Jesse James, Wendi Barlow, Brian Watkins**

of Expected Participants: **200**

Platform: **Zoom**

Max Allowed by Platform: **500**

Meeting URLs (*click hyperlink for details*):

1. **Zoom Main** (810 8870 2202)–Wendi & Jesse
2. **Zoom 1** (810 8870 2202) – Wendi Barlow
3. **Zoom 2** (703 484 0476) – Jesse James
4. **Zoom 3** (847 786 1002) – Brian Watkins

Dial-in number: **+1.312.626.6799** (For all sessions)

Features you plan to use during the meeting (*See resources*):

- Screen sharing**
 - Chat**
 - Polling (*Producers call; should pre-load Polls*)
 - Breakout Rooms (*not recommended*)
 - Share Video/Multimedia (*Producer's call*)
- Yes - Recording** (*if auto recording, do not turn off*)

View this year's **Speakers' FAQs**, **Participants' FAQs**
Participant Registration List, **Agenda with Zoom URLs**,

BEFORE THE EVENT

Who: **ELE Event Admin**

Review Your Meeting Settings

- Have you prepared the settings you prefer in the system? Waiting room? Mute upon entry? Video on? *Tip: Use the waiting room and mute upon entry for groups larger than 20.*
- Do you plan to record? Have you preset recording? Have you informed participants? If you don't have it preset, how will you remind yourself to turn on the recording?
- Ensure the link to the virtual meeting is correct in all materials you send including email and calendar invites.
- Ensure the time and time zone are correct in the invites and that they matches the time in your online meeting account.
- Check your web conferencing platform to ensure you have enough capacity for the expected number of participants. Some systems stop at 100 or 10. **Check your account.**
- Always provide an audio dial-in option. Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. People need the ability to participate via audio but make it clear that video-first is the new norm.
- Identify a co-host who can step in if something goes wrong with your internet settings. Look for a setting where you can add this person as a co-host in the system.
- Use the meeting platform's app for your operating system instead of running the meeting in your browser version of the meeting platform to eliminate one extra application layer that could slow things down.
- For large meetings, have a co-host who can monitor and read the chat box, solve technical problems, or launch a PowerPoint if the primary speaker is struggling with technology. Having one person in charge of speaking and one in charge of technical issues helps keep the session from stopping if technical issues arise.

BEFORE THE EVENT

Who: **ELE Producers**

Schedule a Rehearsal (*minimum one week prior to the event*)

- Invite all presenters, producers, co-hosts, and moderators to the event. Ask someone to join as an attendee to test the experience.
- Conduct a test run with all presenters and co-hosts. Ensure everyone can log into the virtual platform.
- Connect in the same way, from the same location and device as you will for the live event.
- Test everyone's audio.
- Share video in the rehearsal to ensure presenters can be seen clearly. Adjust lighting if needed and remove any unnecessary items from their background that may be distracting.
- Have all presenters test content sharing and any multi-media sharing from the same device they will use in the live event, in presentation mode.
- Run through the content for timing, transitions and to test the interactive features you'll use. Practicing each activity will help you become comfortable with the platform. It will also help in the event you will need to teach participants how to use the platform if they have difficulty.
- Create, test and save polls for use during the live event.
- If you are using dual monitors or switching between camera-view and a full-screen presentation, practice that hand-off. You will likely have to exit full-screen mode in your presentation to access the teleconferencing interface. (*See resource section*)

DAY OF THE EVENT



Who: ELE Producers

- Reboot your computer the morning of or before logging in and presenting. If there are any updates that need to finish, etc., you won't be caught with prompts in the middle of your presentation.
- Turn off or disable all email notifications, calendar alerts, and instant messaging before your meeting begins.
- Connect your computer by Ethernet cable if possible so you eliminate any Wi-Fi issues.
- If you are using Wi-Fi, try to get closer to the router or access point so you get the strongest signal possible.
- Plug your laptop in instead of running on battery power as the processor and other functions are slowed in order to preserve battery when not plugged in.
- Close all apps and browser windows that are not needed in the meeting so the maximum resources are available for the meeting platform and the visuals you are showing.
- Position your webcam at eye-level (a stack of textbooks works well as a “booster seat”). Position your light source directly in front of you to illuminate your face. Clear any clutter behind you.
- Check your microphone and your volume. Do a test call with someone in a different space to check for any audio issues.
- Do a quick run-through to check slides and transitions.
- Plan to record the meeting, so if an individual has technical difficulties you can let them know you will send the recording rather than attempting to fix the issue and delaying the meeting for other participants.
- Have a back-up of your slides – both a hard copy and printed copy. This will give you peace of mind if you have any trouble with your internet connection. Printed copy is most fool proof – in case your computer shuts down or you lose internet connection This way you still have a visual of your slides but can have another colleague or your producer advance the slides for you as a back-up.
- Have your presentation ready to email in case some people can't see the screen and join only by phone.
- Preload any polls you plan to use during the session.
- Consider including an opening slide that shares instructions or expectations with participants.

DURING THE EVENT

Who: **ELE Producers**

- Post the dial-in number in chat in case someone is having difficulty with their VoIP and need to dial-in.
- All presenters, producers, co-hosts and moderators should join 15-30 minutes early to allow the host to assign roles as needed, re-test audio and visual and do a quick run through of the presentation.
- If you haven't yet done so, raise up your computer or camera so that it's at eye level. Look into the camera when speaking.
- Open the room at least 15 minutes in advance of your start time. As participants enter, engage in small talk to build relationships. A few minutes of friendly interaction before diving into a meeting can really build the necessary rapport—and keep participants engaged when the conversation jumps to business talk.
- Welcome attendees and allow a few minutes for people to join. Announce that the call will be starting in 3,2,1 minutes.
- Ensure the meeting is recording. If not, start your recording.
- If your presentation has slides with questions, enter the questions in chat as well. This is useful when posting the chat dialogue after the event.
- Have participants state their name when they speak.
- Set expectations for attendees like muting etiquette, opportunities they will have to interact and ask questions – if any.
- Tell your audience if or where you'll be sharing your content and recording after the event.

AFTER THE EVENT



Who: **ELE Event Admin**

- If possible, plan to stay in the virtual event after the scheduled time has concluded to answer any additional questions, save chat panels and Q&A for post-event follow-up.
- Post recording links, referenced or shared content from the event, poll results, copy of chat or next steps in the space or agreed location before the event.

RESOURCES

Kassy LaBorie Consulting Virtual Platform Checklists (PDF)

- [Adobe Connect Platform Checklist](#)
- [WebEx Training Center Platform Checklist](#)
- [Zoom Platform Checklist](#)
- [GotoTraining Platform Checklist](#)

Cindy Huggett: [The Virtual Presenters Guide to Using Zooms Meeting Tools](#)

Think Outside the Slide: [Resources for Presenters in Microsoft Teams and Zoom Online Meetings](#)

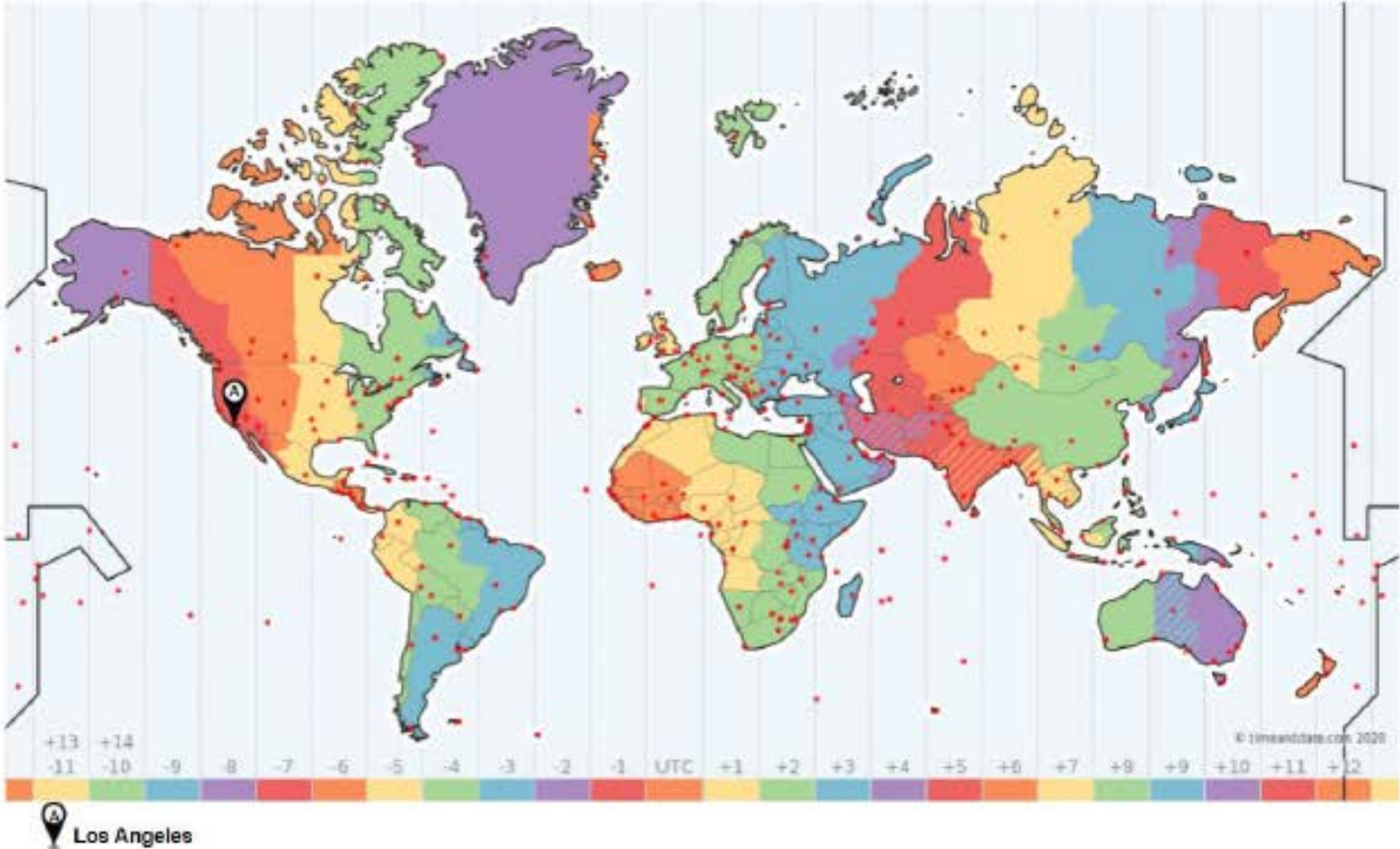
Setting up Dual Screens Video Tutorials

- [Using PowerPoint Presenter View with a Single Screen in Zoom](#)
- [Setting Up Dual Screens in Zoom](#)
- [PowerPoint Presenter View in Teams with 2 Screens \(Windows\)](#)

RESOURCES

www.thetimezoneconverter.com

Time Zone Map



Global Time
Zones



Zoom Producer Hi-Level Notes

See Speaker Notes

Created by
Wendi Barlow
Wendi Barlow Consulting, LLC
September 2020



Pre-Session Decisions

1. Determine roles
2. Share Team Contact Info (Phone / Text / Email)
3. Determine team norms
4. Assign a Producer (ELE Member Contributor/Influencer) am ELE Zoom Account



Pre-Session Zoom

1. Check Internet Connectivity / MBPS
2. Check Zoom Setup
3. Check / test Hardware
4. Schedule dry run / rehearsal
5. Confirm roles
6. Confirm timing

Live Session Zoom

1. Facilitation Team log in 1 hour prior to event
2. Close Other Applications (except files used, email)
3. Silence Phones, Other Applications
4. Create / test
 - a. Polls
 - b. BO Rooms
5. Open / test
 - a. URLs/Apps to share
 - b. PDF document(s) to share
6. Start Live Session promptly
 - a) Verbally welcome participants and welcome in Chat
 - b) Kick off official content 2-3 minutes after start time

Post-Session

1. Debrief Live Session Production
 - a. What went well?
 - b. What do we need to change?

2. Debrief Live Session Content
 - a. What went well?
 - b. What do we need to change?

3. Distribute
 - a. Chat file
 - b. White board file(s)
 - c. Recording(s)
 - d. Evaluation(s)



Break



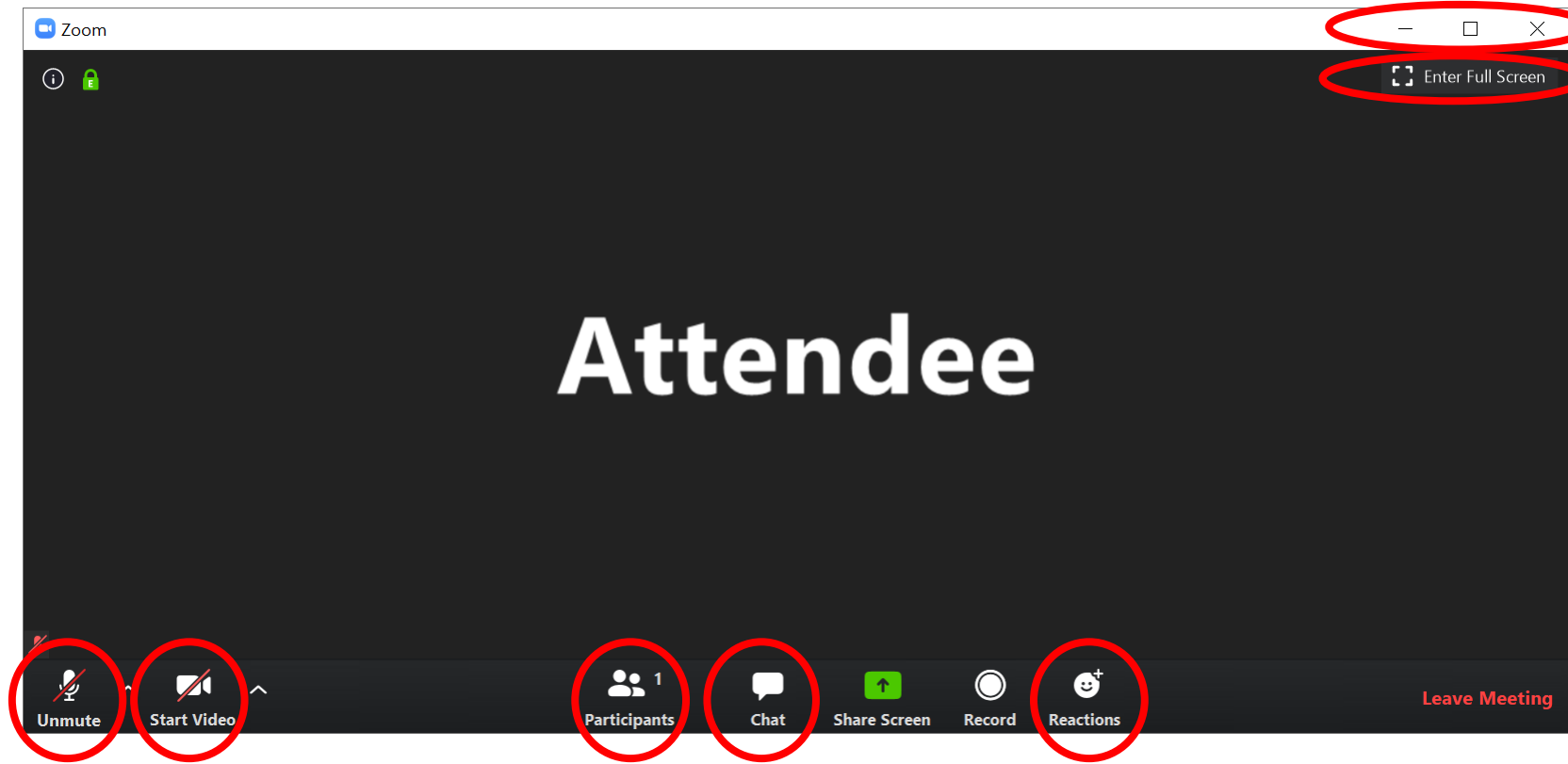
1:00



Insert ZOOM meeting info

If we get
kicked out
of
ZOOM

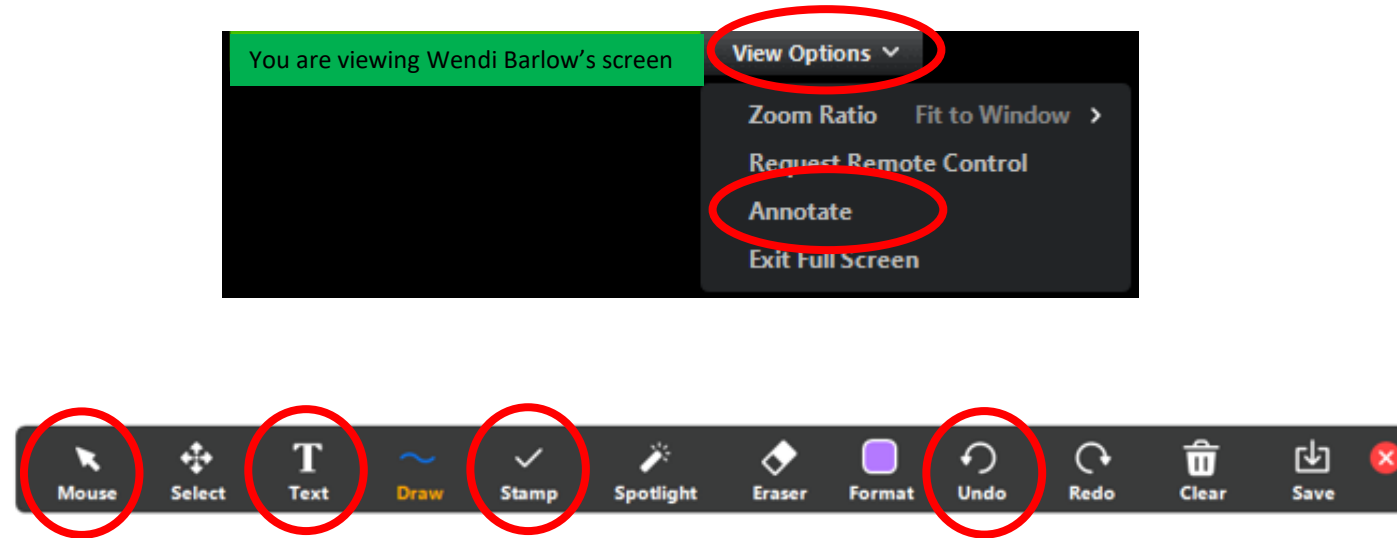
Tools We Will Use Today



Zoom Tool Bar

Bottom of Your Screen

Tools We Will Use Today



Zoom Annotate

ONLY in Screen Share Mode.



Attendance for CEU's July 27, 2020

Name	Start of Day	Lunch	End of Day

