

RUN YOUR BEST VIRTUAL CAMPAIGN: ZOOM BEST PRACTICES



EVENT CHECKLIST:

4-8 Weeks in advance

- ☐ Determine goals and audience for the event
- ☐ Determine how you want people to register for the event (Outlook invitation, Zoom, or others)
- ☐ Decide if you're using Zoom meetings or Zoom webinar
- ☐ Pick a topic, select your speakers, and set date and time for the event
- ☐ Obtain approvals to move ahead
- ☐ Consider your promo plan
- ☐ Delegate tasks between the webinar team (host, co-host, content, tech, etc.)

2-6 Weeks in advance

- ☐ Set up your registration page (through your chosen platform above)
 - o Title, date, and time
 - o Description and overview
 - o Speaker bio + headshots (if applicable)
 - o Schedule Zoom link for event
- ☐ Develop communications and registration emails (double check for typos)
 - o Ensure content is approved
 - o Confirm "from" name and email address in the send field of email
 - o Subject (less than 10 words) and preview text (less than 8 words)
- ☐ Create image for Zoom meeting
 - o GIF, JPG, JPEG or 24-bit PNG, maximum dimensions: 1280px by 1280px
- ☐ Brief your speakers and compile any information they need to know or you need to share
- ☐ Create a banner for your invitation (see the [campaign toolkit](#) for ready to use banners)
- ☐ Create or select a Zoom [virtual background](#) (optional)
- ☐ Check to make sure all the links work properly across all pages and assets

2-3 Weeks in advance

- ☐ Outline presentation and create first draft of slide deck
- ☐ Create poll questions for webinar and prepare a few questions to ask during the Q&A if the audience doesn't submit anything
- ☐ Promote the event across your organization

1-2 Weeks in advance

- ☐ Book dry run for hosts and speakers
- ☐ Test audio / video and slides
- ☐ Create posts to share on social media during your event (optional)
- ☐ Send out event emails and reminders

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During the virtual event

- ☐ Make sure the session is recording; it's usually automatic, but double check
- ☐ Have the host or moderator give introduction and remind them of hashtag (if applicable)
- ☐ Let attendees know about Q&A and polls (and you're recording)
- ☐ Have fun!
- ☐ Monitor chat boxes for questions
- ☐ Conclude webinar and let them know what will happen after (next session, where to find the recording, etc.)
- ☐ Thank attendees
- ☐ Share call to action for people following the event (donate, sign up for next event, etc.)

Following virtual event

- ☐ Upload the recording online (YouTube, website, etc.)
- ☐ Send follow up email to attendees with a link to the recording/where they can find more info
- ☐ Send a follow up email to registrants who didn't attend with link to the recording/where they can find more info

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GETTING STARTED

Decide if you are going to use Eventbrite as a registration system, Outlook, Zoom, or another tool.

Eventbrite is generally used if you're trying to get more of a public event or new attendees and it's used in conjunction with Zoom which uses the technology to run the actual meeting.

Zoom also provides the option to contact and invite people.

For your internal campaign, using your email or meeting booking system, such as Outlook, can also be a good way to get your invite into everyone's calendars. The Zoom links can be added directly into the meeting invite.

If using both Eventbrite and Zoom, pick one of them to manage the communications, and to use to send all the emails to registrants and disable the other one. This ensures there is no confusion or duplicate emails to attendees.

PICK YOUR SOLUTION: ZOOM MEETINGS VS. WEBINARS

When you're planning an online event, think about what you want your user experience to look like and ask yourself this question: What level of interaction do I expect from my attendees? The Zoom Meeting and Zoom Webinar platforms offer similar features and functionality but have some key differences (*please note that the host will need an account upgrade to be able to use webinars):

- Meetings are designed to be a collaborative event with all participants being able to screen share, turn on their video and audio, and see who else is in attendance.
- Webinars are designed so that the host and any designated panelists can share their video, audio, and screen. Webinars allow view-only attendees. They have the ability to interact via Q&A, chat, and answering polling questions. The host can also unmute the attendees.

If you expect attendees to mostly just listen, you're on the fast track to a [Zoom Video Webinar](#). When you need more back and forth between the audience and the host, a [Zoom Meeting](#) might be the better option.

For the most part, a Zoom webinar will be the preferred solution for many digital events because it provides a simpler platform to manage large audiences.

If using Zoom Webinar, check your account settings to ensure you have access.

HOSTING A ZOOM MEETING

Zoom Meetings are great for hosting interactive sessions where you'll want to have lots of audience participation or break your session into smaller groups. Zoom's [Breakout Rooms](#) feature allows you to easily assign participants to virtual side sessions and bring them back to the main meeting. If you are hosting a secure internal event, we suggest using the [Waiting Rooms](#) feature. You can send all participants to the waiting room when they join your meeting or only guests (participants who are not on your Zoom account).

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You can then admit attendees one by one or all at once. While Zoom meetings also offer tools to manage participant interaction, they are more impactful when you're looking to have broader participation.

ZOOM MEETING FEATURES

Polls

Polls are pre-populated in advance of the session. Then the host or co-host has the option to share the poll with attendees during the webinar. Attendees have the choice to answer the polls using their name or anonymously.

HOSTING A ZOOM WEBINAR

Think of webinars like a lecture hall or auditorium. Webinars are ideal for large audiences and events that are open to the public. Typically, webinar attendees do not interact with one another. Zoom provides options for you to get more social with your attendees, though your average webinar has one or a few people speaking to an audience.

You can also quickly promote an attendee to a panelist so they can interact live. Other features like hand raising, Q&A, and polling enable additional engagement between the speakers and audience.

Here are some other benefits of using Zoom webinars:

- [Customize the webinar registration page](#) to better support your event needs.
- Turn on [webinar registration source tracking](#) and discover what promotions are most effective so you can optimize your efforts.

Webinars need special account permissions, so ensure you have the right account early in your planning.

ZOOM WEBINAR REGISTRATION OPTIONS

You can require attendees to register for the event if you wish and request specific information such as: first name, last name, email address, title, department, etc.

ZOOM WEBINAR EMAIL OPTIONS

There are several email options that you can take advantage of:

- Invitation email to panelists
- Confirmation email sent to registrants
- Reminder email to attendees and panelists
- Follow up email to attendees
- Follow up email to absentees

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Zoom comes with standard email content, but you can also add any additional information you wish.

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Q&A

Zoom Webinar also allows people to ask questions anonymously and you can edit whether or not attendees can comment on questions.

Live streaming

After launching the webinar, click "More," and choose the service on which to live stream your webinar. (Facebook Live, YouTube, Workplace)

ZOOM WEBINAR BRANDING

Zoom branding options for meetings and webinars include adding a banner (displayed at the top of your invitation) and adding a logo (displayed on the right side of the webinar topic on your invitation page, registration page, and in the email invitation to the webinar).

ZOOM WEBINAR APPS & INTEGRATIONS

You can sync your account with tools like SurveyMonkey to survey your attendees. You can enter the survey URL into the field and Zoom will open a survey page in the attendees' browsers after they leave the webinar. New integrations must be approved by your Zoom administrator before adding to your account.

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HOSTING TIPS FOR WEBINARS

The event host sets the tone for the event. Practice and preparation beforehand will ensure your audience has the very best experience. Here are a couple of pro tips to ensure you have a successful digital event:

- Hardwire your internet connection if possible. This will help you avoid any issues with an unstable Wi-Fi connection, which can affect your audio quality and the overall attendee experience.
- Test the audio before your webinar begins. This will ensure your speakers and mic are working properly before the live event begins. [Here's how to test your device audio.](#)
- Minimize background noise. Try to host your webinar in a quiet place. If you must be in a loud environment, using a headset with a mic often reduces background noise compared with your computer's built-in microphone. In fact, using a headset is a general best practice for higher-quality audio than other built-in options.
- Dress to impress. You'll be on video, so be sure to wear business attire or whatever is suitable for your event (if that's a Hawaiian shirt, wear one!). We recommend solid colors as opposed to garments with patterns. Be mindful of any accessories or jewelry if you are expressive with your hands as the noise and movement can be quite distracting.
- Expect the unexpected. This is real life and there could be interruptions from pets, children, and family: and that's ok. Think about how you want to respond before the situation happens.
- Set proper expectations. Create a clear webinar title and description for the content that will be delivered. Make sure you deliver on the content that was promised in the promotions leading up to the virtual event.
- Start on time. We recommend you start your event five minutes early to allow your attendees to join before the content kicks off. The host should let attendees know when the event will begin and if the content will be recorded and shared afterward.

For additional webinar best practices on designing content and creating impact, check out these [webinar hosting tips](#) from Let's Do Video founder David Maldow.

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ENGAGING YOUR AUDIENCE

One of the main benefits of an in-person event is the interaction. Online events also can offer an informative and interactive experience while you enjoy the comfort of your home or office.

It's important to put just as much effort into the online experience as you would for an in-person event. Here are a few tips to help you maximize engagement:

- Set the tone. Welcome attendees as they join the webinar or meeting. Start with an icebreaker question and ask attendees to send in their answers in the chat. "Where is everyone joining from today?" "What are you looking forward to hearing/learning about?" Call out some of the answers you hear and share your own response with the audience.
- Enable Q&A. Designate panelists or other hosts to help answer questions that come in during the event. We recommend you encourage attendees to ask questions throughout the session. This gives you a chance to collect questions as you go and decide whether to answer them live or wait until the end. There's nothing worse than dead air, so prepare a few questions in advance in case you need to fill the gap.
- Polling is key. Create three to four polling questions that can be set up before the event. This is a great opportunity to gauge what information your audience is interested in, their level of expertise, and their current understanding or opinions on the content you are sharing.
- Ask for feedback. With Zoom Video Webinars, you can include a post-event survey to collect feedback on the presenters, content, and audience satisfaction. All you need is the URL for your favorite survey tool. As attendees leave the webinar, the survey will automatically launch.
- Reactions. Participants can now [react during a meeting](#) by sending a thumbs up or clapping hands to communicate their excitement without interrupting the presentation.

BROADEN YOUR REACH WITH MEETINGS OR WEBINARS

Zoom webinars and meetings can be broadcast across social channels with [Facebook Live](#), [Facebook Workplace](#), and [YouTube Live](#), as well as a custom [livestream integration](#). This allows participants to join via Zoom or watch on social, so your content can reach a larger audience without any extra effort.

TRAINING

Here are [additional training videos](#) from Zoom to help you create your best virtual event.

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ADDITIONAL RESOURCES

Here are some additional resources to help you deliver a successful online event experience:

- [Your Top Five Online Event Questions: Answered!](#)
- [How to Create the Best All-Hands Meeting Experience With Zoom](#)
- [Technical Deep Dive: How We Live Streamed Zoomtopia Without a Hitch](#)
- [Get More From Zoom Video Webinars with New & Expanded Apps](#)

Still have questions? Watch this webinar on [Best Practices for Hosting Digital Events](#) and get your questions answered.