

# Zoom Basics:

## Tips and tools for hosting engaging sessions

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**SCHOOL OF MEDICINE  
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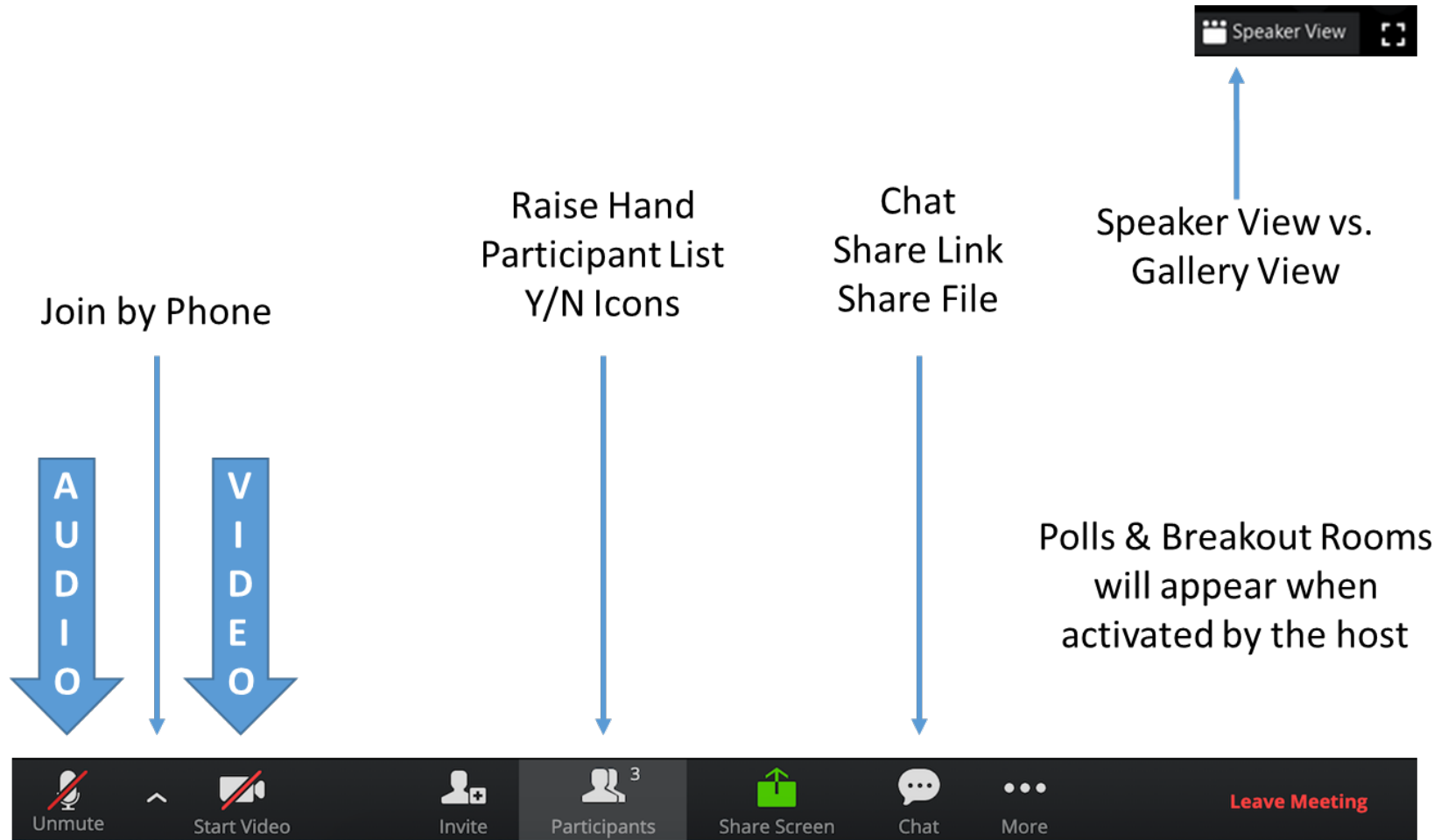
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Information Technology  
School of Nursing



**School of Nursing**  
UNIVERSITY OF WISCONSIN-MADISON



# Getting Started



# Introductory activity

In the chat box, please type

- Your first and last name
- Your unit/department
- A brief answer to the question:

**What is your favorite fall activity?**

# Trick or treat



# Agenda



- Planning and facilitating virtual sessions 20 min.
- Features in Zoom 35 min.
- 10 tips for engaging 20 min.
- Wrap-up and Q & A 15 min.

# Objectives

1. Describe key steps to prepare for successful Zoom sessions
2. Explore scheduling, security, and interactive features found in Zoom
3. Identify resources to expand facilitation skills in virtual settings

# Adapting to virtual space

## Before

- Practice in advance
- Identify your technical support
- Carefully match tasks with tools

## During

- Set clear expectations for participation
- Allow for more “start up” and discussion time

# Planning for virtual sessions: Participants

## Access

- Home computer, smartphone (hardware)
- Internet service, data plan (connectivity)

## Familiarity

- Offer tips sheet for entering/exiting meetings and using features
- Schedule practice sessions
- Discuss virtual meeting etiquette

# Community agreements

A consensus on what every person in our group needs from each other and commits to each other in order to feel safe, supported, open, productive, and trusting SO THAT we can do our best work, and achieve our common vision.

- Relational
- Operational

# Setting expectations for virtual sessions

- Remain on camera
- Use mute function; be available to join on-mic
- Avoid distractions
- Feel free to raise your hand
- Use the phrase, “I’m done” when you’re finished speaking
- Be mindful of your airtime
- Be patient—we’re all figuring this out together

- Content courtesy of CoCreative Labs and SparkDecks

# Creating an agenda

## T – O – P agendas

1. Determine **T**opics
2. Identify **O**utcomes for each topic
3. Consider how to accomplish each outcome in virtual space (**P**rocess)



S. Kaner et al. (2014). *Facilitator's Guide to Participatory Decision Making*. pp. 145 – 195.

# Other agenda considerations

## Topics and outcomes

- What will participants do before, during and between sessions?
- What is the best sequence of topics?
- How much time will each topic take?

## Processes

- How do you plan to start and end?
- Use multi-modal processes to support different learning styles

# Common process options

- Open discussion
- Brainstorming
  - Categorize
  - Prioritize
- Managed discussion
- Presentations/reports
- Pair and Share
- Breakout groups
- Role plays/skits
- Debate
- Individual writing

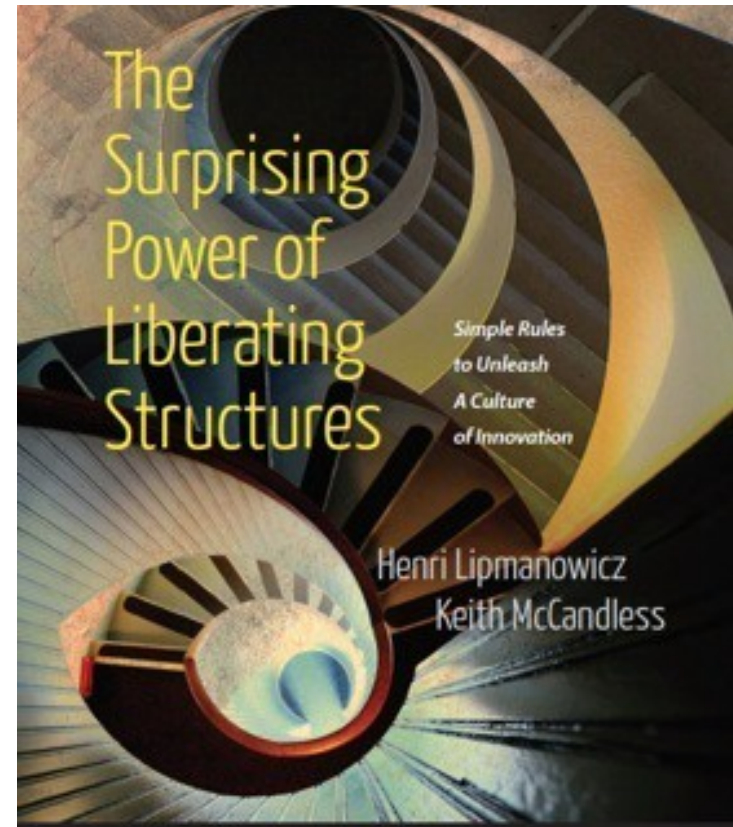
For more ideas:

S. Kaner et al. (2014). *Facilitator's Guide to Participatory Decision-Making*. pp. 113-143.

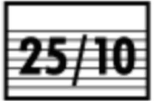
H. Lipmanowicz & K. McCandless (2013).  
*The Surprising Power of Liberating Structures*.  
<http://www.liberatingstructures.com/>

# Liberating Structures

- Alternative structures for facilitating conversations
- Designed to embrace distributed control and involve more people
- Benefits are Innovation, inclusion, participation, clarity, purpose, and fun!



# LIBERATING STRUCTURES

|                                                                                                               |                                                                                                     |                                                                                                                |                                                                                                             |                                                                                                                |                                                                                                                    |                                                                                                  |
|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| 1-2-4-All<br>                | TRIZ<br>           | Shift & share<br>             | Helping<br>heuristics<br> | Design<br>storyboards<br>   | Generative<br>relationships<br> | Ecocycle<br>  |
| Impromptu<br>networking<br> | 15% solutions<br> | 25 : 10<br>crowdsourcing<br> | Conversation<br>café<br> | Celebrity<br>interview<br> | Agree/certainty<br>matrix<br>  | Panarchy<br> |

# Zoom roles and responsibilities

## Essential

- Host/Leader
- Facilitator(s)
- Note taker

## Helpful

- Timekeeper
- Chat monitor
- Tech support



# Facilitation in a virtual space

## Best practices

- Center yourself, be prepared
- Start and end on time
- Use group agreements
- Hold space for open, inclusive conversations
- Engage participants
- Stick to the agenda
- Be agile

## More on facilitation

- Pay attention to individual participation
- Adjust your time schedule if progress is quicker or slower than expected
- Be prepared to stop and change course if need be (ELMO)
- Declare an end to each step as you move through the agenda
- Encourage participants to ask questions

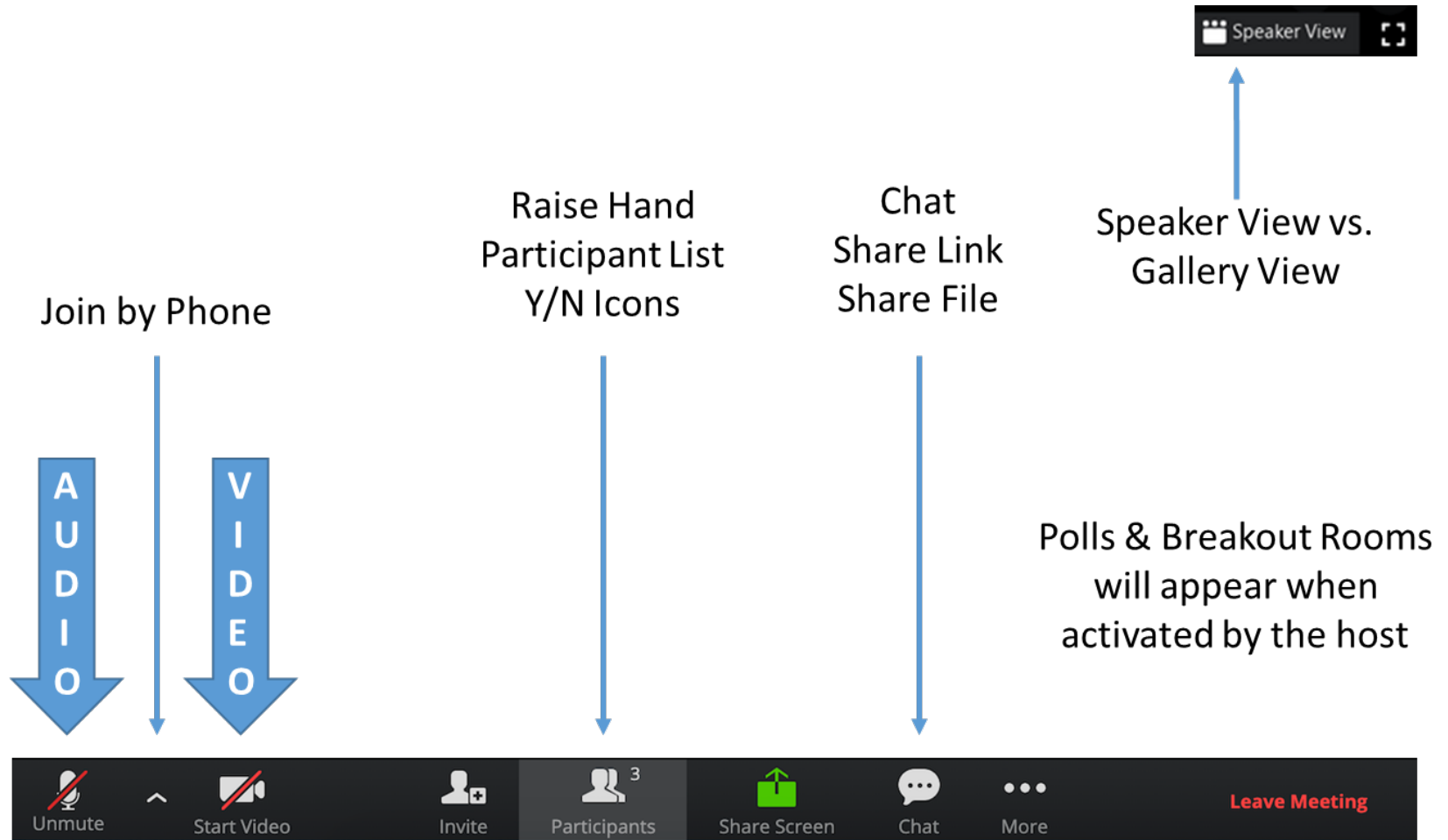
# Closure

- Summarize topics covered
- Review next steps
- Address parking lot items
- Ask for feedback on the session
  - What went well for you today (why?)
  - What didn't go so well (why?)
- Thank everyone for participating

# Online resources for virtual meetings

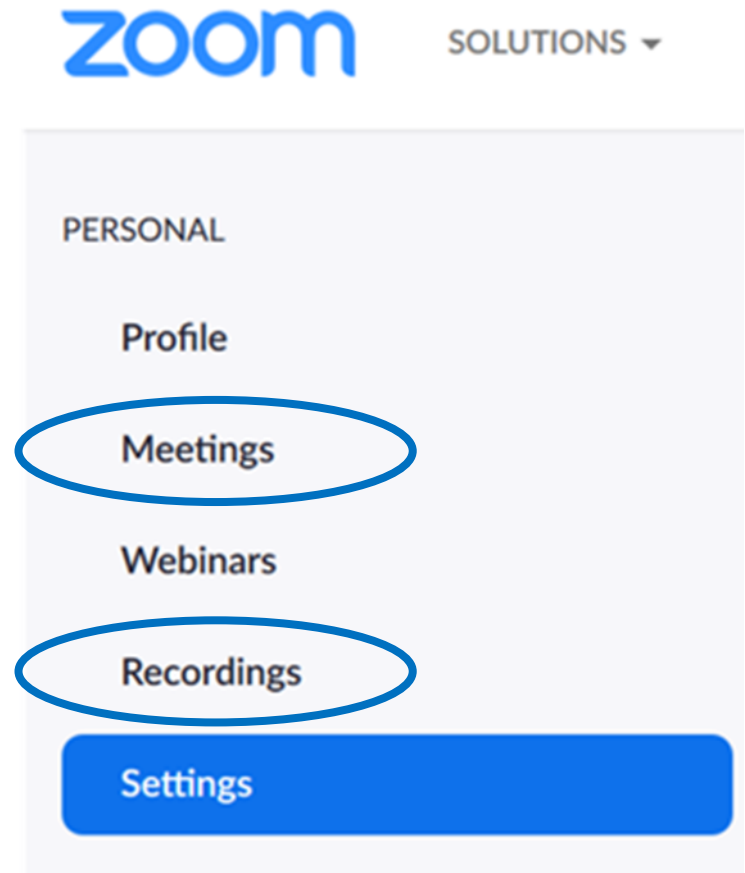
- [Online training tools](#), Training For Change
- [Toolkit for community builders](#), Communities for Impact
- [Online meeting resources toolkit](#), resource repository
- [Leading groups online](#), e-book
- [A guide to facilitating virtual meetings](#), SessionLab
- [Best practices for effective meetings](#), UW Office of Strategic Consulting
- [Materials on effective meetings](#), UW Office of Human Resources
- [Zoom meeting basics](#), Good Group Decisions
- [Zoom Help Center](#)
- [Zoom KnowledgeBase](#), University of Wisconsin

# Getting Started



# Zoom Administration

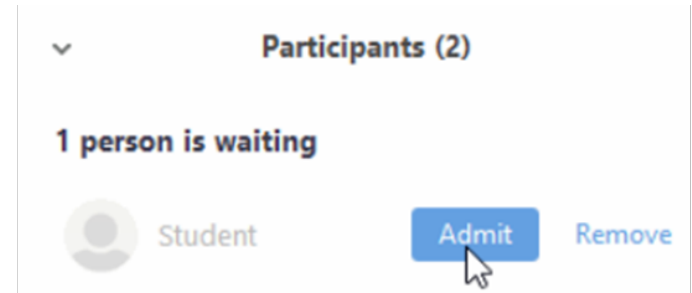
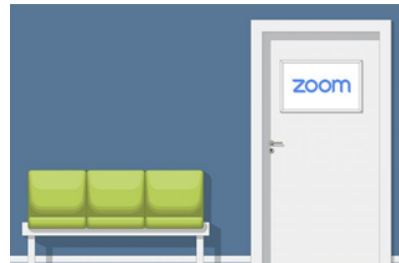
- Security Features
- Engagement Tools
- Scheduling a Meeting



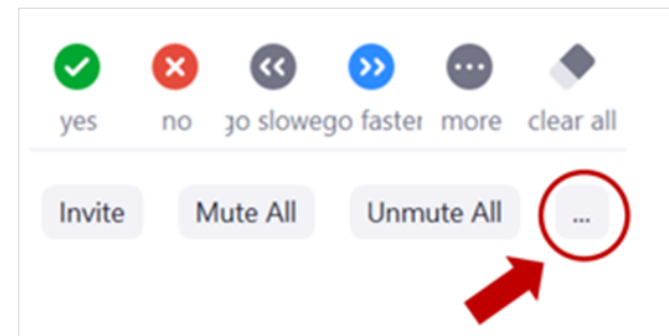
# Zoom Security Settings



- Waiting Room



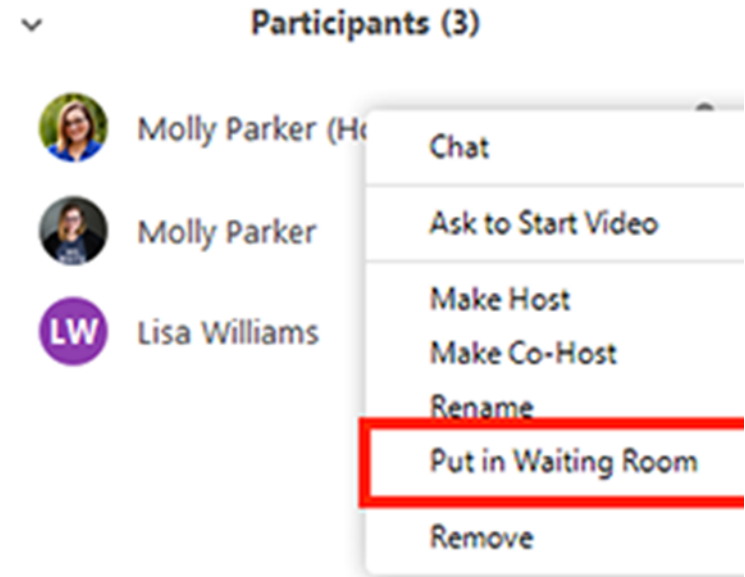
- Locking a Meeting



# Zoom Security Settings



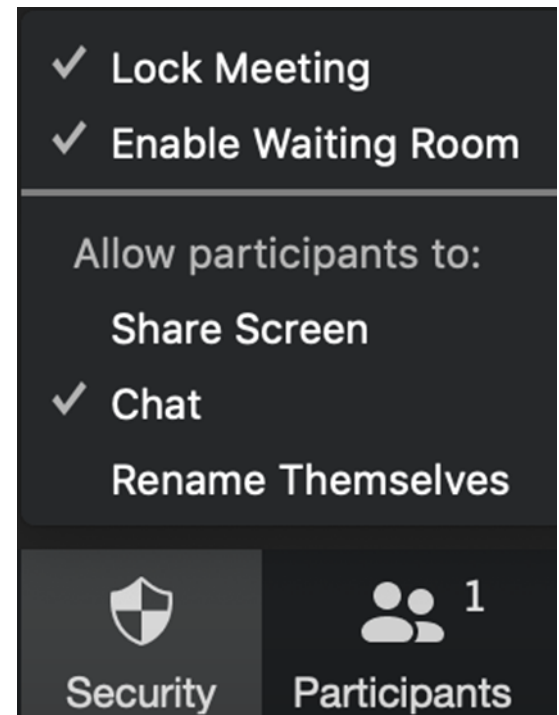
- Return to Waiting Room
- Remove Participant



# Zoom Security Settings

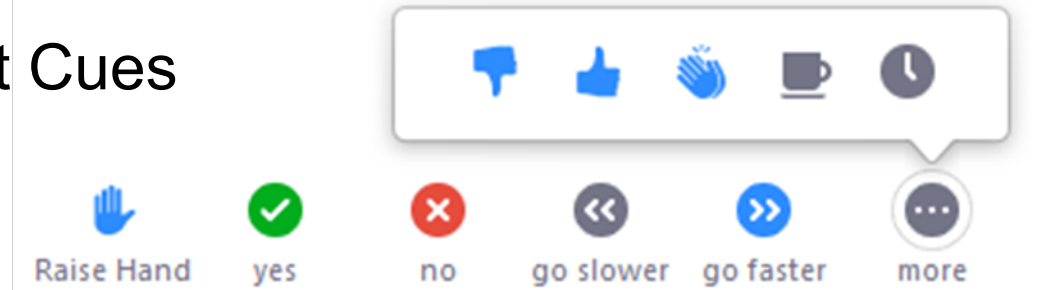


- Tool Bar Security Features

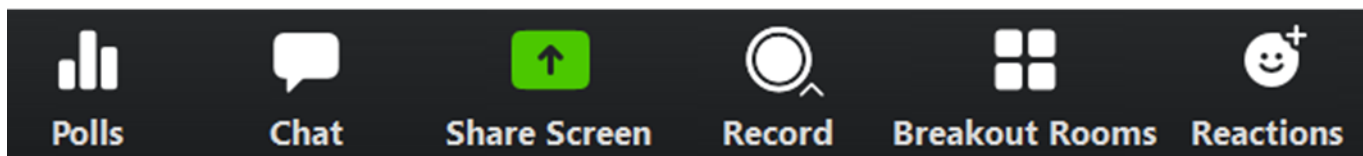


# Zoom Engagement Tools

- Non-Verbal Participant Cues



- Reactions



# Zoom Engagement Tools

- Screen Share

## Screen sharing

Allow host and participants to share their screen or content during meetings



## Who can share?

☐ Host Only ☒ All Participants [?](#)

## Who can start sharing when someone else is sharing?

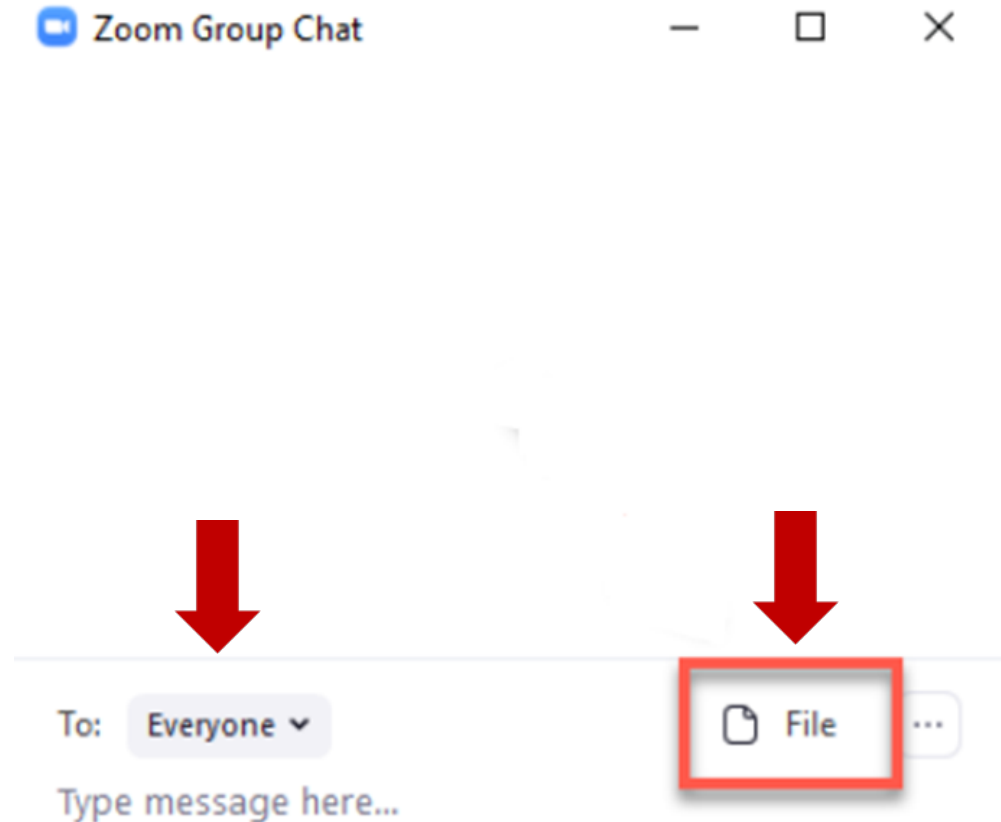
☒ Host Only ☐ All Participants [?](#)



# Zoom Engagement Tools

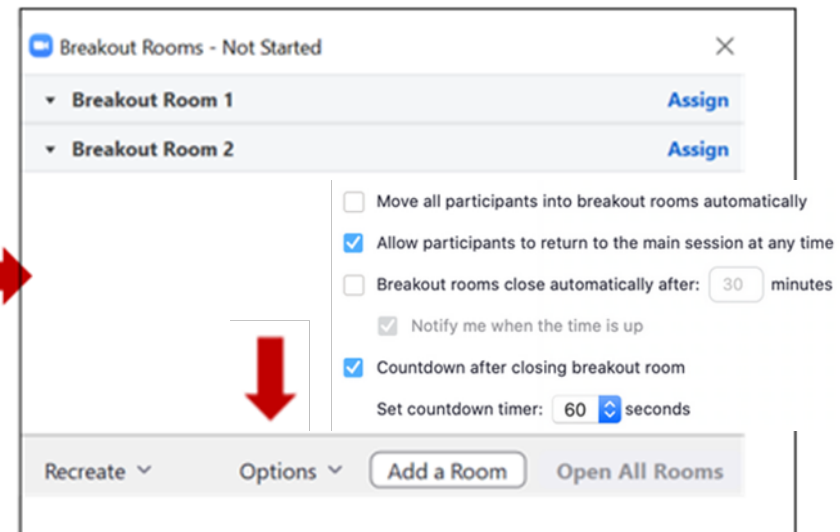
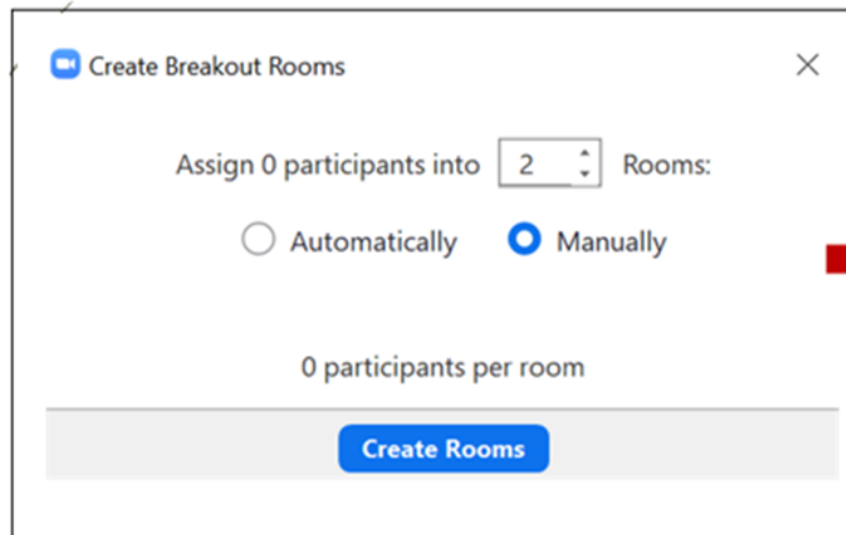
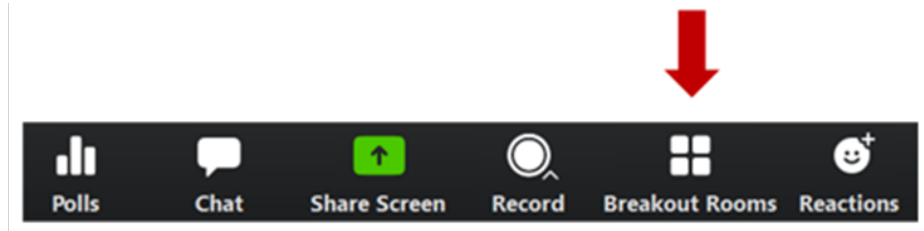
- Chat
  - Everyone/Public
  - 1:1/Private

- File Sharing



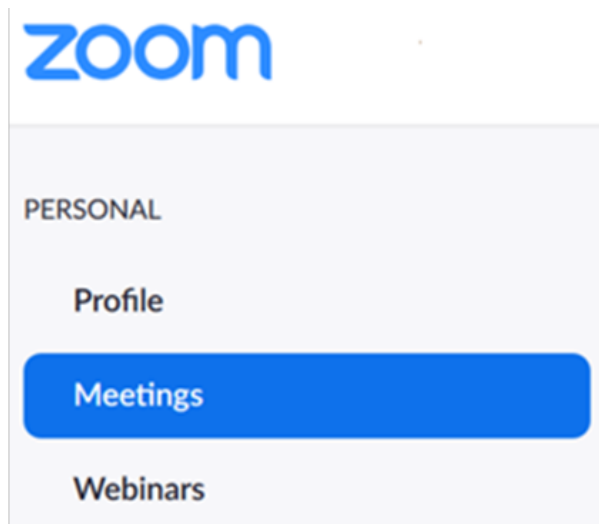
# Zoom Engagement Tools

- Breakout Rooms



# Zoom Engagement Tools

- Polls (Setup)



## Add a Poll

Enter a title for this poll.

☐ Anonymous? ?

1.

Type your question here.

☒ Single Choice ☐ Multiple Choice

Answer 1

Answer 2

Answer 3 (Optional)

Start Time ↕

Topic ↕

Meeting ID

Recurring

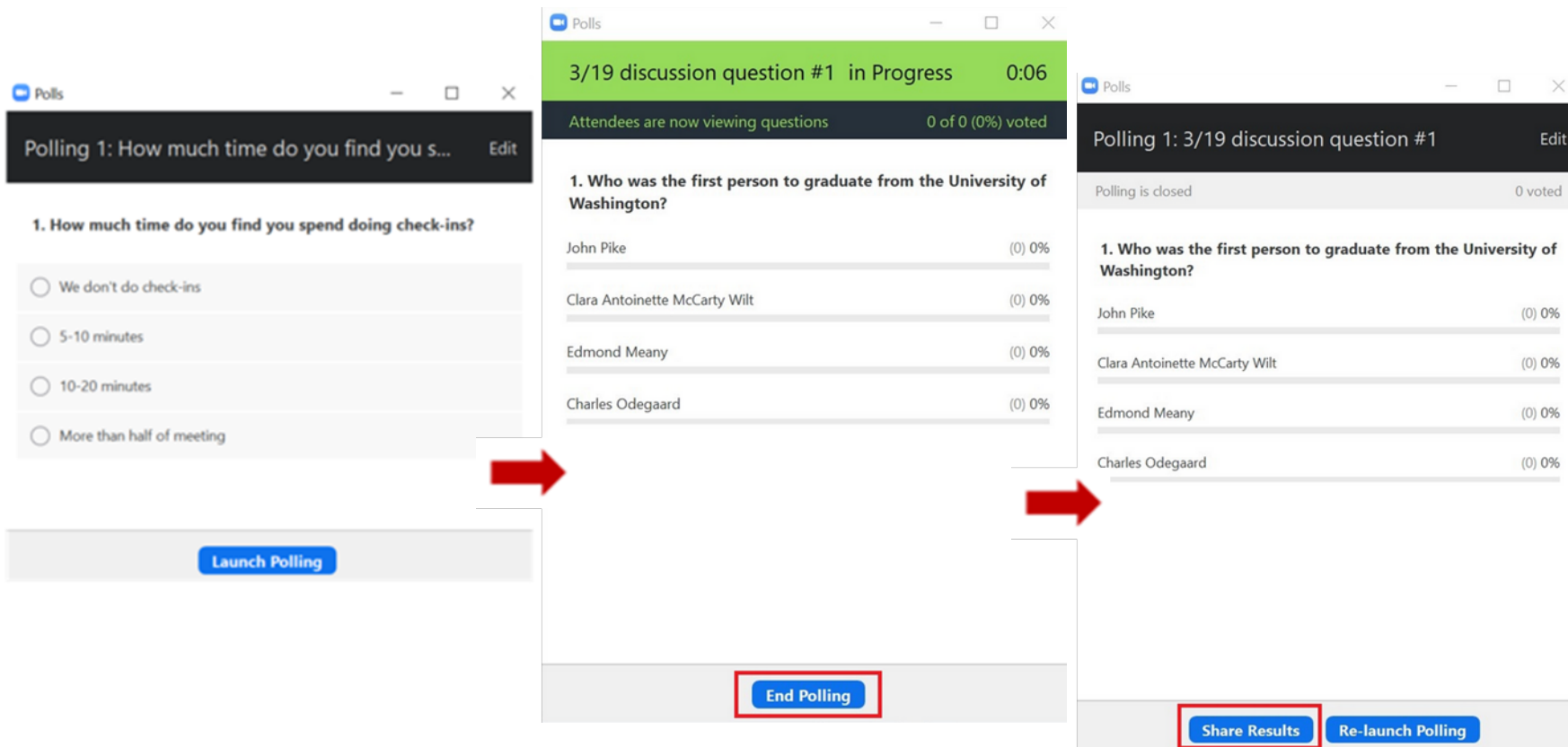
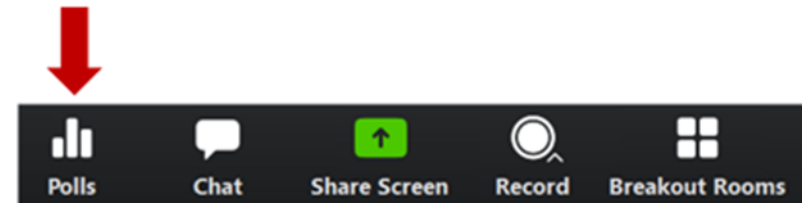
Virtual Labs



Start

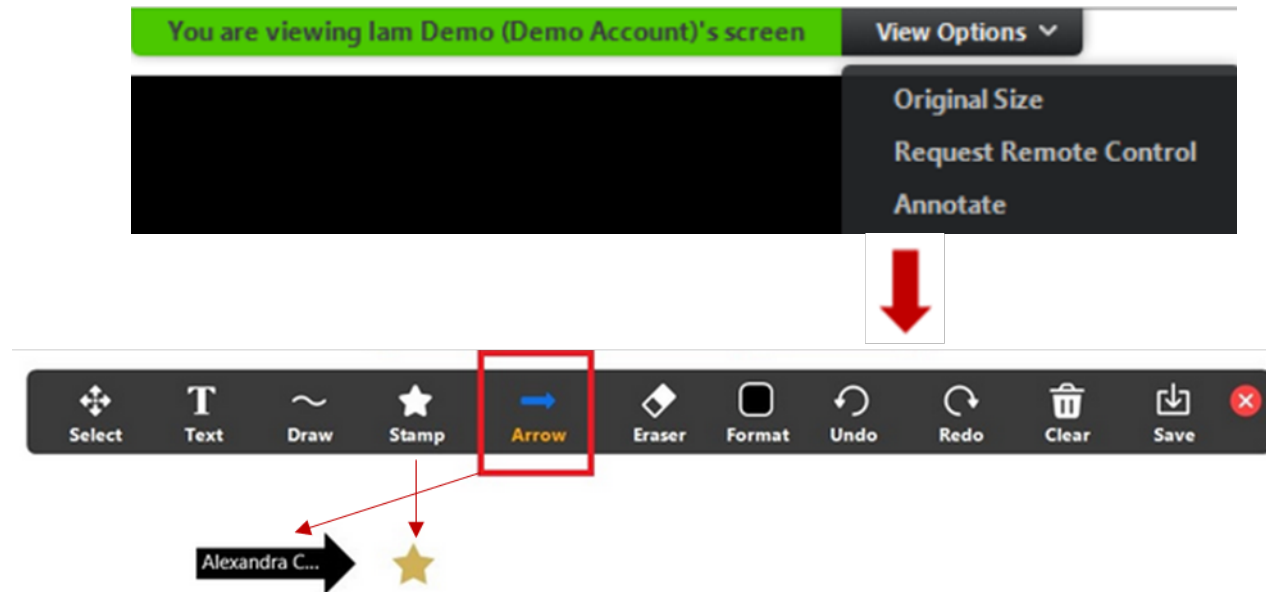
# Zoom Engagement Tools

- Polls (Launch)

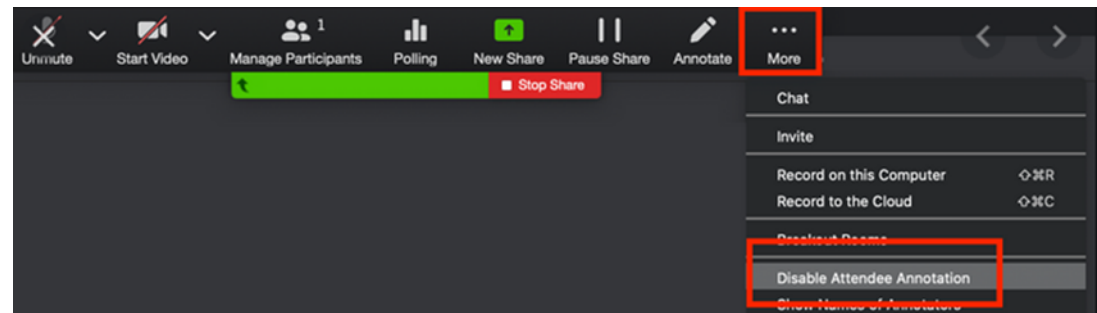


# Zoom Engagement Tools

- Annotate



- Disable Annotation





## Campus Map



The University of Wisconsin-Madison is known throughout the world for excellence in teaching, research and service. For more than 150 years, we have nurtured innovation and creativity for the benefit of the state and beyond. We call this The Wisconsin Idea.

Those who visit campus soon agree with our students that UW-Madison offers an abundance of things to see and do, from seeing architectural, historic and natural marvels to experiencing the thrill of Big Ten athletics or a world-class arts performance.

This guide will help you explore our abundant opportunities. Whether you are here for an hour or a day, we are delighted you chose to spend time on our beautiful campus. You will discover why this is one of the best learning and living environments in the world.

I hope you enjoy your time on campus and visit us when you can.

John D. Wiley, Chancellor



UW-Madison and Surrounding Area

# Level Up!

## 10 tips for engaging virtual attendees

Traci Gaydos, MFA  
SMPH Signature Events Manager  
[traci.gaydos@wisc.edu](mailto:traci.gaydos@wisc.edu)

# Memorable in-person events

- We're doing a thing at a dedicated time.
- We're wearing a particular attire.
- We're doing a thing with a defined group of people.
- We're doing a thing we don't usually do.
- We're having a shared meal.

# 1. We're doing a thing at a dedicated time.

- Get really great at [doodle polls](#)
- Is this a time that works for everyone?
- Consider time of day
  - Is your audience working from home and / or homeschooling kiddos?
  - Worst time of day for an event?
- Can your event be themed and indicate time of day?
  - Coffee Toast
  - Happy Hour

# OR... we're Not doing it at *one specific* time...

- Expand your event to a week-or month-long series of engagements.
- [American Red Cross](#)
- [The 31 Days of Women Leadership](#)
  - Synchronous learning (live): Lecture (w/questions at end)
  - Synchronous learning (live): Interactive discussion on topic
  - Synchronous learning (live): Other
  - Asynchronous learning (pre-record): Video
  - Asynchronous learning (pre-record): Podcast

## 2. We're wearing a particular attire.

- Graduation regalia
- White Coat
- Dress Clothes



### 3. We're doing a thing with a defined group of people.



#### Invitation

Include a link and any password needs.

Share a program and bios in advance or with the reminder. Redistribute in the chat of the event.



#### Who is in your group?

Accessibility: transcripts, closed captioning, ASL interpreting, or audio descriptions.

Interpretation and Translation services for non-native English Speakers

## 4. We're doing a thing we don't usually do

- Use Special Virtual Backgrounds
- Consider how you can involve families
- Leverage the use of social media
  - Facebook profile picture frames
  - Hashtags
  - Sharing among departments

## 5. We're having a shared meal.

- Hospitality, Gifts and Swag
  - [SMPH Official Functions Form](#)
- Not a 1:1 exchange
- Provide recipes and an ingredient list for a shared meal experience
- Consider delaying the mailing as an “after event” gift

## 6. WELLNESS BREAK



## 7. Observe a wellness break

- <https://www.sessionlab.com/blog/online-energizers/>
- One Minute Dance Party
- [Square Breathing](#)
- Coloring pages
- Shake it Out
- Stretching
- Meditation or Visualization
- [Well-Being in Academic Medicine](#)

## 8. Engage audiences through livestreaming

- Push your video to Facebook or YouTube
  - Zoom Meetings
  - WebEx Meetings
  - [OBS](#)
  - [StreamYard](#)
- [Consider comment moderation](#)
- Options for [Facebook and YouTube](#)
- [Waivers!](#)
- Rehearse, rehearse, rehearse!
  - [Match Day](#)
  - [MD Graduate Recognition Ceremony](#)

# 9. Modify Liberating Structures for Virtual Space

- Liberating Structures
  - 1-2-4 all
  - TRIZ
  - Wicked Questions
  - 25-10 Crowdsourcing
  - Celebrity Interview
  - Troika

## 10. Embrace a solid inspirational quote.

Everything I needed to know next  
was inside the discomfort of now.

- Glennon Doyle