

ZOOM Meeting Checklist

1. Before the meeting – Prepare

- Create the Zoom meeting invitation in Outlook; set up default choices for guest audio and video; add an alternate host if needed
- Attach all documents to the invitation and send to attendees
- Follow up before meeting with any updated documents
- Have alternate contact information for high stakes meetings

2. Start the meeting – Create a conducive space

- Prepare the meeting space; arrange seating to work with conference equipment
- Log into Zoom meeting early; always start the meeting on time
- Test your audio equipment to make sure it works; test attendee equipment
- Ask attendees to introduce themselves and then mute audio unless talking
- Have a backup plan for audio (move communications to a phone line if needed)
- Ask distant attendees to introduce themselves and then mute audio unless talking
- Record meeting if necessary

3. During the Meeting

- Make sure all speakers use the microphone and share any visual information
- Confirm that distant attendees can hear speaker and view presentations; or that they see the video; move webcam or camera as needed
- Encourage distant attendees to participate
- For Q & A, give local audience the microphone OR repeat all questions and answers; confirming distant attendees can hear; Work with local audience to improve sound quality
- Monitor audio from distant attendees and mute mics if necessary;
- End meeting on time; verbally end meeting and close the Zoom Meeting; Don't forget to stop the recording

4. After the Meeting

- Save your recording to your drive for sharing
- Return room and equipment to original location