Meeting Checklist

1. Before the meeting – Prepare

☐ Create the Zoom meeting; set up default choices for guest audio and video; add an alternate host if needed. Enable advanced features if desired; registration, polling.
☐ Invite participants via a calendar invitation or via email. Attach all documents to the invitation.
☐ Follow up before meeting with any updated documents.
☐ Approve any registrations if necessary.
☐ Run participant reports. Download the participant list if you want to send an email to registrants.

2. Start the meeting – Create a conducive space

☐ Prepare your meeting space. Adjust lighting as needed so you are not backlit.
☐ Log into the Zoom meeting early; always start the meeting on time.
☐ Share your screen and post welcome slide.
☐ Have a fellow participant join early to test equipment and setup with you.
☐ Admit participants if the waiting room is enabled.
☐ Introduce yourself and the agenda.
☐ Ask participants to mute audio unless talking. Mute them if needed.
☐ In large meetings, ask participants to turn video off during presentations.
☐ In large meetings, assign a co-host to help you monitor the chat.
☐ Record meeting if necessary.

3. During the Meeting

☐ If you have screen sharing set to host only, change this setting and allow other participants to share if needed.
☐ Confirm that participants can hear you and view presentations.
☐ Run poll(s) as needed.
☐ For Q & A, ask participants to raise their hand or write their questions in the chat. Acknowledge them and ask them to unmute while talking.
☐ End meeting on time; verbally end meeting and close the Zoom Meeting. Don't forget to stop the recording if used.

4. After the Meeting

☐ Access your recording. Share as needed.
☐ Run poll reports.
☐ Run participant reports.