

Guide to Running Successful Zoom Webinars

Version 1.0 – 11/19/2020

Running a successful Zoom webinar requires a bit of preparation as well as knowledge of some specific Zoom features and settings that are critical for a positive user experience! In this document we have tried to summarize our experience from running several medium to large-scale online events throughout 2020, starting with a Three-club 100-year celebration that included RI President Mark Maloney to a Rotary Foundation fundraiser, to the Zone 28 & 32 Online Summit, in addition to several smaller district events.

0. Zoom Meetings vs Webinars

Before we dive in, a brief note on Zoom Meetings vs. Webinars. In a Zoom meeting, all participants (other than the host and co-hosts) are equal, and all can unmute themselves and turn their video camera on/off and see each other. If you enable screen-sharing for participants, then all of them can start screen-sharing. Zoom meetings are, therefore, a lot more interactive and social, but give the host much less control. A disruptive participant in a Zoom meeting can quickly bring the entire meeting to a halt. By contrast, Zoom webinars provide three different levels of access: host and co-hosts have full control, panelists are the ones who can unmute themselves and turn their video camera on/off and are thus seen on-screen, and attendees are in permanent view-only mode and can neither see other attendees, nor know how many attendees are on the call. Their only ability to interact is via chat or Q&A functions, but even those can be limited by the host.

Therefore, webinars provide a more structured format of presenting information to the public and are the preferred choice for educational events where you want less distraction, more security, and more control over what attendees get to see. But the lack of interactivity and the inability of attendees to see each other can make them less personal or social.

The following tips are based on running a Zoom Webinar, but many of these functions are also available in regular Zoom meetings, so feel free to adapt this guide to your specific needs, even if you are not doing a full-blown webinar.

1. Multiple Co-Hosts

This is, perhaps, the most important success factor for a good webinar/meeting experience. You need a host and at least a second co-host (depending on the number of expected participants you may need more!). Co-hosts need to be able to communicate with one another over a back-channel outside of Zoom chat. A WhatsApp or Facebook Messenger group message works perfectly fine for that purpose, or just a simple group text message, if co-hosts are not on any of these app platforms.

There are two purposes of having co-hosts:

- a) If the host suddenly disconnects from Zoom (computer problem, Internet connection problem, power outage), a co-host can take over smoothly and the participants will not notice a thing. To achieve that level of redundancy, each co-host should have the same set of media downloaded and ready to play on their computer (PowerPoint, any videos, audio) so that the hand-off can be seamless if/when the main host drops off.
- b) Trying to control all the functions can be very stressful and demanding. Multiple co-hosts can divide the labor effectively and make the entire operation run more smoothly. For example, one co-host could be responsible for the screen-sharing and advancing the slides for speakers. Another could oversee chat. A third one could run Q&A. A fourth one could be in charge of turning video on/off and muting of panelists based on the script.

Also, you need to enable the Co-host feature in the Zoom Account. Go to zoom.us, log in, and then select Admin > Account Settings > In Meeting (Basic) and then scroll down a bit:

Co-host

Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.



2. High-speed Internet Connection

Both the main host and the backup co-host need to have a broadband Internet connection with at least 100 Mbps nominal up/downstream capability. They either need to have their computer connected to a wired Ethernet connection, or they need a modern WiFi (802.11n, 802.11ac, or 802.11ax aka WiFi6) with close proximity between their computer and the next access point. Ideally, a test result on [speedtest.net](https://www.speedtest.net) should show Ping < 10ms and Download as well as Upload speeds of > 70 Mbps. In all large-scale webinars I have hosted in the past, we have actually had the host and co-host on nominal 1 Gbps fiber-optic Internet connections with speed test showing 5ms ping and effective download/upload speeds in excess of 300 Mbps.

This is obviously even more important when you are planning to present videos during the webinar, as well as when the webinar is being recorded.

3. Scripting the Event

While it is not necessary for every speaker to have a full script of every word they are going to say, you need at least bullet points from every speaker. And then entire event needs to have a master script with expected times that also has directions as to which speaker will be on at what time and who will be introducing them. The script also needs to include “A/V cues” regarding audio-visual events: when to have which panelist on camera, when to mute/unmute their microphone, when to do screen-sharing of PowerPoint slides, when to advance slides, when to run a video, etc. This is not much different from the

A/V needs during a live event. The full script needs to be available to all co-hosts! For an example of a script with Zoom AV cues, please see Friday night from the Zone Plenary Sessions:

https://drive.google.com/file/d/1SddLH3AnGa3j90-ad8wvFh448_po2o9X/view?usp=sharing

4. Rehearsal

For a smooth webinar performance it is imperative that you do a rehearsal with the panelists, so that you can (a) check their lighting setup and sound volumes; (b) check their camera angles; (c) brief them on when to turn on/off their cameras and mute their microphones; (d) walk through the script with them so that they know when it is their turn. The rehearsal does not necessarily need to include their full-length speech, so it is totally fine for them to just do their slides 1 and 2, and then jump to their last slide. But you need to rehearse all transitions from one speaker to the next, as well as other people introducing speakers.

If a Rotary International senior leader is not available to participate in a rehearsal, their role should be played by another person, so that camera switching can still be practiced. For example, during the rehearsal for one night of the Zone Online Summit, we had Valarie Wafer stand in for Jennifer Jones.

Very often you will find that is during that rehearsal that the master script gets adjusted and finalized, based on how the rehearsal ran!

5. Create one Master PowerPoint

If possible, it will greatly help the host to have one master PowerPoint presentation that includes all the slides from all the speakers. It is much easier to only have to switch between Zoom camera view and screen-sharing of one PowerPoint deck, than it is to keep track of multiple different PowerPoint files and making sure to use the right one at all times. When copying slides from one PowerPoint file into the master slide deck, make sure to use the Paste option “Keep Source Formatting”.

For an example of a (219MB) Master PowerPoint presentation, please see Friday night from the Zone Online Summit Plenary Session, which includes all intros, all slides, and all videos in one file:

<https://drive.google.com/file/d/15Kruk8J6orDAOWFVNyHuUf9ZVc0sFSTz/view?usp=sharing>

6. Managing Webinar Registrations

There are two ways to handle webinar attendee registration:

- a) You can either use Zoom's built-in registration system, in which case each attendee will need to register through a special link that takes them to the Zoom website, and you can then control whether they will be automatically or manually approved to get their actual personalized link that will allow them to attend the webinar:

Registration ×

[Registration](#) [Questions](#) [Custom Questions](#)

Registration

Required

Approval

Automatically Approve
Registrants will automatically receive information on how to join the webinar.

Manually Approve
The organizer must approve registrants before they receive information on how to join the webinar.

Notification

Send an email to host when someone registers

Other options

Close registration after event date

Restrict number of registrants

Allow attendees to join from multiple devices

Show social share buttons on registration page

Using this process will allow you to customize which questions the attendee has to fill out in order to register, and you can even add custom questions to that process. One major benefit of this approach is that when you have all attendees register via Zoom you can automate the process of sending out personalized reminders to the attendees one hour or one day before the event:

Reminder Email ×

Send Reminder Email to Approved Registrants and Panelists

- 1 hour before the webinar start date and time
- 1 day before the webinar start date and time
- 1 week before the webinar start date and time

Subject

Reminder: [Meeting Topic] starts in [time]

Body

Hi [User Name],

This is a reminder that "Test" will begin in 1 hour / 1 day / 1 week on:

Date Time: Nov 3, 2020 02:00 PM Eastern Time (US and Canada)

Join from a PC, Mac, iPad, iPhone or Android device:

[Click Here to Join](#)

Note: This link should not be shared with others; it is unique to you.

Passcode: 214506

[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or join by phone:

US: +1 646 558 8656 or +1 301 715 8592 or +1 312 626 6799 or +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799

Webinar ID: 811 8595 1002

Passcode: 214506

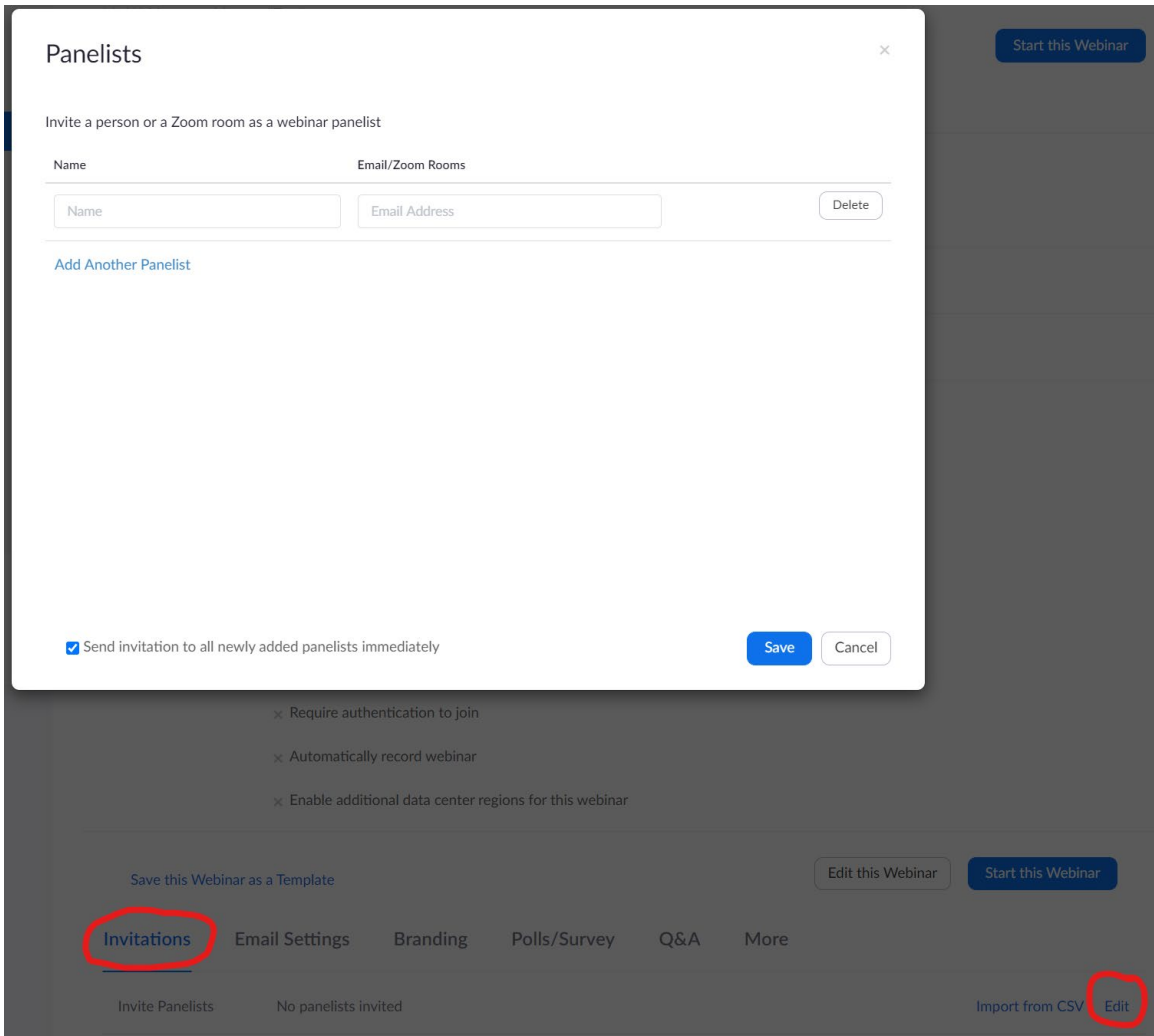
International numbers available: <https://us02web.zoom.us/j/keHJvhWwhg>

- b) The second option is to turn off registrations in Zoom, which will give you one link for everybody to actually join the webinar, and you then need to implement the registration process externally, for example via ClubRunner, and must then simply distribute that link to your attendees via that external registration system, as well as handle all reminders in that other system:

Invitations	Email Settings	Branding	Polls/Survey	Q&A	More
Invite Panelists	No panelists invited				Import from CSV Edit
Invite Attendees	Webinar Size: 100 attendees				Copy Invitation Send Invitation to Me
	Link to join Webinar https://us02web.zoom.us/j/81185951002?pwd=SkRpUkhtZ0ZaNTdoUE5kY...				
Registration Settings	No Registration Required				Edit

7. Invite Panelists separately from Attendees

Irrespective of which option you use for attendee registrations, it is highly recommended that you invite your panelists via the built-in function in Zoom – this will result in each panelist receiving an email from Zoom with their individual link to login and those links will be different than the ones give to the regular attendees. Once a panelist clicks that link, they are immediately admitted as panelist the second that they join the Zoom webinar:



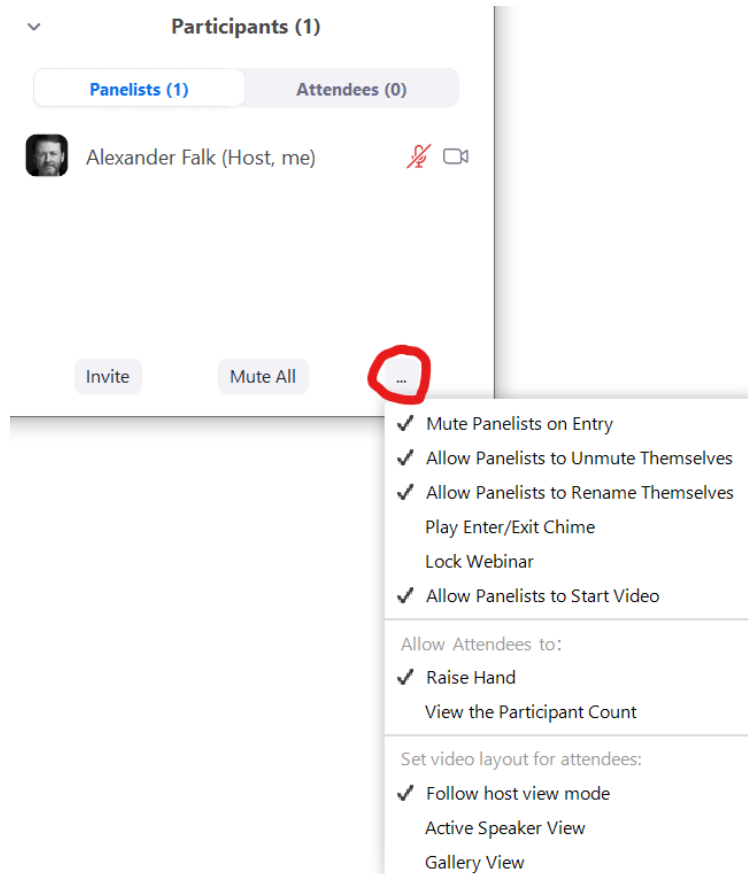
The screenshot shows the Zoom 'Panelists' management interface. At the top, there's a 'Start this Webinar' button. Below it, a modal window titled 'Panelists' is open, allowing users to invite a person or a Zoom room as a webinar panelist. The modal includes input fields for 'Name' and 'Email/Zoom Rooms', a 'Delete' button, and a checkbox for 'Send invitation to all newly added panelists immediately'. Below the modal, there are several settings options: 'Require authentication to join', 'Automatically record webinar', and 'Enable additional data center regions for this webinar'. At the bottom of the interface, there are buttons for 'Save this Webinar as a Template', 'Edit this Webinar', and 'Start this Webinar'. The 'Invitations' menu item is circled in red. In the bottom right corner, the 'Edit' button is also circled in red.

If you decide not to use these panelist invites, you will potentially need to ask you panelists to join the Zoom call 15 minutes before the general audience joins, and will then need to promote each panelist manually from the list of attendees. For larger webinars this can become extremely stressful – especially if one of your panelists only joins the call 2-3 minutes before the start of the webinar, when you already have hundreds of attendees online and finding that panelist in such a large group can become tricky.

8. Configure important settings at the start of the webinar

8.1 Participants Settings

There are a ton of important settings hiding behind the three dots at the bottom right corner of the Participants window and you should check them at the start of the webinar to make sure everything is set up correctly:

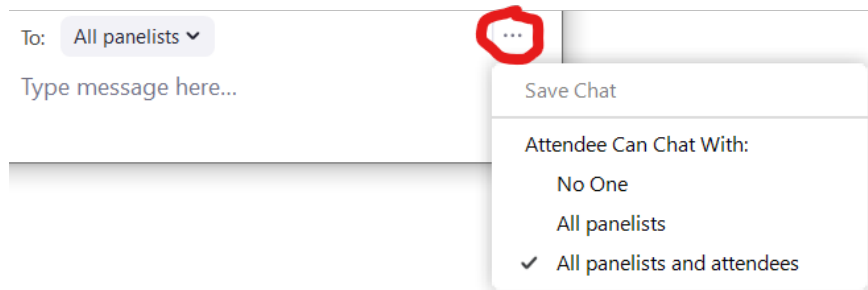


While the top portion appears to give you control over whether panelists are allowed to unmute themselves and whether they may start their own video, these functions are very confusingly named. The unmute function actually does what it seems to say: you can either give the panelist control to unmute themselves at any time, or – if you remove that checkmark – a host needs to ask a panelist to unmute specifically otherwise they cannot speak. One the other hand, if you turn off the checkmark for “Allow Panelists to Start Video”, then neither the host nor the panelist can actually ever turn the on the panelist’s camera, so that setting needs to always be turned on!

Even more important is the setting at the very bottom of that menu: this defines what the participants will be seeing during the webinar. Especially in cases where you want to switch between panel discussions and single speakers, it is critically important to set this to “Follow host view mode” so that you can switch back and forth between gallery view and speaker view and this will apply to all participants automatically!

8.2 Chat Settings

Make sure to decide who the participants of the webinar are allowed to chat with – there are three options available and you can configure those by clicking on the three dots in the chat window:



It is also possible to change this setting during the webinar, so that at some points in time you can allow attendees to chat with one another, and at other times you can disable it, or restrict it to only sending messages to panelists.

9. Controlling Cameras

The most important aspect of moderating a successful webinar is for the host to control the cameras in order to direct what the attendees will be seeing. Think of this role almost like the producer/director in a baseball stadium, who will switch from a camera angle behind the pitcher to one behind the batter to and overview of the game depending on the situation, and sometimes they even may want to give a split-screen view of multiple angles.

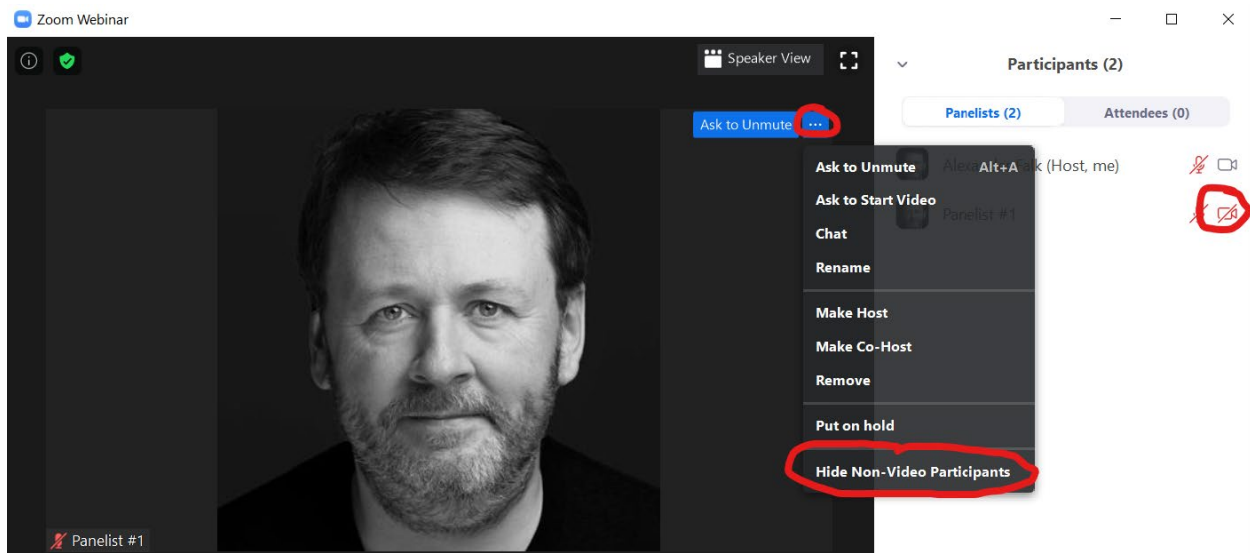
This is what sets Zoom a bit apart from other collaboration/meeting/webinar tools that don't offer as much fine-grained control of the experience. But some of the functions are a bit tricky to find in Zoom, hence this will be one of the longer chapters in this document...

The first, and most important step is for the host to make sure to turn on the setting to hide all non-video participants. This is something I recommend for regular meetings as well as for webinars and for both hosts and panelists because it declutters the screen and removes those video boxes from gallery view that just contain a name or a static picture. As a general rule, if somebody doesn't have their video camera turned on, we don't want them to be on the screen. Simple as that.

There are two ways to change this: in the Zoom client app (before you start your webinar) you can go to Settings > Video > Meeting and then turn on:

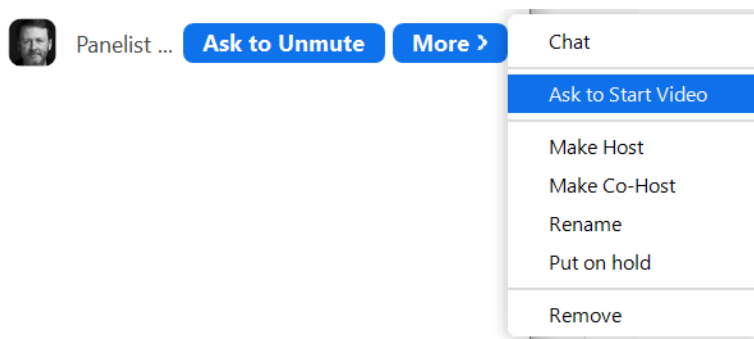
- Meetings:**
- Always display participant names on their video
 - Turn off my video when joining meeting
 - Always show video preview dialog when joining a video meeting
 - Hide non-video participants
 - Spotlight my video when I speak
 - Display up to 49 participants per screen in Gallery View

Or, if the webinar has already started, you can find any panelist whose video camera is turned off, and then on their portrait in the upper right corner there are three buttons that allow you to open a menu, and the last option in that menu is “Hide Non-Video Participants”:



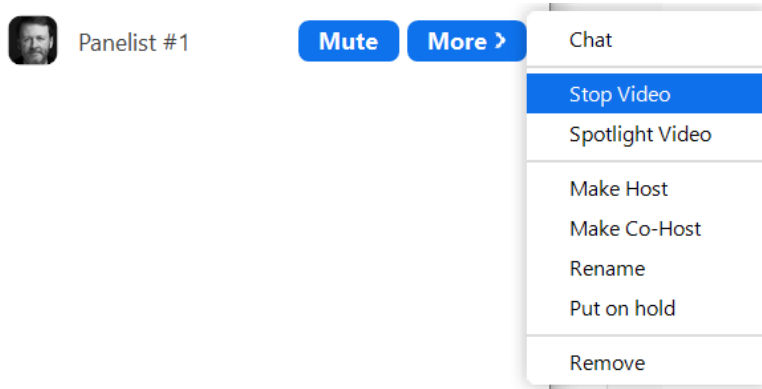
Once you have ensured that non-video participants are hidden, the easiest way to control what the attendees are seeing is to just have only those panelists, whose turn it is to speak, have their cameras turned on. In addition, it probably makes sense to be in Gallery View rather than Speaker View, so that you can occasionally have multiple people on the screen at once.

So, for example, you might have an emcee initially be the only person whose camera is turned on and they introduce the keynote speaker. As they get to the end of their introduction, you ask the keynote speaker to turn on their camera and unmute themselves:



At that point in time, you will now have both the emcee and the keynote speaker on the screen.

As the emcee finishes, the keynote speaker will typically thank them for their kind introduction, and at that time you mute the emcee and turn off their video:



If you have a panel discussion with 3-5 panelists, it is also typically best to keep operating in gallery view – unless the panel is also using slides, in which case you may want to use speaker view to just highlight the person next to the slides who is currently speaking.

Depending on the circumstances of your webinar (and also for larger Zoom meetings) there is another tool at your disposal that can help with controlling what attendees see: this function is called [Spotlight Video](#), and it allows you to highlight up to 9 video feeds. So, for example, if you had a panel discussion with 7 panelists, but during one part of the script it is really just 3 of them talking for a couple of minutes, you could keep the video turned on for all 7 panelists, but spotlight only those 3 who are currently relevant. If you use the spotlight function, don't forget to use "Remove Spotlight" when you are done. I actually find this spotlight function much more useful during a large Zoom meeting rather than webinars, because it allows me to put a spotlight on the keynote speakers and panelists to ensure that those are seen by all.

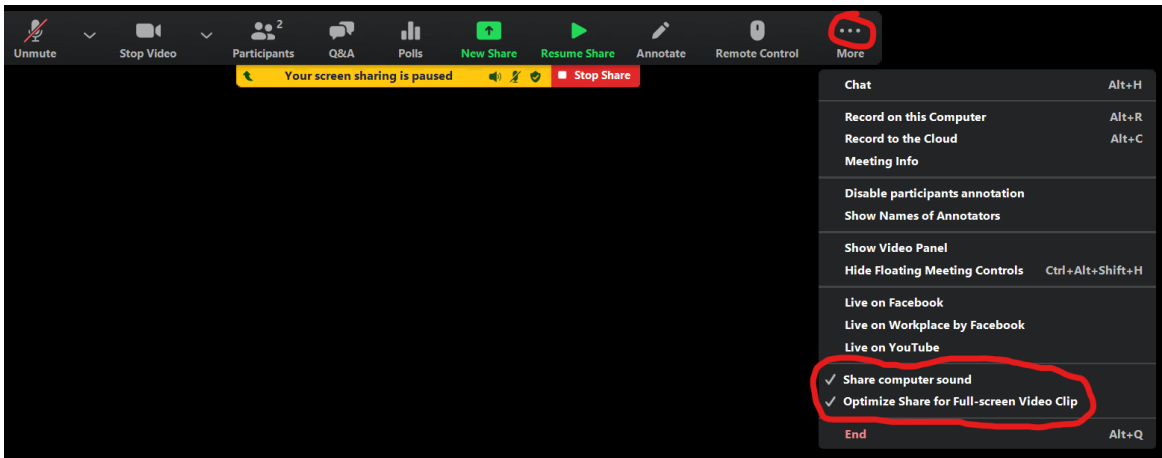
Btw, keep in mind that during a webinar what other panelists will see is very different from what the participants/attendees are seeing. The host essentially controls the view for all participants, whereas each panelist controls their own view. So, panelists need not worry about what they are seeing on their screen, as long as the host knows what they are doing! If you want to have a level of quality control, consider using a laptop or tablet next to your main computer and log into the webinar as a plain attendee to double-check that they are seeing the right things.

10. Screen Sharing

Two things are important to keep in mind when you are starting screen-sharing: whether you have any audio that you need to share, and whether you will be playing any videos. At the bottom of your selection screen at the start of your screen-sharing session are two checkboxes that control those features – make sure you turn them on, as needed:

- Share computer sound
- Optimize Screen Sharing for Video Clip

You can still change those at a later time, if you forgot to set them initially, by clicking on the More menu in your floating screen sharing toolbar and then checking the respective last two menu options:

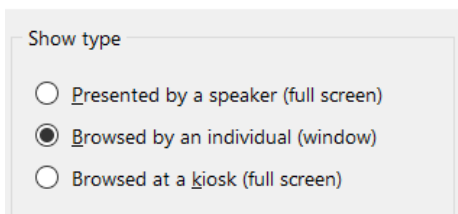


This menu also includes another important feature: it allows you to control whether participants can do annotations on your screen while you are screen sharing. Unless you are in a small group and deliberately are inviting collaboration, that feature should probably be turned off.

If you are using PowerPoint to present your slides during screen-sharing, there are two options that you may want to consider:

- a) If you have dual monitors, you can use the presenter view in PowerPoint which gives you one window on your main monitor with the controls to advance slides as well as a preview of the next slide, and you can have that window on the same screen where you sharing control bar is as well as the video panel, participant panel and chat. You may need to take PowerPoint out of full-screen mode when it starts up to achieve that. The screen that you would then share via Zoom is the 2nd monitor that PowerPoint is presenting the slides on. If you use this approach and you have a high-resolution monitor (e.g. a UHD or 4K display), the it is highly recommended that you first reduce the resolution on that second monitor to something more reasonable like regular HD resolution at 1920x1080. Otherwise screen-sharing will consume a lot of bandwidth and potentially get choppy – especially if you have any videos included in your presentation.
- b) The other option is to go to the Slide Show ribbon/menu in PowerPoint, select the Set Up Slide Show option, and switch it to “Browsed by an individual (window)” in which case the PowerPoint presentation will run in a normal window on your desktop that you can then share via screen-sharing:

Set Up Show

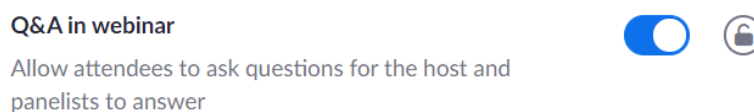


During screen sharing, you will probably also want to turn on Show Video Panel, so you can see all the panelists' video feeds, and can control whether or not you want to spotlight one of them, if they are the primary presenter for a particular segment of the presentation. That Spotlight function can again be found in the top-right corner of each video under a menu behind the three dots.

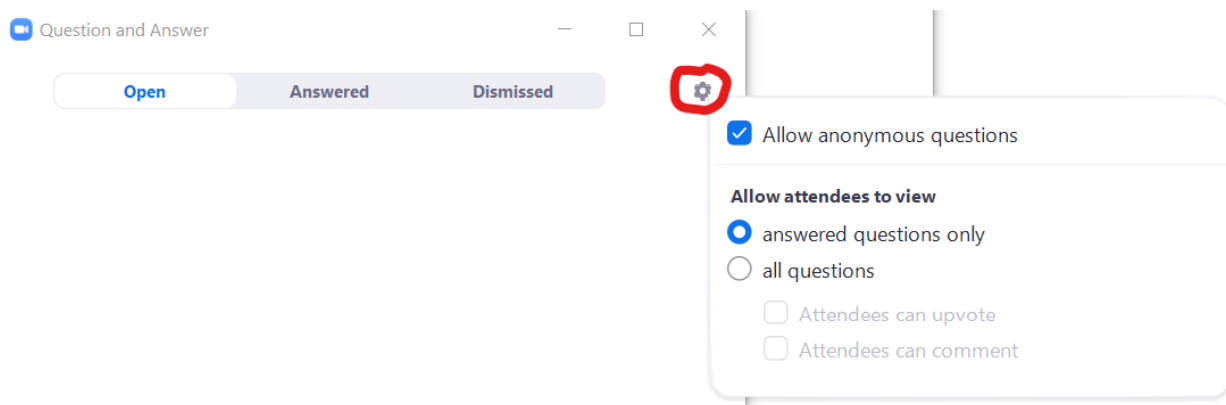
Last, but not least, I recommend showing the list of Participants in a separate window, so that you can quickly ask them to turn on their video when it is their turn in the script.

11. Q&A

For large webinars, it can easily become very convoluted, if attendees are asking questions via the regular Chat function. It is recommended to instead turn on the Q&A feature for the Zoom account. This can be found on the Zoom.us website by logging into your account and then going to Admin > Account Settings > Meeting > In Meeting (Advanced) and turning on the Q&A function:



Once this has been enabled, there will be a Q&A button visible for all attendees at the bottom of the Zoom window, and they can use that function to ask questions. As the host you can control various useful settings using the menu behind the cog wheel at the top right corner of the Q&A window:



These setting include whether attendees can see all questions or only those that had been answered, and whether they can upvote or comment on other people's questions. If you have an emcee as part of your program who will ask the questions to the keynote speaker during the Q&A session, and you, therefore, want more control over which questions to actually ask, it is recommended to allow attendees to only see those questions that you select to be answered, rather than all questions.

12. Recording the webinar

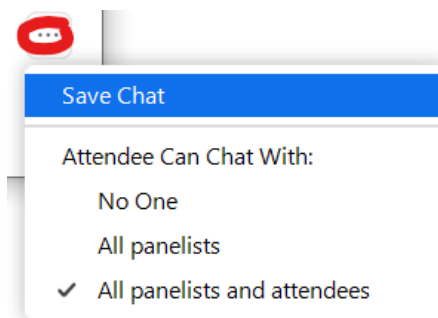
If you want to record the webinar for publishing to YouTube, the recommend approach is to use the Record on this Computer function (rather than Record to the Cloud), because you can get a higher-resolution recording that way. Make sure you have several GB of hard disk space available on your computer. I recommend turning on the following settings for the best recording results:

- Zoom client app > Settings > Video > Enable HD
- Zoom client app > Settings > Share Screen > Side-by-side mode
- Zoom client app > Settings > Recording >
 - Record video during screen sharing
 - Place video next to the shared screen in the recording

After the end of the webinar, Zoom will convert the recording from an internal format to an MP4 file that you can then cut/edit in your favorite video processing software. For professional-quality editing we recommend either Adobe Premiere or FinalCut Pro (the latter is only available on Macs).

13. Saving Chat

Before you end the webinar for all attendees, be sure to save the chat history to a file on your local computer for further analysis or to respond to participant questions after the webinar, if it wasn't possible to answer all questions live during the Q&A portion. In the chat window, click on the three dots and then choose "Save Chat":



This will produce a text file that looks like this:

```

18:39:40 From Marty Peak Helman to All panelists : Good evening everyone!
18:50:39 From Cecily Smith to Alexander Falk(Privately) : Panelist Reid is here :)
18:51:07 From Alexander Falk to Cecily Smith (Privately) : got him, thx
18:51:37 From John Kramb to All panelists : Bruce!
18:52:12 From Claude Martel to All panelists : Bonjour Claude du club Québec-Val-Bélair D-
7790
18:52:49 From Sue Goldsen to All panelists : Welcome all. We will start in 8 minutes.
18:53:26 From Sue Goldsen to All panelists : all sessions are being recorded and will be
posted at web site www.rotaryzones28-32.org
18:53:54 From Jean Cadwallader : Hi Bruce
18:54:01 From Sue Goldsen to All panelists : Hello Jean.
18:54:50 From Marc Glass District 7890 : hello from district 7890 Northen CT and Western MA.
18:55:12 From John Kramb to All panelists : Hello from Gettysburg, PA
  
```

14. Attendee Reporting

Reports about attendance can be downloaded from the Zoom.us website after the webinar/meeting. On the Zoom website log into your account and then go to Admin > Account Management > Reports > Usage Reports > Active Hosts. Then select the date range you are interested in and click Search:

Topic	Meeting ID	User Name	User Email	Start Time	End Time	Duration (Minutes)	Participants	Source
RYLA 2021!	862 4071 8671	Rotary District 7930	rotary7930meetings@gmail.com	10/27/2020 06:02:07 PM	10/27/2020 07:03:28 PM	62	10	Zoom
DEI Committee Meeting	818 7037 5436	Rotary District 7930	rotary7930meetings@gmail.com	10/29/2020 11:29:34 AM	10/29/2020 01:30:32 PM	121	4	Zoom
Moving from Diversity to Incl...	827 7566 5622	Rotary District 7930	rotary7930meetings@gmail.com	10/29/2020 05:31:46 PM	10/29/2020 05:42:04 PM	11	2	Zoom
Moving from Diversity to Incl...	827 7566 5622	Rotary District 7930	rotary7930meetings@gmail.com	10/29/2020 06:06:53 PM	10/29/2020 07:41:37 PM	95	129	Zoom

For the meeting you are interested in, click the blue number in the Participants column – this gives you an on-screen listing of all participants and there is an Export button available to download the data as a CSV file:

Meeting Participants ×

Export with meeting data

Show unique users

[Export](#)

Meeting ID : 827 7566... Topic : Moving from Diversity to... User Email : rotary7930meetings@gmail.com
 Duration (Minutes) : 95 Start Time : 10/29/2020 06:06:53 PM End Time : 10/29/2020 07:41:37 PM
 Participants : 129

Name (Original Name)	User Email	Join Time	Leave Time	Duration (Minutes)
Alexander Falk (Rotary Dist...	rotary7930meetings@gmail...	10/29/2020 06:06:53 PM	10/29/2020 07:41:37 PM	95
Mia K	mkoutoulas@beauportosp...	10/29/2020 06:06:57 PM	10/29/2020 07:18:01 PM	72
Betsy Manzelli (Betsy Manz...	btzmnz1@gmail.com	10/29/2020 06:07:29 PM	10/29/2020 07:41:32 PM	95

15. Useful tips for a professional appearance

Typically, you will want to open the webinar 10-30 minutes before your actual start time, so that people can log in early. At that time, it is recommended that all panelists have their videos turned off and are muted. Use screen-sharing to present a title slide that includes the Rotary logo and the title of the webinar as well as the official start time. If you want to get fancy, you can turn on “Share Computer Sound” when you start screen sharing, and then use Spotify or a similar music streaming app to play some nice background music. Make sure to use an account that doesn’t suddenly run any ads and also turn off “explicit” content. It is also recommended to unmute yourself every 5 minutes and welcome participants and tell them when the actual webinar will be starting.

16. Security Considerations

While Zoom webinars are less prone to attacks by malicious players (aka Zoom-bombings), because the hosts have more control, there can still be disruptive messages posted in Chat or Q&A that can take a few minutes to stop and to remove those participants.

It is, therefore, recommended to require registration for webinars and ideally not post the webinar link publicly on the district website or via social media. If registration is not turned on, then it is recommended to have the Zoom link require a password and only distribute the link via a directed email campaign to members only.

For very important training events it may be prudent to have a “Plan B” from the get-go and set up a second “backup” Zoom webinar or meeting in advance, so that in case of a disruptive event, there is already a plan in place for how to provide that backup link to all the participants and how to inform them to switch over to the backup meeting.