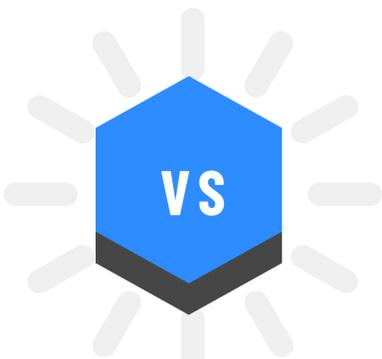


# Zoom Meeting



# Zoom Webinar

Up to 300 participants

## Size

Up to 3000 participants

Meetings with Audience Participation or Group Work

## Description

Virtual Auditorium

Information or Training Sessions & Meetings

## Best for

Town Halls or Quarterly Updates

Breakout Rooms/  
Waiting Room

## Special Features

Q & A  
Customize Registration Q's

## Both Offer

Registration

Co-Host

Mute All Attendees Upon Entry

Whiteboard

Annotation

Video Sharing (Meeting/Participants) (Webinar/Hosts & Panelists)

Lock Screen Sharing

Put Attendees on Hold or Remove Them

Polling

Group and 1:1 Chat

Livestream for Facebook and Youtube

Reporting of Registrants, Attendees, and Chat

# ZOOM: BECOME A WEBINAR EXPERT

A good webinar may take time to plan and arrange. In addition to planning, you need time to prep and test, to execute, and to follow up and debrief for the next webinar.

**IMPORTANT: PLEASE ALLOCATE THREE DAYS FOR PLANNING, EXECUTION, AND FOLLOW-UP.**

## REQUEST A WEBINAR LICENSE

Zoom Webinar license are limited, are provided upon request, on a first-come, first-served basis. The license will be revoked 24 hours AFTER the webinar end date.

1. Click to [Request a Webinar License](#).

## BEFORE THE EVENT

### PRE-PLANNING A WEBINAR

Before you schedule your webinar, you will need to consider the following:

1. **Purpose & Theme** (Would a regular Zoom meeting be better, and allow for more interaction?)
2. **Date** (Include the Host, Co-hosts, Moderator, Panelist)
3. **Zoom Roles** within your staff/team
4. **Real-time Closed Captioning** needed? Contact [ATI@csudh.edu](mailto:ATI@csudh.edu) to **secure closed captioning services** (requires 2 business days notice; captioner fees not included)
5. **Key Factors for the Webinar:**
  - a. Do you want to **enable Q&A**?
    - i. Would you like registrants to send questions to the team ahead of time?
    - ii. Who will moderate the Q&A?
  - b. Do you want to **enable Chat**?
    - i. Who will moderate the Chat?
  - c. Is your event **open only to authenticated users**?
  - d. Will you **record and post the recording to a YouTube channel**?
  - e. Will you want to gather information from your attendees **AFTER** the event is over?
6. **Schedule a Date/Time for the Practice Session/Dry run.**
7. Share **Webinar Best Practices** (handout) to identified, confirmed Panelists.

## DAY OF EVENT

1. Host enters event 30 min prior to event and **enables the Practice Session**. (Practice session allows for a private arena, away from Attendees, for the webinar team (Panelists) to get settled for the tasks ahead. *(Caveat: Late and last minute additions will be parked in a waiting room until the meeting is Live. To include them, the original invitation will need to be edited to include them as a panelist.)*)
2. Co-host and Alt-Hosts join as well, and can set up slides and **begin monitoring Chat or Q&A**, as applicable and rehearsed.
3. Hosts will **'promote' individuals to Panelists status**. (Panelists may be identified during webinar set up, so this process may be eliminated.)
4. Moderator **begins the event**.
  - a. If using Enable Practice Session, Host or Alt-host will **switch to BROADCAST to begin** the webinar and begin recording.

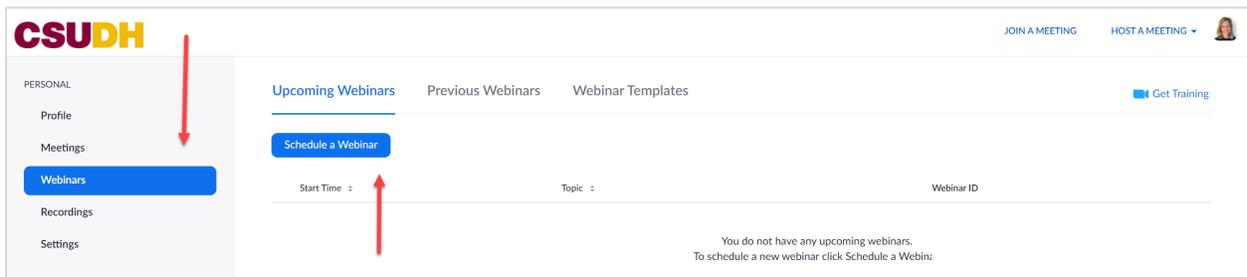
## AFTER THE EVENT

1. **As attendees are filing out and BEFORE THE MEETING IS OFFICIALLY ENDED BY THE HOST**, Host will capture Chat transcript, if used.
2. Host will **capture screenshot of Q&A, Answered, and Dismissed tabs**. (These can always be discarded, if not needed. Q&A report is available after the event, but the Dismissed will not be available once the meeting is ended.)
3. The Host will allow **the video to render on the computer** for the duration.
4. Host will send **upload to YouTube as unlisted and send for review as needed**.
  - o Once approved, video will be set to public and posted to YouTube channel:  
<https://www.youtube.com/user/CSUDHTV>
5. **Follow up with Attendees**, if applicable.
6. **Download and save all Reports**.

## ZOOM: SCHEDULE THE WEBINAR

The person who schedules the webinar will have an option to designate a Host, Alt-host, and Co-hosts, as well as Panelists.

1. Go to [csudh.zoom.us](https://csudh.zoom.us).
2. In the upper right-hand corner, click **Sign In**.
3. Log in using your campus username and password.
4. Click **Webinars**.
5. Click **Schedule a Webinar**.



## WEBINAR OPTIONS

- **Enable Q&A** – Do you want attendees to ask questions and you provide answers?
- **Enable Practice Session** – Enabling allows panelists and moderator private time before the webinar to settle in and ask questions without the attendees hearing.
- **Only authenticated users can join**
  - If your event open to those outside of CSUDH, leave unchecked.
- **Record the webinar automatically on the local computer**

## INVITE PANELISTS AND ATTENDEES

### INVITATIONS TAB

- **Invite Panelists** – Add Co-Hosts here
- **Invite Attendees** – Copy Invitation or send a copy of the invitation to yourself
- **Approval Options** – Select from Automatically Approve Registrations, Close registration after the event date, allow attendees to join from multiple devices, and show social share buttons on registration page
- **Manage Attendees** - Click to view registrant information such as approved or blocked, email address, and the registration date

## EMAIL SETTINGS TAB

**By default, the person who schedules the meeting will receive the registrations. You can setup an Outlook rule to capture those emails, or you may edit/change the email address in the Zoom session, once it has been scheduled.**

- **Email Language:** English
- **Email Contact:** Change email here, if necessary. For example: vpit@csudh.edu
- **Invitation Email to Panelists:** Leave checked
- **Confirmation Email to Registrants:** Send Upon Registration, and Send Host a preview email
- **No Reminder Email to Attendees and Panelists** – Change defaults to 1 hour, 1 day or 1 week before the webinar start date and time
- **No Follow up Email to Attendees** – Toggle on/off
- **No Follow Up Email to Absentees** - Toggle on/off

## BRANDING TAB

- Best left to defaults, but the **Banner, Logo, Speaker Information** (for up to 3)
  - Attendees see the speaker information in the email invitation and on the registration page
- **Post Webinar Survey:** Opens a Zoom survey page in attendees' browser after leaving the webinar - Toggle on/off
- **Social Media Share Description** – Customize the short description that will appear on the registration post to Facebook and LinkedIn

## POLLS TAB

- Click to create polls.

## Q&A TAB

- The Q&A settings configured is for the default settings when you start this webinar. You can change the settings in the webinar.

**IMPORTANT: Uncheck Allow anonymous questions.**

- Allow attendees to view answered questions only – Leave checked.

## INTEGRATION TAB

- Currently not used in CSUDH webinars

## LIVE STREAMING TAB

- You can live stream to Facebook @workplace, and YouTube. You can also check off a box to allow users to watch the live stream when the webinar has reached capacity.
- After launching the webinar, click "More", and then choose the service on which to live stream your webinar.

### IMPORTANT:

- **Do not include sensitive data during a Live Streaming event.**
- **Do not use to teach or conduct research.**
- **Respect any individuals who may appear in the stream (both audio and video). Notify them in advance and offer the option to opt-out.**

## WEBINAR REPORTS

Zoom offers a few follow up options to engage with attendees, learn what you can do better next time, etc. You can also send a post-webinar survey link to attendees or send them to a specific webpage afterwards.

As the webinar Host you can generate different metric and information reports including:

1. **Registration:** Displays a list of registrants and their registration details.
2. **Attendee:** Displays details about each attendee.
3. **Performance:** Displays engagement statistics on registration, attendance, and feedback.
4. **Q&A:** Displays questions and answers from the webinar.
5. **Polling:** Displays each attendee poll result.
6. **Reports** can be exported in a .CSV format for further analysis. Reports are available for the previous year

## TIPS FOR SUCCESSFUL A WEBINAR

- **Secure your meeting** by requiring registration.
- When scheduling the webinar, **Enable Practice Session**. This way the webinar team can join 30 minutes ahead of the designated webinar to get settled and ready, out of earshot of the attendees. Once ready to start, the practice session will need to be switched to Broadcast. *(Caveat: Late and last minute additions will be parked in a waiting room until the meeting is Live. To include them, the original invitation will need to be edited to include them as a panelist.)*

**TIP: YOU CAN ONLY HAVE ONE PRACTICE SESSION PER WEBINAR EVENT.**

- **Practice**. Schedule a dry run through with as many participants as possible. This will go a long way in alleviating confusion and avoiding repetitive issues during the day of.
  - Decide who will do what during the meeting.
    - Who will release the mic to the attendees?
    - Who will welcome the speaker to the mic?
    - Who will address technical concerns from attendees?
  - Decide if Q&A will be Live or Type Answer. One offers more interaction, while the other can be done silently in the background.

**TIP: DESIGNATE THOSE WHO WILL ANSWER LIVE AND THOSE WHO WILL TYPE ANSWER, AS IT IS DIFFICULT TO DO BOTH AT THE SAME TIME.**

- In the event of technical issues, who is the back up to the Moderator, or Technical Director? Much like a play, designate the understudies ahead of time.
- Always have an **opening, housekeeping, and closing slide**. Do not forget date, time, and agenda.
  - **Housekeeping Slide**: What tools will be used, how to ask questions, etc.
  - Slides will take the attention away from the speaker, but it may be needed to convey or emphasize important information, such as graphs.
  - **Closing Slide**: Call to Action and Thank you's
- Consider your viewers. Do any need **Closed Captions**?
  - Does your event need a real-time captioner? If so, you may assign someone to do so. You may contact [ATI@csudh.edu](mailto:ATI@csudh.edu), 2 business days prior to the event to reserve a third-party captioner. There is a cost associated with hiring a captioner.

# ZOOM WEBINAR ROLES



## ZOOM ROLE: HOST

**There can only be one host of a webinar.** Can assign someone else as alt-host to start and control the webinar.

**Functions as:** *Webinar Lead*

**Full Control of Webinar:** Start and stop webinar, mute panelists, stop panelists' video, remove attendees from the webinar, and more.

**Duties:**

- Create & schedule webinar (and designate alt-host, & co-hosts as needed)
- Send invitations
- Coordinate Panelists
- Monitor registration
- Follow up on surveys, emails, polls, etc. after webinar ends

## ZOOM ROLE: ALT-HOST

**Must be assigned by the Host when meeting is scheduled.**

Alt-host shares the same controls as co-hosts but **can also start the meeting.**

**Functions As:** *Technical Director*

**Duties:**

- Monitor attendees and panelists:
  - Transfer attendees to panelists, if not pre-planned.
  - Muting and unmuting attendees and panelists (if they forget they have control)
- Monitor the chat, if used
- Monitor Q&A (when needed)
- Record the session (needs a stable internet connection and room on the computer to access the file)
- Will review, edit and share recording to YouTube (listed/unlisted/private) or Dropbox
- Will need to review for closed captioning

## ZOOM ROLE: CO-HOST

**Must be assigned by the Host when meeting is scheduled.**

Co-host shares many of the controls that Host has and can manage attendees or starting/stopping the recording but **cannot start a meeting.**

**Functions As:** *Moderator/Emcee*

**Duties:**

- Can be the 'voice' of the webinar. Responsible for the introduction, description, and closing of session
- Timekeeper & Facilitator - Call on speakers, as needed
- Curate the Q&A
- Brief the panelists, so everyone is on the same page
- Coordinate the panelists presentation and sequence of the session
- Provide questions or topic ahead of time to keep a unified theme and connected points of view

Depending on the size and scope of the webinar, you may need a team of people to run the webinar. At a minimum, there will be two-three people actively involved in the webinar: the Host, co-host, alternative host. If the event is small, people could do double-duty in many of these roles. For large events, the number of co-hosts can be increased to manage and control the administrative side of the webinar. If you are conducting a large webinar (over 300) we recommend having more people on hand to help with Q&A, Raise Hand feature, and presentation.



## PANELIST

**Must be assigned panelist permissions by the webinar Host.**

- Full participant in a webinar.
- Can view and send video, screen share, annotate, etc.
  - The Host can also disable some features for panelists, including starting video, sharing your screen, and recording.

### Duties:

- Prepare, share, discuss, and present to the selected topic
- Replying to Questions and Answer either Live or Type Answer.
  - Difficult to respond to live and type answers simultaneously.



## ATTENDEE

- Attendees are view-only participants who can be unmuted if the Host chooses.
- Their view of the webinar is controlled by the Host.
- They can interact with the Host and the panelists through the Q&A and the chat.

Depending on the size and scope of the webinar, you may need a team of people to run the webinar. At a minimum, there will be two-three people actively involved in the webinar: the Host, co-host, alternative host. If the event is small, people could do double-duty in many of these roles. For large events, the number of co-hosts can be increased to manage and control the administrative side of the webinar. If you are conducting a large webinar (over 300) we recommend having more people on hand to help with Q&A, Raise Hand feature, and presentation.

# ZOOM: WEBINAR PANELIST QUICK GUIDE

The Question & Answer (Q&A) feature for webinars allows attendees to ask questions during the webinar and for the panelists, co-hosts, and host to answer their questions. As a panelist, you will have control over your mic, while attendees may have the option of chat and/or Question & Answer.

## QUESTION & ANSWER PANEL

The Question & Answer Panel loads **Open**, **Answered** and **Dismissed** Questions. You have the option to answer questions **Answer Live** (using your mic) or **Type answer**.

1. Questions will load into the Question and Answer Panel as they are typed. They will appear in the **Open** tab.
2. As a panelist, you have the choice to **Answer live** (using your mic) or **Type answer**. **Suggestion: Cue the moderator and the other panelists if you will be responding to the question by reading the question aloud and then reply either Live or Type.**
  - a. If you click on **Answer live**, the question is automatically moved to the Answered Panel – **EVEN IF YOU DO NOT REPLY.**
  - b. If you **Type answer**, there may be a delay/lag before the reply appears.
    - (Optional): Check Answer Privately before clicking send, if you would like to answer to the attendee only.
3. Questions that have been answered automatically move to the Answered panel.
4. If you do not wish to answer a question, click on the **Dismiss** button to move it to the Dismissed panel for review later.
5. Dismissed questions can be reopened by clicking on the **Reopen** button in the Dismissed panel.

