Users Guide to Using Zoom for Communication and Meetings

Most likely you have heard of Zoom. Since the Covid lockdown, Zoom became a buzz word, especially in the business world. Did you know that Zoom is more than just a meeting place? There are many features within Zoom for communicating and meeting with your team.

As seen by this quote from the folks at the Zoom Blog, (source: https://blog.zoom.us/how-the-world-connects/)

"We're proud to play a fundamental role in how the world connects. **Half a million businesses globally** choose Zoom for their critical communications, including:

- 70% of the Fortune 100
- Over half of the Fortune 500
- 85% of the Forbes Cloud 100, the world's top private cloud companies"

But it's not just for big business. As we saw in 2020, education took on Zoom to teach our students. Workers from all walks of life used Zoom to stay connected with their bosses and employees.

With Zoom, you can:

- Share your thoughts and opinions with someone else.
- Share all your ideas with anyone.
- Share your own product or service with others or the world.
- Bring your ideas or products to life with your team or collaborations.
- Share ideas, thoughts, improvement ideas or plans with others.
- Meet with your team members, hold video conferences, create webinars, or teach courses.

By using Zoom for communication and meetings, you aren't limited on the ways you can have a meeting. In this Insider's Guide to Using Zoom for Communication and Meetings, we'll be digging into the ways to use Zoom for business, tips for holding meetings, getting started and holding your first meeting. Finally, will talk about the different ways you can use Zoom and how different features work.

And don't forget we have some great templates and resources for you too.

Let's get started.

Ways Zoom Can Be Used for Business

Zoom is perfect for communicating and meetings. It allows you to hold business meetings without having to meet people in person. Besides meetings there are many ways you can use Zoom.

1. It can be used for presentations. Zoom allows you to share information on slides, videos, and audio to people anywhere.

2. Zoom can host small group meetings, a large meeting with many participants or events that require multiple people to attend. This includes conferences, trade shows, concerts, and other events. Due to its simplicity and usability, it is one of the most popular solutions for taking part in live video conferences.

3. Another option is to use Zoom to present an online workshop. For example, if you are a writer or artist, you could use Zoom to present a workshop on how to write a compelling description for your product. Or present a how-to type of workshop on using Canva to create a logo.

4. Host your paid discovery calls on Zoom. A paid discovery session is when someone gets in touch to buy your services. Instead of the usual sales meeting call, you can offer them a discovery Zoom call. In it you spend most of the time with them working out their problem and coming up with a solution.

5. Instead of the paid discovery call, you could do a free consultation on Zoom. Offer people the opportunity to choose a time to meet with you on Zoom, add it to a calendar on your website that has your available times and let them book it. You can use a scheduler like Calendly for this. Then on the appointed date and time, meet with them over Zoom to discuss their needs.

6. Zoom can be used to record yourself for a course you create. You can record yourself teaching skills you've learned. Then sell the course to others.

7. Do you offer one-on-one coaching? Zoom is perfect for these sessions.

8. Set up a Zoom call or recording for onboarding new clients. You can do this live with them or send it out in an email after they sign up.

9. Record a screen share or explainer video answering frequently asked questions on Zoom.

10. Use Zoom to give better customer service. Record yourself demonstrating how to use your product to save them time.

11. Host a meet and greet business book or new book release discussion evening through Zoom.

12. Show others have to do specific accounting techniques to help them with their personal or business finances.

13. Offer guided walks via Zoom for hotels, resorts, vacationers.

14. Zoom is perfect for doing DIY demonstrations.

As you can imagine Zoom is perfect for business meetings and communicating in many different ways. Once you get it set up you can use it for marketing, sales and communicating with your team, partners, customers, potential clients, and many others.

Getting Started with Zoom

Now that you have an idea of how you can use Zoom for business, you need to create an account on their app or Browser extension. You can download Zoom desktop client on macOS, Windows, Linus and Chrome or use the Zoom mobile app for iOS and android.

There are free and paid options with several levels depending on participant size needs.
- Free or Basic

- Pro - $149.90 /year/user

- Business - $199.90 /year/user

- Business Plus - $250 /year/user

- Enterprise – contact Zoom for pricing

How to register with Zoom

If you don't already have a Zoom account, go to the [Zoom sign-up page](#) to register for an account. You'll receive an email with a link to activate your account.

If you already have an account, log into it. Once logged in, you can use the control panel in the Zoom web portal to update your profile, schedule a meeting, edit your settings and more.

Scheduling a meeting

- Sign into your Zoom account.

- Click on Meeting.

- Click on Schedule a Meeting.

- Choose the time and date for the meeting.

- Tick the Recurring meeting if it will be an ongoing meeting.

- Select any other settings you would like to use. This might include the waiting room to have users wait to be admitted by the host to join. Other options include Video on or off options for host and participants. Choose the Calendar app.

- Under the advanced options: Choose to allow participants to join any time. Mute participants upon entry. Automatically record meeting on local computer. Approve or block entry for users from specific regions/countries.

- Click save or cancel.

Invite People to Join

There are two options for inviting people to join your zoom meeting: before a scheduled meeting or during a meeting.

Inviting to a meeting in progress:

1. Sign to the Zoom app.
2. Click start or join a meeting.
3. Click Participants in the meeting controls.
4. Click Invite at the bottom of the participant's panel.
5. Choose from the following invite methods:

    Email:
    - Click on the Email tab.
    - Select your provider.
    - Add recipients to the email and send it.

    Contacts:
    - Click on the Contacts tab.
    - Select the participants name from the window or search for a contact.
    - Click on the name you want to invite. You can choose multiple contacts. Their names will highlight in blue and appear at top of the window.
    - Click invite in the lower right window.

    URL or invitation text
    - Copy Invite Link: Copy the meeting join link.
    - Or copy the full invitation text in Copy Invitation.
    - Paste the URL or invitation link.

Inviting participants to a scheduled meeting:

In the Desktop version of Zoom:
- Sign in.
- Schedule the meeting.
- Click on Meetings tab.
- Select the meeting you want to invite participants to. Click Copy Invitation.
- Paste the link into an email or wherever you want to send it out.

Or sign-in to the Zoom web portal.
- Click on Meetings. Click the topic of the meeting.

o   In the Time section, choose an option for adding to your Calendar.

o   Another option is to click on the Copy Invitation link. And send the link to your participants via email or other service.

Getting started with Zoom is fairly easy. Once you begin using it, you'll begin to see how easy it is. Inviting people to your Zoom meeting, scheduling meetings, and setting up your video and audio are just a few of the things you can do when you first set up your account and meeting.

Features available for meetings

Zoom isn't just a simple meeting video. It has many useful and fun features that help your meetings be more productive, organized, and enjoyable. Let's look at these.

Breakout rooms

Breakout rooms are perfect for smaller group discussions. Split big Zoom meetings into smaller sessions of up to 50 breakout rooms. The host chooses to split meeting participants either manually or automatically. Or they can let the participants choose and enter breakout session they like. The host can switch between the sessions at any time.

Waiting room

The waiting room feature is Zooms way of preventing uninvited guests from crashing your Zoom meeting. The waiting room puts the person on hold basically, until the host lets them into the meeting.

Whiteboard

The whiteboard tool allows participants to collaborate on a sharable canvas. This canvas can be accessed outside of Zoom meetings. This is an ideal tool for brainstorming ideas together. You can also share multiple whiteboards at the same time.

Share Screen

The Share Screen tab allows you to share your computer screen with others. It shows everything you have open including the full desktop, browser tabs or open applications. You can allow others to share their screens simultaneously.

Chat

The Chat tab is on the main bar. It's designed for users to type questions or messages, and share files stored on cloud storage or directly on their computer. The host can set the permissions of the chat. Save the chat session. They can also control who participants can talk to - no one, the host alone, everyone publicly or everyone publicly and privately.

- **Private chat**: allow or restrict direct messages by participants using the private chat option.

- **Channels / Chat groups**: lets you create groups of contacts that are either public or private. You can use it to chat with a specific group quickly and conveniently. Send group chats, files, images, and screen captures to everyone in the channel group.

As you can see, Zoom has added many new features to enhance business meetings and communication. Each one has a purpose and can help you have more productive meetings.

How to run your first meeting

Now that you've seen the features and set up your Zoom account it's time to run your first meeting. It might be a little scary at first, but these tips will help you run it more smoothly.

Getting started

1. Begin by creating your first meeting.

   o Hover your mouse over the HOST A MEETING link and select your options: with video on, with video off or screen share only.
   o Schedule your meeting time and date.
   o Get your Invitation URL to send to attendees.

2. Send out calendar invites to those you want to attend. You can add a brief description of the meeting agenda, so everyone knows what topic to expect.

3. Define the objective of your meeting.

   o What are you trying to accomplish?
   o Who are you meeting with?
   o Is it a client meeting or a meeting with teammates?
   o Will it be formal or informal?

   Once you have the answers to these questions you have a better idea of how to direct your meeting.

4. Create your meeting agenda. You need to know, before you get in front of your participants, what you are going to talk about.

5. Run through a rehearsal, especially if you are having other presenters in your meeting. If you're sharing slides or documents during the call, make sure they are loaded onto your computer and easily accessible.

6. Set up in plenty of time before the meeting begins. Make sure all your equipment works. Open any documents you want to share. Test links you will be opening during the meeting. And don't forget to close any applications you won't need.

7. If you are presenting to a large group, you might want to enlist the help of a co-host or facilitator. This gives you an extra set of hands for helping with any technical issues or to keep track of chat questions.

   They can also be responsible for muting participants or recording the meeting. You can add a co-host by clicking "Manage Participants" in the meeting controls and choose "More" next to their name. Then select "Make Co-Host."

Running your meeting

1. To avoid disruptive noises when someone joins your meeting, it's a good idea to mute all participants upon entry. They can unmute themselves once they are in the meeting.

2. Prepare a greeting slide. Let attendees know they are in the right session by creating a welcoming PowerPoint slide they see when they join the meeting.

3. Don't forget to record the session. Recording allows you to share the video meeting with others who couldn't attend. And allows participants the opportunity to review what was covered.

   One of the benefits of using Zoom is the ability to record meetings as videos. You will need to set certain permissions though. The host (you) will need to go to the Settings section of your Zoom account and enable the recording option.

   The record button appears at the bottom of your screen when your meeting begins. You can see where the video is being stored.

   When recording meetings in Zoom, you have the option of saving the video locally or in the cloud. The cloud option is available only to paid subscribers. Local recording is available to both free and paid subscribers. Local recording lets participants record the meeting video and audio to a computer. It can include participant names, audio tracks for each participant, timestamps, etc. The recorded files can be uploaded to a file storage service like Dropbox or Google Drive or to streaming services like YouTube.

4. Arrive early to get set up with everything and go over the topics with your co-host. This is when you need to address any potential issues such a technical hiccups.

5. Make sure your camera and microphone work and that your attendees know how to set up and use their camera and microphone.

6. Break the ice to engage everyone on your screen. This is especially helpful for any newcomers to the group. For instance, you could have each person make a short introduction of themselves, sharing a fun fact. Or simply have everyone tell a recent personal story if they already know each other.

7. Stick to your agenda and timeframe as much as possible. Everyone's time is valuable including yours, so be aware of your time.

8. Make time for questions. Encourage attendees to ask questions either before hand or in the chat. Then take the last five or 10 minutes to answer them.

Closing out your meeting

1. As the host of the meeting, you decide when it eventually ends. Stay on the call until the last attendee has left. This is just good manners. You can ask if there are any other issues needing discussed before leaving. Another option is to remind everyone of the next meeting time and where the recording can be accessed.

2. Near the end of the meeting thank everyone for attending.

3. Hit the "End Meeting" tab to finish your session. This ends the meeting for everyone.

4. Send out your meeting notes right after the meeting to everyone. And do any follow up as needed. This is especially helpful to attendees that had to leave the meeting early.

5. Let attendees know when and where the recording of the session can be found.

Hosting a Zoom meeting is mostly just a matter of being prepared and monitoring everyone as the meeting progresses. As the host it's your responsibility to make sure the meeting stays on topic and time.

Tips for hosting meetings

Hosting a meeting on Zoom has a lot of little steps that might be overlooked. And like an in-person meeting it has some etiquette rules that should be followed. We've all seen the embarrassing shots of people showing up in their underwear or talking to someone offscreen while unmuted. These little annoyances can be prevented by following these tips.

- Zoom etiquette: There is no substitute for good manners. This means being on time, maintaining eye contact, being polite, and paying attention are just as important in a virtual setting as in in-person meetings.

- Show up as a professional, or at least fully dressed and clean.

- When screen sharing, use the optimize option prevent distortion, lagging and buffering issues.

- Look directly into the camera rather than at participants or yourself. This mimics eye contact. If you look at the image of yourself, it appears like you are looking off to the side. You can look at other participants to gage reactions but alternate between them and the camera for best results.

- Double-check all your settings.

- Test audio and video before and as you join.

- If you are hosting, connect from a large screen instead of a phone or small tablet.

- Try to use a stable or wired connection to prevent buffering or loss.

- Join meetings from a quiet space. Lock the dogs in another room. Make sure the kids occupied elsewhere. Avoid high traffic areas such as coffee shops or train depots.

- Deliberately pause to encourage conversations. When you finish a point, pause to see if others have a comment or question. Use the "raise hand" function or chat box to be recognized when you have an idea or thought you want to share.

- Remain on mute when you are not talking. This helps prevent any kind of background noise from distracting others on the Zoom meeting.

- Stay focused on the meeting. Don't multitask.

Use these tips as a guide for having a pleasant and productive Zoom meeting.

Putting it all together

A great addition to any business is using Zoom for meetings and communications to bring members of your team or clients together. Once you sign up on the zoom app or portal you are ready to start hosting or attending meetings.

Setting up your first meeting involves planning ahead of time, scheduling and sharing the link with attendees and creating an agenda to follow.

When you attend a meeting, either as a participant or as the host, you should follow basic manners and etiquette to have a productive and pleasant meeting with others.

To help you along your journey of using Zoom we've created four templates to guide you.

1. A Zoom Meeting Setup checklist to help you remember the steps to setting up your Zoom meeting.

2. Hosting a Zoom meeting Worksheet helps you narrow down everything you need to do.

3. The Apps, features, and integrations for Zoom Tool sheet gives you some special features and apps that work well with Zoom.

4. The Using Zoom Tip list contains 25 tips to help make your first Zoom meeting a success.

There you have it. Now it's time to start your first Zoom meeting.