Using Zoom for training or workshops

When I looked for articles about using Zoom as a trainer or workshop leader, I couldn't really find anything relevant. I've recently developed an online version of my Writing Funding Bids training and was hoping for something to help me with the planning.

There were lots of 'Top Tips For Using Zoom' articles, but the pearls of wisdom they shared only included things like "don't eat your dinner while on a Zoom call" and "did you know you should mute yourself when you're not speaking?"

I've now run the training several times and each time I've made notes for myself about Zoom which I'm sharing here. It's not a tech 'how-to' for Zoom as they have great videos and articles on their site, which I've linked to where relevant. It's more about ways of using the tools to help online events you're running to go smoothly. I'm not setting myself up as an expert or as the perfect online trainer – I've just collated my own experiences in the hope they will be useful for others.

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1. Make Zoom your friend

There are a few ways you can get used to Zoom before you launch into live delivery:

a. Go through 'settings' in your Zoom account to familiarise yourself with the different options. This gives you an overview of the tools you can use and also creates your default settings. When you then create meetings, they will be based on those settings

b. Start a meeting without inviting any other participants and just test out all the functions you can use as 'host' – you can't break it – press all the buttons! Zoom also has a test meeting url which you can use to check audio and video and is useful to share with participants in confirmation emails too: zoom.us/test

c. Join other people's events on Zoom and note what works and what doesn't for you as a participant. How do they structure it? How do they use the different functions?

d. Test with colleagues, friends and family. The first time I tested using breakout rooms, my aunt, my cousin and a few friends kindly joined a Zoom and let me try different settings, gave me feedback and took screenshots so I could see what the participant view looked like.

e. Use the Zoom videos, blogs and help articles. They're pretty comprehensive. They also run live and recorded training intros to Zoom on a daily basis.

2. Setting up your physical and virtual workspace

Spend some time getting this right so you're comfortable when running your online events and the participant view works well. Make sure you'll have everything you need to hand and reduce distractions/interruptions.

The most important thing for the participant view is that it's uncluttered so they can focus on your face. Virtual meetings mean you lose some of the non-verbal cues you would get in real life and your brain also has to work harder to focus, so help people out by creating a suitable backdrop. This can simply be a blank wall or you can indulge your inner designer and set dress your background. Think minimalist chic rather than Laurence Llewelyn-Bowen.

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Creating a helpful participant view

✓
- uncluttered
- evenly lit
- in focus

🚫
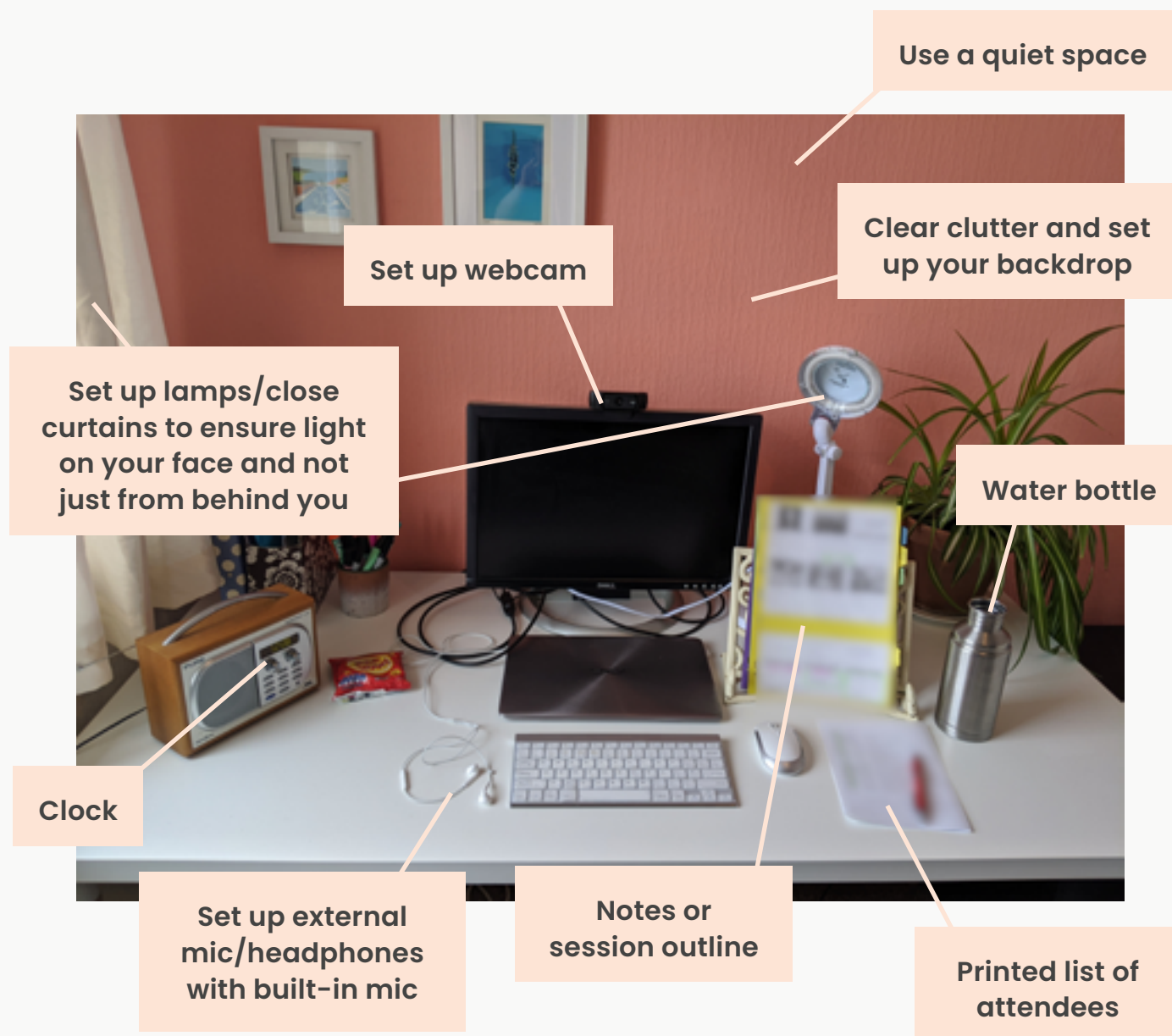- cluttered
- unevenly lit
- out of focus
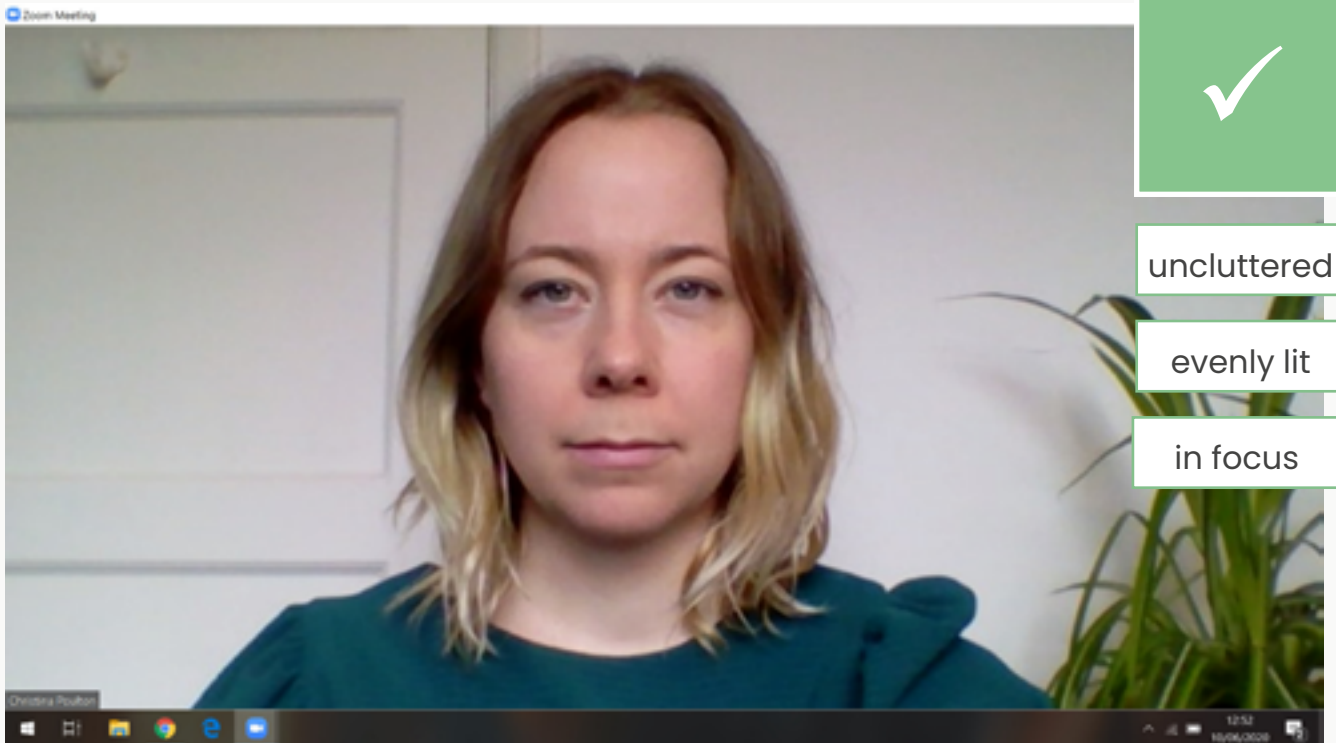
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Workspace layout

After trying a few things I've settled on a preferred set up, so here's a set up checklist I have created for myself:

Use a quiet space

Set up webcam

Clear clutter and set up your backdrop

Set up lamps/close curtains to ensure light on your face and not just from behind you

Water bottle

Clock

Set up external mic/headphones with built-in mic

Notes or session outline

Printed list of attendees

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Checklist

☐ **Quiet space**: switch off phones and computer notifications

☐ **Webcam**: you can use the built-in webcam on a laptop but an external webcam gives a clearer, less jumpy image

☐ **Mic**: this makes a big difference to quality of sound. I ordered an external mic as many articles recommended this, but I did tests and my cheap headphones that came with my 'phone worked much better for cutting out background noise and stopping the echo from my voice in the room, because the mic is so much closer to your mouth.

☐ **Clock**: when you are sceensharing in Zoom you can't see the time on your computer, so have an old school clock around so you can easily check how you're doing for time.

☐ **Lighting**: if you're against a window it will silhouette you and participants will find it hard to see your face

☐ **Water bottle**: also line up some snacks for breaks if it's a long session!

☐ **Session outline**: I found a cookery book stand which I use to prop them up with, so I'm not looking down all the time.

☐ **Printed list of attendees**: once you've started you can see who's in the session from the underline participants bar in Zoom but if you're using the waiting room for security I found it easier to check names against a paper list than toggle between windows on my computer while in the Zoom

3. Starting the session

I start the Zoom meeting 10 minutes before the official start time. I prefer to welcome people one by one as they arrive, in the way you would in real life, and chat a bit before the start. It also means those who haven't used Zoom before can check it's working for them before you begin. For me, letting everyone in at the same time and starting straight away feels like the digital equivalent of walking on stage into a spotlight. The waiting room feature also allows you to keep track of who's joining.

Before people arrive, I quickly double-check the sound and volume levels in the meeting itself as well as checking the in-meeting settings. If you've made changes to your main profile settings, sometimes these don't get carried across to meetings you had already scheduled.

I enable host-only chimes to make sure I let people in promptly and don't miss them waiting. It says it's a chime for when people enter or leave a meeting but it also chimes when people arrive in the waiting room

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If I am planning to share slides I will share the first one and then stop sharing.

This means when I then share again in the training itself I can select to share the full screen slideshow rather than everyone seeing my version of Powerpoint with all my slides and notes.

4. Working with groups online

For online training most of the principles are the same- the content is more important than the technology- but there are some extras to consider and some things which become much more important online.

It's also worth thinking about what else people would get from an in-person version of your event, aside from the content, and work out if there's a way to recreate some of that online, for example if networking, one to one conversations or hearing the experiences of others in the group would be important, how can you create opportunities for this online?

- Online sessions usually need to be shorter than in-person events. You have to work harder to engage people and it's difficult for participants to concentrate for long periods of time. Cut down the running time of any sessions you are transferring from live to online and add in more breaks. Give time for breaks away from the screen, encourage participants to stand up and stretch regularly and try to vary content. As well as presentation, include discussion and other activities (see 'Tools for Interaction' below)

- Be clear about the session structure and give explanations of how activities will work to take away uncertainty for participants. In an online setting it's harder to take your cue from others in the group and people are less inclined to ask questions if they're not sure.

- Be clear about how you're using mute. The standard is for everyone to be muted once you start, to reduce unwanted background noise, and then people unmute themselves to speak. Use people's names so they know if you're directing questions to them or inviting them to speak, or be clear if it's a question to the whole group.

- Participants can use the 'raise hand' feature if they want to speak. I prefer to ask people to raise their hands in real life as the more 'real' interaction the better, for me. If you are screensharing, however, you won't necessarily be able to see everyone's videos so people will need to use the 'hand up' icon at that point.

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- Give an opportunity for people to speak and interact early on in the structure of your session so that they feel actively part of it. Use people's names consistently to manage conversation, bring people in and create connection

- Plan introductions. If you have a big group this can end up taking a really long time so you may need to be specific or creative about what people share to introduce themselves. I have been on meetings where people brought an object to show, which said something about them, or where participants annotate a map with their location, introduce themselves in the chat, or are asked to share one word which describes how they're feeling.

- Do a quick Zoom familiarisation at the start of the session for any new users including the key features e.g. mute, video on/off, chat, participants and gallery vs speaker view.

- Agree any ground rules such as not taking screenshots without everyone's permission. It's also very easy when you're participating in a Zoom to be checking your 'phone, emails etc so I ask people to try and avoid distractions for the time of the training and be fully present in the session.

If it's a complex event or with a very large group then having a second person to manage the waiting room, chat, help mute and unmute for people etc can be invaluable and you can also swap and make them the host if you're having tech problems.

5. Tools for interaction

Zoom has a range of interactive tools you can use to facilitate teaching and learning and to encourage interaction and keep people engaged.

- Chat can be used to share links to documents or urls, for the whole group to post their responses to a question or for participants to share comments with the group.

- Polls are great for icebreakers, evaluation, quiz questions or gauging baseline knowledge.

- Breakout rooms are a brilliant feature and allow participants to do a discussion activity in small groups, network or giving feedback to one another. It's a great tool for allowing everyone to participate in discussion in a way which is difficult in large online sessions.

- Feedback icons allow participants to agree, disagree, clap, wave and say yes and no; good for quickfire questions, quizzes and gauging a response to something you're sharing.

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- Participants can <u>rename themselves</u> (or you can rename them) which can work for activities where people play characters or for people to add preferred pronouns after their name. I've also seen it used where participants put a number at the start of their name, which corresponded to the breakout room they wanted to be in and the host then used this to assign the rooms.

- <u>Whiteboard and annotate screen functions</u> mean participants can create diagrams together, mark items on a list, circle parts of an image, identify favourites with the heart stamp etc

If many of your participants are using mobile phones to access the session then some of these tools are less easy to use than on a computer. If you're using the chat, post a message first and then the chat window will pop up on a mobile user's screen. The whiteboard and annotation functions can be a bit fiddly on a mobile.

In addition to the Zoom tools, some 'real' interaction e.g. group stretch, dance break, people introducing their pets etc helps connect people. Doing something all at the same time can also be effective. I was on a very large group international Zoom and they got everyone to unmute and say hello in their first language and it was a great moment. Try and interact directly with each participant on the Zoom where practical, so they feel part of it. A colleague has a list of participants and ticks off each person once she has spoken to them to ensure she doesn't miss anyone.

6. Security

Zoombombing has received lots of press but the only instances I have heard of are where the link to a Zoom event was shared publicly on social media etc. There are several things you can do to help make meetings more secure:

- Share the link close to the meeting date, direct with participants rather than making the information public, and <u>include a password</u>. Eventbrite now has a feature where you can create an online page which only ticket holders can access and you can share the link there.

- The <u>waiting room</u> feature means you only let in people who have signed up. Make sure people let you know if they're not using their own name on their account. If people are using an organisation account, for example, they might appear as, say, 'ABC Arts' rather than their name.

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- You can lock the meeting once all attendees have joined. The only thing with this is that I'm not sure what happens if people need to leave and re-join due to tech issues

- You can also change the meeting settings so attendees can't screenshare, only you as host.

There's more info on Zoom's support site.

7. Random extras

These things don't really fit anywhere else but caused momentary stress for me in early sessions so I'm including them here:

- When I screenshare a Powerpoint presentation I have to click in the middle of the screen first before I use the arrow keys to move between slides, otherwise I press the keys and nothing happens.

- If going through participants one by one, for example for introductions, the order in the participants list changes depending on who's speaking or muted etc so I've found using the order the videos are in, in the gallery view, to be easier. If you have to mute individual participants it's also quicker to do it from their video rectangle than from the participants list.

- If you post links in the chat before people join the Zoom they can't see them once they're in. I've ended up using this to help me as I post anything I need to use in the session before people join, and then when I need it I can just copy paste it into the chat again quickly and easily

- My standard set up for working is to have my laptop and a separate monitor but the first time I screenshared in Zoom whilst using this, Powerpoint started using one screen as my preview screen and then even when I stopped sharing I couldn't see the Zoom meeting on my main screen and had to do the rest of the session talking blindly to the webcam without being able to see people's faces. So if you're planning to use a second screen, check your display settings for Powerpoint first.

8. Most importantly...

You and what you have to share are more important than the tech and people are very forgiving and understanding if things aren't working as they should. Use whatever features you find useful and don't worry about the rest.

Although we all miss the face to face connection, the accessibility of online meetings can open up opportunities in a brilliant way. I've had people join training who are also homeschooling, or whilst breastfeeding or from their sickbed. The fact that people don't have to travel makes it easier for people with health conditions where they have to manage their energy levels and also makes it more time and cost effective for everyone. You can lie down or walk around during the session if you have a bad back, you don't have to leave your dog alone to take part and you only have to get dressed from the waist up. What's not to like?

Very best wishes if you're planning to run training or workshops on Zoom and I hope you enjoy it.

If you've found this resource useful, I'd love it if you could share the link with others – and feel free to spread the word about the <u>Writing Funding Bids training</u> too.

Thanks!

Christina