

VIRTUAL MEETING BEST PRACTICES



THE GROWTH PARTNERSHIP

— PLAN ON SUCCESS —



TABLE OF CONTENTS



THE GROWTH PARTNERSHIP

PLAN ON SUCCESS

The Growth Partnership (TGP) works exclusively with public accounting professionals to help them succeed as business owners. Our consultants, coaches and trainers offer growth and development strategies to address the most important issues faced by accounting firms today.

Our expertise includes marketplace positioning, performance training, lead generation and customer loyalty, and our best-practices approach draws on more than 15 years of organizational experience. We excel at helping our clients achieve sustainable, profitable growth. For more information, visit our website at www.thegrowthpartnership.com or call (314) 209-0922.

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Determine Your Approach	1
Prepare for the Meeting	3
Participate Productively	5
If You Are the Host.....	7
Additional Meeting Tips	9
Top 10 Advanced Tips to Shine on Zoom.....	11
Top 10 Advanced Tips to Shine on Teams	13
Top 10 Advanced Tips to Shine on GoTo	15



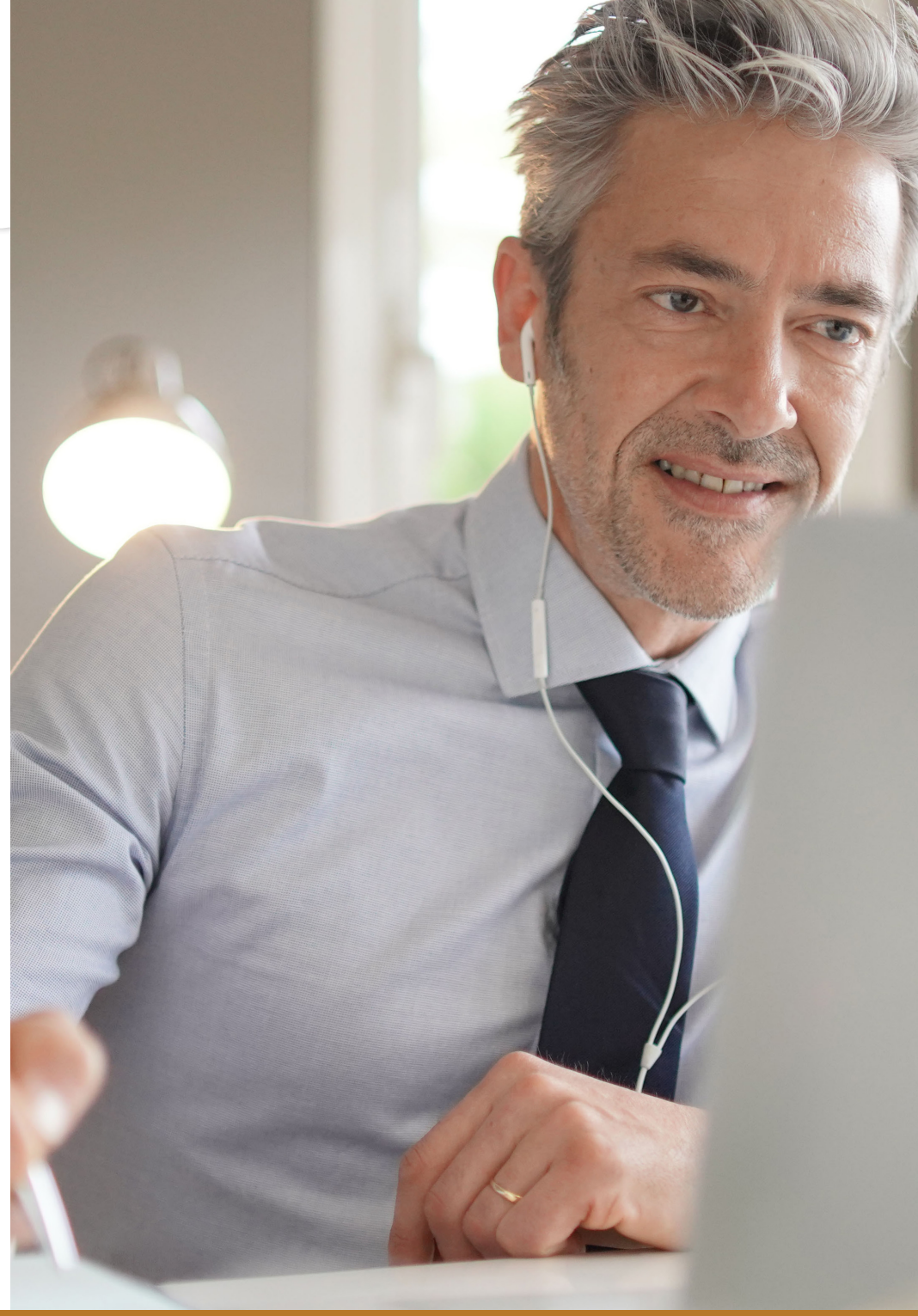
DETERMINE YOUR APPROACH

1. Consider if your session should be live or pre-recorded.

- Live webinars are intended to create emotional resonance and promote direct interaction. If you believe your content will be best served with audience collaboration, choose a live webinar or meeting as your format. Live webinars should include one or more of the following: polls, breakout discussions, live Q&A, chat interactions, or group exercises.
- Tools for managing pre-registrations for live events are often available with your website. WordPress and similar CMS platforms offer registration plug-ins. You can also utilize platforms like [Eventbrite](#).
- Pre-recorded webinars are most effective when audience participation is not necessary. Pre-recorded content allows you to edit and add value in post-production and can minimize nerves for the presenter. Final videos can be hosted on sites like YouTube and Vimeo, then distributed through social media to promote viewership.
- If you elect to go with a pre-recorded session, webinar editing tools may be available with your chosen webinar tool (included in GoToWebinar and GoToMeeting). Alternatively, you can use third-party tools like Lumen5, Corel VideoStudio, or Nero Studio.

2. Strategize based on your logistics.

- If you are planning a live session, you should incorporate interaction every 20-30 minutes.
- If you are planning a pre-recorded session, you should include graphics, imagery and videos. Music can add a nice touch to a prerecorded session as well.
- Follow the 10-20-30 rule for your webinar – 10 slides, 20 minutes total or between activities/interaction, 30 point font.
- If you have a chat open for the session, recruit a partner to help you manage the chat.





PREPARE FOR THE MEETING

1. Set up your equipment.

- Encourage guests to download the meeting software in advance within your meeting invite. This can prevent a hold-up at the beginning of the session if technical difficulties occur.
- Test your audio and video at least 30 minutes prior to start. It is best to do this with a partner so you can test how they are able to see and hear.
- Understand the software functionality before the meeting – screen share, recording, chat. Practice at least once before your live session.
- Close unnecessary tabs in your browser. Turn off email and messaging notifications.

2. Look your best.

- Lighting should come from in front of you or from the side to best light your face.
- Keep your background clear of distractions.
- Look at your webcam, not at the screen.
- Use gestures and mannerisms you would typically use in-person.
- Dress for a virtual meeting as if it were an in-person interaction.

The equipment used during live webinars and recorded videos can play a significant role in delivering high-quality content. In most cases, the latest technology available in laptops and desktop computers is sufficient. However, if the technology you are using is older, you may want to consider investing in specific items to improve your presentations.

You can conduct an easy technology audit of key equipment you'll need prior to creating your webinar or video. If any items do not work properly, you may want to consider replacement, external technology.

Be sure to test your:

- Microphone
- Speakers
- Webcam
- Lighting

After testing, if your technology isn't up to par, consider the following technology upgrades.

CAMERAS

- [Logitech C270](#)
- [Logitech HD Webcam C920](#)

MICROPHONES

- [Blue Yeti](#)
- [Samson Go Mic](#)
- [Blue Snowball](#)

LIGHTING

- [Mini LED Light](#)
- [Panel Lights](#)
- [Softbox Lighting Kit](#)

HEADPHONES

- [Bose QuietComfort](#)
- [Apple AirPods](#)
- [Sony WH1000X](#)

SPEAKERS

- [Creative Pebble](#)
- [Satechi Dual Speaker](#)
- [Logitech Z50](#)
- [Bose Companion Series](#)





PARTICIPATE PRODUCTIVELY

1. Make sure everyone can hear you.

2. Help everyone focus.

- If you aren't talking, mute or turn off your microphone.
- Avoid noisy activities like typing while your microphone is on.

3. Reduce distractions.

- Sit or stand somewhere with a neutral background.
- Make sure your camera is on a steady surface to prevent shaking.
- Turn off your camera if you need to take care of business outside of the meeting (ex. something needs your attention). Turn the camera back on when you are present in the meeting again.





IF YOU ARE THE HOST

1. Secure your meeting to prevent unwanted guests.

2. Review your host controls and meeting settings ahead of time.

3. Share housekeeping details with attendees at the beginning of the meeting.

- Remind them to mute their mics when others are presenting or speaking. Alternatively, the host can mute everyone at the beginning to minimize distractions.
- Let your audience know how they can get your attention during the meeting.
 - Will you be checking the chat window?
 - Should they unmute themselves to speak up?
 - Is there a hand raise option they can employ?

4. Start the recording (or set up automatic recordings).

5. Prepare your interactions – have all of these planned out and ready.

- If you are sharing screen elements, be sure to have these pulled up and ready to cue.
- If you have polls or chats that you intend to run, have these cued for participants.
- If you have videos to run, be sure you have tested how the audio will play in the webinar utility.
- If you need to use a white board, make sure you understand how to use the functionality in your chosen tool. Zoom, GotoWebinar/GotoMeeting, Microsoft Teams, and Adobe Connect all have built-in white board functionality. Alternatively, you could use a Word document on screen share as your white board tool.





ADDITIONAL MEETING TIPS

1. Use interactivity every 20 minutes to periodically engage your audience and keep them focused.
2. If your meeting is more than 1.5 hours, make sure to take a break.
3. Monitor the chat function for questions as they come in. Ideally, you should consider having a partner to help you monitor the chat so that your attention is not pulled in multiple directions.
4. Enable video only for the presenter unless it is a collaborative session.
5. Keep it short. The ideal virtual meeting time is less than an hour. For a webinar training, 2.5 hours is an ideal length.



TOP 10 ADVANCED TIPS TO SHINE ON ZOOM:

1. Quick Invite

When you're in a meeting, type Alt + I (MAC: ⌘Cmd+I) to open the Invite window. From the email tab, copy the URL, and send it to anyone who you want to invite to the meeting. Or click on Contacts to directly invite a colleague if they're on your contact list.

2. Record Meeting

Recording is a tremendously useful feature in Zoom. Want to save key meetings or employee one-on-one's? Record them for reference. Offering a training and want to record for later on-demand access? Just type Alt+R (MAC: ⌘Cmd+Shift+R) to start recording. Type Alt+P (MAC: ⌘Cmd+Shift+P) to pause/resume recording.

3. Share Screen

Screen sharing is one of the key features of Zoom. To start a screen share, type Alt+Shift+S (MAC: ⌘Cmd+Shift+S). To pause/resume a screen share, type Alt+T (MAC: ⌘Cmd+Shift+T).

4. Mute Your Audio

Prevent unwanted background noise and disruption. Mute during group conversations or during video playback. Use Alt + A (MAC: ⌘Cmd+Shift+A) to mute/unmute your audio.

5. Turn Off Video

To quickly turn video off/on, hit Alt + V (MAC: ⌘Cmd+Shift+V).

6. Mute Everyone

Ambient or background noise can often get in the way of clear communication. Use this trick where the meeting host can hit Alt+M (MAC: ⌘Cmd+Ctrl+M) to mute everyone on the call at once.

QUICKLINKS FOR MORE INFO



- [General Support](#)
- [Keyboard Shortcuts](#)
- [Secure Your Meeting Room](#)
- [Virtual Backgrounds](#)
- [Record a Meeting](#)

7. Display Names

This is less important when you're chatting with people you know well, but if you use Zoom for client interactions, then this setting will ensure you never accidentally forget the name of the person you're talking to. Go to Settings > Video and check "Always display participant's name on their videos."

8. Enable Shortcuts Outside Zoom

This setting will double the power of Zoom keyboard shortcuts. If you often have other windows open while in Zoom meetings, with this setting, you can use your Zoom keyboard shortcuts even when you're in another window. To turn it on, go to Settings > Keyboard Shortcuts and select "Enable Global Shortcut."

9. Touch Up My Appearance

In Settings > Video, check "Touch up my appearance," and Zoom will soften the focus on your camera, theoretically minimizing any issues with your skin.

10. Set a Virtual Background

Find a great image you'd like to use as your background (might be better than your basement office). In My Meeting Settings > Meeting tab, navigate to Virtual background and enable. Logout for setting to take effect. When you sign back in, click on your profile picture > Settings. Select virtual background. Click on an image to select or upload your own image.

TOP 10 ADVANCED TIPS TO SHINE ON TEAMS:

QUICKLINKS FOR MORE INFO



- [General Support](#)
- [Keyboard Shortcuts](#)
- [Record a Meeting](#)
- [Security in Microsoft Teams](#)

1. Quick Video or Call Functionality

Have that quick video chat or call to easily sync and get the information faster. Often it's quicker to speak directly with someone. Open up the chat with the person you'd like to video or call, then click on the video or call icons in the top right-hand corner.

2. Like a Chat Interaction

Acknowledge that you've read a message or agree without having to type a reply. Hover over a message and click on the thumbs up icon.

3. Turn on Background Blur

This is a simple yet effective feature in Teams that helps to reduce background distractions, whether you're in a busy office or at home with a curious cat. Press the CTRL+Shift+P combination. If things go blurry, during your video call, you know that your PC has this feature. The second option is to start your video from a meeting. Then, click on the Ellipsis icon from the meeting options and choose Blur My Background.

4. Mute Your Audio

Prevent unwanted background noise and disruption. Press Ctrl+Shift+M to mute your audio.

5. Turn Off Video

To quickly turn video off/on, hit Ctrl+Shift+O.

6. Share it All

Whether you need to share your screen navigation, a whiteboard for collaboration, or a particular document/tool, you want to be prepared for a share. To toggle on your share toolbar, hit Ctrl+Shift+Space.

7. Record Your Meetings

Recording is a tremendously useful feature in Teams. Teams recordings are conveniently saved directly within Microsoft Stream. Once your recording is ready, you can make it accessible to others or add it to a channel. If you would like to enable video transcription, select 'Caption' within the video settings. This also makes the content of the video searchable afterwards. To start recording, go to the meeting controls and select More options. > Start recording. To stop recording, go to the meeting controls and select More options > Stop recording.

8. Review Your Audience

After a video meeting with a large number of invitees, refer to the admin portal within Office 365 to get a clear report on who attended. Sometimes people forget to respond to the original invite but join the call. It can be useful to see who did and didn't attend, particularly if you'd like to reach out for feedback on the content of the call.

9. Use Schedule to Manage Invites

With Teams, you can host online meetings with people both inside and outside of your organization. The next time you schedule a meeting in either Teams or Microsoft Outlook, simply include the email address of your external guests and Teams will take care of the rest—including sending an email invitation complete with instructions on how to join your online meeting. Your meeting guest can click on the link, enter their name, and join the meeting from their browser—all without having to install a plug-in or download the Teams client.

10. Enable Audio Only Participation

Make sure meetings are inclusive for those who don't have internet access by enabling audio conferencing in your meeting settings.

TOP 10 ADVANCED TIPS TO SHINE ON GoTo:

1. Secure Your Meeting

During a meeting, access the MeetingLock feature by selecting the People icon in the top right corner of your meeting room screen. At the bottom of the menu that pops up, there is a toggle button next to the phrase Meeting is Unlocked. To lock your meeting, tap on this toggle button to change the phrase to Meeting is Locked. To unlock the meeting again, just tap on that same toggle button.

2. Use Drawing Tools During Screen Sharing

To access the Drawing Tools feature while in screen sharing mode, select the drop-down menu labeled Drawing Tools at the top of the screen. Then, choose your preferred tool from the menu.

3. Use the Hand-Raise Feature

This GoTo feature is great way to improve audience engagement and get quick answers to questions. You can easily activate and deactivate the hand-raise feature in the control panel.

4. Mute Your Audio

Prevent unwanted background noise and disruption. Press Ctrl+Alt+A to mute your audio.

5. Turn Off Video

To quickly turn video off/on, hit Ctrl+Alt+W.

6. Mute Everyone

Ambient or background noise can often get in the way of clear communication. Use this trick where the meeting host can hit Alt+M to mute everyone on the call at once.

QUICKLINKS FOR MORE INFO



- [General Support](#)
- [Keyboard Shortcuts](#)
- [Record a Meeting](#)
- [Staying Secure](#)

7. Manage Chat

To best minimize distractions, you can toggle on/off your chat window. To show/hide the chat pane, hit Ctrl+Alt+C.

8. Record Your Meetings

GoToMeeting gives you the option to record meetings and save them to your computer. This means you can go back and reference things from the meetings. This could come in handy if you missed some notes or need to share the meeting with someone who could not make it. Simply click the record button in your control panel. Smart Meeting Assistant will even transcribe your meeting (which is great for SEO on YouTube)!

9. Create a Custom Landing Page

Set up a welcome message and custom polls to welcome your audience to your session and kick off your interactivity. Go to settings on the event details page to set up the welcome message and add custom polling/survey questions.

10. Monitor Participation

During the webinar, you can easily see who is paying attention in your control panel. Monitor who is asking questions, responding to polls, raising their hand, or who has minimized GoToWebinar because they're doing something else. If your attentiveness meter gets down to 30%, that's an indication you need to engage your audience with questions, hand raises, or polls.



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