Digital event guide | Zoom Webinar

You can find full Zoom Webinar support guides in their Help Centre: https://support.zoom.us/hc/en-us/sections/200324965-Video-Webinar.

Please note you must purchase a webinar licence to gain access to the features and settings mentioned below. Pricing can be found here: https://zoom.us/pricing.

If you are already familiar with Zoom webinar, you may still find the tips and advice highlighted green helpful.

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1. Scheduling your Webinar

Sign in with the Zoom Pro (or above) account that you have purchased the Webinar licence for at https://zoom.us/signin. Once logged in on the Zoom website, select 'Webinars' on the left-hand side of the page and then click on 'Schedule a New Webinar'.
From here you can change the following (these can be edited up until the webinar is broadcast):

→ Title (Topic)
→ Description
→ Date and Time
→ Duration
→ Time Zone
→ If registration is required
→ If a password is required
→ Q&A
→ Enable Practice Session
→ If only authenticated users can join
→ Automatic recording

2. Webinar settings

The Zoom Help Centre guide for setting up a Webinar can be found here: https://support.zoom.us/hc/en-us/articles/200917029-Getting-Started-With-Webinar

Key articles in this section include:

→ Audio, video and sharing
→ Account and Admin
→ Integration
→ How to access training
→ Live streaming

The main settings for webinars, which will impact all the webinars you set up from this account, can be found on the side menu bar under Admin > Account Management > Webinar settings. It is recommended that you run through this first.

Here you can set overall settings for:

→ Branding, logos and themes (colours)
→ Emails direct from Zoom (if you use this function) for panellists/attendees – invitation, confirmation, cancellation, follow-ups
→ Registration settings
→ Email Settings
→ In Webinar Settings
Individual webinar settings that we recommend:

→ **Include a password following the **UIS security guidelines.** If you want to change the password of your webinar, select 'personal meeting ID' and tick 'require meeting password'.

→ **Only authenticated users can join** – we recommend **reading this guide** to see if this is something you wish to enable.

→ **Enable Practice Session**
   Once ticked, this will allow you and the panellist to enter the webinar before you 'broadcast' to the public, allowing you to conduct briefings and re-confirm settings.

Once you've saved your Webinar settings, it will take you back out to the main set-up page, and it should look like this:

3. **Recording**

When setting up the options to record a webinar, there are different layout styles

- **Active Speaker** – will only record the Speaker speaking
- **Gallery View** – will record up to 25 speakers in a grid format
- **Shared Screen with active Speaker** – will record the slides (large) and the image (small) of the Speaker in the top right corner
- **Shared Screen without active speaker/gallery view** – will only record slides

In settings > recording, you have the options to configure what you would like to record. **We tend to tick all options to provide us with multiple formats to pick up. Below are the settings we have found to work the best.**
You will notice that "Display participant's names in the recording" is not ticked, we do this due to GDPR. We also suggest that you don’t record any chat or allow participants or speakers to save the chat.

Please note, by ticking all of the above options you may run out of cloud storage quicker.

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Included Storage Capacity</th>
</tr>
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<tbody>
<tr>
<td>Pro</td>
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</tr>
<tr>
<td>Business</td>
<td>1 GB/Pro User</td>
</tr>
<tr>
<td>Education</td>
<td>0.5 GB/Pro User</td>
</tr>
<tr>
<td>Zoom Rooms</td>
<td>1 GB/Zoom Room</td>
</tr>
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</table>

You can purchase additional storage or set up auto-deleting in settings.

Pricing for additional storage (US Dollars):

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<th>Storage</th>
<th>Additional 1 GB</th>
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<tr>
<td>$100 per Month</td>
<td>500 GB</td>
<td>$0.5/GB</td>
</tr>
<tr>
<td>$500 per Month</td>
<td>3 TB</td>
<td>$0.1/GB</td>
</tr>
</tbody>
</table>
4. Roles during the event

To learn more about the responsibilities of each role, please read this document:
https://support.zoom.us/hc/en-us/articles/360000252726-Roles-in-a-webinar

We recommend having two or three team members, each with defined roles.

To enable communication during the event set up a separate chat stream on another platform e.g. Microsoft Teams or WhatsApp. We suggest using an external platform in case there are any technical difficulties during the event.

We recommend that each member has a second screen or device so they can also see the audience's point of view throughout the webinar.

HOST: This person (signed in as the primary account) has complete control over setting up the webinar and behind the scenes tools. As host, you can change the audience view and should control the camera function described below.

ALTERNATIVE HOST: This person is also a host, with all hosting capabilities, but this is only an option with a second webinar license. In your scheduled webinar click edit and scroll to the bottom, under webinar options, you can add an alternative host. Please follow this guide for more information. Please note that additional webinar licences can double your costs.

CO-HOST: Co-hosts can only be assigned once the webinar is started (pre-broadcast). This role has 90% of the shared control – screen sharing, muting, unmuting etc. They cannot change the 'audience view', start or end a webinar, edit polling (but they can launch polls) and make others a co-host. For events with only one admin, a speaker can be made a co-host if they are comfortable with the system.

PANELLIST: You can have up to 100 panellists/speakers in an event. You can enable panellists to send video, screen share and annotate, mute and unmute, view attendee list, etc. We recommend that they have the option to unmute themselves.

AUDIENCE / ATTENDEES: No cameras or microphones are turned on; however, they can ask questions through the Q&A, 'Raise their hand' if they have an issue/question and can be unmuted by the host if needed. We recommend that you select 'Attendees can chat with – no one'. We make this suggestion, in order to provide more control over the questions that are submitted.

Promote attendees to panellists
This is useful in case a speaker uses the wrong link to join the webinar and comes in as an attendee. You can promote them to a panellist, which will provide them will all the same rights as other panellist.
5. Inviting Panellists

Read this useful overview guide on managing participants/panellists in Zoom.

→ Under invitations, go to "Invite panellists", and click 'Edit' on the right-hand side of the page, enter their email address and name:

To learn more about adding panellists to Zoom and sharing their unique link with them, please see this link.

→ Note that you can choose to send panellists confirmations later, or at the time of adding them. If you choose to send later, you can find the unique links by going back into edit and choose either 'resend' or 'copy'.

6. Technical rehearsal

A technical rehearsal is your opportunity to run through the event and test the relevant technical functions in zoom with the speaker(s). For this reason, we advise running the technical rehearsal in the same platform as the event, i.e. if a webinar, in Zoom webinar. You may wish to use this time to confirm the following:

- The speaker's technical and visual set up, i.e. what's in the background, ensuring they have hard-wired internet etc.
- The running order and any cues for slides/videos
- Confirm any details or visuals with the speaker, i.e. slides, names to be displayed
- Demo technical functions, i.e. muting and un-muting, turning cameras on and off, screen sharing, how Q&A will work
- Agree alternative communication method i.e. WhatsApp or Teams if any technical issues occur during the event

This meeting should take place ideally before the day of the event. If this is not possible, then a couple of hours before the event is advisable

Each webinar has individual links for each panellist, so you will need to set up a separate webinar for the technical rehearsal if this meeting takes place before the event date.

We suggest sharing the 'Digital events – Speaker Info’ document with speakers so that they can check their camera set-up, lighting and audio is correct.

It is a good idea to have a function sheet or running order to guide you through your slide transitions, and so you can keep track of time.

As you go through your technical rehearsal make sure that everyone understands the running order and what you want them from a technical point of view.
7. Facilitator opening remarks, speaker introduction and closing remarks

We highly recommend having a digital event facilitator or host (this can be the speaker). They will introduce the session and the speaker/themselves, welcome guests and confirm the housekeeping arrangements. For example, how to use the Q&A function and polls or to explain why videos/audio are on or off.

It is best to provide the facilitator with talking points for their introduction. For events with more than 60 participants it can take 30 seconds or more for the audience to connect. Therefore we suggest that once 'broadcast' has begun, the facilitator waits before beginning their welcome. During this time, it is helpful if they announce that the webinar will begin shortly and that they are just allowing everyone to connect. You could also display a slide with the necessary information for those joining in reinforcing this welcome message.

An example of housekeeping slides, please add statements that reflect your event

As with the opening remarks, we recommend including closing remarks for the facilitator to help them smoothly end the session. At this point, it is good to mention if the talk has been recorded for later viewing or to direct participants to an email address if they have any further questions or follow-up requests. If the event is part of a series, this is an excellent opportunity to promote the next event.
8. During the live event

You can read about different roles in Zoom Webinar in this guide. Some of our useful tips can be found below:

Once you have set up your webinar and invited your panellists you are ready to go 'Live'. Go online and click into the webinar tab, find your chosen webinar, and choose 'Start Webinar'.

If you have enabled 'Practice session' you will now be in practice mode. Once everyone is ready, click 'Broadcast' at the top of your screen.

Practice Mode Only: Viewers cannot join until you broadcast

Broadcast

a. Cameras and spotlighting videos

→ Use 'Follow Host's View' to make sure the audience can see what the primary host can see. You can change this from the 'Participants' window at the bottom of your screen under the three dots. For information on cameras, read this guide.

Spotlighting can be helpful as a tool but does not work if you would like to have more than one Speaker visible. When you spotlight, the view will remain on the speaker that you have spotlighted even if someone else (who is unmuted) makes a noise, which would cause the system to change the camera view.

Choosing 'gallery view' on the attendee video layout means that your audience can see all speakers at once if you need them to.

We suggest that if you want more than one person on the screen, that you 'Cancel Spotlight Video' if you have begun it, turn off the cameras for the speakers that you do not want to appear on the screen, and choose 'gallery view' in the top right-hand corner of your screen. The audience will only see the panellists that have their cameras turned on.
(Note, hosts and panellist will still see 'named squares' for anyone with video off, but the audience will not see them at all).

b. Q&A and Polls

A useful guide on the Q&A function in Zoom: https://support.zoom.us/hc/en-us/articles/203686015-Getting-started-with-Question-Answer

→ The Q&A function has three tabs: questions asked, answered and dismissed. As the audience ask questions a small notification will appear to the panellists, you can either 'answer live' - which enables the host to ask the question and the speaker to reply verbally during the webinar, or 'type answer' to type a reply.

→ Note: if you upgrade attendees to panellists, they will be able to see discarded questions.

→ Polls can either be created before the webinar starts and uploaded into the settings, or created live during the event. Once your event is live, only the primary host can add or edit polls. Co-hosts can launch them.

c. Slides (screen sharing)

→ To learn more about effective screen sharing, read this guide.

→ To share your screen, click on 'Share Screen' on the toolbar at the bottom of your screen, select the application you would like to share in the basic tab (close other tabs and programmes that you do not wish to share).

→ We recommend that a second staff member operate any slides during your event if possible:
  o If a panellist is unfamiliar with Zoom, or only has one screen, a staff member controlling the slides means that there is one less thing they have to think about
  o The person controlling the slides will not be able to do or see anything else. Thus we recommend the primary host is not responsible for the slides.

→ Remember to tell your panellists that they will need to give a verbal prompt when they would like the next slide to appear. We recommend that they say something along the lines of "on my next slide" so that it sounds as natural as possible.
We recommend that speakers send their slides to the team a minimum of 24 hours before the webinar. If you have multiple speakers, this also allows you to combine them into one beforehand.

Please note that we recommend you select the application (i.e. Word, Chrome, PowerPoint) rather than just your screen or ‘screen 1’. If you screen share in this way, the audience will not see any other windows on your computer (i.e. Outlook) even if you accidentally open these applications during the webinar.

Presentations should be made to a 16:9 ratio to fit the screen the best.

We recommend that any media (slides/video) is downloaded to the personal computer that will be sharing the information with the audience. We have found sharing directly from a web browser doesn’t work well.

d. Sound settings for panellists

→ If panellists are happy to do so encourage them to mute and unmute themselves during the event. We recommend that you select “allow panellist to unmute themselves” in the participant panel.

→ It is also advisable to select 'mute participants upon entry' if any of your speakers will be joining the webinar at a later stage. This setting can be found in the webinar participants panel under the three dots.

→ When the you or panellists are unmuted, the audience can hear ‘pings’ on computers, i.e. Outlook, remind the speakers that they should either turn off their notifications or shut down the applications for the duration of the webinar. Alternatively, you can disconnect from the webinar audio. This can be found by clicking the small ^ arrow next to the
microphone on your toolbar and choosing ‘Leave Computer Audio’. Please note that if you leave computer audio, you cannot hear or be heard by other participants.

e. **Sharing audio ‘computer sounds’**

This is a useful feature if a speaker’s PowerPoint contains audio. Click 'share screen' and tick 'Share computer sound' and 'Optimise Screen Sharing for Video Clip'. The audio will then match the volume set by the person sharing the presentation or audio.

The audio should be set to around 50% as if participants are using headphones this audio could come through much louder than the actual meeting.
To share audio only, click 'advanced' and 'Music or Computer Sound Only' before sharing:

9. Branding

Branding for individual webinars can be edited in the web app. A complete guide on this can be found in the [Zoom Help Centre](https://support.zoom.us/hc/en-us/sections/200324965-Video-Webinar). Items you can edit include:

- a. Banner and logos  
- b. Speaker photo and profiles  
- c. Post-event survey or redirect links  
- d. Social Media share description

For more information on how to host Webinars, please see the Zoom Help Centre:

https://support.zoom.us/hc/en-us/sections/200324965-Video-Webinar