Backstage Magic

ZOOM PRODUCER CHECKLISTS

Add a touch of magic to your virtual meetings.

This free resource from Advantage Performance Group contains the **producer checklists** and **participant tip sheet** from a new training program we created called *Backstage Magic*, culled from our many hours of experience producing and facilitating training and conducting webinars on the Zoom meeting platform.

Backstage Magic helps people running virtual meetings turn their Zoom sessions into engaging, memorable, and worry-free experiences.

The full program includes a comprehensive guide with these checklists plus best practices and our recommendations and resources for each step along the way. The training consists of two self-directed modules and two 90-minute virtual sessions, experienced over a 2-week period. Through instruction, live practice, and performance challenges, participants build the confidence and skills they need to make their sessions run like magic.

All instructions assume you have a Zoom account and the desktop client loaded on your desktop or laptop computer, and that you have basic knowledge of Zoom features and functionality.

Access our **Zoom Participant Tip Sheet** to share with your attendees here.

Schedule the Session

CHECKLIST

- ☐ Assign a producer.
- ☐ Get a list of participants.
- ☐ Schedule the Zoom meeting using https://zoom.us/ on the web so that you have full access to all the hosting functionality.
- ☐ Review your account settings in https://zoom.us/ to be sure the meeting will have the permissions and functionality you want (detailed in the next section).
- ☐ Prepare an invitation email to the Zoom session that includes participant attachments, links to other materials, and the Zoom Participant Tip Sheet.
- ☐ Send the Zoom invitation to the participants.

Prepare for the Session

CHECKLIST

- [ ] Check the meeting settings at https://zoom.us/ (not the desktop client) to be sure you have the meeting set the way you want it (password, waiting room, audio and video controls, allow co-hosts, whiteboard, etc.).
- [ ] Determine roles for the session.
- [ ] Determine and document the number of breakout rooms you will need and who will be in each breakout room. (See the best practices below for critical information on setting up breakout rooms).
- [ ] Prepare and load any polls in advance.
- [ ] Determine which engagement tools you will need (whiteboard, annotation, chat, etc.) and when and how they will be used.
- [ ] Verify whether the session should be recorded.
- [ ] Verify that your equipment is appropriate for hosting a Zoom meeting and that you have a high-speed internet connection.
- [ ] Verify that the participants will be able to use Zoom and test access in advance.
- [ ] Ideally, set the expectation with participants that they should log on 10 minutes early to take care of technology checks. This timing can be noted in the invite.
- [ ] Verify that your room background and lighting are appropriate, and that your workspace will be quiet.
- [ ] Do a test run (in a separate Zoom meeting) with the facilitator, producer, and any other co-hosts to be sure you practice the flow, timing, handoffs, and how the Zoom functionality will be used.
- [ ] Print out a participant list, including meeting room assignments and timing, to keep handy during the session.

Run the Session

CHECKLIST

- [ ] Have the team log on at least 15 minutes early to verify that the technology is working.
- [ ] Assign the producer as the host (if not already assigned) and the facilitators as co-hosts.
- [ ] Have the facilitator (recommended) or another co-host share the first slide from the PowerPoint application from their desktop.
- [ ] Create the breakout rooms as early as possible. Assign participants to breakout rooms as they join.
- [ ] Mark attendance on the printout.
- [ ] If using a waiting room, disable it 5-10 minutes before the session starts to allow participants time to check their technology.
- [ ] Have the facilitator or sponsor greet each participant as they join to build engagement and verify that their audio and video is working.
- [ ] At kickoff, refer participants to the Zoom Participant Tip Sheet for any technology questions they may have.
- [ ] Press Record once the formal meeting starts (if recording the session).
- [ ] If using breakout rooms, check for any participants who have dialed in using phone audio and help them pair their audio to their computers.
- [ ] Pause the recording during breaks and breakout rooms (be sure to restart recording when everyone returns).

After the session

CHECKLIST

- ☐ Share the attendee list with the facilitator/sponsor.
- ☐ Schedule a debrief call with the facilitator/sponsor to discuss how things flowed and any changes to make for future sessions.
- ☐ Post the recording.
- ☐ Send any follow-up emails. Include a link to the recording and/or the chat if desired.
- ☐ Delete the cloud recording once it is no longer needed.

Learn more

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Advantage Performance Group
We help organizations develop great people.

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