ZOOM GUIDELINES

A Checklist for Participating in a Zoom Call

cpas — Making Mission Possible

Set Up

It will really help the quality of the call if you can do the following ahead of the meeting.

- ○ Download the plug in or App to your device. It ensures you have full functionality for the call.

- ○ If possible, find a quiet place to be a part of the gathering. Try to place yourself in a room without a phone that will ring, and preferably in a room without an echoey sound.

- ○ Where appropriate, let others know you are going to be on this call. Put a notice on the door to remind people of this.

- ○ Turn off all other programmes on the device you are using to maximise bandwidth. If you know you sometimes struggle with internet speed generally, if it is possible, it will also help to ask others to disconnect from the internet for the duration of the gathering,

- ○ Plug your device in. Some devices perform better when plugged in, and it also means you won't run out of juice half way through.

- ○ Sit with a light source in front of you and not behind or to the side of you so your face can be easily seen.

- ○ Ensure the camera on your device is at just below eye height if possible, so people don't spend the call looking up your nostrils!

- ○ Ensure that no other computer/tablet is on in the room to prevent nasty feedback on the sound.

- ○ Sit relatively close to the screen so you can be seen and heard easily, especially important if there are multiple people on the call when images of people will be small. Also best not to use a phone or tablet if it is a multi person gathering.

- ○ Make yourself comfortable. Have a glass of water/ cup of coffee to hand, something to nibble.

- ○ Be online and click the meeting link at least five minutes before the start of the meeting so the meeting can start on time.

Take a look at this video (just over four minutes) for ten tips on how to set yourself up well for an online gathering.

During the Meeting

An online meeting is more demanding than normal face-to-face meetings. It requires a higher level of attention.

- ○ Stay focused on the conversation even if you aren't contributing directly at that moment.

- ○ Leave your camera on (unless there is a bandwidth issue) as it will help you to stay connected with the meeting.

- ○ Don't do email, Facebook etc. (switch off these programmes so they don't draw your attention).

- ○ Switch your mobile off/put it out of the room, and remove other distractions (whatever they may be) to help you stay focused on the gathering.

- ○ If it helps you to concentrate take notes, but if you are on a laptop it's best if you don't use the keyboard as every tap of a key is magnified and can be distracting for others in the conversation.

- ○ If there are more than 6-8 people on the call mute your microphone (Alt A on PC) to prevent distracting background noise until you want to speak. When you want to speak, it is often best to indicate that by raising your hand (physically or virtually) and then wait to be drawn into the discussion by the facilitator.

- ○ You will find there are two settings for how you see people (normally located on the top right). One is called Gallery, where everyone is tiled on the screen at the same size. This is ideal when in conversations with one another. The other is called Speaker view where the person speaking becomes larger. This is ideal when the facilitator of the gathering is giving some input.

- ○ Breakout rooms enable group work. If this facility is used, be sure to stay focused on task. It takes a few moments for the breakout rooms to start, just follow the onscreen instructions.

- ○ Be prepared for a few frustrating moments with the technology. Be patient.

- ○ If your connection drops out, try clicking on the original link to re-connect.

And if you want to see how it can all go horribly wrong take a look at this video.

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