

THE GO! AGENCY PRESENTS

MASTERING ZOOM

FROM BEGINNER TO EXPERT

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INTRO



ARE YOU READY? IT'S TIME TO BEGIN.



WHY YOU NEED ZOOM

YOU ARE TRANSITIONING FROM LOTS OF IN PERSON MEETINGS TO VIRTUAL MEETINGS.

WHY YOU NEED THIS GUIDE

YOU WANT TO LOOK PROFESSIONAL, MAKE A GOOD IMPRESSION, AND EXUDE CONFIDENCE AND PROFESSIONALISM IN ALL OF YOUR INTERPERSONAL COMMUNICATIONS.

WHAT YOU ARE GOING TO LEARN

HOW TO ORGANIZE, MODERATE, AND EXECUTE ZOOM MEETINGS THAT ARE GOING TO HELP YOU EDUCATE, ENGAGE, AND GET THE RESULTS YOU WANT - NO MATTER WHAT YOUR LEVEL.

THE APPROACH

QUICK HIGH LEVEL EXPLANATIONS THAT YOU CAN REFERENCE AND GET BETTER AT ZOOMING IN NO TIME!

EVEN BETTER? THESE MAIN FEATURES AND CONCEPTS CAN BE USED FOR ANY VIRTUAL MEETING PLATFORM THAT YOU USE!



WHAT YOU NEED BEFORE YOU START

ZOOM MEMBERSHIP

There are different levels available. Visit Zoom online at zoom.us to choose the best one for you. Not sure? Start with a free and build!

HOW ARE YOU GOING TO ZOOM?

What device are you going to use to Zoom? You can either download the Zoom application or you can access it via the Zoom website (both after logging in). Many prefer the application as it is available to be downloaded to your desktop or laptop computer, mobile phone, or tablet.



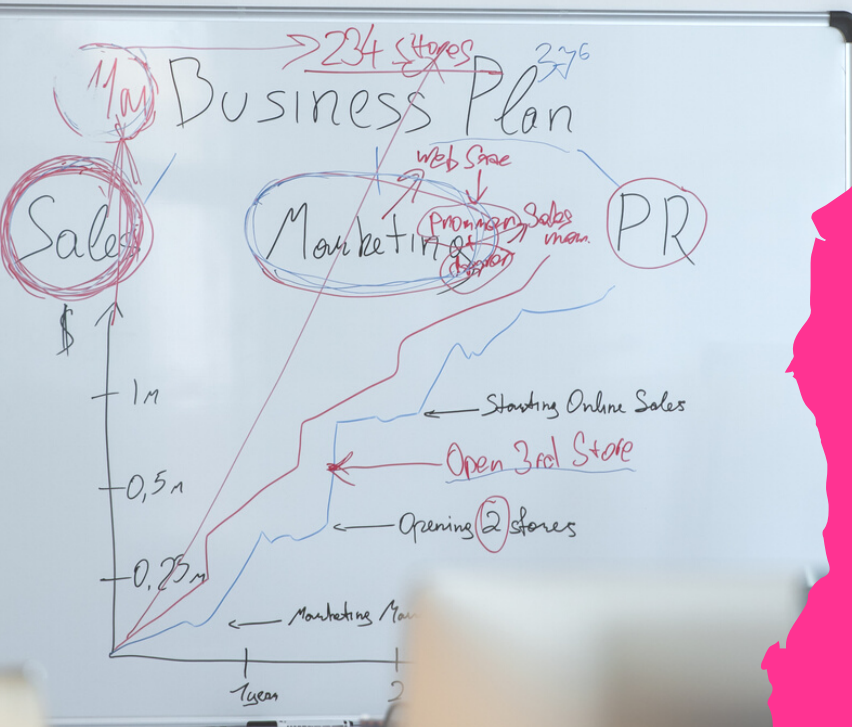
WHAT ARE YOU USING FOR A CAMERA?

If you are going to be doing video calls (which should be the majority of Zoom use) you will need to have a camera available. Luckily, all devices that you can access Zoom on will have access to a video camera and have them built in. When setting up the application on your device, make sure to choose your internal camera in the process. Don't worry though, when you start a new meeting you can also choose your camera source if you have issues.

ARE YOU USING AN INTERNAL OR EXTERNAL MICROPHONE?

Simply, are you going to use the microphone inside your device or are you going to plug in a microphone to use? Many simply use the microphone that is in their device - so you can do the same. If you find that you need to enhance it - perhaps looking into an external mic could be the solution.

NOTE: Experiencing an echo? Try utilizing a pair of headphones to remove that and increase sound quality. Have a pair handy at all times.





WHERE IS YOUR ZOOM HQ?

Zoom meetings are just that...meetings! So you should try to mimic the same setting that you would have a regular meeting in. Find a quiet place that you can setup a chair, desk, and your device. It is good to have your place setup so that you can do not only scheduled meetings but impromptu ones as needed.

ASSESS YOUR BACKGROUND

Quiet on the set...your bedroom is a mess! When you look at the frame on your video call (what you are broadcasting) take a look at your background. Make sure it looks professional, it is clean, and all distractions are absent. No one wants to see your laundry basket in the background, your partner vacuuming your rug, or look at your kitty litter box. Why do I say that? Because these are all things that we have seen on Zoom calls before. They left the exact impression you would expect.

Note: Have a background you are not proud of...and just can't change it? Don't just turn off the camera - choose a background that you can use (more about that later). It's a quick fix that will help you show yourself but cover up your background.

LIGHTS AND ANGLES?

You will see when you sample your video, you may need a little bit of extra light. If you don't have access to professional lighting (like many people), you can either position a lighting source ABOVE the camera on your device to lighten up your face and give your shot dimension. You can also purchase a Ring Light from Amazon.com - there are lots of affordable versions available. Also, when positioning the camera, for the best shot make sure the camera on your device is aimed at your hairline. It will give you a great shot and favorable angle.

Note: Ensure that the device you are using is STABLE and UNMOVING.

A shaky Zoom is one that looks unprofessional and is distracting to everyone concerned. This is not a throwaway FaceTime call - this is a professional communication.

INTERNET SPEED... IS IT FAST ENOUGH?

One of the killers of a solid Zoom stream is a poor internet connection. Make sure that you are in a good spot and that your internet plan is adequate to execute a seamless video and audio stream!



NOW IT'S TIME TO TEST



JUMP IN. DON'T BE SCARED.

WHY TEST?

IT IS IMPORTANT TO CHECK ALL OF YOUR EQUIPMENT AND GET EVERYTHING PERFECTLY SET PRIOR TO YOUR FIRST OFFICIAL MEETING.

QUICK TEST PROCESS:

1. Invite someone already using Zoom to a meeting (see Beginner section for instructions)
2. Check your video.
3. Check your sound.
4. Check your lighting.
5. Check your background shot.
6. Ask for feedback from your friend.
7. Done!

QUICK START SETTINGS

FAST IS GOOD. EFFECTIVE IS BETTER.

READY FOR YOUR FIRST MEETING?

HERE ARE THE THREE WAYS TO ENGAGE IN A MEETING
AND HOW YOU CAN JUMP RIGHT IN.

OPTION 1: SCHEDULE A MEETING

1. Open Zoom application on your device.
2. On the application home screen, click Schedule.
3. Once the Schedule Meeting window opens, complete the fields on the form. It is important to incorporate this with your calendar, so choose the calendar application that you use. Why? This will help you automate a reminder to attendees (and yourself).
4. When done - click Schedule.
5. This will redirect you to your Calendar application so that you can add and send invitations to attendees!

OPTION 2: JOIN A MEETING

1. First step is open your Zoom application.
2. On the home screen, click Join.
3. On the Join Meeting pop up - add the MEETING ID or the link that was sent to you by the meeting organizer.
4. Click Join!

OPTION 3: START A MEETING AND INVITE PEOPLE

1. Open Zoom application.
2. Click New Meeting.
3. This will open up your camera view. On the bottom of the window, you will see Participants. Click this.
4. This will open a side window and at the bottom you will see the Invite button. Click this.
5. On the next window you can find and invite using Email, Choosing Saved Contacts, or copy URL and Invitation.
6. Choose what you want and send.
7. Once people accept they will either go right into the room, or will be transported to your waiting room.
8. If using waiting room, your Participants button on the bottom of the screen will blink Orange. Click on it and admit your meeting mates.
9. Start your meeting! Make sure you are not muted!

SETTING UP THE SETTINGS

Your Zoom application has all of the basic settings at your disposal. These are easy to understand and easy to maneuver around. To access these, once you open the Zoom application on your device, on the top right hand corner of the home screen, underneath your picture, will be a cog. Click that and a pop up window called Settings will appear.

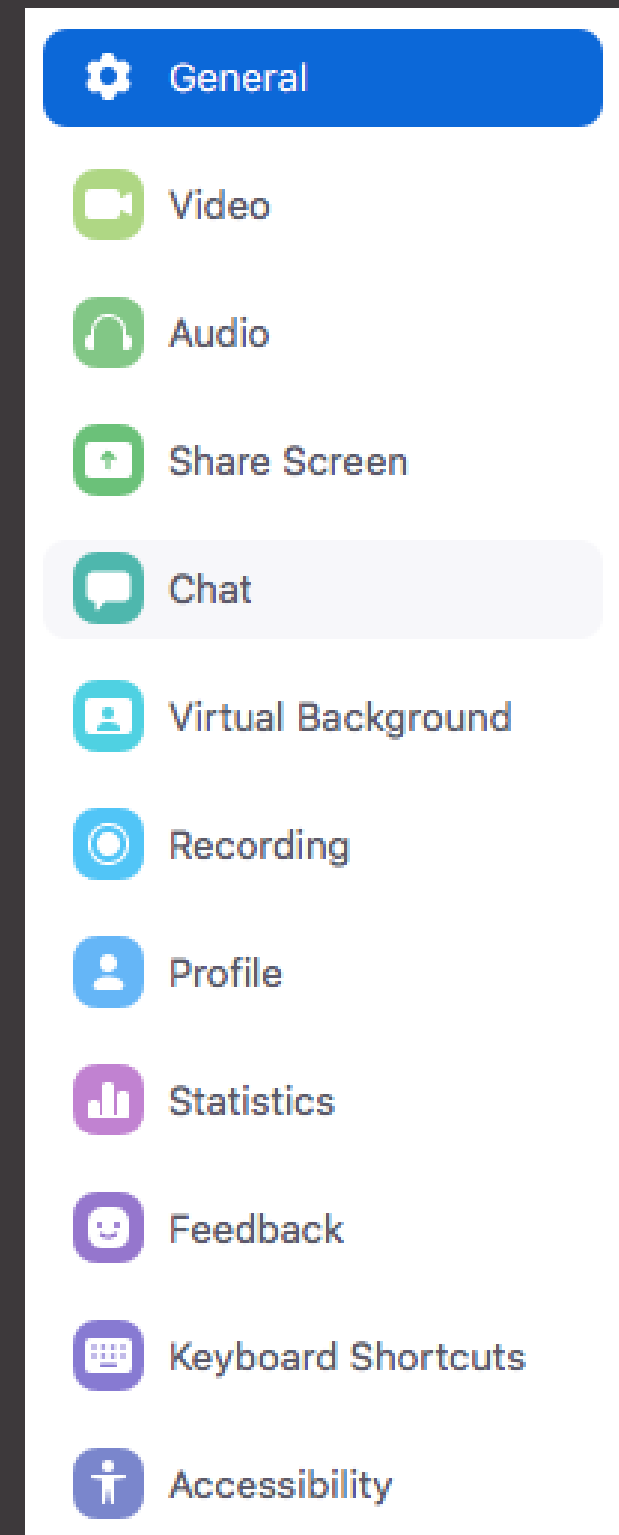
GENERAL SETTINGS TAB

Running down the left side you will see the following options:

General | Video | Audio | Share Screen | Chat | Virtual Background | Recording | Profile
Statistics | Feedback | Keyboard Shortcuts | Accessibility

LET'S LOOK CLOSER

To get you familiar with these settings in order to quickly setup your optimal Zoom meeting - let's take a fast track through these settings. These are all of the "light version" of the features. The full features can be found on your account on zoom.us. More about that later.



GENERAL

Most important here are to make sure that you have the following selected (the rest are up to your own preferences):

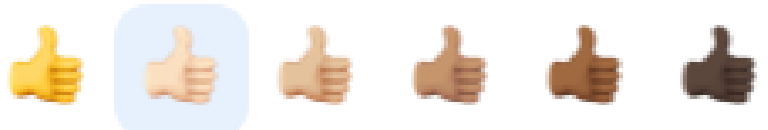
*Ask me to confirm when I leave a meeting

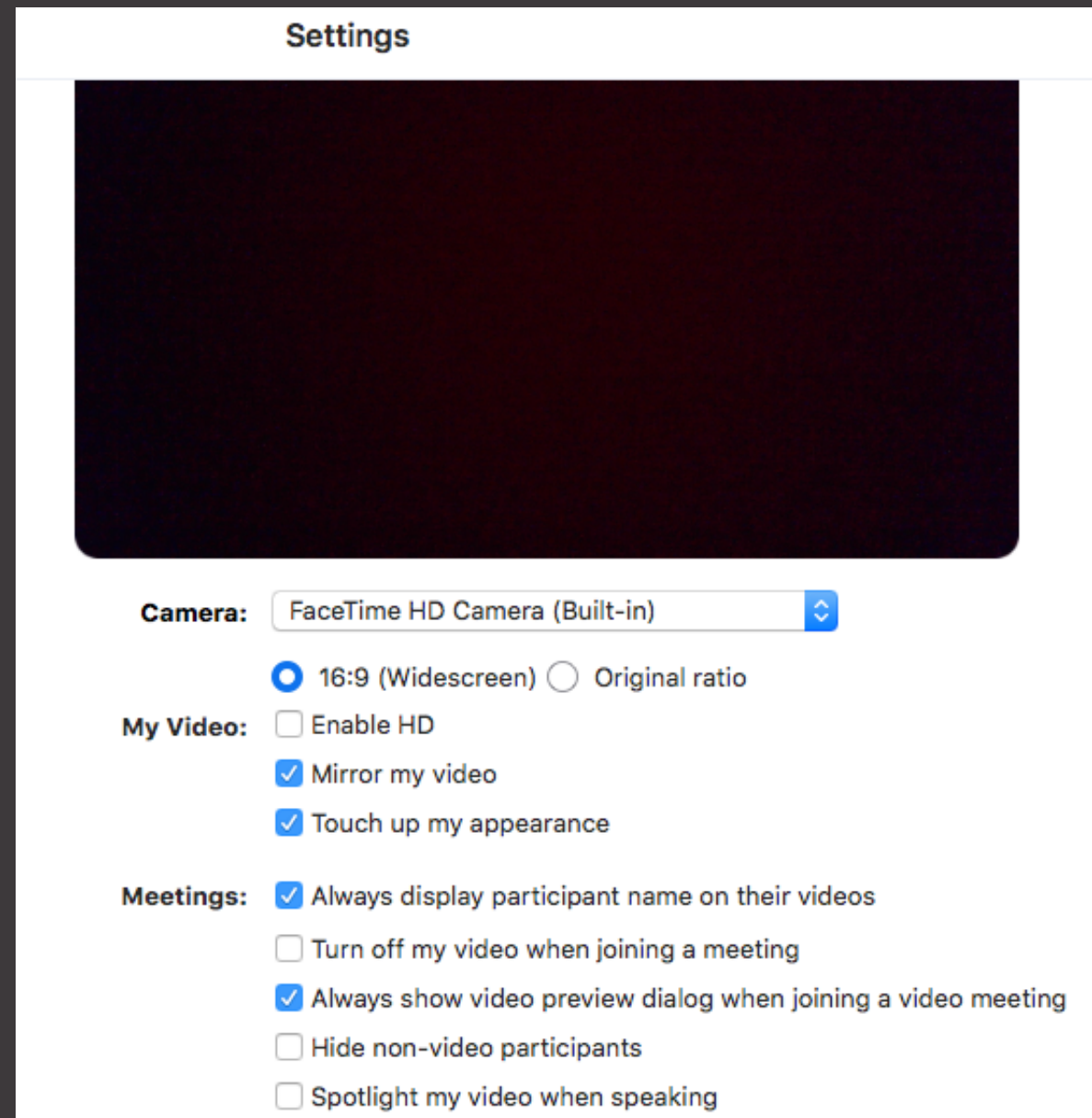
*Show my meeting duration

Settings

- Use dual monitors ?
- Enter full screen when starting or joining a meeting
- Automatically copy invitation URL once the meeting starts
- Ask me to confirm when I leave a meeting
- Show my meeting duration
- Add Zoom to macOS menu bar
- Stop my video and audio when my display is off or screen saver begins
- Remind me minutes before my upcoming meetings

Reaction Skin Tone





VIDEO

Most important settings:

*Camera: make sure you have the right one chosen

*16:9

*Mirror my video

*Touch up my appearance

*Always display participant name on their videos

*Always show video preview dialog when joining a video meeting

AUDIO

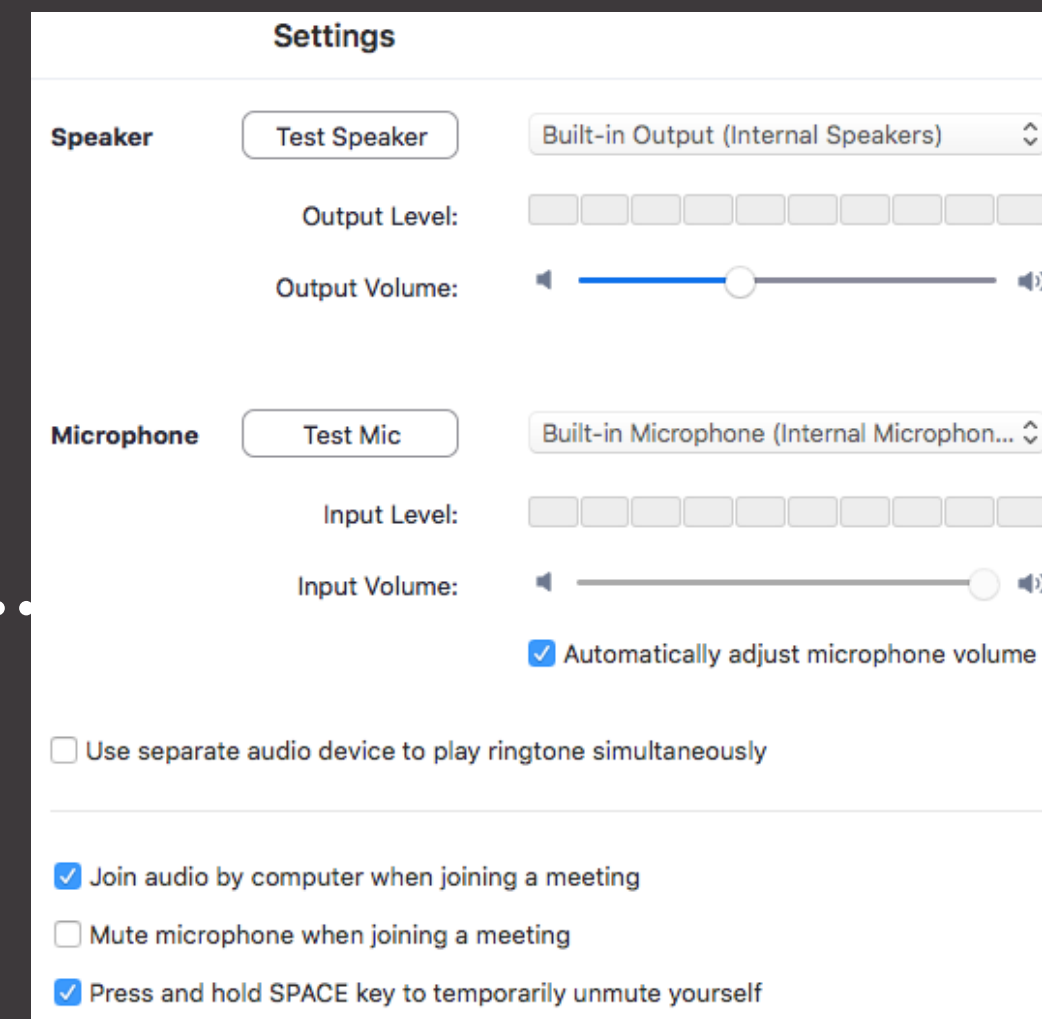
Most important settings here:

Speaker: choose and test the right output speaker

Microphone: choose and test the correct microphone

*Join audio by computer when joining a meeting

*Press and hold SPACE key to temporarily unmute yourself



Settings

- Enter full screen when a participant share screen
- Maximize Zoom window when a participant share screen
- Scale to fit shared content to Zoom window
- Side-by-side Mode ?
- Silence system notifications when sharing desktop

SHARE SCREEN

Settings to pay attention to:

Scale to fit shared content to Zoom window

*Side by side Mode

*Silence system notifications when sharing desktop

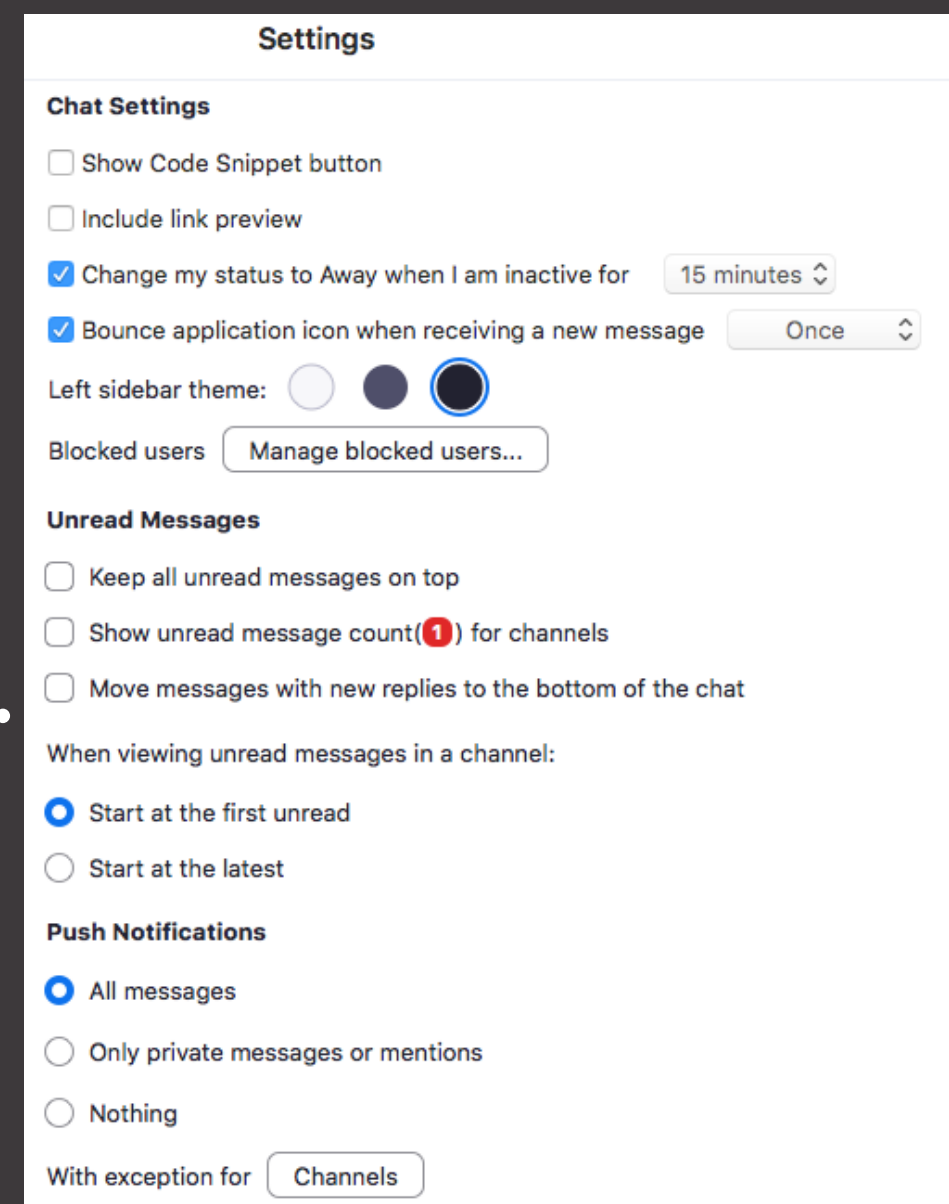
CHAT

Focus on these settings:

*Bounce application icon when receiving a new message

*Play sound when I receive a new messages

*Mute notifications while I am in a meeting or internal call

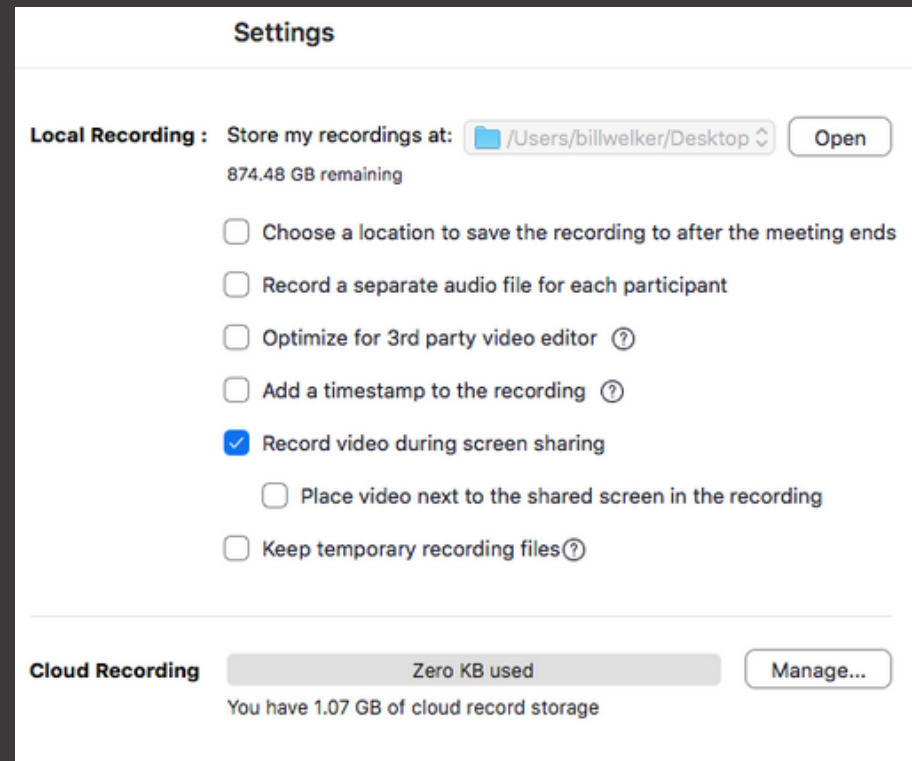


The screenshot shows the 'Settings' window for a Zoom account, specifically the 'Chat Settings' section. The settings are as follows:

- Chat Settings**
 - Show Code Snippet button
 - Include link preview
 - Change my status to Away when I am inactive for 15 minutes
 - Bounce application icon when receiving a new message (set to Once)
- Left sidebar theme:** Three radio buttons are shown, with the third one (dark blue) selected.
- Blocked users:** A button labeled 'Manage blocked users...' is visible.
- Unread Messages**
 - Keep all unread messages on top
 - Show unread message count (1) for channels
 - Move messages with new replies to the bottom of the chat
- When viewing unread messages in a channel:**
 - Start at the first unread
 - Start at the latest
- Push Notifications**
 - All messages
 - Only private messages or mentions
 - Nothing
- With exception for:** A button labeled 'Channels' is visible.

VIRTUAL BACKGROUND

Here you are able to choose a virtual background from pre-sets, upload your own (by using the plus sign underneath your preview) or use a green screen. Click on the images and videos provided to test these.



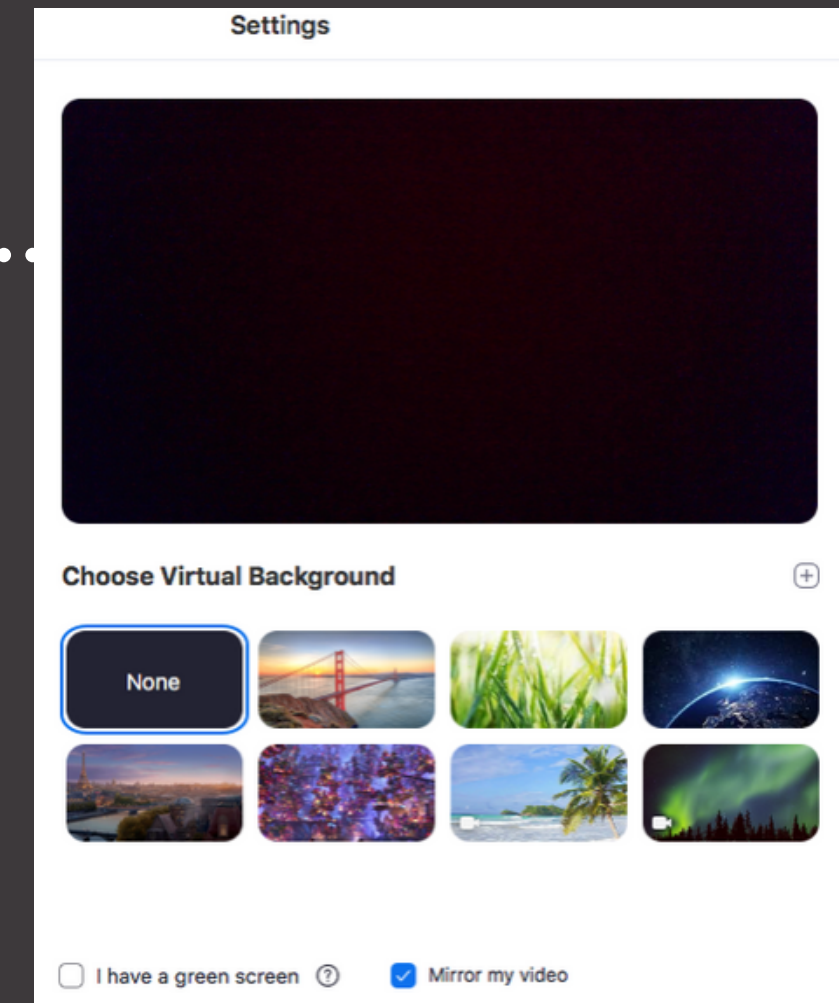
RECORDING

Most important here are:

*Local Recording:

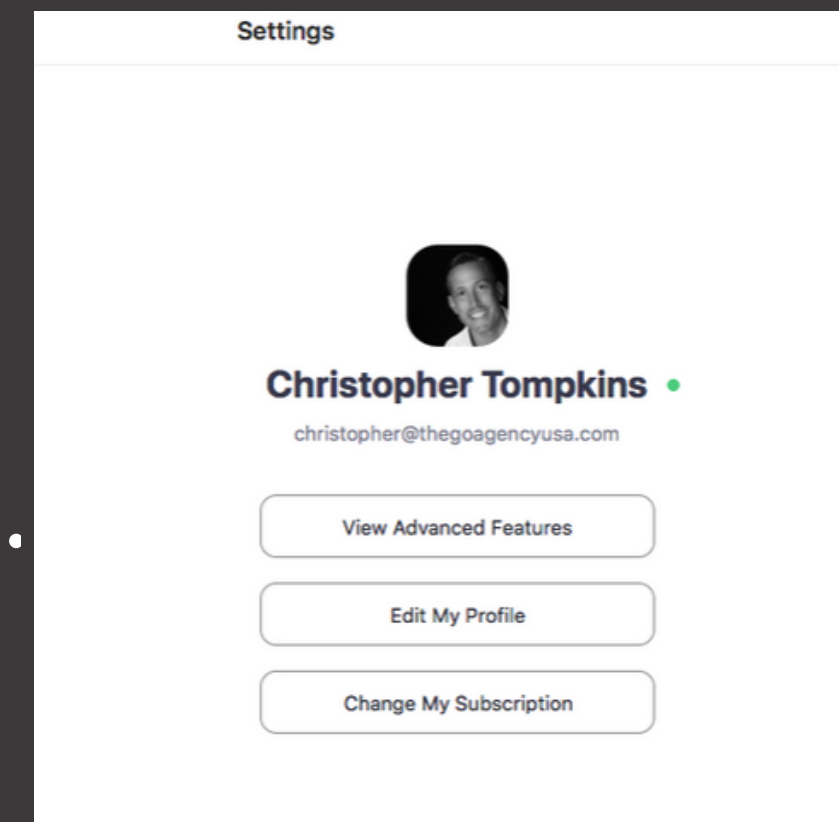
*Choose the right folder to store any recordings that you do.

*Record video during screensharing



PROFILE

No picture? Click the box above your name, and upload your headshot. It is good to have this on there as this will be seen while your video loads (or if there is any interruptions on your end). Use a professional headshot.



STATISTICS

This is based on usage - so not super important at this stage.

Settings

Submit Feedback

We appreciate your ideas, comments, and suggestions.

Submit Feedback

Settings

Overall

Audio

Video

Screen Sharing

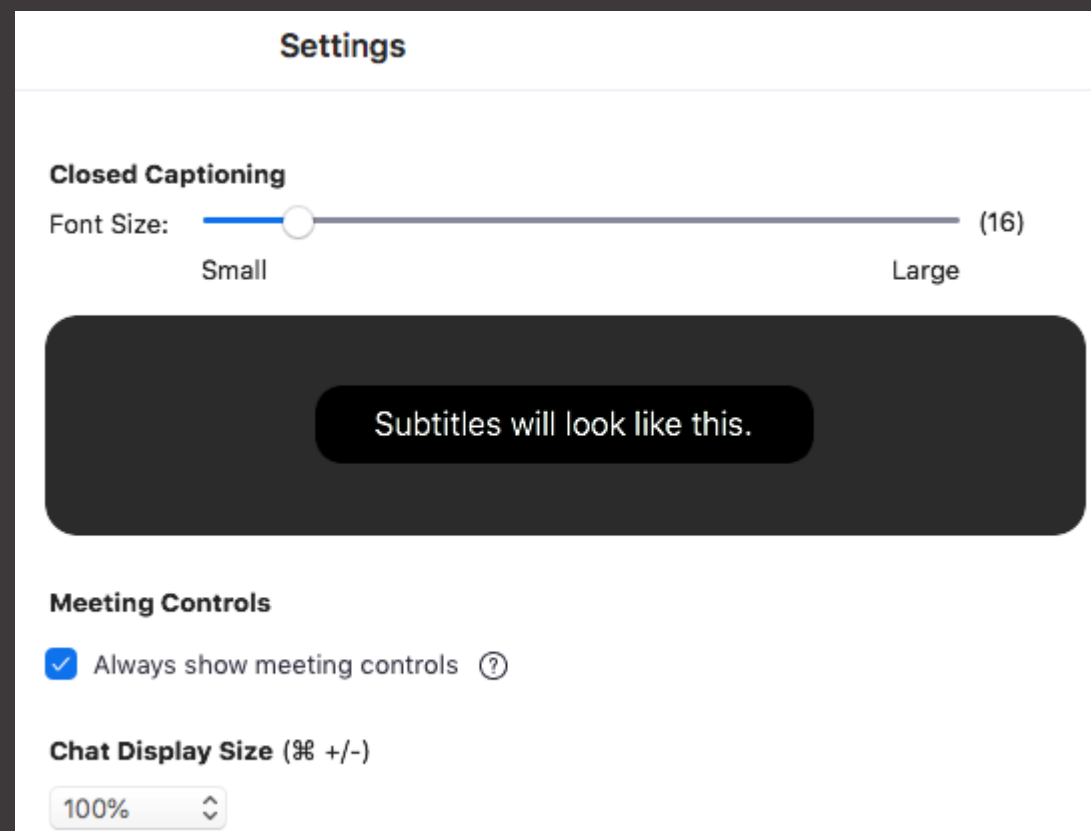
Item Name	Send	Receive
Latency	-	-
Jitter	-	-
Packet Loss - Avg(Max)	-	-
Resolution	-	-
Frame Per Second	-	-

FEEDBACK

Have thoughts on features you want to see?
Add them here and send onto the Zoom team.

KEYBOARD SHORTCUTS

These are wonderful power tools for power users. Print off a list or keep a copy of these handy as a screenshot on your desktop if you would like to make the use of Zoom a little simpler and fast.



Description	Shortcut	Enable Global Shortcut ?
Meeting		
Join Meeting	⌘J	
Start Meeting	^⌘V	
Schedule Meeting	⌘D	
Start Screen Sharing (Direct Share)	^⌘S	
Mute/Unmute My Audio	⇧⌘A	<input type="checkbox"/>
Mute Audio for Everyone Except Host (Host Only)	^⌘M	<input type="checkbox"/>
Unmute Audio for Everyone Except Host (Host Only)	^⌘U	<input type="checkbox"/>
Push to Talk	Space	

ACCESSIBILITY

Most important here:

*Closed Captioning:

*Fit the size to fit what you are most comfortable with.

*Always show meeting controls selected.

ZOOM ETIQUETTE



RULES ARE RULES. IT REALLY ISN'T HARD.

JUST BECAUSE YOU ARE WORKING REMOTELY OR UTILIZING A VIRTUAL MEETING PLATFORM, THIS SHOULD NOT CHANGE THE CONTENT OR FORMALITY LEVEL THAT YOUR MEETING SHOULD HAVE.

- Remove Distractions
- Limit Interruptions
- Put Phone and Computer Alerts on SILENT
- Close Programs With Pop-Ups
- Look Directly at the Camera (we can all see you answering emails)
- MUTE Your Mic When You Arent Talking
- Look Professional and Have Professional Background
- Act Professional: Be Pleasant, Personable, Welcoming
- Use "Gallery View" So You Can See Everyone (especially if you are presenting)
- Take Notes (this is a meeting, right?)
- Join Meeting at Least 2 Minutes Early (to ensure no technical difficulties)
- Do Join In. Raise Your Hand, Use Reactions Button, Use Chat.
- Use Usual Conversation Rules (no talking over, look at your audience, present clearly, regularly check in with your audience)



THE FORGOTTEN RULE

YEAH. IT'S A MEETING.

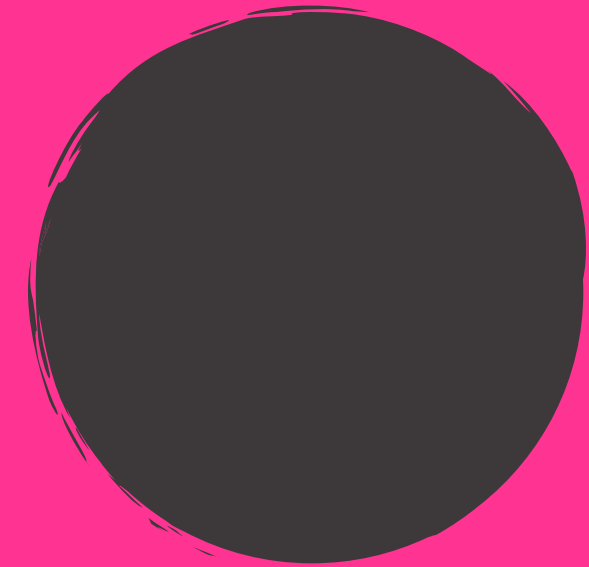
COME PREPARED - HAVE AN AGENDA

One of the main items that always tends to be forgotten about when moving from in person to virtual meetings is Agendas.

While it may sound odd, one of the number one things that people begin to loosen up on is setting a solid meeting agenda and coming to the meeting fully prepared.

So prior to any meeting that you schedule - a full agenda for the meeting should be shared with all participants. This can be recapped at the top of the Zoom meeting when you launch it - and can even be shared in the chat if needed.

Also - make sure that you come prepared to the meeting. While you can't hand out copies virtually, you have the ability to show everything very easily on your screen. So prior to the meeting if there are any presentations, outlines, reports, or supporting docs - you want to have them ready on your home page so that they will be easily shared. If you are having a meeting with multiple people, each can take control and do screenshares when needed - so coordinate prior to the virtual meeting to get your cadence correct.



SCREENSHARING GUIDE

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WANT TO SEE WHAT I'M SEEING?

SCREENSHARING BASICS

ARE YOU GOING TO BE USING VISUALS DURING YOUR PRESENTATION? SCREENSHARING IS THE WAY TO GO.

HERE IS THE EASY WAY TO SHARE YOUR SCREEN:

- On the bottom of your main window, click on Share Screen.
- On the popup window, choose what you would like to share. All of the options should be available. You can share an entire window/screen/monitor, or a single document or browser window.
- Highlight your desired window and click Share.
- This will put a colored border around the window that you are going to share to indicate that it is being shared.
- When you are done, click on the red STOP SHARE button to return to the regular meeting view.

ADVANCED SCREENSHARING

If you want to only share a portion of your screen, after you click Share Screen, toggle from Basic to Advanced and choose Portion of Screen and then Share.

A colored box will appear and you can drag and select whatever you will like in real time. This will give you more flexibility if you want to change from lots of different windows, documents, or you want to show more of a process.

WORDS OF WARNING!

CLEAN UP YOUR DESKTOP

If you are going to choose to show your desktop...make sure that it is clean and professional. Meaning your wallpaper is appropriate, the applications on your navigation bar are appropriate, and the files and folders on your desktop are suitable.

CLEAN UP YOUR WEB BROWSER

If you are showing something on your browser, make sure that your history is appropriate, your autofill is professional, and your saved bookmarks are professional.



WRAP UP



ENOUGH ALREADY. GET ZOOMIN.

YOU ARE READY TO ZOOM!

If you thought that this was a useful guide - please feel free to share it with your friends, family, and colleagues. This guide will help everyone jump on with Zoom and put their best professional foot forward in any virtual meeting situation.

Need further assistance or have more questions? Let us know!

Visit us online at www.TheGoAgencyUSA.com or email us at Info@TheGoAgencyUSA.com.



ABOUT THE GO! AGENCY

WE GET STUFF DONE.

WE LOVE WHAT WE DO. WE LOVE MAKING YOU SUCCESSFUL.

What sets our agency apart is our distinctively client-focused approach to help you grow your business online. We are engaged with you from the first conversation and truly care about creating the best possible solution for your needs. You set the tone, and we empower you to market your business online with confidence.

Our team of forward-thinking creative designers, marketers, writers, and account managers deliver a comprehensive array of cutting-edge services customized to exactly what you need no matter what stage you are in within the online marketing spectrum.

Our cutting-edge marketing and sales services include:

Social Media Marketing - Online Advertising - Lead Generation - Email Marketing - Graphic Design - Website Design and SEO - Copywriting - Reputation Management - Online Review Generation - Photography and Videography - Podcasting - Consulting

Get in touch with us today for a free consultation to show you how we can help enhance your current sales and marketing strategy and take your ROI and results to the next level!

LET'S TALK

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