



Teleconferencing and Video Conferencing Best Practices

Intended for [Zoom](#) meetings, but can be adapted for other platforms

- Log in 10 mins early, check controls/settings
- When the call start time occurs, admit all to the conference, remove the waiting room so all guests join the call immediately
- Jump on the line within a minute or two, welcome everyone and let them know that the call will begin momentarily
- Go over basic controls
 - On computer, mute/unmute and raise hand is below the participant list, can access that list at the bottom of the video screen
 - On phone *6 to mute/unmute, *9 to raise hand to ask question
- Go over format of call
 - Begin with presentations, then question/answer
 - Smaller calls will unmute everyone for open forum discussion, please be patient and keep personal device muted when not speaking
 - Larger calls let everyone that host will control mute/unmute throughout the call
- Ensure that you have all main speakers on call
- Find speakers or other guests and ensure that they are unmuted on the system, but personal device muted until called on. Best practice is to confirm this ahead of time.
- Begin call by repeating the welcome message and basic controls
- Introduce initial speaker
- After each speaker thank them and introduce next speaker, using titles as best as possible (director, doctor etc.)
- Some may have mute/unmute issues, stay on top of those controls
- Many speakers will ask if they can be heard, stay on the line to confirm that for them before muting your personal device
- Before question/answer remind everyone of the controls again and whether it will be open forum or moderated question/answer
- Open forum
 - Give everyone the ability to mute/unmute themselves
 - Unmute all as you let everyone know that the open forum has begun
 - Remind everyone to introduce themselves and their organization when asking a question or making a comment
 - Check for noisy folks who haven't muted their personal device and put them on mute
- Moderated question/answer
 - Go over the controls again, ask folks to raise their hand
 - Take questions in the order they arrive, they will all move to the top of the participant list
 - When taking someone live, unmute them and introduce
 - If there's a name, say the name the best you can (Our first question comes from Joe or Jane, go right ahead)
 - Be patient and give folks a chance
 - Many will ask if they can be heard, stay on the line to confirm
 - If they don't ask question, re-mute and move on to the next one
 - If it's just a phone number, read the last 7 digits (we have a question from someone dialed in at 333-3333...again 333-3333, go right ahead)
 - When they are done re-mute them and lower their hand
 - As questions die down, do a reminder to raise hand
 - When questions are complete or time is running down, do a "last question."

- If appropriate, offer primary speaker/host a chance for closing remarks
- Provide a brief closing, thank speakers, thank everyone for joining, remind of any key numbers or if there will be follow up
- Click "END MEETING" to end meeting in lower right corner of video screen
- Follow up
 - Take notes throughout the meeting and/or copy the information that has populated in the chat box (before ending the meeting!)
 - Gather information and send out to all participants.