

Essential Video Conferencing Skills for Facilitators and Participants

Skills for Facilitators

Knowing the Technology

Before facilitating a virtual meeting, it's important that all facilitators and presenters understand, and are comfortable using, the video platform technology. Specifically, all facilitators and presenters should know how to:

- Record the session
- Assign a co-host (if possible)
- Help participants who are experiencing poor internet connections (e.g., suggest turning off their video camera, have them call in using a landline)
- Prevent "Zoom-bombing". Strategies for doing so include the following:
 - Don't use a personal meeting ID
 - Always use a meeting password
 - Use the waiting room feature
 - Mute audio and disable video for meeting attendees
 - Turn off screen sharing for everyone except the facilitator/co-facilitator
 - Use the "lock meeting" feature once all meeting attendees have joined
- Conduct polls (if possible)
- Use breakout rooms

Knowing Your Participants

In planning the meeting, facilitators should have some sense of who is attending and how comfortable they are using technology. Specifically, facilitators will want to know:

- How many participants will be joining?
- Will they be able to join the online component (or audio only)?
- How strong are their internet connections?
- Will they be using webcams?

Planning Your Interactions

Interaction doesn't just happen; planning is key. In planning how you will engage with participants—and how they'll engage with one another—consider the following questions:

- Will you ask everyone to be muted?
- Will you ask people to use the chat feature? White board? Polls?
- Will you be recording the event?
- Will you be sharing any documents during the session?

Having the Right Staff on Board

For your virtual event to run smoothly, you need a strong team. To make sure you have the right staffing in place, consider the following:

- Who will be responsible for specific tasks and roles during the meeting?
- Will one person be responsible for the technology (muting noisy lines, moving to polls or breakout rooms, forwarding PPT slides)?
- Who will facilitate?
- Who will schedule a rehearsal for the staff to test video, check audio, practice sharing documents, and practice transitions between presenters?

Zoom Shortcuts

Before hosting a meeting, it is helpful to know the platform “shortcuts” that will help you navigate the site. For example, with Zoom you can use the following shortcuts:

- *I is for invite.* Press Cmd+I (macOS) or Alt+I (Windows) to jump to the Invite window, where you can grab the link to the meeting or send invitations to others via email.
- *M is for mute.* Press Cmd+Ctrl+M (macOS) or Alt+M (Windows) when you are the meeting host and want to mute everyone else on the line.
- *S is for share.* Press Cmd+Shift+S (macOS) or Alt+Shift+S (Windows) to share your screen.

- *R is for record.* Press Cmd+Shift+R (macOS) or Alt+R (Windows) to start recording any meeting.
- *P is for pause.* Press Cmd+Shift+P (macOS) or Alt+P (Windows) to pause/resume recording.

If you are using another platform, simply google "shortcuts" and the name of the platform—you will typically find many listed.

Skills for Participants

In order to engage fully in a video conference, participants need to feel comfortable using the technology—and the best way to become comfortable is through practice. If possible, schedule a session for interested participants to practice their conferencing skills. Specifically, have them:

- Turn on/off their video cameras
- Mute/unmute their audio
- Change their name on the screen
- Chat privately and to everyone
- Share their screen
- Change their display view (from speaker view or gallery)
- Change their background
- Annotate on a whiteboard or document that is shared
- Raise their (virtual) hand