



Supporting Organizations | Aider les organismes
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Virtual Meetings & Webinars CHECKLIST

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TABLE OF CONTENTS

BEFORE THE EVENT	3
DURING THE EVENT	3
AFTER THE EVENT	4
ZOOM MEETING - TIPS.....	4
ZOOM WEBINAR - TIPS	5
ONLINE EVENT SCRIPT TEMPLATE	6
Introduction	6
Conclusion.....	7

Even though this checklist is especially useful for Zoom users, most listed items are common to all online meetings or webinars.

This guide assumes that your date is set and that your speakers and interpreters are secured (optional).

BEFORE THE EVENT

- Write a description of the event and/or the agenda
- Have a bio of the speaker(s)
- Decide if you'd like to provide a recording of your event, and ask for your speakers' agreement
- Set up the event in your virtual meeting/webinar platform (see p. 4 for Zoom meetings tips)
- Set up a short registration form (optional) - focus on essential info to encourage registration
- Promote the event: send out invitations, reminders, share on your social media, reach out to your network and ask them to share the info (when relevant)
- Send out the agenda/program a few days in advance so that your participants can prepare for the meeting
- Assign roles to your team members:
 - Moderator/Chair
 - Co-moderator - to help manage questions and chatbox comments
 - Technical support - someone who can focus on any glitches while the event carries on
- Prepare your introduction and conclusion scripts, include technical information to tell participants (see p. 6 for a script template)
- Have a test session with your team members and your speakers (about 30 minutes)
- Set up a short evaluation survey for attendees

DURING THE EVENT

- Team members, speaker(s) and interpreter(s) should log in 15 to 30 minutes before
- Make sure all the features you plan on using work (screen sharing, polls, Q&A)
- Use a chat box to send a Welcome message to all participants; you can also share the link to the agenda, the program or any other document that would be useful (one or two links only, to keep things easy for participants)
- Open the meeting: welcome the attendees, technical info, short introduction of the speaker(s)
- Moderate the Q&A sessions (at the end of the speakers' presentation or throughout)
- Close the meeting: thank speakers and participants

AFTER THE EVENT

- Team debrief
- Thank the speakers and have a debrief session
- Thank the interpreters and have a debrief sessions
- Send evaluation survey to attendees (ideally, have the survey automatically open in attendees' browsers immediately after the event)
- Send thank you email to attendees and no shows, including a recording of the event if the meeting was recorded.

ZOOM MEETING - TIPS

1. Once you have scheduled a Zoom meeting, you can save it as a Template. This is especially useful if you know that you will be having similar meetings in the future. You'll then be able to use this meeting as a template to plan similar meetings in the future.
2. If you are having a recurrent meeting, you can check the 'Recurring meeting' box when scheduling the event. When sending the invite, participants will have the information for future meetings. The event link and ID will remain the same for all recurrent meetings and you won't have to manually create the meeting each time.
3. For more security, Zoom recently made two settings a default for all meetings: 'require a meeting password' and 'enable waiting room'. This helps prevent ill-intentioned people joining your online meeting. You can disable those two features if you think you're not at risk. Otherwise, don't forget to give your participants the meeting's password and to let them into the meeting once it has started.
4. As the host of the meeting, start the meeting at least 10 to 15 minutes before and make sure that you, your team, the speakers and the interpreters join ahead of time as well so that everyone is ready when the meeting starts. If you do have panellists and interpreters, logging in 30 minutes in advance is ideal.
5. The Zoom Help Center has numerous video tutorials and articles to walk you through all their features : <https://support.zoom.us/hc/en-us>

ZOOM WEBINAR - TIPS

1. All the Zoom Meeting Tips on the previous page can be applied to webinars.
2. When scheduling your webinar, add your speakers as panelists. They will automatically receive an invitation to attend the webinar as a panelist. Check with them that they've received this link. It is not the same link as that of the participants.
3. Enable the 'Practice Session'. When you start the webinar you'll be able to make sure all your speakers and interpreters are ready, share your presentation if needed and only then broadcast to all participants. It is great to figure out the last minute details without the added stress of being live! During the 'Practice Session' participants will see a message saying that the webinar will start soon.
4. You can use a Q&A box in addition to the classic chatbox. The advantage of the Q&A box is that participants can vote for their favorite questions.
5. Set up a registration form using Zoom directly and use Zoom email settings to schedule an automatic reminder and follow-up.
6. The Zoom Help Center has numerous video tutorials and articles to walk you through all their features : <https://support.zoom.us/hc/en-us>

ONLINE EVENT SCRIPT TEMPLATE

Introduction

Hello everyone, and welcome to today's webinar/meeting on [EVENT TOPIC]. Thank you for joining us, we are thrilled you're here!

My name is [YOUR NAME] and I will be your moderator. [PRESENT YOURSELF QUICKLY, YOUR ROLE AS WELL AS YOUR ORGANIZATION].

We are very fortunate to have [NAME OF YOUR SPEAKER] as our speaker today. [GIVE SOME INFORMATION ON THE SPEAKER, A BRIEF BIO].

I wanted to share a couple of useful notes before we get started. Today's webinar will be available on-demand after the session; we will send you an email on how to access the video and the presentation.

The presentation will be in English, and you can access simultaneous interpretation in French by clicking on the interpretation icon at the bottom of your screen.

[NAME OF YOUR SPEAKER] will be answering your questions at the end of the presentation [OR THROUGHOUT]. Please type your questions in the chatbox [OR Q&A BOX WHERE YOU WILL BE ABLE TO VOTE FOR YOUR FAVORITE QUESTIONS].

Finally, you can also use the chatbox to let us know of any technical issues that you encounter, and we will do our best to help you.

So without further ado, I'd like to kick things off by welcoming [NAME OF YOUR SPEAKER].

[NAME OF YOUR SPEAKER], over to you.

Conclusion

It looks like we covered all of the questions.

[NAME OF YOUR SPEAKER] thank you very much for this great presentation.

A reminder that our next webinar will take place on [DATE]. We will discuss [BRIEF DESCRIPTION OF THE TOPIC] with [NAME OF YOUR SPEAKER]. Don't forget to register! We will send you the link by email along with the recording of today's webinar.

Thanks again everyone for joining us today, and we will see you next time!