

Online Event Best Practices – A Zoom Success Guide

If online events fail to meet expectations it is most likely due to a lack of planning and adherence to best practices. Please use the following guide to help you meet and exceed expectations in your online events. You'll find best practices all over the Internet if you search, but this guide is not limited to the top 10 or the ones we find most useful. We've listed them all here for you and you can do your best with what we're sharing. If you want help, we're here for you (seriously). [Visit our support page](#) to learn more about our Online Event Consulting Services and let us help you get the most out of your online events.

Pre-Event Best Practices:

Create a brief but thorough registration form:

There is a risk of losing a small percentage of your prospective attendees for each question you ask on your registration form. With that in mind, draft a registration form that gathers all of the information that you need to collect and be sure to remove any questions that are not completely necessary for your event analysis. Always ask for questions and comment and make that field optional. [View this article](#) on our support site to learn what a Zoom Webinar registration form can do for you or choose our "registration-less" option and push your attendees through to your own registration form without bothering with any integration setup.

Promote the event early and up to the start time:

Event promotion should start one month to two weeks prior to the event start date. Increase promotion frequency and tactics to include all viable channels as the date nears.

Utilize all viable promotion channels:

How do you plan to promote your event? For public facing events, take advantage of the power of social media like Facebook and Twitter. Always take advantage of industry message boards and forums as well as internal and private communications as it suits your needs. There is no such thing as over promotion, but be careful to not promote through exhausted channels.

Set your duration with care:

A typical online event is one hour in duration. Longer events should be managed consciously of attendees' schedules and attention. Keep in mind that they are in front of their computers – one of the most distracting environments ever. Recommendation in the industry is to never exceed two hours if it can be avoided. Even with a one-hour event, we recommend at least 10 minutes be set aside for interactive activity such as Q&A. If you need to deliver more content than two hours will allow, please consider breaking the session up into multiple, bite-sized sections.

Plan a rehearsal:

Have you ever seen a play or concert that did not involve rehearsals? We hope not. Schedule at least 30 minutes with your presenters and stakeholders a few days prior to your event to review the technology, discuss roles and tasks, and finalize your content to make sure that your day of is as stress free as possible. We suggest scheduling your rehearsal or dry run as a separate meeting or webinar from the live event. Be sure to invite only your key players to keep the discussion on track.



Review the attendee report:

If you're not going to review and use the report, why ask the registration questions? Download and analyze the attendee report to see who may be joining you and where from. Review their questions and comments to gear the presentation to trends that you may discover. This is your chance to provide a unique and engaging attendee experience. [View this article on our support site](#) to learn how to access your Zoom Webinar reports.

Live-Event Best Practices:

Start early and start interacting:

Tired of your attendees joining you five minutes late or more? Start a new precedence with your audience! While you should always have your session open at least 15 minutes prior to the start time to get yourself and your team prepared, try adding some interaction early to motivate them to join early. Turn on your audio and video and start asking them questions or request that they ask you questions. If they receive some rather exclusive interaction with you, word will get out that there is valuable time being shared before the event even starts.

Bring a buddy to help you:

Have you ever hosted a large number of attendees on your own? It can be overwhelming. If you expect more than 20 people to join you, consider bringing a subject matter expert to assist you. Zoom allows you to make them a co-host (locate the "more" menu next to their name in the participants list to "make co-host") so that they can help manage participants, chat, and Q&A*. They will not be able to launch polls or end the meeting, however. [View this article on our support site](#) to learn more about the co-host feature.

Use dual monitors:

It may prove quite difficult to manage all aspects of an online event on a single monitor. Add screen sharing to that and you may find windows are always in your way while you present. With a second monitor, you can host the screen sharing on your primary display and move windows like your participants list, chat, Q&A, and polling to a secondary monitor which will give you a greater ability to track everything at a glance. Don't have dual monitors? Bring a second laptop, make sure it is made a co-host and you can monitor additional features there.

Provide housekeeping:

If you want your session to be engaging and interactive, you have to use the tools to your advantage. Provide a brief housekeeping at the start of your event to show your attendees what tools you will use and set expectations. We even have some slides already prepared, just for you! [Please view this article on our support site](#) to download housekeeping templates for hosting a Meeting or a Webinar.

Waste no time getting into your content:

Many online events are service oriented. There should be a call-to-action and there should be some form of promotion of services in your event. Consider saving that content for the end of your event. Providing a lengthy pitch at the beginning of your event encourages a lack of engagement and simply begs your attendees to tune out. Provide a brief, five-minute (at



most) introduction to your event and dive right into the content. Content is what they are there to hear. If your content is compelling, they will stay with you to hear that call-to-action at the end.

Avoid “death by PowerPoint” – visualize your content:

We know you’ve seen it and maybe you’re guilty of it. Those text-heavy slides may seem meaningful and informative, but what they actually do is draw attention from the presenter’s verbal content. Replace those wall-of-text slides with images, single key terms or brief phrases that help to drive the content home without distracting from the presentation. You may need more slides to do this successfully and you may need to push through them more quickly than before. Visualize your content to create a more lasting impression. If you need help finding some great images for your presentations check out [Pixabay](#) for high-quality, royalty-free images.

Encourage a discussion-based presentation:

Lectures are great for conveying information, but never discount the engaging power of discussion. Your moderator should be skilled enough to bring in questions that lead to discussion of topics of interest. If you’re hosting multiple presenters, ask them to co-present on a topic when possible. Hearing multiple voices and their questions and comments brought into the presentation will discourage attendees from tuning out.

Always record:

There are numerous benefits to recording your sessions: reach parties that could not attend, provide a chance for attendees to review the content, and more. Consider whether you want to record from beginning to end or if you only wish to record certain portions of the event. Zoom will provide a separate file for each portion of the event that you record if you opt to start and stop recording, so please be aware that you may need to stitch those files together with a basic video editing software. Typically, we recommend that you start recording just after delivering your quick event housekeeping as that live interaction instruction is not useful to those watching a recording. [View this complete resource](#) for recording from our support site if you have any questions.

Interact within the first few minutes:

The beauty of an online event is that it is a synchronous experience for you and your audience. Treat it as you would an in-person presentation. Drive engagement and interest in your topic by getting your attendees to interact with you early and often. Set the stage for a highly interactive and engaging session right away by immediately using features such as Q&A* and polling.

Use frequent and varied interaction:

We just can’t emphasize this enough. Interaction with your audience promotes engagement with and interest in an event. Consider interacting at regular intervals without making it too formulaic. Five-minute intervals (give or take) is a good marker. Use all of the tools at your disposal so that the interaction avoids becoming mundane. Polling is an obvious option, but also consider asking them to type in a response to a question or comment using Q&A* or chat. Hand raising is also a quick and easy way to interact with your attendees. In Zoom Meetings, you may find a benefit to interacting with the annotation tools

as well (your viewers will need to have the Zoom interface in full screen mode to access the options menu and enable their annotation tools - not applicable to Zoom Webinar). We recommend starting a session by asking participants to chat in where they are joining from and read through several responses just to give the event that real-life feeling.

Use annotation to grab and direct attention:

Zoom's [annotation tools](#) are top notch. You have a lot of options for drawing, highlighting, making lines and arrows, and even blocking out areas on your screen under the "draw" menu. Use the spotlight menu to access the arrow pointer, and (our personal favorite) the red spotlight tool tip that will even let you use your mouse as normal while it's active, which is ideal for demos.

Manage the aesthetics of your webcam view:

Zoom lets you get face-to-face with your audience, which adds a high level of engagement opportunities for you as a host. Take advantage of this by optimizing your meeting space for video. Lighting should be bright and even and preferably come from in front of you and never behind you to avoid casting shadows on your face. Your background should be interesting but not distracting – consider using the [Virtual Background](#) feature to present from literally, anywhere!

Make eye contact:

Want to really pull your attendees in? Look at your webcam instead of your screen. This will give the effect of eye contact and visual engagement. Use the gestures and mannerisms that you would typically use in person. If you are viewing the video feed of others, try moving that feed to a monitor position just below your webcam to make this easier.

Provide presenters with a final comment:

Sometimes that final question is a doozy. Other times it may be a bit lackluster. After you wrap up your Q&A portion of the event, turn it back over to your presenters for a final comment. Let them know ahead of time that you will be doing this to give them a chance to draft some compelling final remarks to help you end your session smoothly and concisely. They are the subject matter experts after all. If you are presenting solo, give yourself this opportunity.

Leave attendees with a call-to-action:

What's the purpose of your event? Whether you are prospecting, providing education, or building your community, you have a great opportunity with online events to ask your participants to take action. We recommend saving this call-to-action for the end of your event to avoid appearing to "salesy." Don't miss this opportunity to promote any upcoming events that you are hosting or are involved with as well. Make your call-to-action clear and concise, and be sure to provide your audience with everything that they need to succeed.

Post-Event Best Practices:

Download the Q&A report and respond to unanswered questions*:

Zoom gives you the opportunity to respond to questions while in session either verbally by selecting "answer live" or via text by selecting "answer by text." Using these options accurately in your webinar will help you review your Q&A report to find questions that were not addressed in session. Take some time after your event to review the report and respond to any



unanswered questions via email. All questions including name and email of the asker will be represented in the report. Be sure to review the document completely as some attendees may have more than one unanswered question. [View this article on our support site](#) for instructions on accessing your webinar reports.

Provide complete follow-up communication:

Zoom provides two follow-up email options: an email for registrants who attended live, and an email for absentees. Both emails default to sending one day after the event. Edit these emails as needed and add custom text. This is a good opportunity to reiterate your call-to-action and [provide a link to the recording](#) of the event, next steps to keep the conversation going, links to resources, and a brief FAQ based on questions received during the event. [View this article on our support site](#) for instructions on editing your webinar email settings. You may also turn these features off to have follow-up emails sent from an external service if you prefer.

Provide a follow-up survey:

While Zoom does not include an integrated follow-up survey tool, it is very easy to use services external to Zoom such as SurveyMonkey to fill this need. Once your survey is completed, you may link to it in a follow-up email or send it separately. The suggestion in the industry is to keep your survey brief to encourage the highest possible response rate. Consider using an NPS format or keep it limited to no more than three to five questions at most. You can configure your Zoom Webinar to automatically launch your survey in a new browser window for your attendees at the end your webinar. Activate the Post-Webinar Survey tool from the Branding tab in your Webinar setup page.

Plan your next event:

If you have not already started planning your next event, now is the time. Hosting your events on a fairly regular and ongoing basis will help you to develop and enhance your community network and their expectations. While online events are justifiably seen as a great marketing tool for engaging your audience and driving revenue, they are also a superlative community-building tool. Use them to enhance the experience of all of your dedicated fans. Don't leave them hanging or waiting for more.

**Denotes an item that is specific to the Zoom Video Webinar service and is not applicable to the Zoom Large Meeting service.*

In Closing:

We know that's a lot to take in. Please use what you can and feel free to return to this document regularly to add best practices to your repertoire. Don't be afraid to try new things and please reach out to us if we can help.