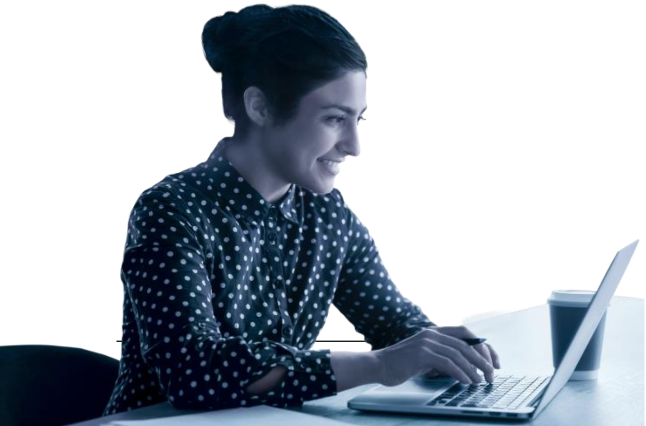
McKinsey Accelerate

Zoom 101

How-to guide for common Zoom features

March 2020

Guide overview



What's the purpose of this guide?

By the time you are reading this, you have likely made it to the point where you are using Zoom regularly and are even turning on the video. Now it's time to bump your skills up a level!

This guide will help you to build the technical foundation you need to run an effective and engaging virtual experience.

You might choose to search for more on a particular feature, or you might find it helpful to do a quick flip through to acquaint yourself with the (non-exhaustive) possibilities.

What will I find?

Overviews of highly-utilized features, aggregated into one place as ready-to-repurpose slides

Guidance for steps to consider before, during, and after the session

A focus on the desktop app experience (which we recommend for both hosts and participants)

Additional resources

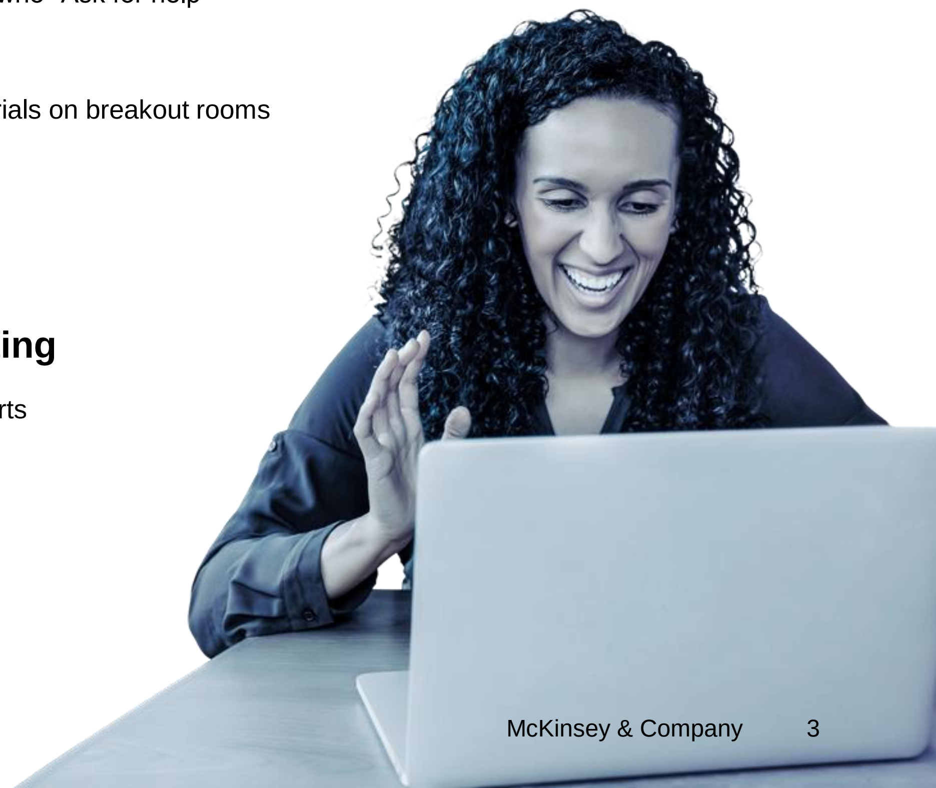
Explore the comprehensive guides from GHD (you must cut and paste these links into your toolbar for them to work)

- *Internal:* https://mckinsey.service-now.com/ghd?id=mck_ghd_kb_article&sysparm_article=KO71777&search_term=zoom%20manual
- *For clients*: https://mckinsey.service-now.com/ghd?id=mck_ghd_kb_article&sysparm_article=KO69396&search_term=zoom%20guide%20for%20clients

Check out the corresponding document on Know (Designing and delivering live virtual learning experiences) and/or reach out to *McKinsey_Academy_First_Alert@mckinsey.com*

- For guidance on designing and facilitating session content (i.e., what is the experience I'm trying to drive through use of these tools)
- To find examples of exercises and activities that would introduce these tools

Table of contents (clickable!)



Before the meeting

Set up your Zoom profile and essential features

Go to your [Zoom profile](#) and make sure the essential features are set up before your meeting.

Explore features you can enable under Settings, such as:

- Polling
- Co-host
- Annotation
- Whiteboard – You also have an option to auto save the whiteboard

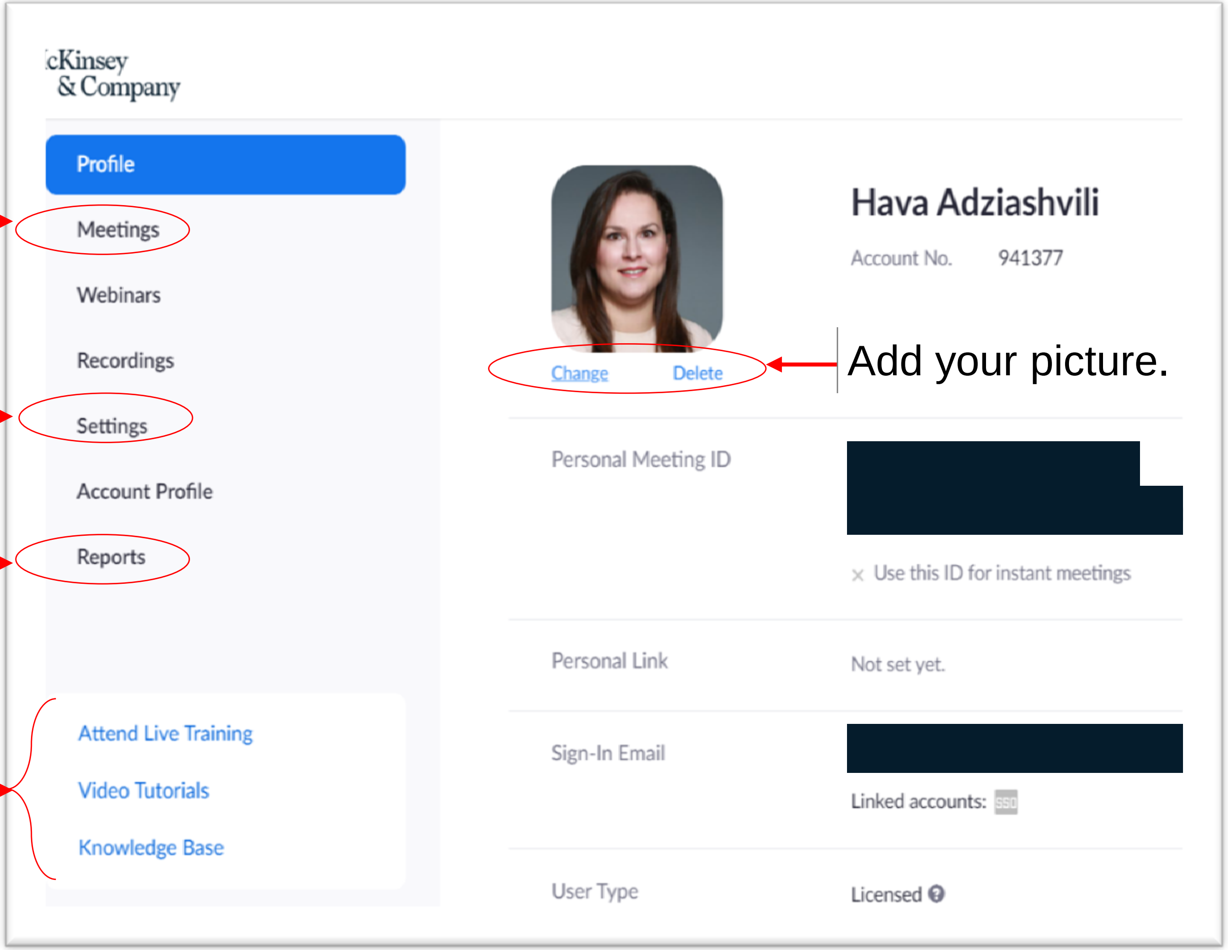
Go ahead and enable breakout room functionality now. Go to Settings → Meetings → Scroll down to "In meeting (Advanced)"

Schedule a meeting

Manage your settings

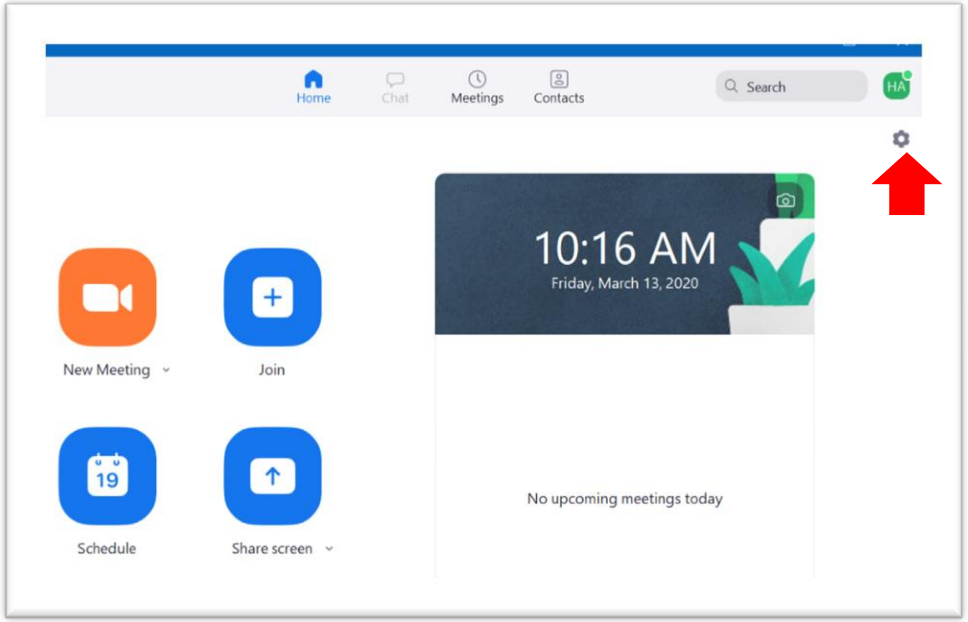
Export registration, attendance and polling reports report

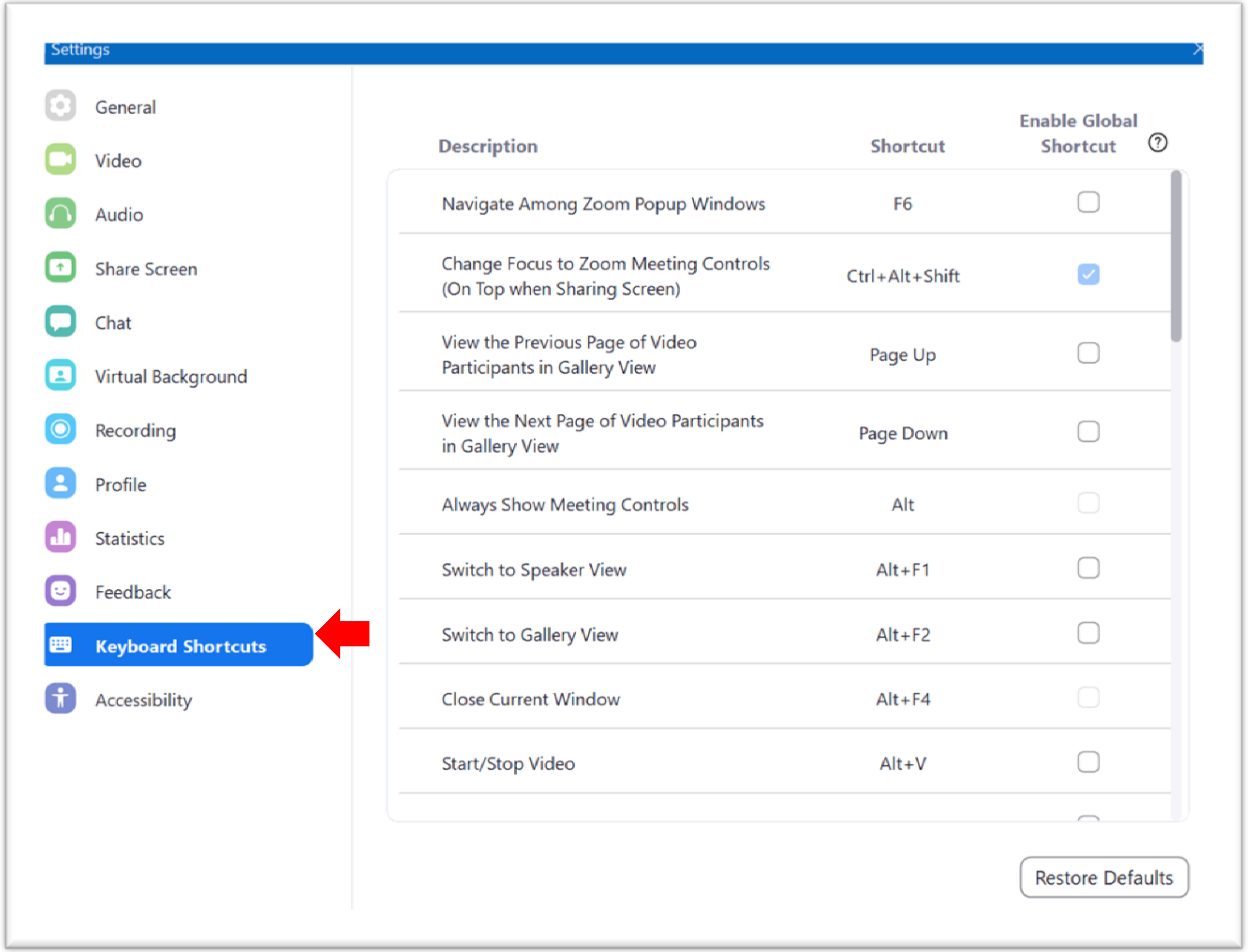
Additional training



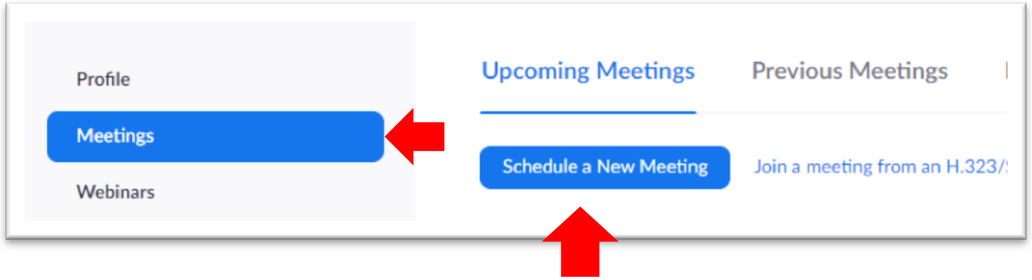
Set up keyboard shortcuts

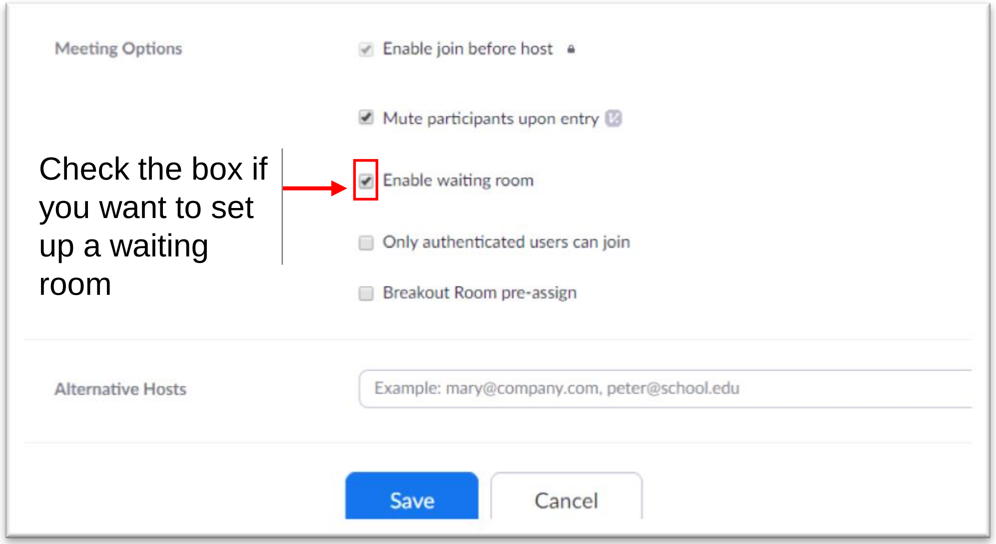
To view and edit keyboard shortcuts go to Settings in your desktop app and click “Keyboard Shortcuts”

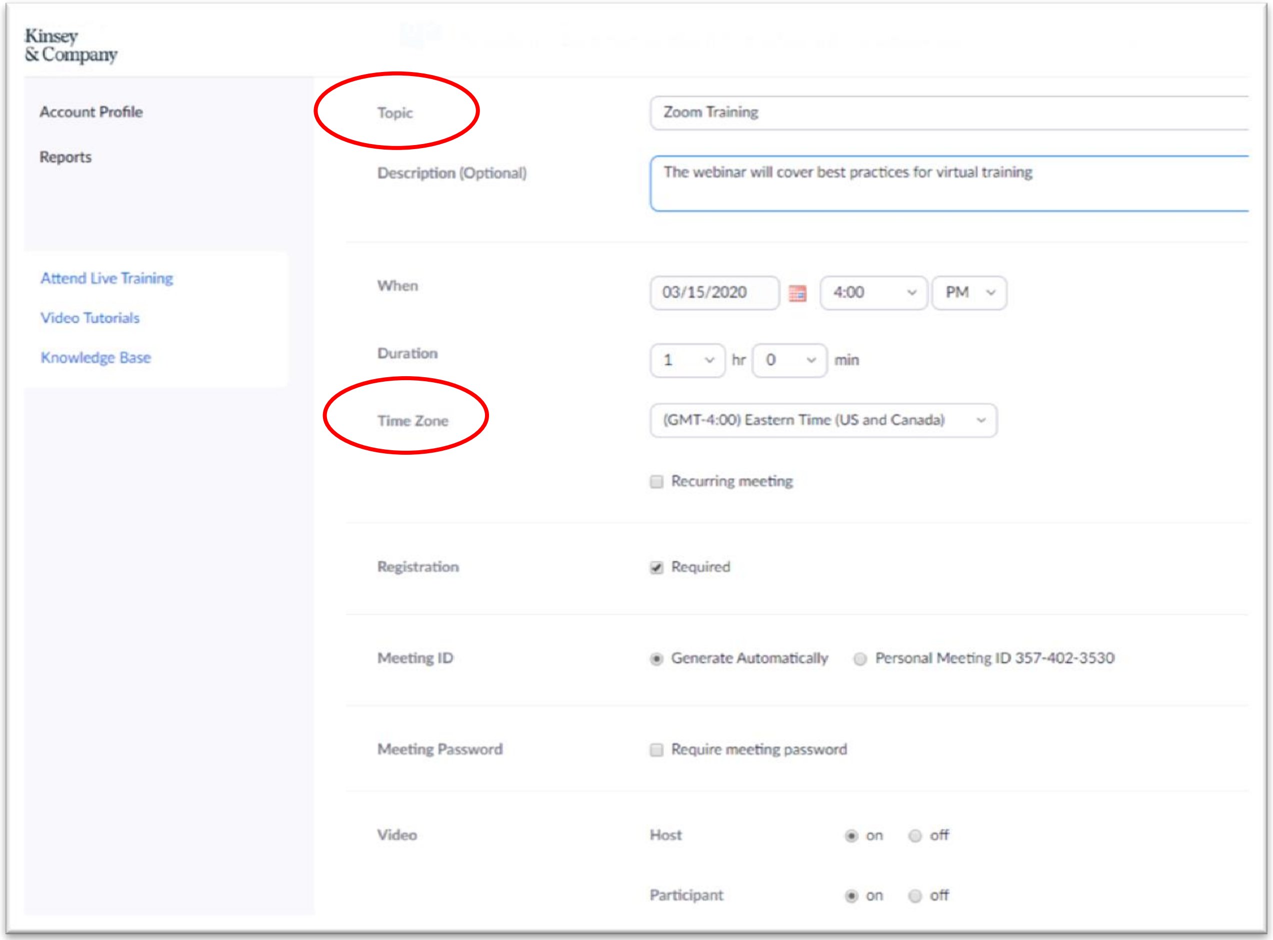




Schedule a meeting via the Zoom site



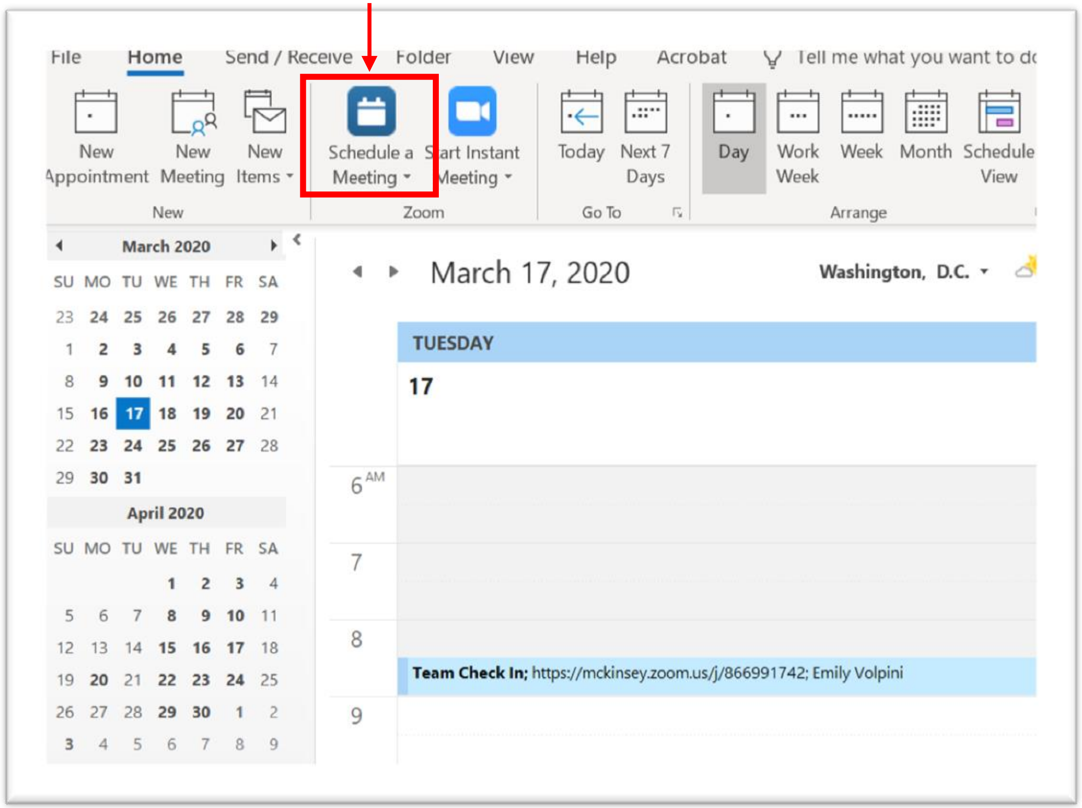




Schedule a meeting via Outlook

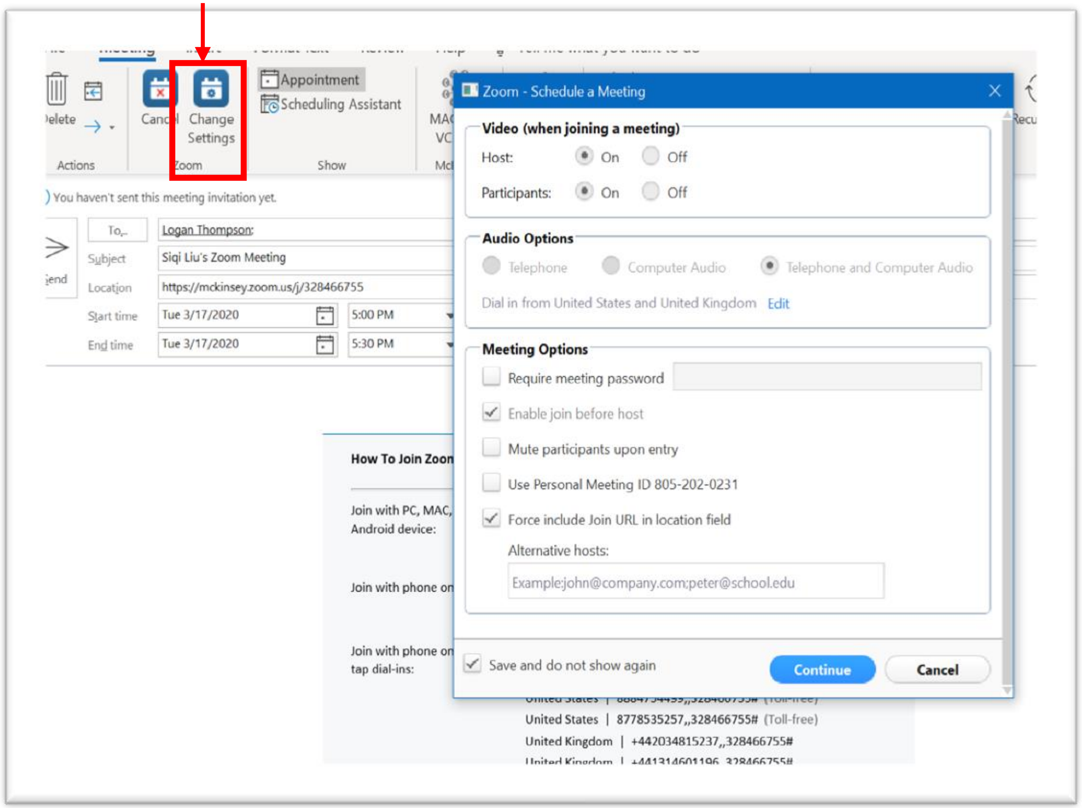
1

Schedule a new Zoom meeting via Outlook calendar



2

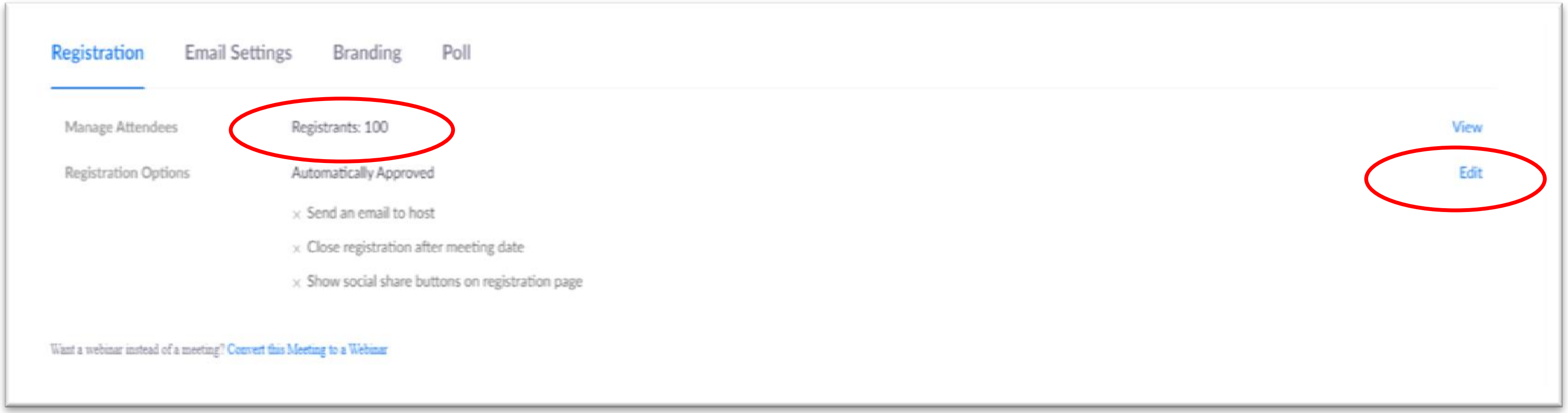
Once meeting is scheduled, use “Change Settings” for changing dial-in options (click “Edit” under Audio Options), setting a meeting password, adding alternative hosts, etc.



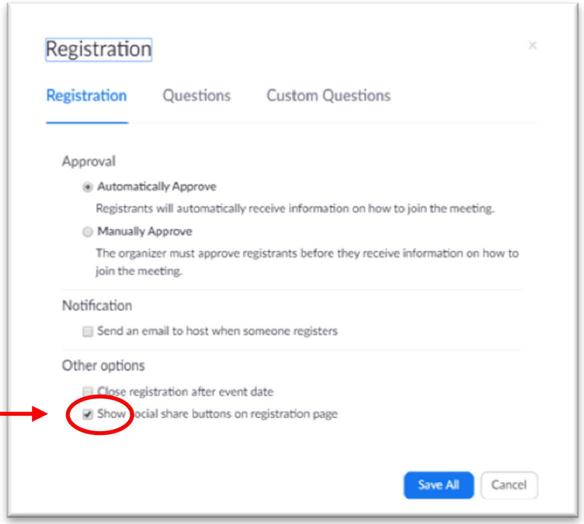
Create a registration page (1/2)

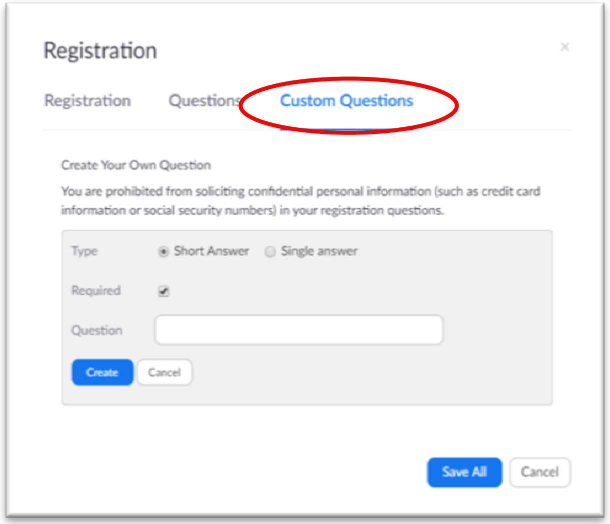
Registration page can be used to track who has signed up for your event and to automate a confirmation email. Creating a registration page is best practice for events with external clients, whose full names or emails may not be visible unless they register (in that case, you would not be able to pre-assign breakout rooms).

To edit and customize a registration page, first make sure you check the box for “Required” next to “Registration” in Meeting settings, then scroll to the bottom of the page, where you can set the features depicted here.



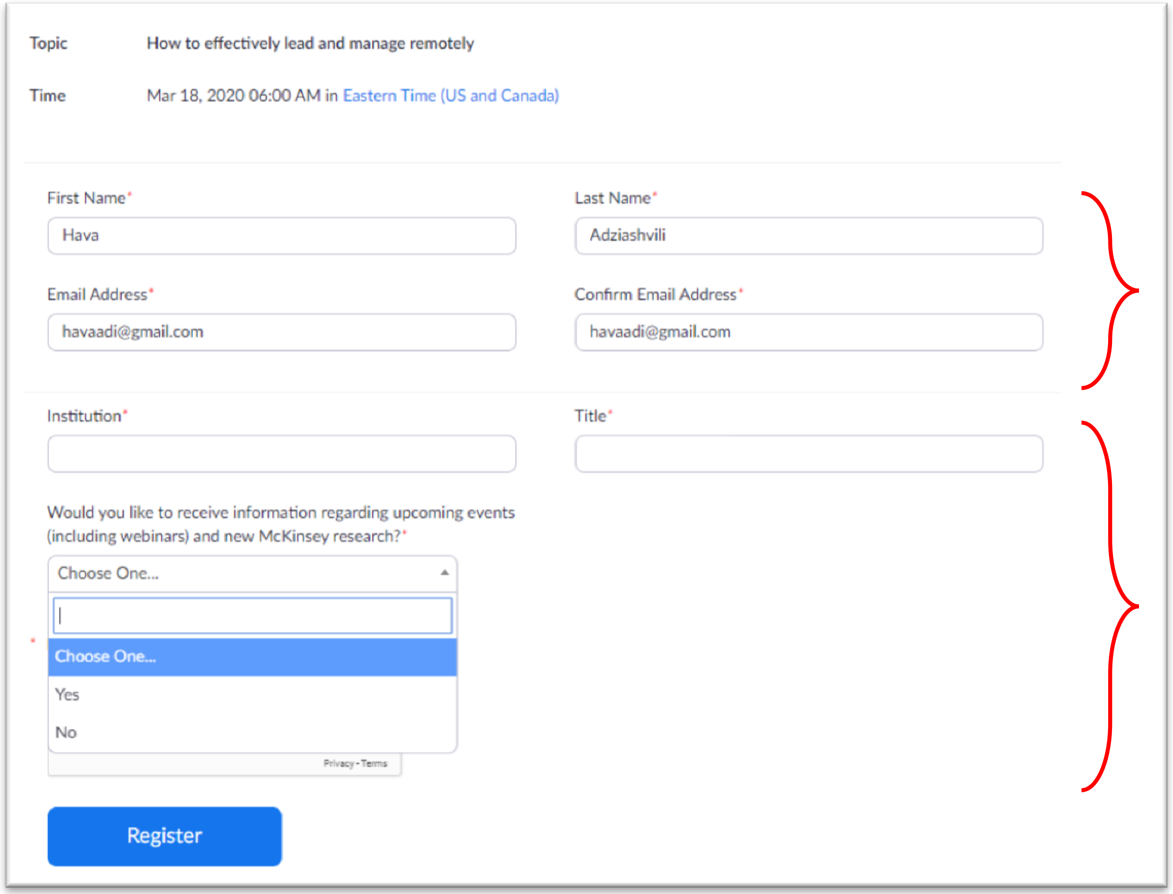
Uncheck the “show social share” box





Create a registration page (2/2)

This is the registration page that invitees will see

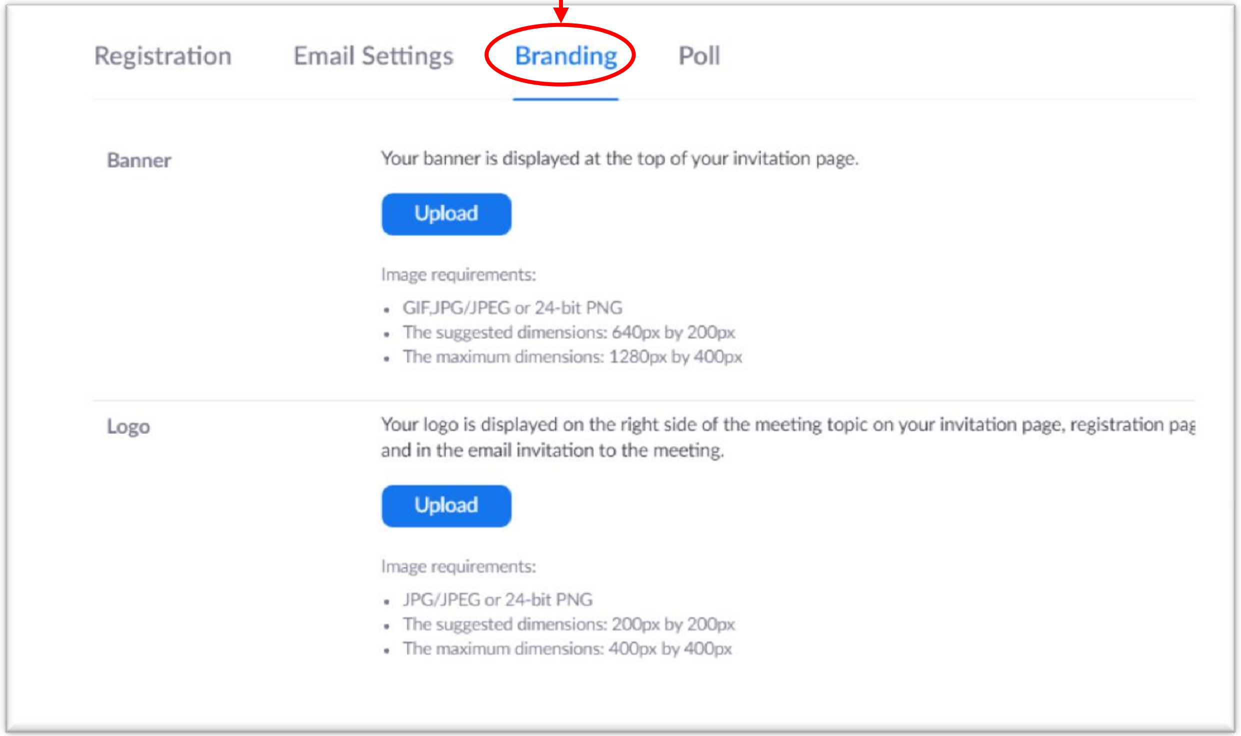


Default questions

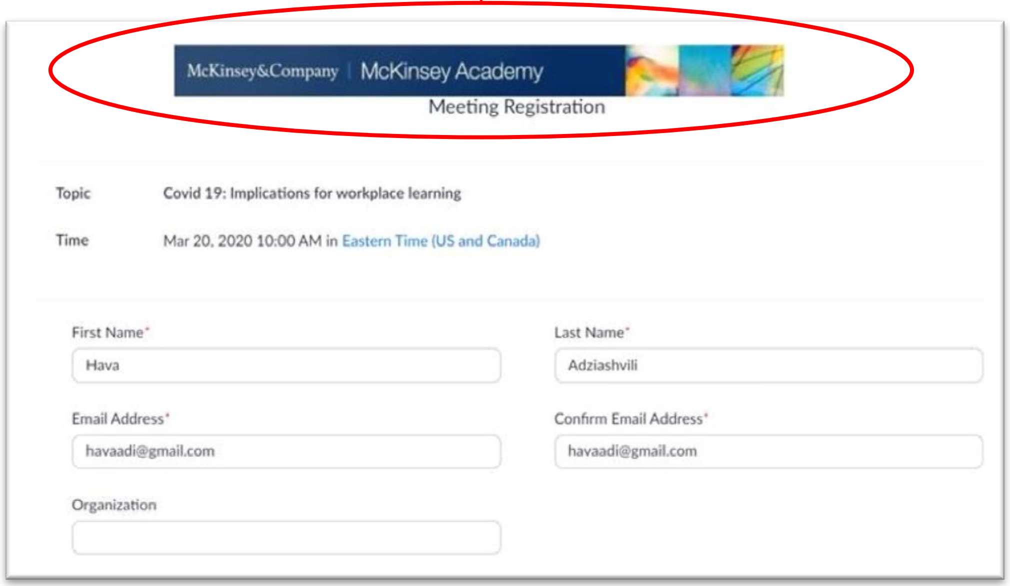
Custom questions

Add branding to the registration page

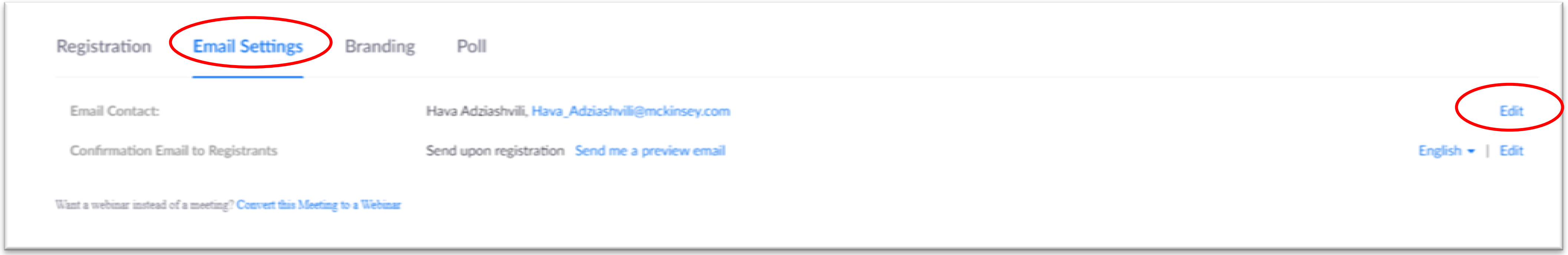
You can upload design for the registration page by adding a banner and a logo

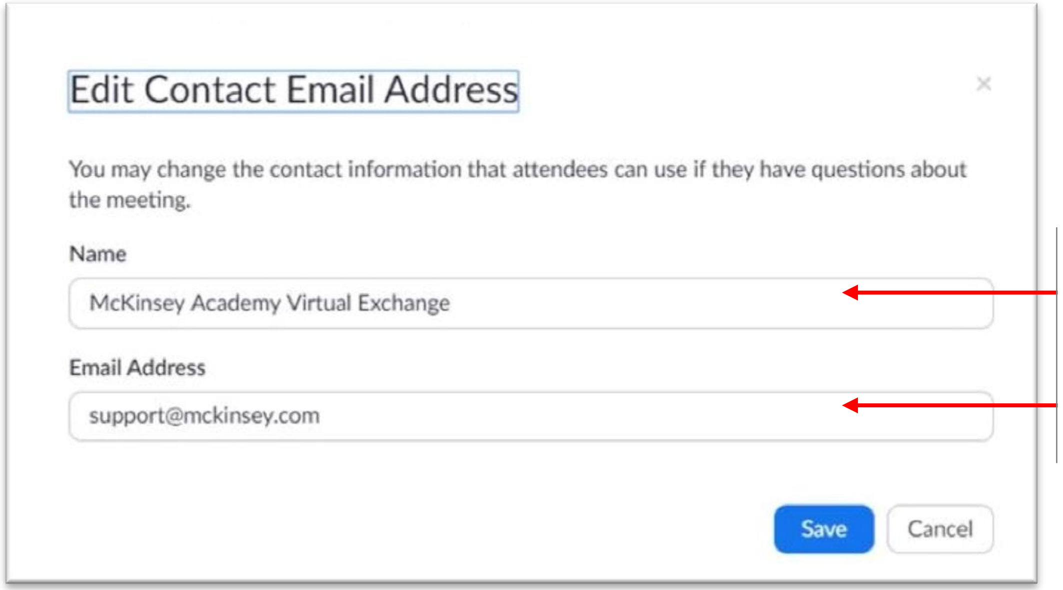


Example of a banner



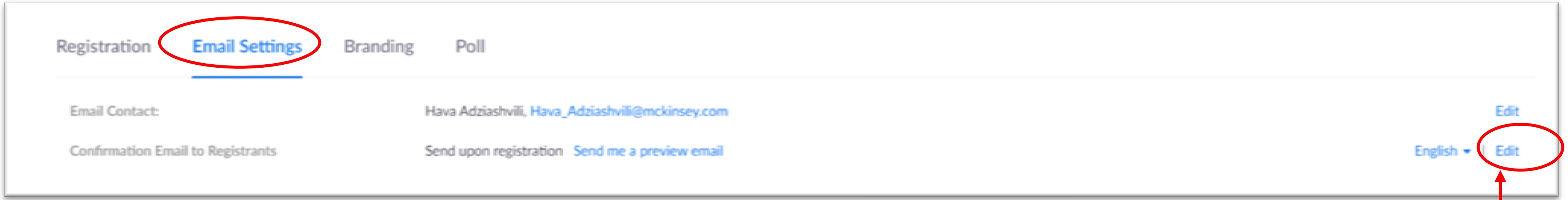
Edit confirmation email settings (1/2)



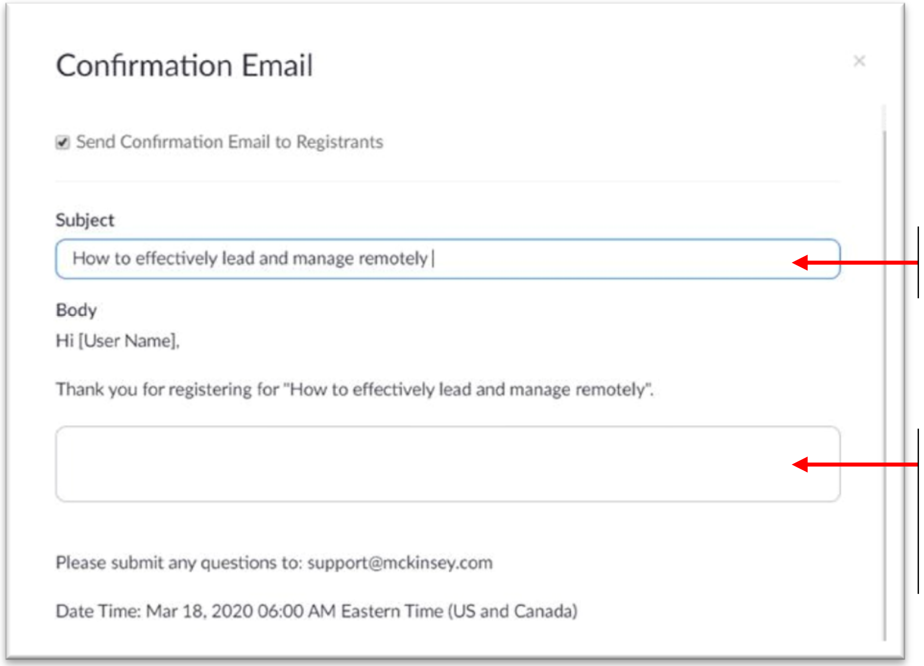


You can edit the name and contact email

Edit confirmation email settings (2/2)



Click here to change the language



You edit the subject

You can add language to the confirmation email

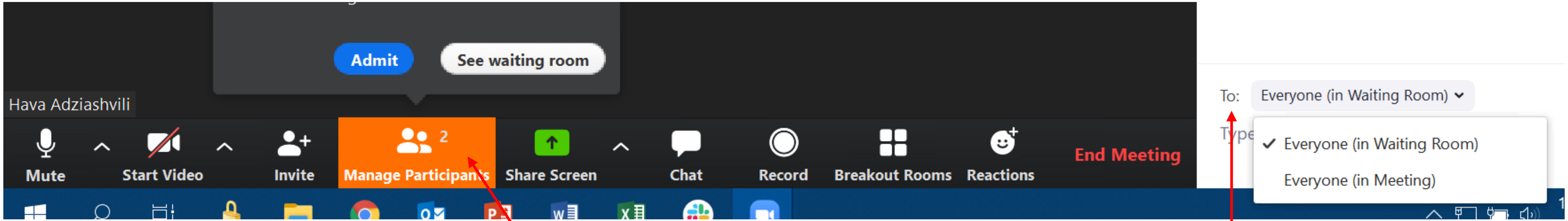
Set up Breakout Rooms and Polls

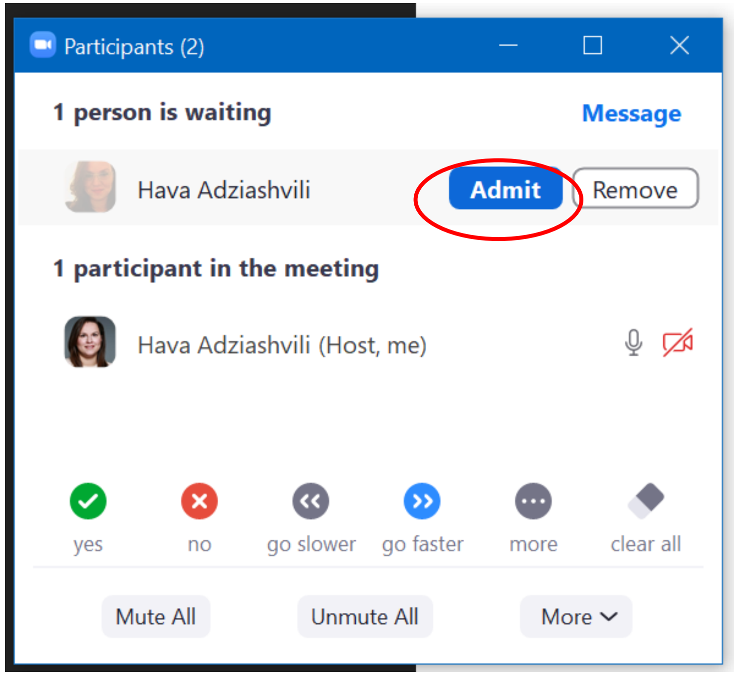
You can also set up polls and breakout rooms before a meeting:

- See page 37 for how to set up poll questions before a meeting
- See page 46 for how to set up pre-assigned breakout rooms before a meeting

When the meeting begins

Manage waiting room



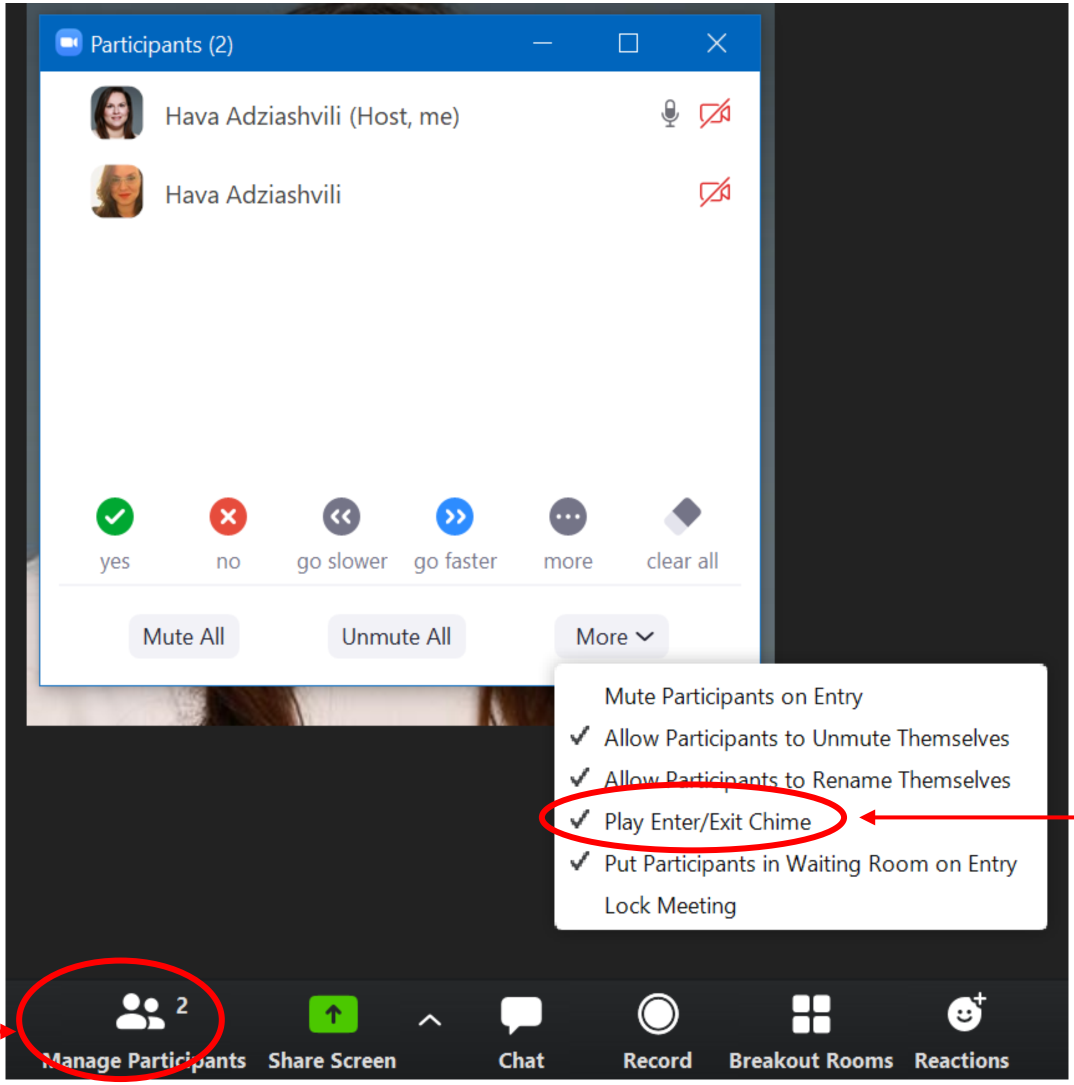


If you enabled the waiting room, click “Manage Participants” and “Admit” to admit individuals (e.g., if you want to have faculty on early for preparation)

You will also have an option to “Admit all”

While participants are in the waiting room you can send them a message (e.g., “Welcome and thank you for joining <SESSION NAME>! We will be opening the session at X:XX.”)

Disable or enable enter/exit chime

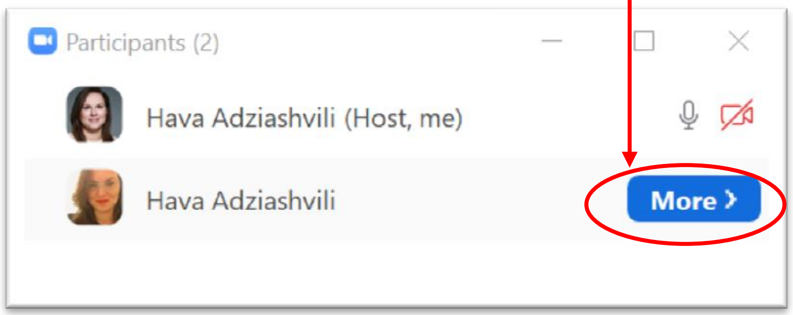


1 Click “Manage Participants”

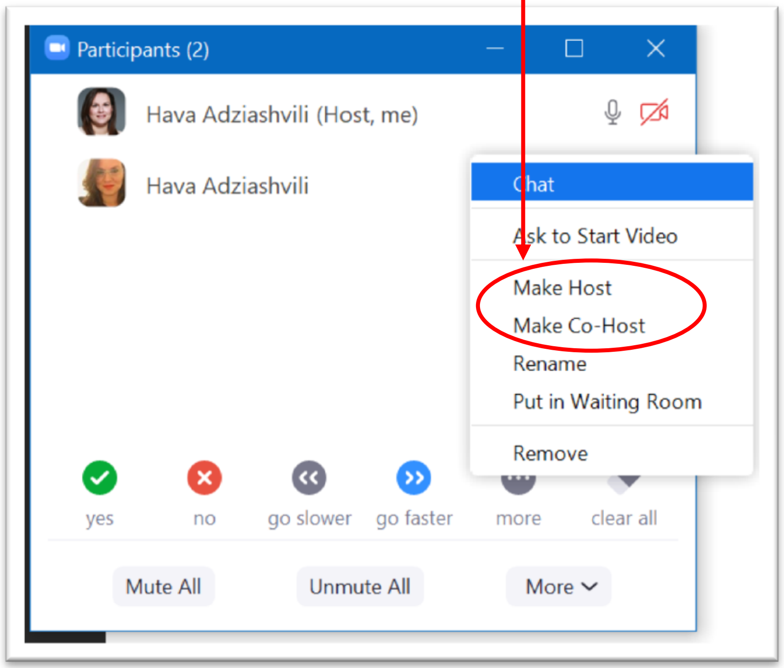
2 Uncheck disable feature (highly recommended for large groups, and unfortunately you cannot adjust in advance through settings)

Make someone the host or co-host

1 Hover over the participant name and click "More"



2 Click on one of the options



Record a Zoom meeting

Set up recording feature

Recording requires GHD approval. Send the following information via e-mail to global_helpdesk@mckinsey.com at least **two days** in advance:

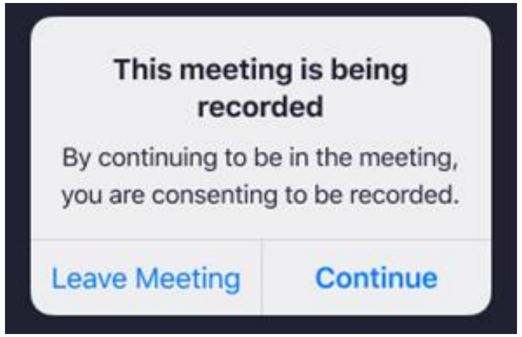
Zoom Meeting Host	FirstName LastName
	Email
Date of Meeting to be recorded	DD/MM/YYYY
Business Reason	

Once approved, this feature is enabled for **30 days**

Joining a recorded meeting

The following message will appear when participants join a session that is being recorded.

To enable Recording consent as a host, log in to your account → Setting → Recording → Recording consent

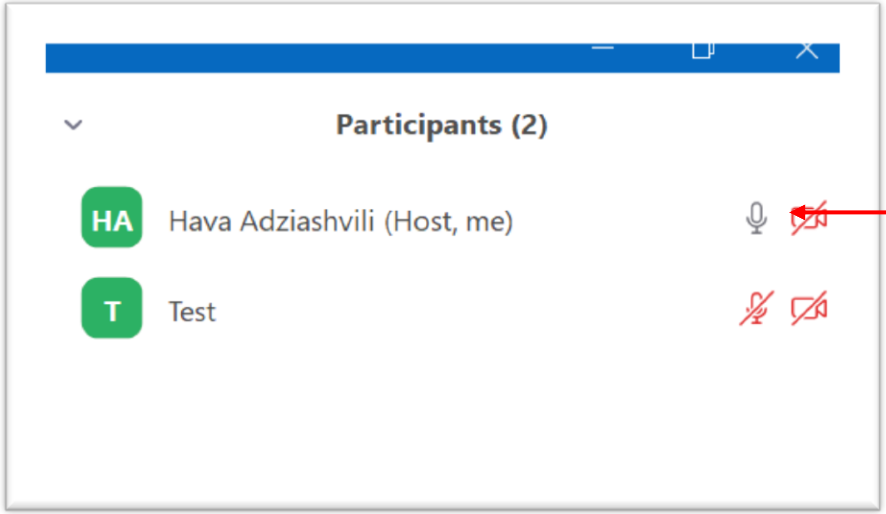


Reporting

Name (Original Name)	User Email	Join Time	Leave Time	Duration (Minutes)	Attentiveness Score	Recording Consent
Hava Adziashvili	Hava_Adziashvili@mckinsey.com	3/17/2020 9:56	3/17/2020 9:59	4	100.00%	
Jacob Jeong	Jacob_Jeong@mckinsey.com	3/17/2020 9:57	3/17/2020 9:59	3	100.00%	Y

During the meeting

Mute and unmute your audio



Click the Participants panel, then click the microphone button to mute/unmute your line

Hover over the bar on the bottom, click the microphone button in the bottom-left corner to mute/unmute your line

Mute and unmute participants' audio

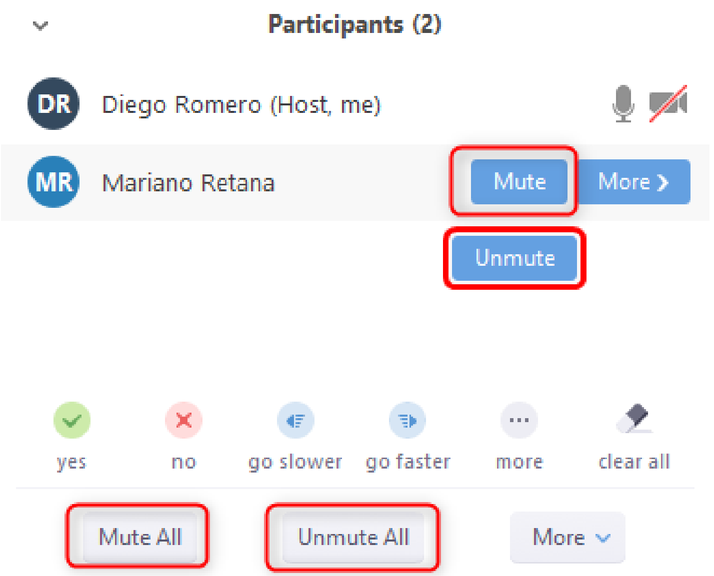
As a host, you can **Mute All** and **Unmute All**

1

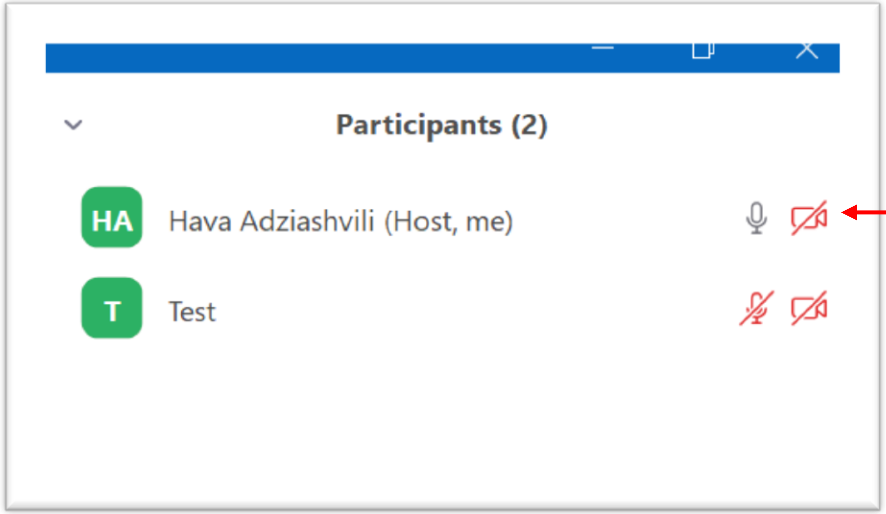
Click **Manage Participants** at the bottom of the meeting screen

2

You can mute/unmute a single participant's audio or mute/unmute all



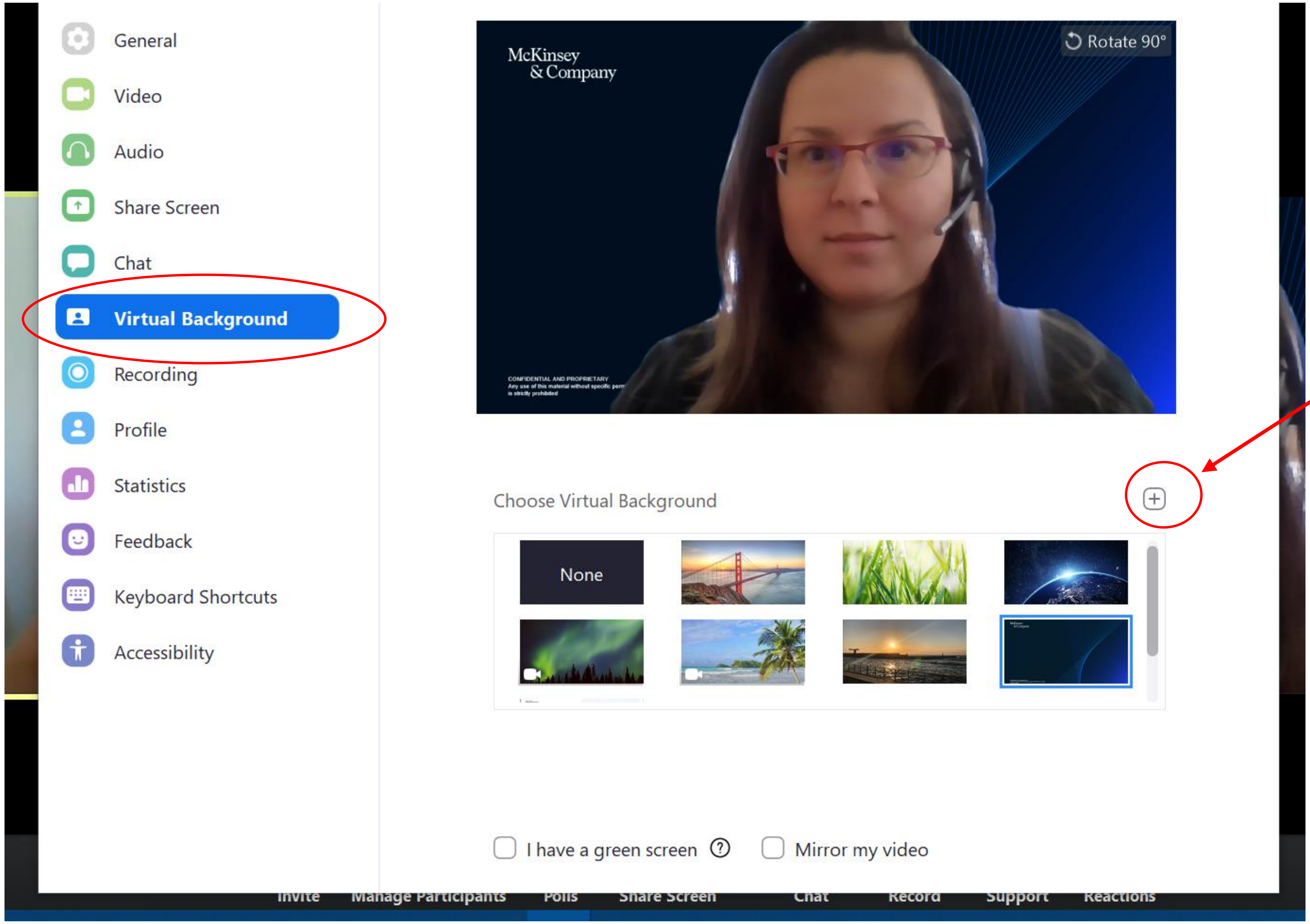
Start and stop camera



Click the Participants panel and click the camera icon to start your webcam. If you are the host, you can also change the audio/camera setting of participants.

Hover over the bar on the bottom, click the **Start Video** icon in the bottom-left corner to start your webcam

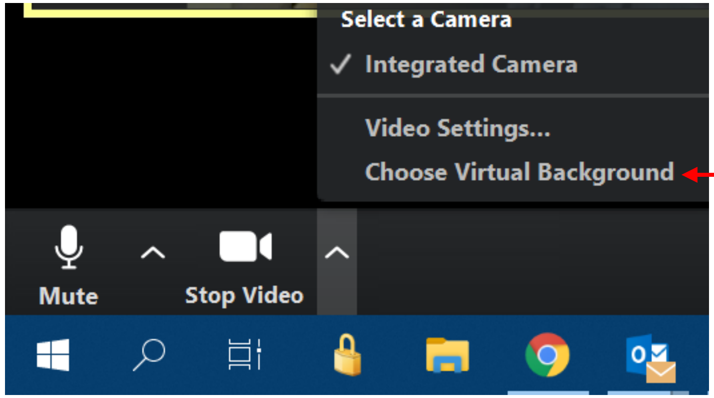
Set a virtual background



Note: Having a virtual background may interfere with the quality of your video if there is not enough bandwidth.

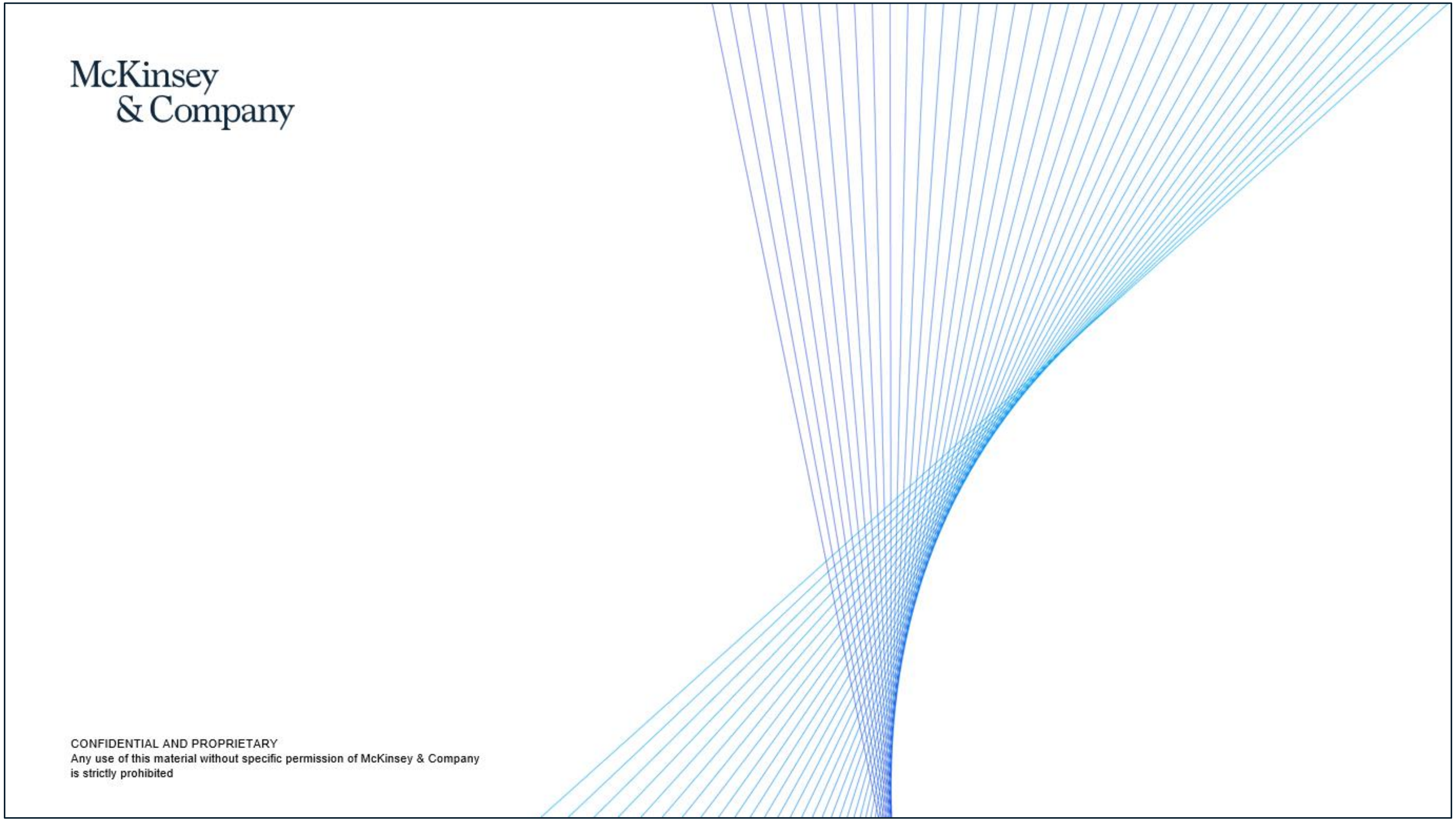
You can add images by clicking the + icon

You can change your background also during the session



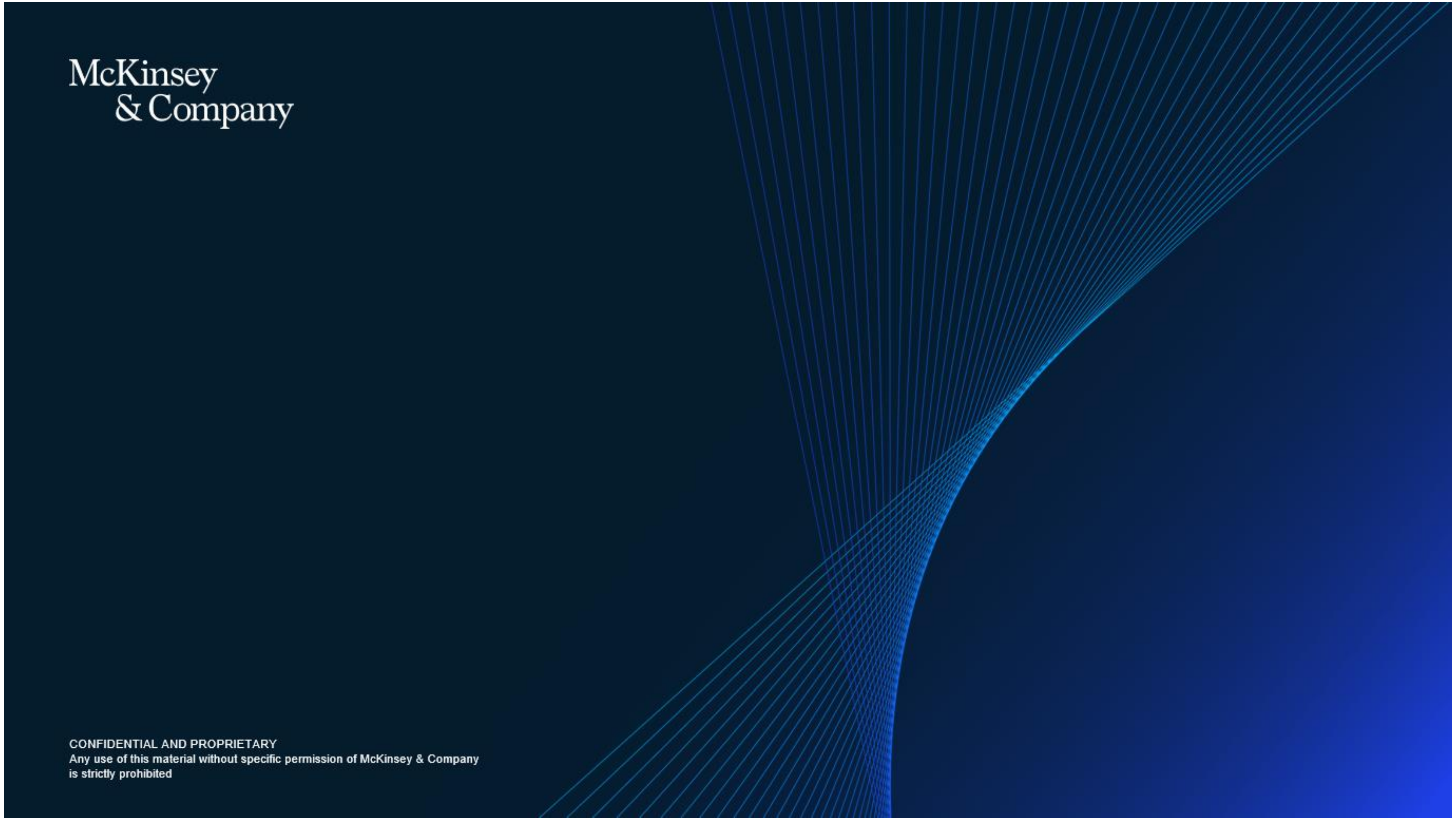
Set a virtual background - Sample Firm Background (Light)

To use: Right-click and Save as Picture



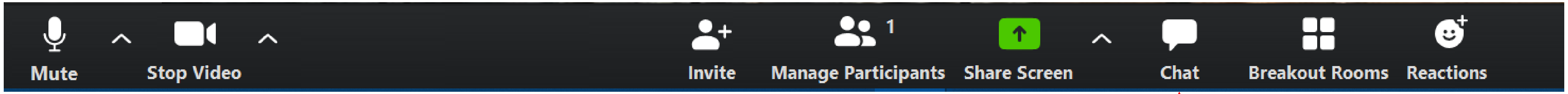
Set a virtual background - Sample Firm Background (Dark)

To use: Right-click and Save as Picture

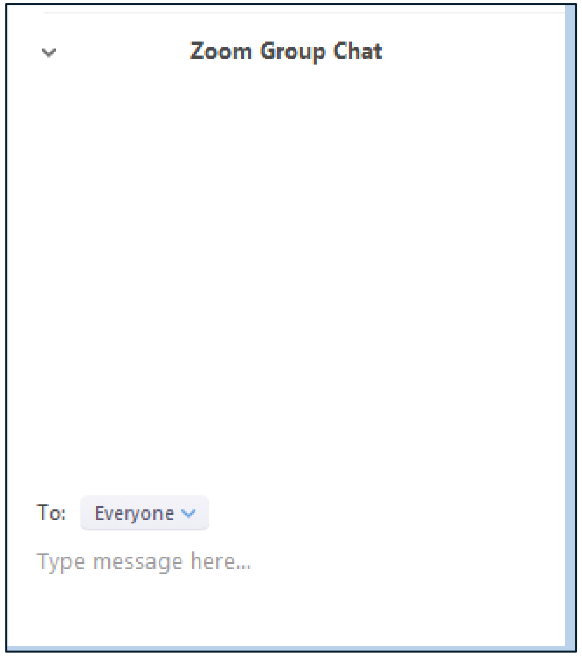


Use the chat feature

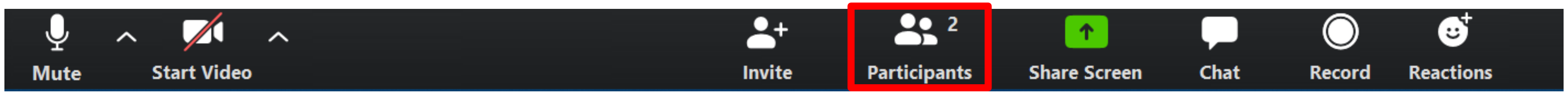
1 Click the chat icon at the bottom of your screen



2 Type your question in the field near the bottom of the panel then press Enter on your keyboard



Provide nonverbal feedback (participant view)



1 Click on the Participants icon

2 Choose and click the Feedback button

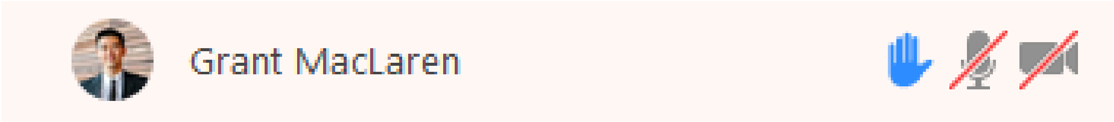
Emoticons

Agree/disagree

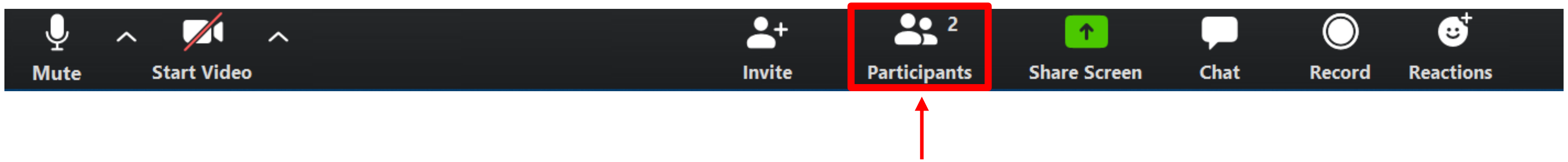
Raise hand

Speak slower/faster

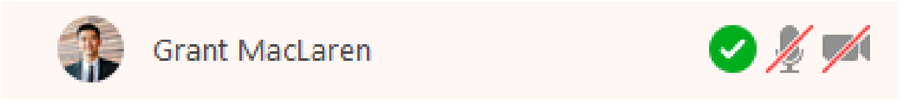
3 Your feedback will appear beside your name



Manage nonverbal feedback (host view)



1 Click on the Participants icon to see the list of participants and their feedback



2 In the participants list, you can view and manage feedback using these features:

- If a participant clicked on a feedback icon, you'll see that icon beside their name.
- The number above each feedback icon shows the how many participants have clicked on that icon.
- If a participant clicked **raise hand**, you can lower their hand by hovering over their name and clicking **Lower Hand**.
- Click **clear all** to remove all nonverbal feedback icons.

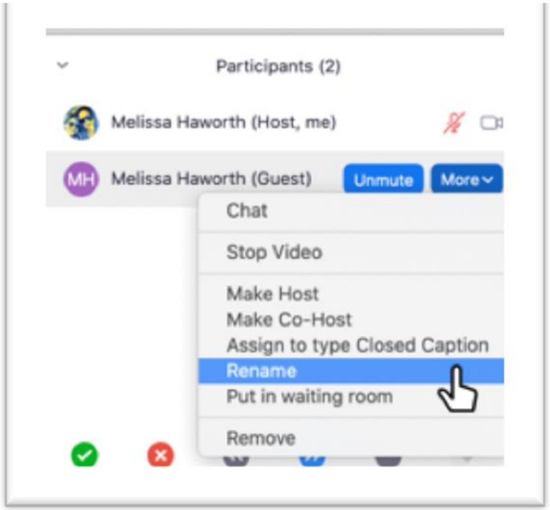
Rename a host, guest, or participant

2 ways a host can rename a participant:

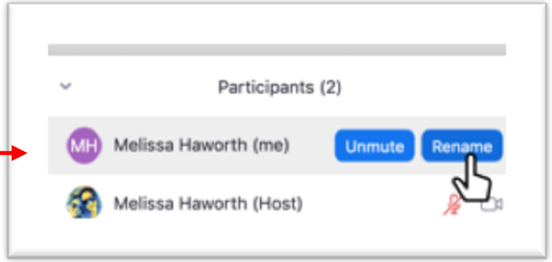
1 Click on **Manage Participants**

2 Click **More** to the right of the Participant or Guest you'd like to rename

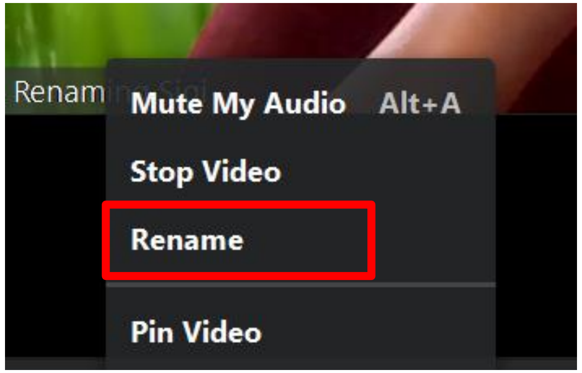
3 Click **Rename** on the resulting drop down menu



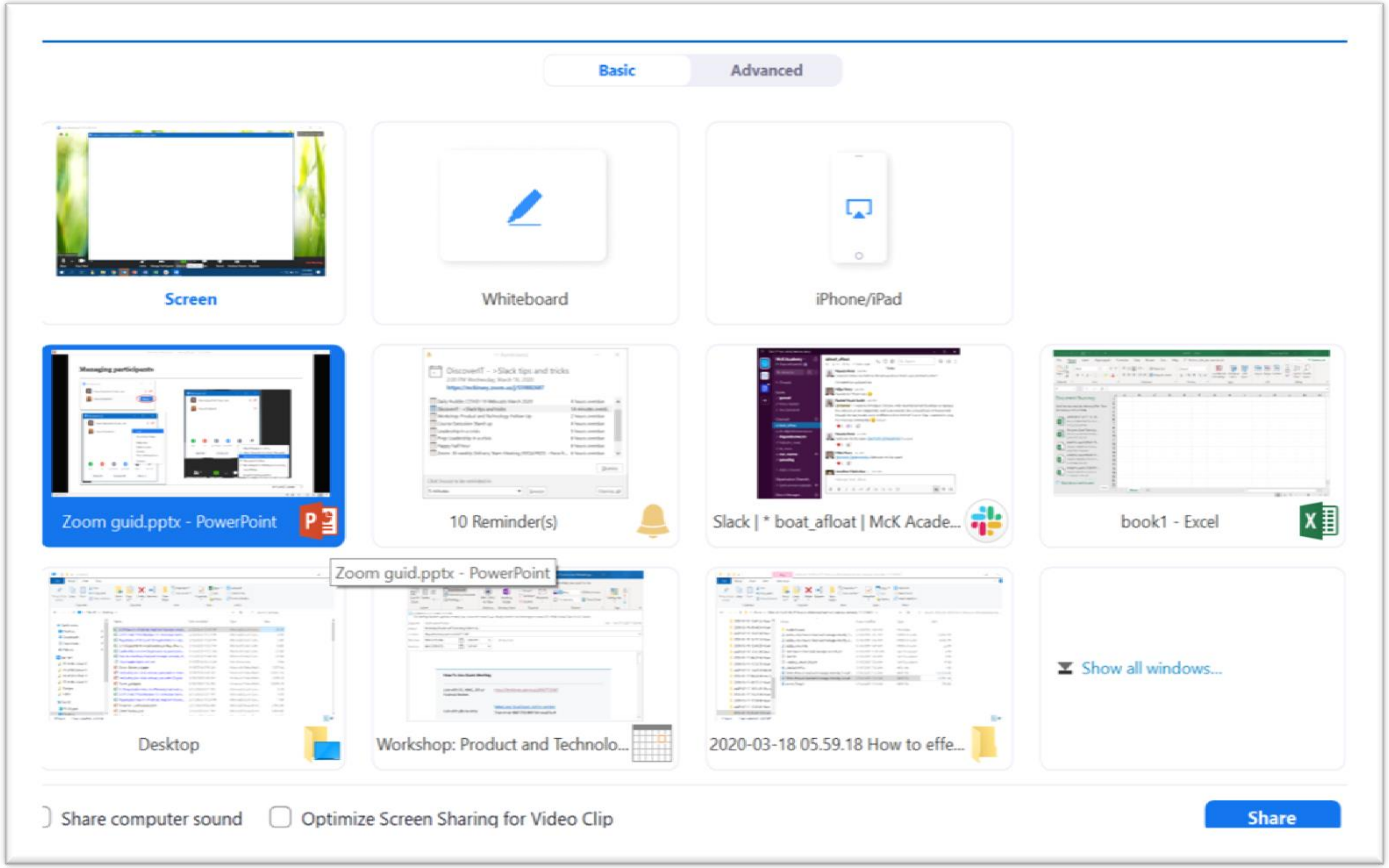
4 Enter the new participant name and click **Rename**



1 Hosts can rename participants, and participants can rename themselves by right-clicking their own name in the "Participants" window or right-clicking their name directly on the screen.



Share a document



1

Click Share Screen

2

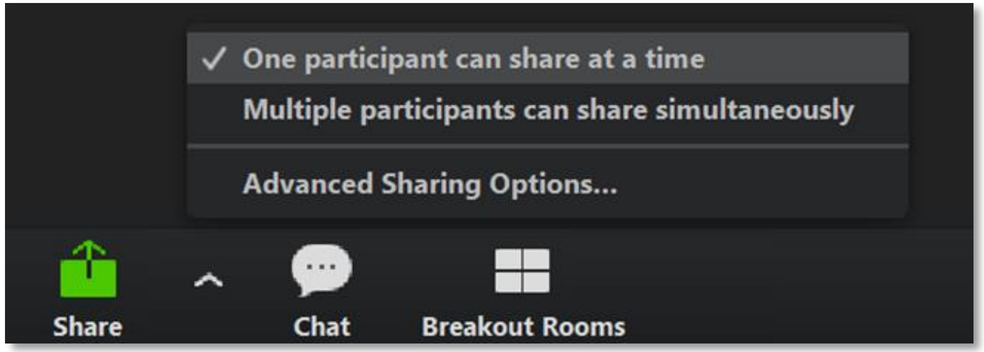
Share the desired application

3

Click share

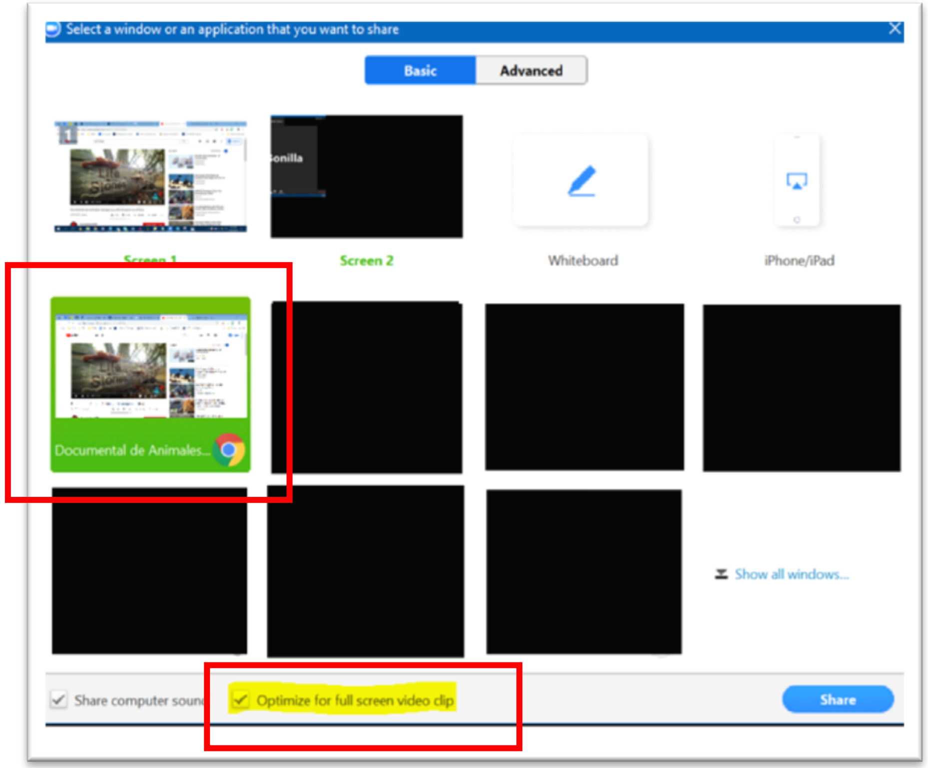
Share videos

1 On Share Options, select **One participant can share at a time**



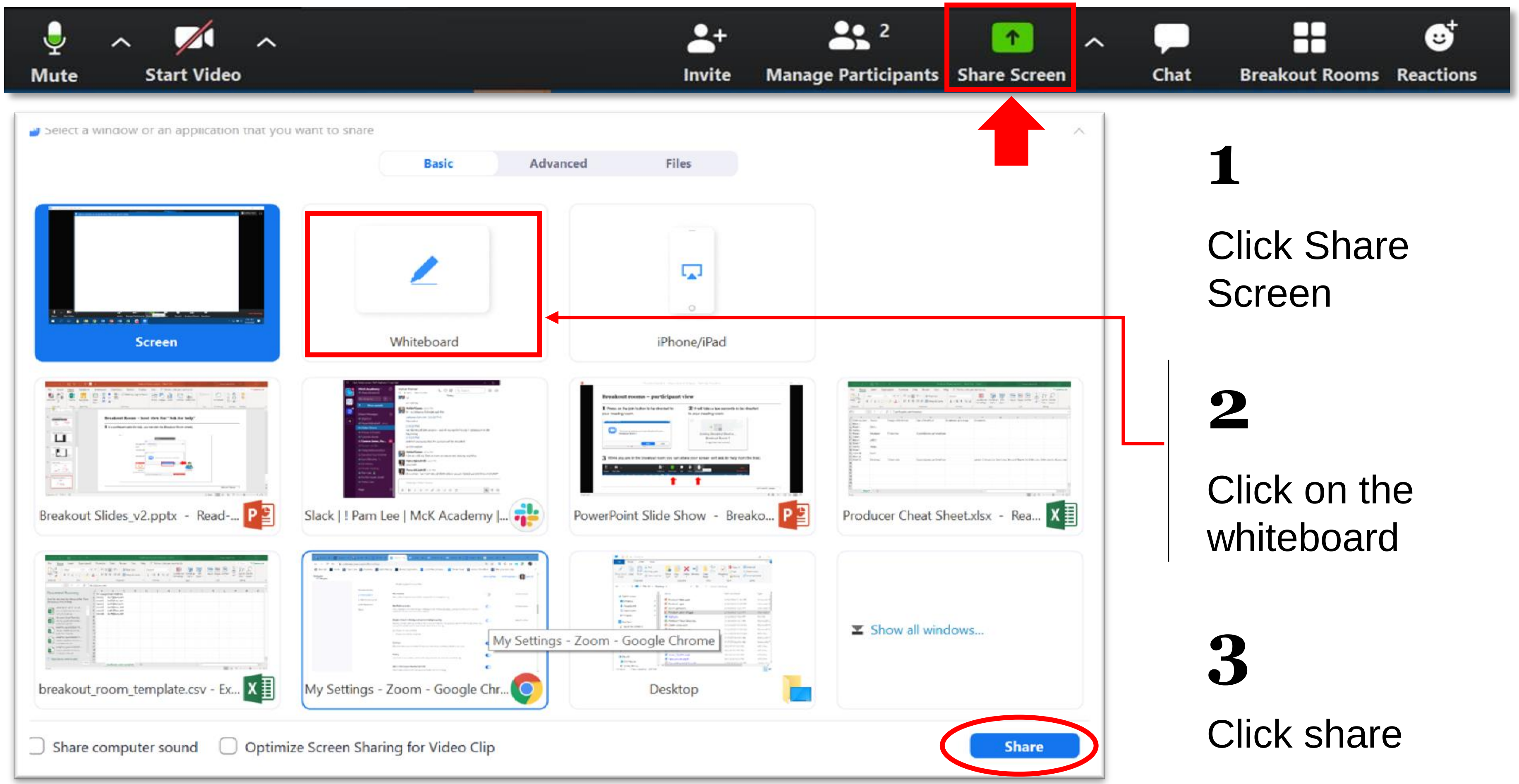
Note: If you select **Multiple participants can share simultaneously** (which enables viewers to switch between shared screens or see two screens at once if Dual Monitor is enabled), it will **disable** the option to share a **video's audio** (not optimized video experience)

2 Select the screen where the video is located and check mark Optimize for full screen video clip



Share a whiteboard

The process of sharing a Whiteboard in the main room and in the Breakout Room is the same. Once shared, participants can use the "annotate" features to write/draw on the whiteboard.



1

Click Share Screen

2

Click on the whiteboard

3

Click share

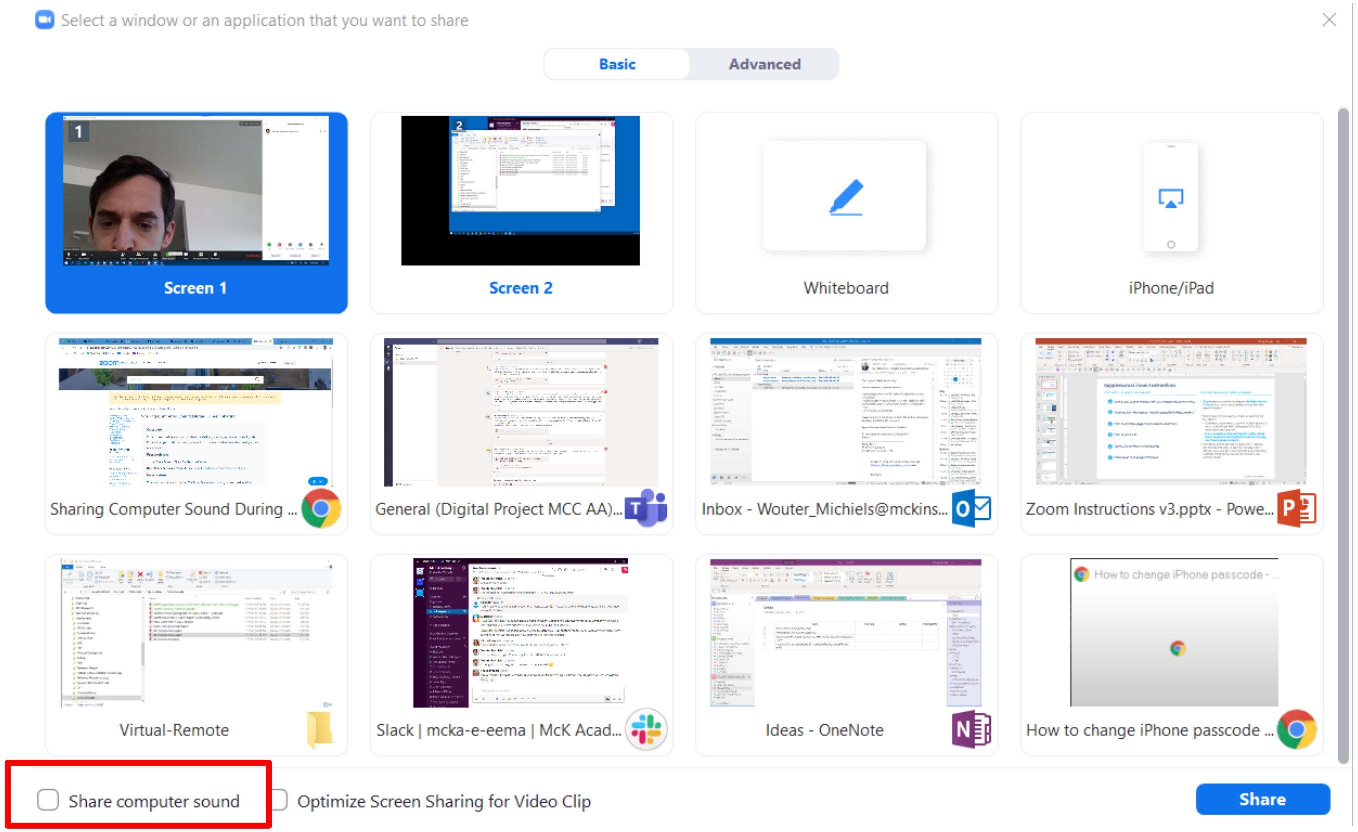
Tip: You can save a whiteboard by clicking on **Save**. It will be saved locally on your laptop (This PC > Documents > Zoom > Folder name contains the meeting date and ID)

Share computer audio

You can also share computer audio without playing a video (e.g., simply playing music). However, you must be sharing your screen to enable your computer audio.

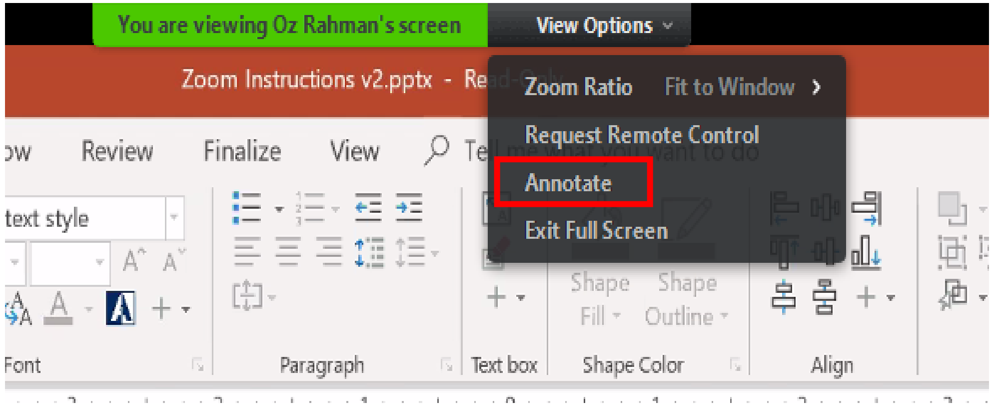
When you select the Screen to be shared, also select “Share Computer Sound” at the bottom

If you use your phone for audio, you need to make sure to be dialed in using your participant ID



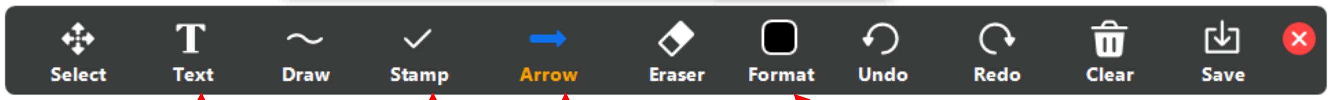
Annotate a screen

1 At the top of your screen, click **View Options**



Tip: You can save annotations by clicking on **Save**. It will be saved locally on your laptop (This PC > Documents > Zoom > Folder name contains the meeting date and ID)

2 Click **Annotate.** This will open the annotation tools. You can click and drag the tools bar anywhere around the screen.



Click the **Text** icon to start typing on the screen

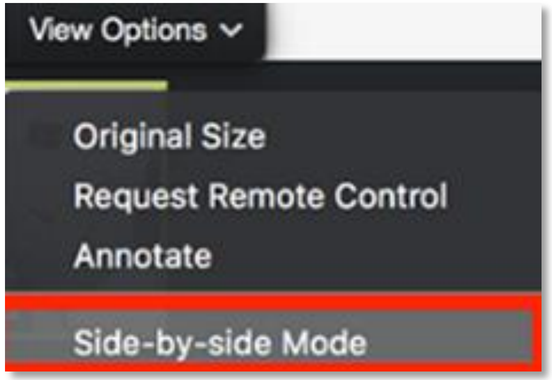
Click the **Stamp** icon to choose a stamp

Place the **Arrow** on the screen indicate to others where you are going to type

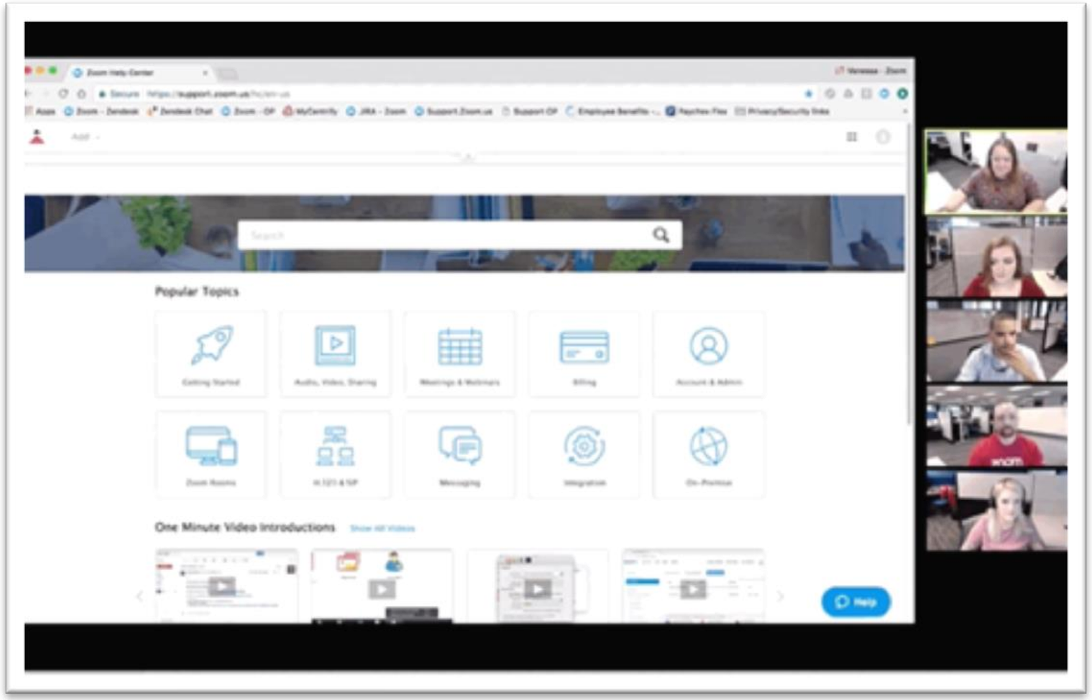
Change the font color by selecting the **Format** icon

Use Side-by-Side viewing

1 When in a meeting and viewing a screen, click on **View Options** and choose **Side-by-Side Mode**.



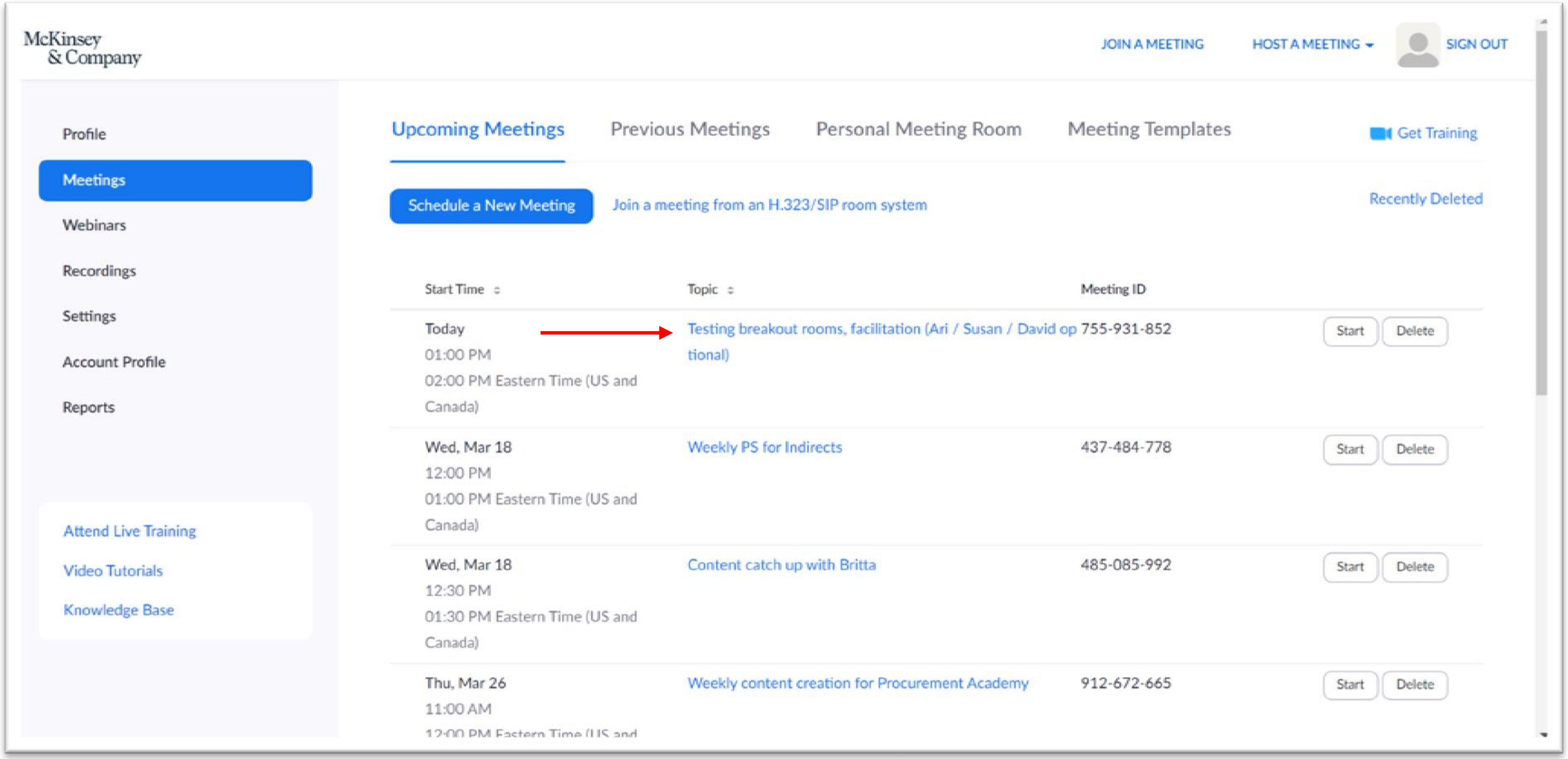
2 The shared screen will appear on the left and the speaker will appear on the right. **Slide the separator** to the left or right to adjust the **size** of each view. You can click **Speaker View** or **Gallery** View at the top to switch between the two.



3 To **exit** Side-by-Side mode, click **View Options**, then **uncheck** the **Side-by-Side** Mode option.

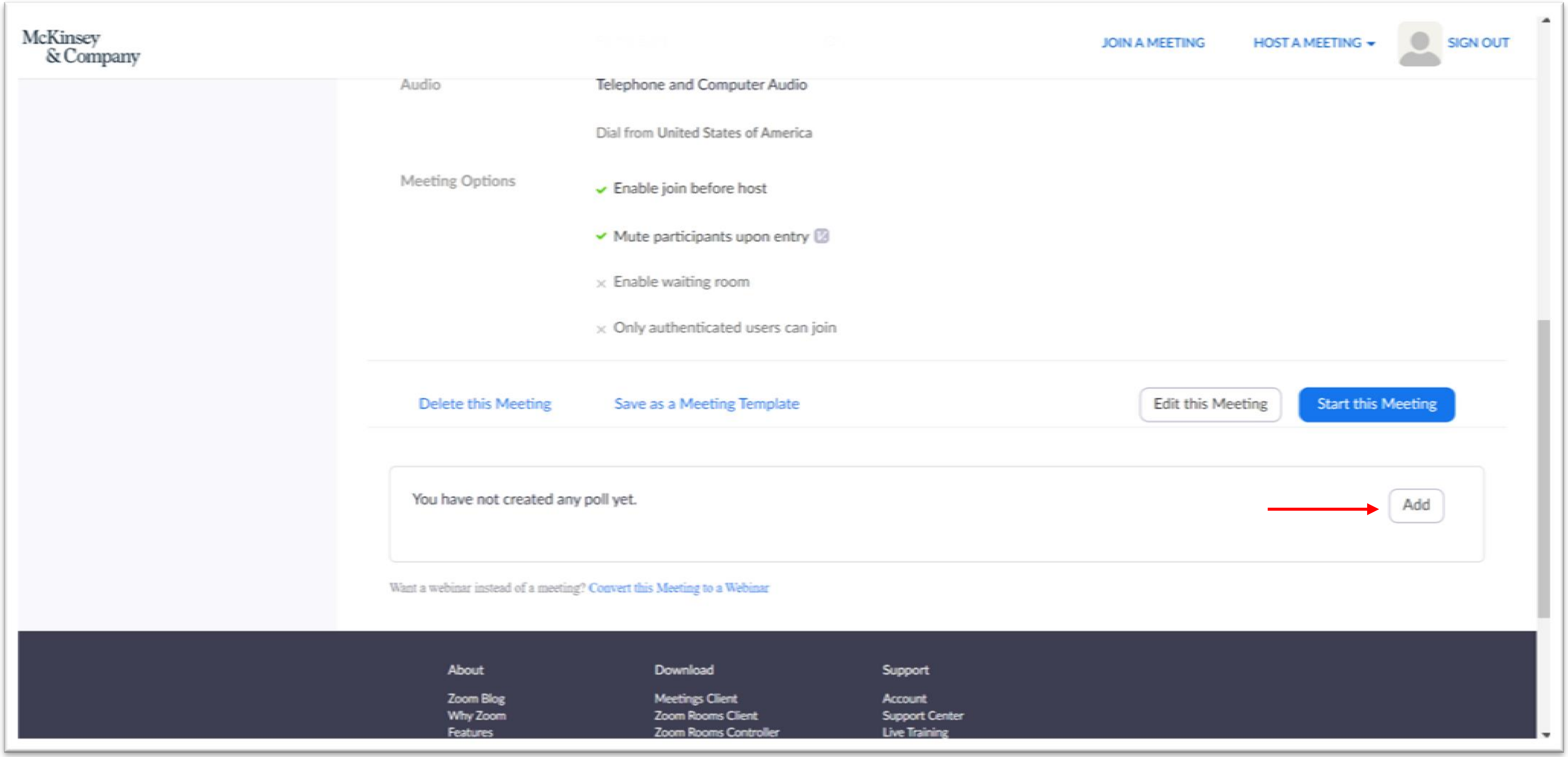
Polls – Set up in advance (1/4)

From your Zoom dashboard, select “Meetings” and click on the meeting in which you want to use the poll



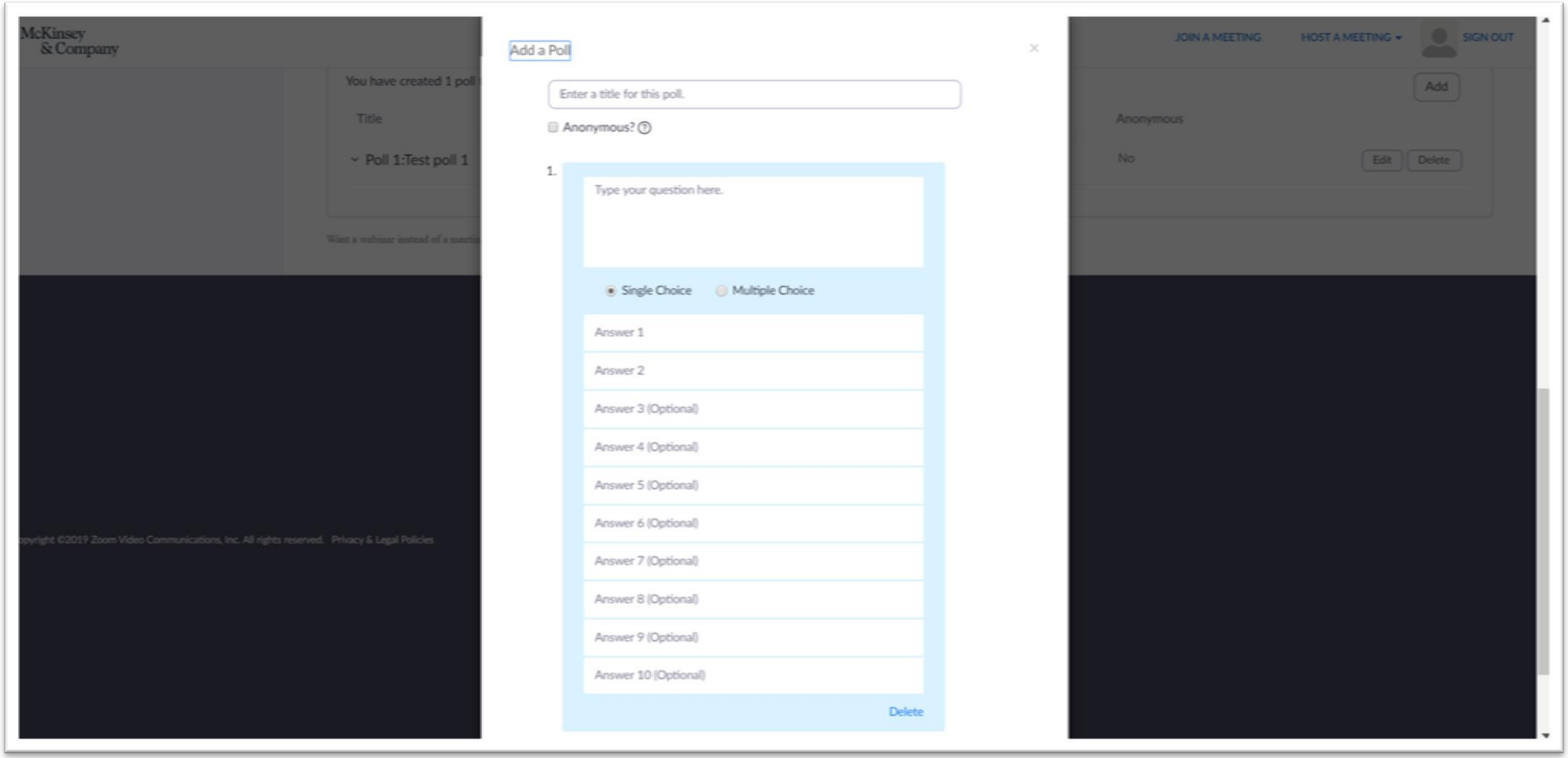
Polls – Set up in advance (2/4)

Click “Edit this Meeting” at the bottom of the next page



Polls – Set up in advance (3/4)

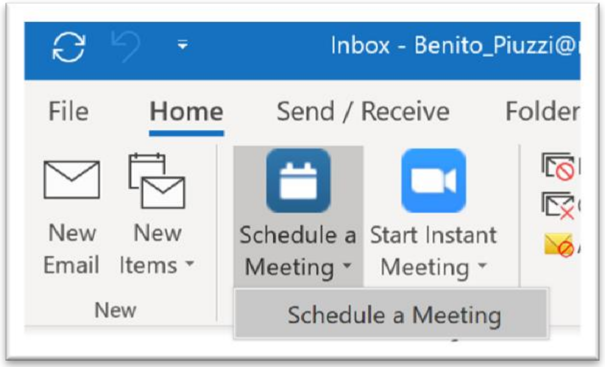
Input your questions and expected responses

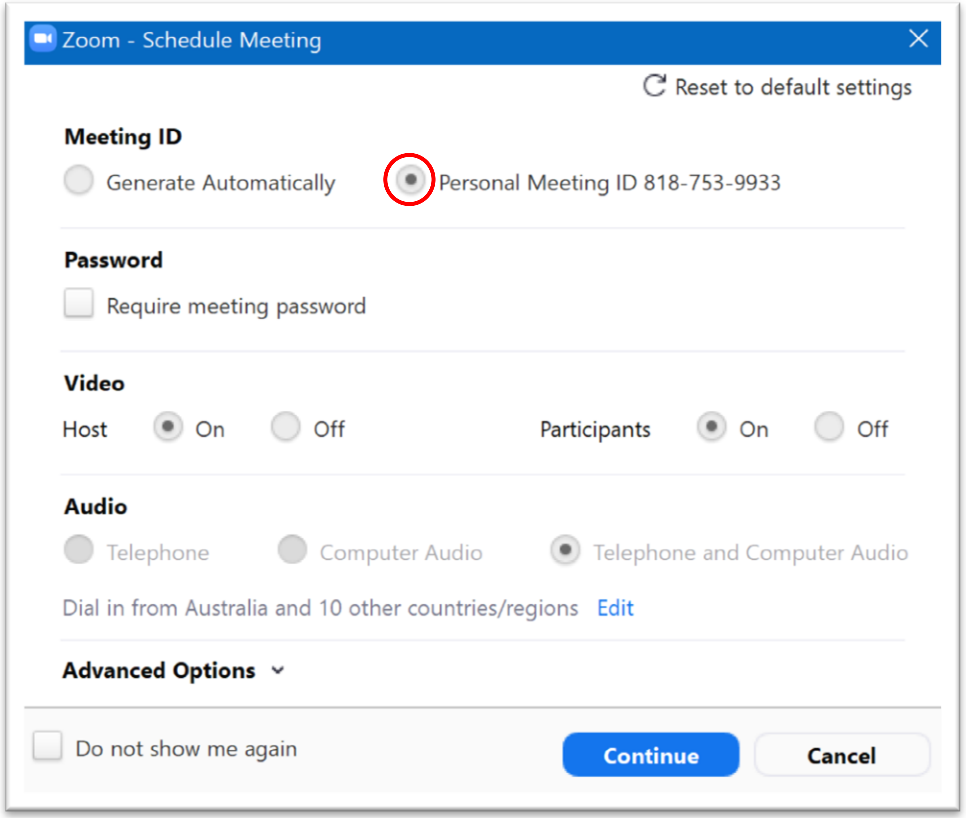


Polls – Set up in advance (4/4)

Reusing polls

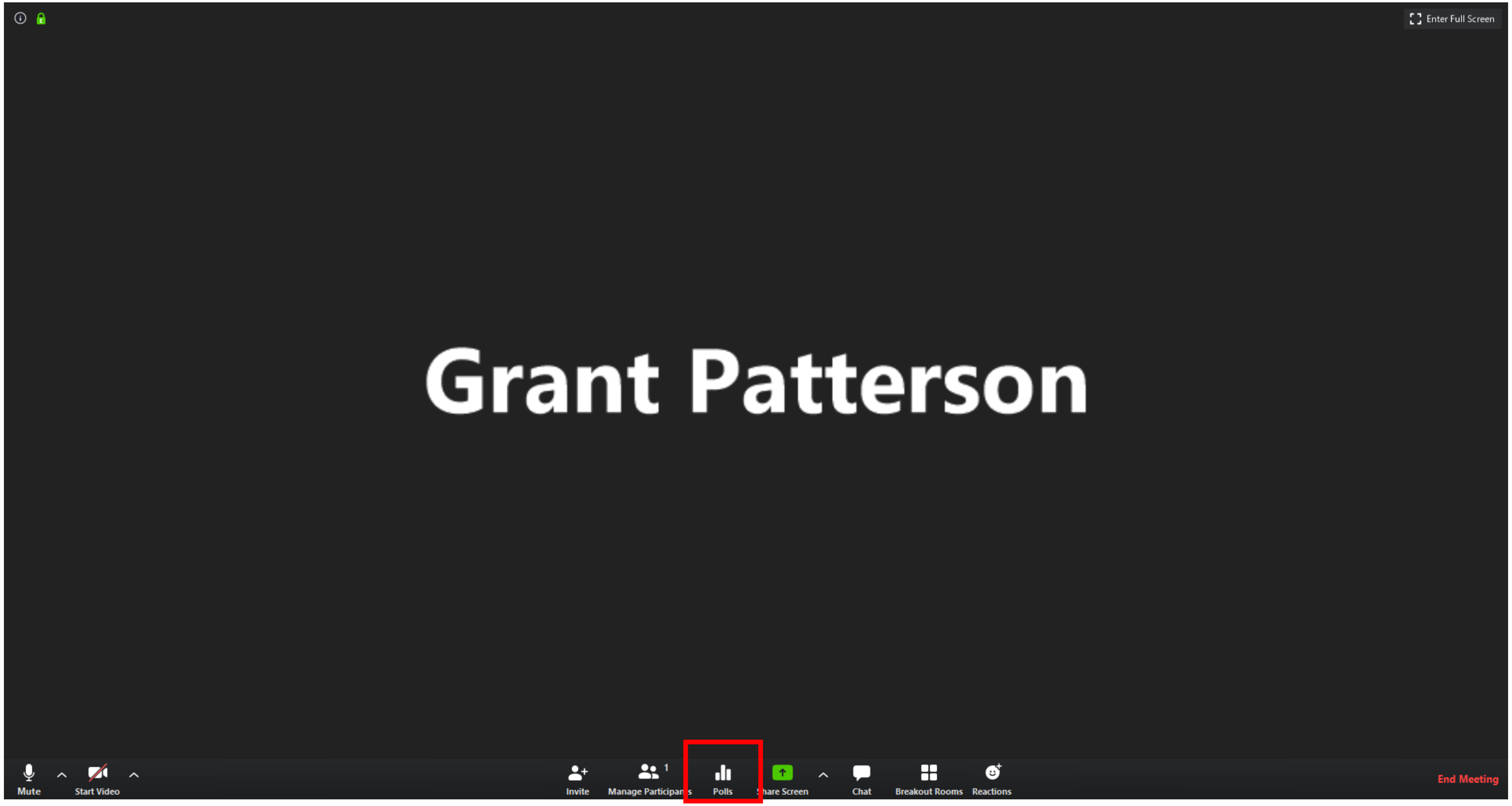
You can also lock the meeting ID by changing the below setting when scheduling the meeting. This will enable you to have a database of polls that can re-use as needed, instead of having to create multiple versions





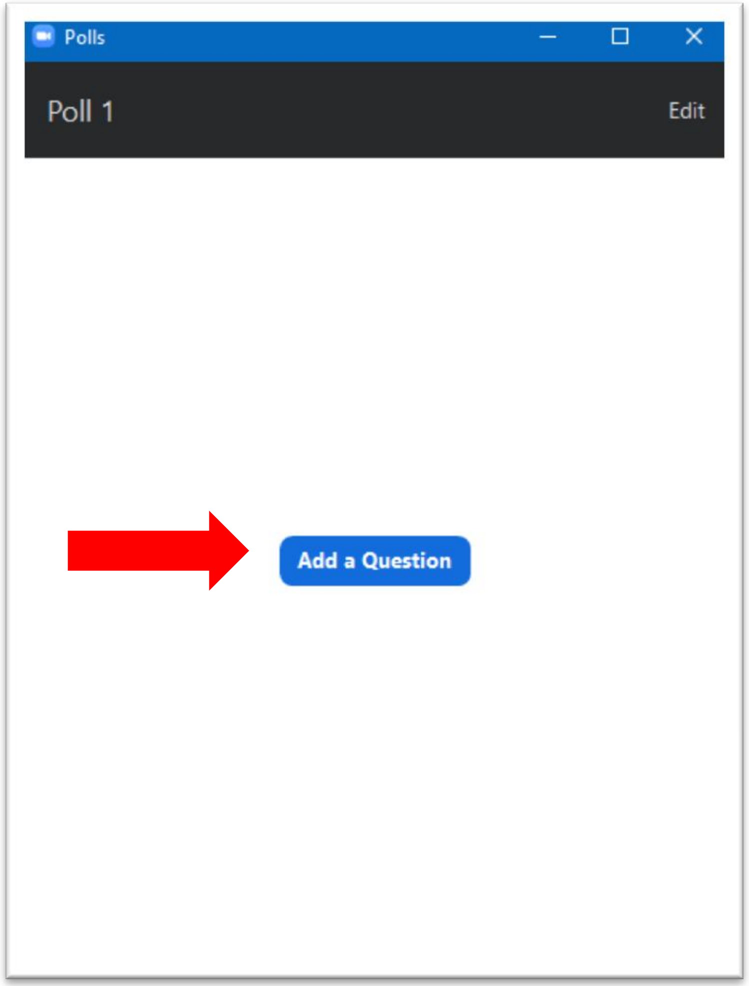
Polls –Set up in the moment (1/3)

Select “Polls” at the bottom of your screen



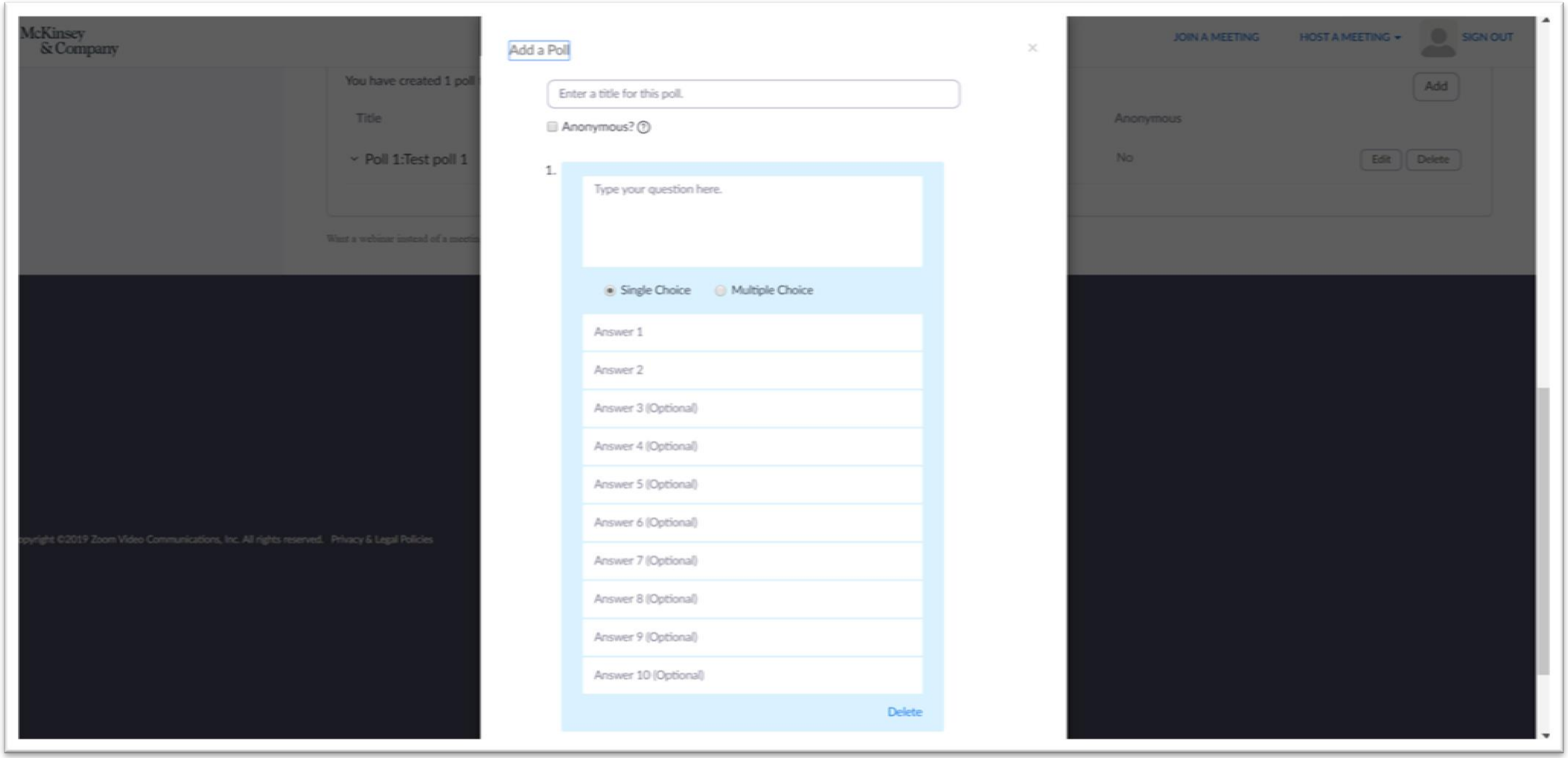
Polls –Set up in the moment (2/3)

Select “add a question”

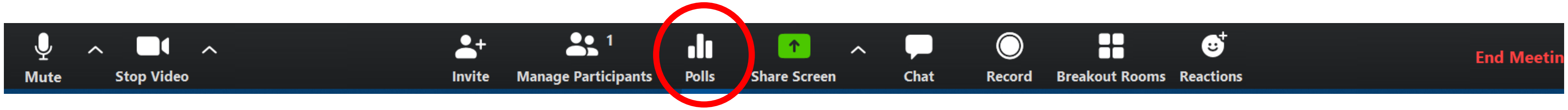


Polls – Set up in the moment (3/3)

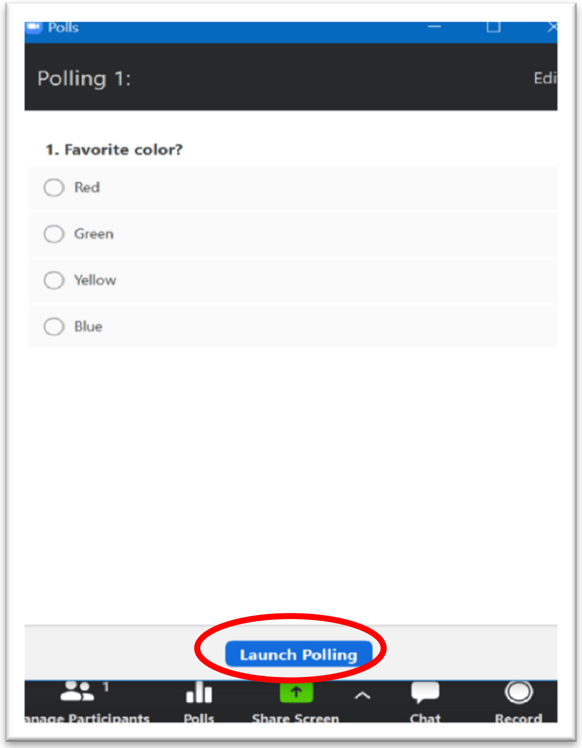
Input your questions and expected responses



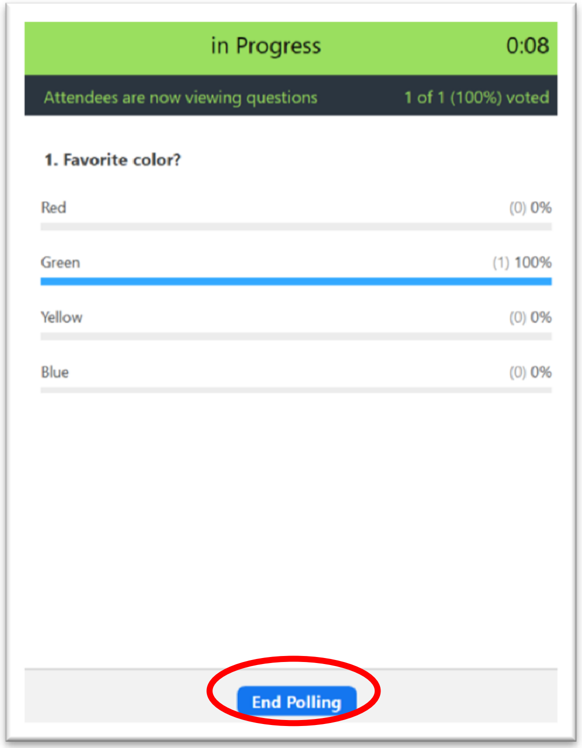
Polls – Launch a poll during the meeting



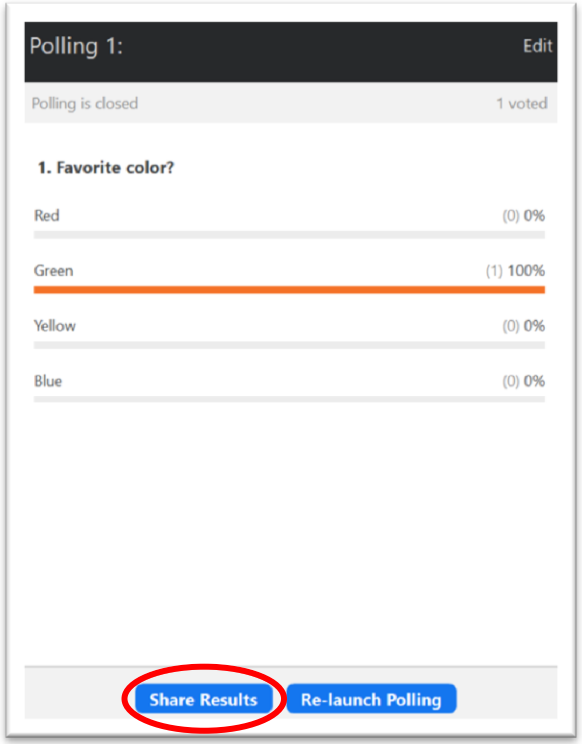
1 Click launch a poll



2 Track the progress



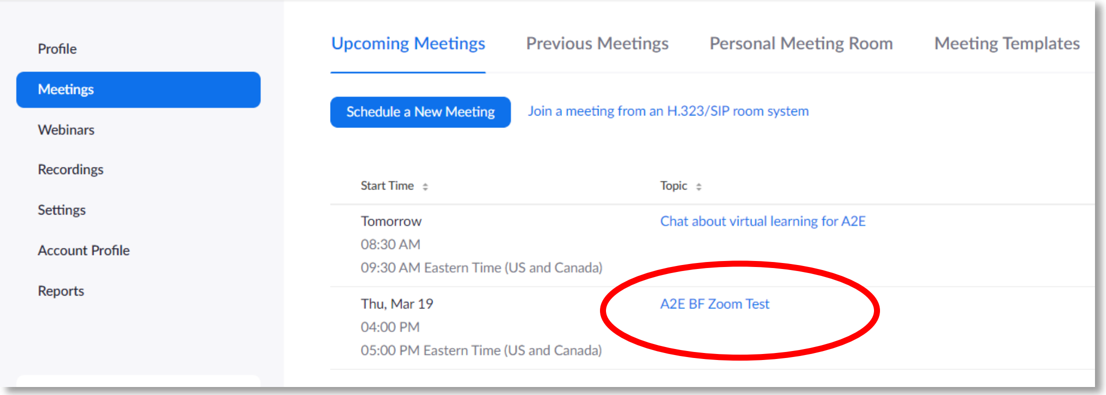
3 Share polling results



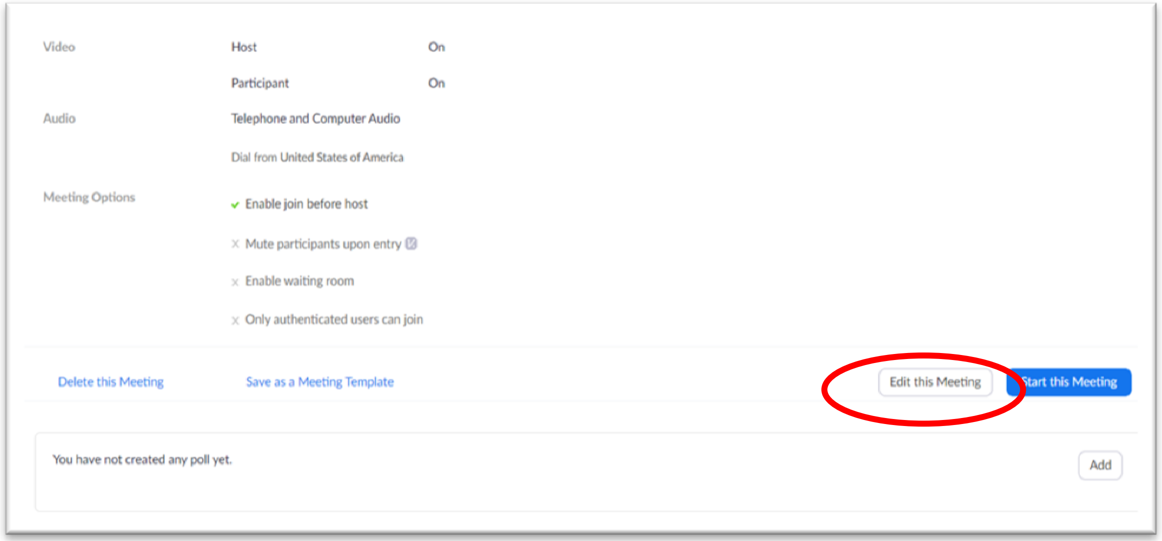
Deep dive: Breakout rooms

Breakout rooms – Create preassigned breakout rooms in advance (1/2)

1 Go to your Zoom profile. Go to "Meetings" on the left-hand bar and click on the one you want.

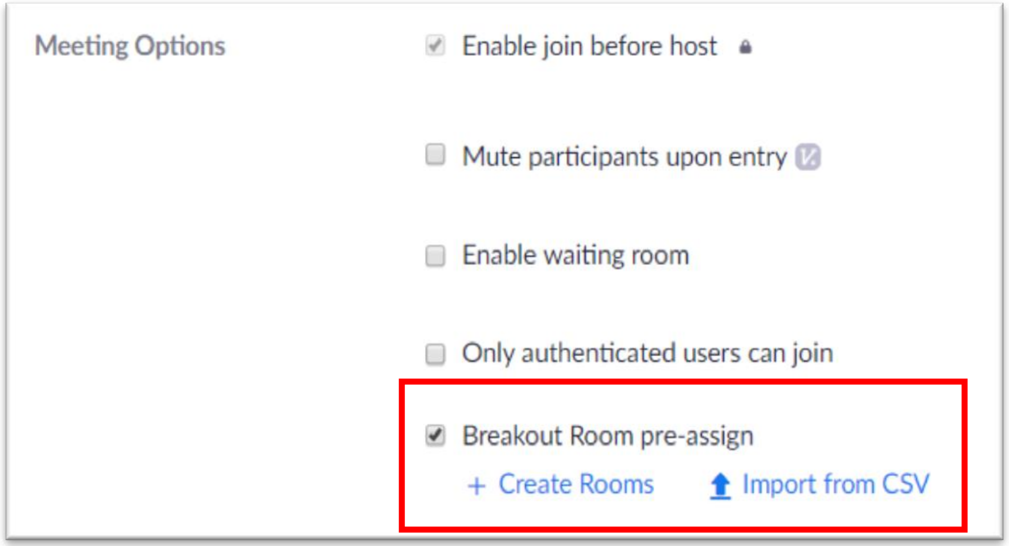


2 Scroll down and click "Edit this meeting."



Breakout rooms – Create preassigned breakout rooms in advance (2/2)

3 Scroll down to Meeting Options and check "Breakout Room pre-assign." Here you can create rooms automatically or import an Excel file with the room names and participants names.

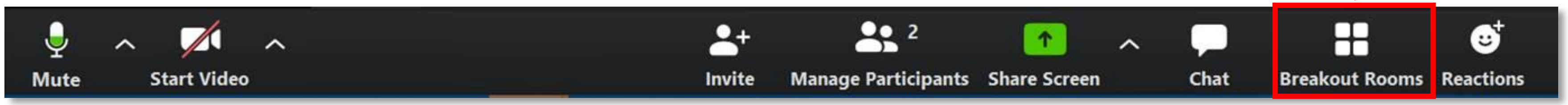


4 Use the CSV template to create your pre-assigned room names and the email addresses of participants in each room

	A	B	C
1	Pre-assign Room Name	Email Address	
2	Mochamotives	barista@compass.com	
3	Mochamotives	manager@compass.com	
4	Mochamotives	HR@compass.com	
5	Lets-go-Lattes	sales@compass.com	
6	Lets-go-Lattes	finance@compass.com	
7	Lets-go-Lattes	marketing@compass.com	
8			
9			
10			
11			

Breakout Rooms – Create breakout rooms during meeting

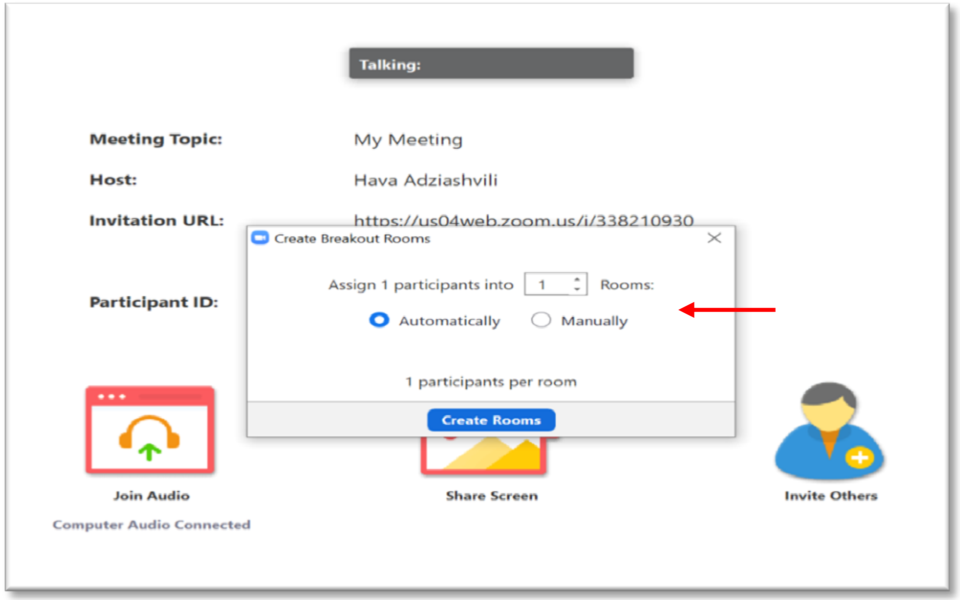
1 To start a Breakout Room, click on the Breakout Rooms button



Note: Make sure you have the breakout room feature turned on in your profile (https://mckinsey.zoom.us/profile/setting).

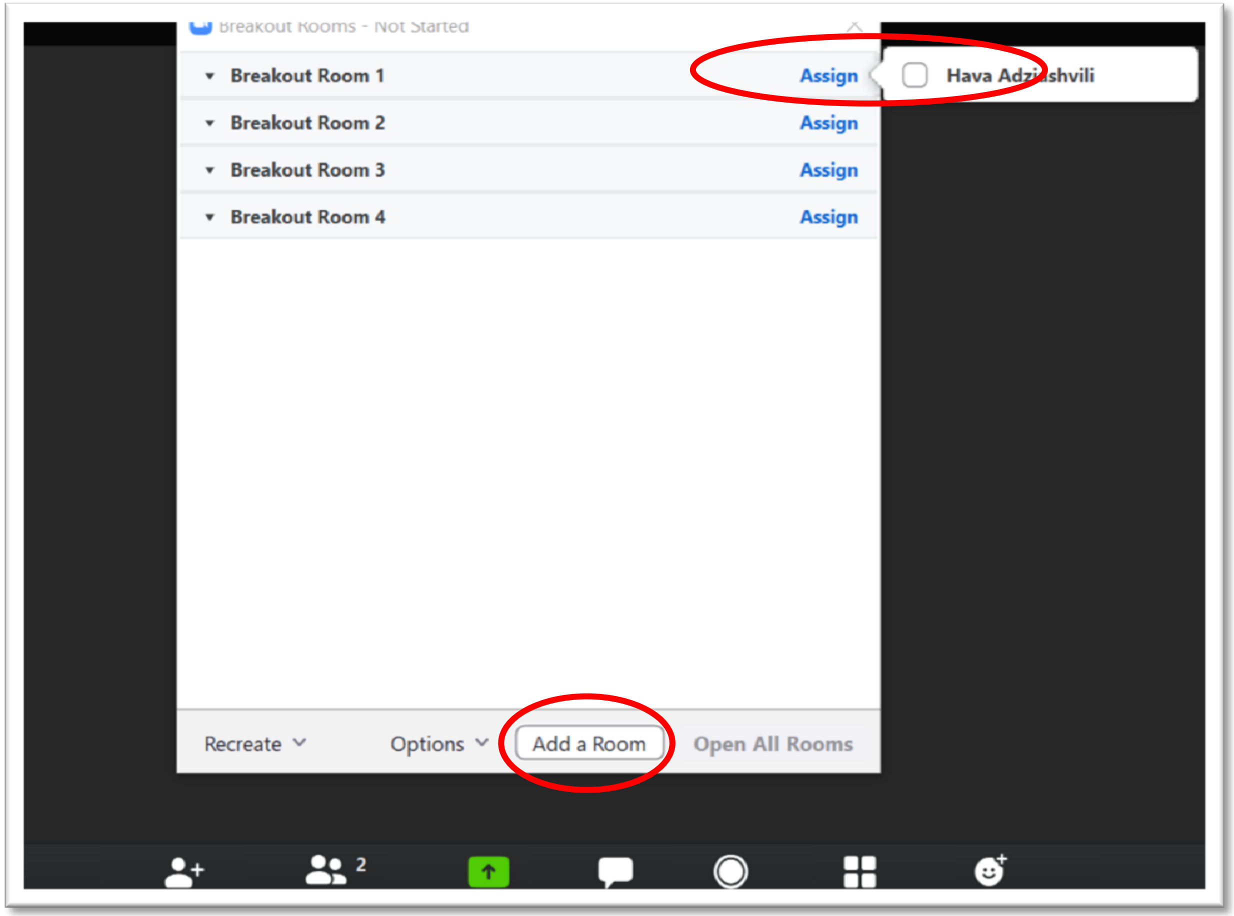
Go to "In meeting (Advanced)." See page 4 for more details.

2 Choose whether or not you want to assign participants Automatically or Manually and the number of Rooms to create



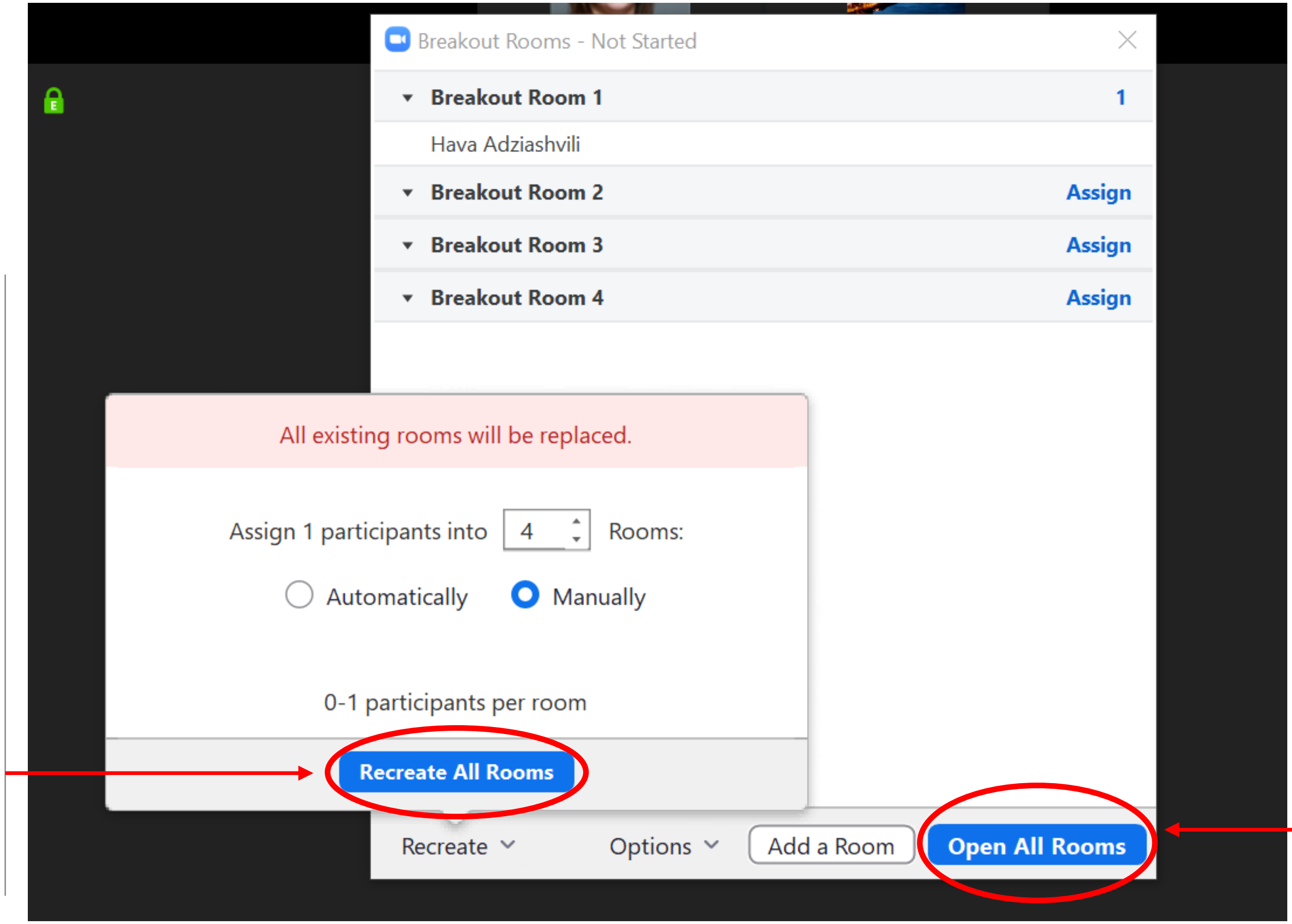
Breakout Rooms – Manually assign participants during meeting

To assign participants Manually, use the Assign button and participant selection list



Breakout Rooms – Reopen Breakout Rooms

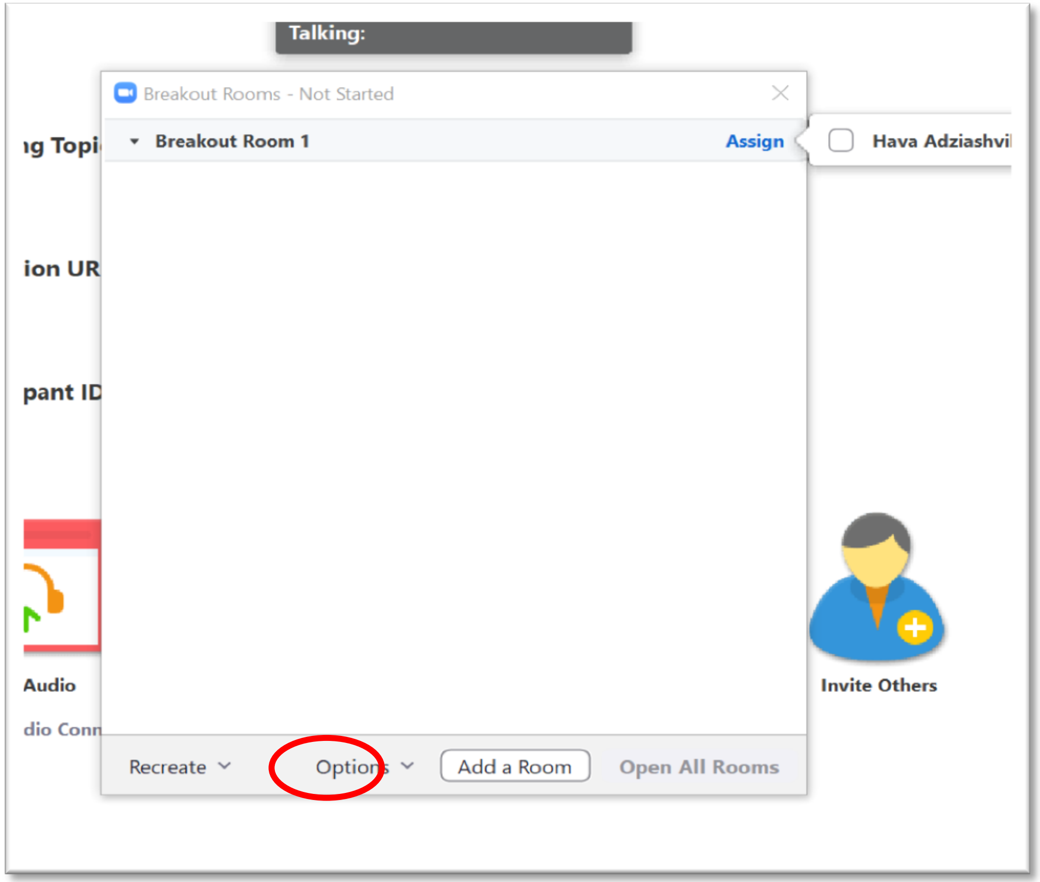
You have the option to recreate the breakout rooms by clicking “Recreate All rooms.” Note: **Recreating rooms will delete original room assignments.** Use “Open all rooms” to open the same rooms as before.

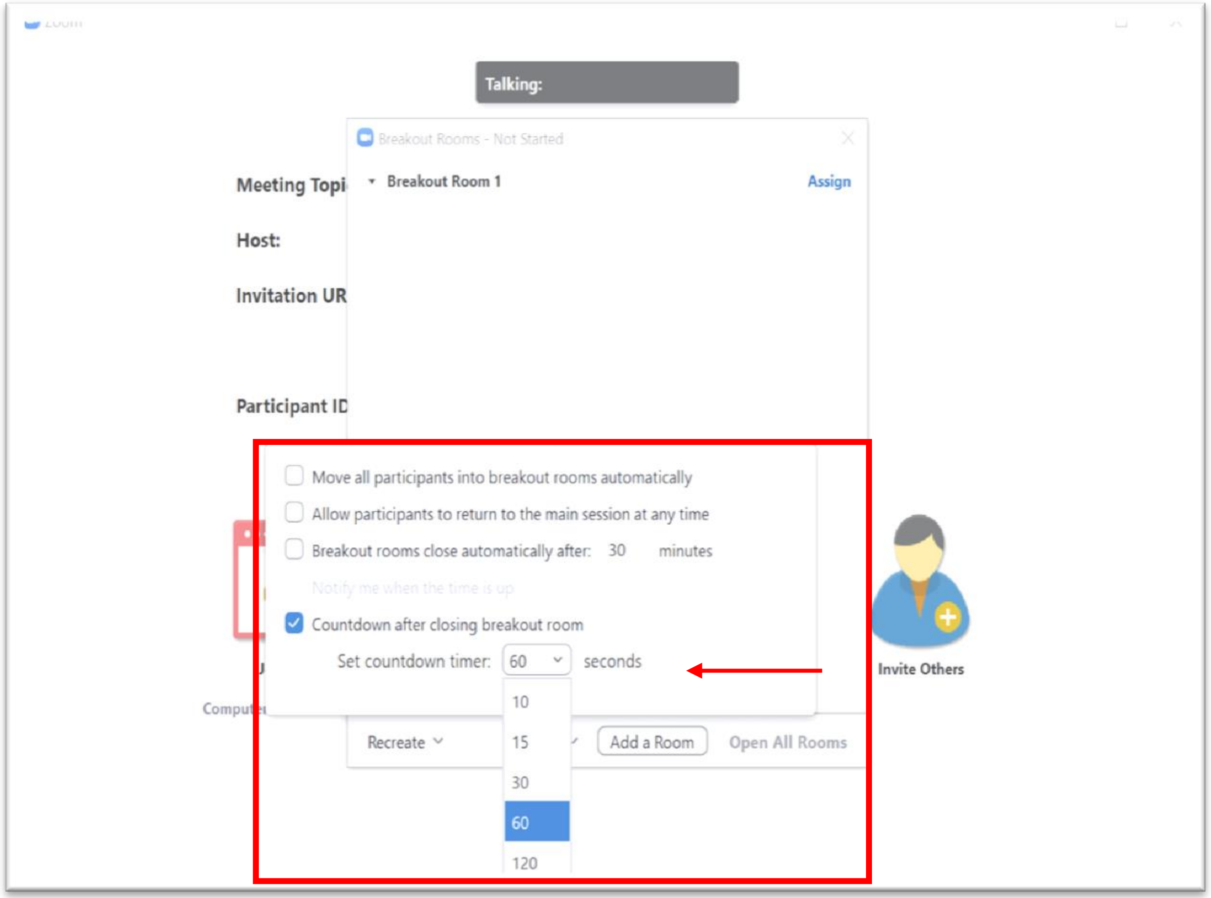


You have the option to reopen the original Breakout Rooms by clicking “Open All rooms”

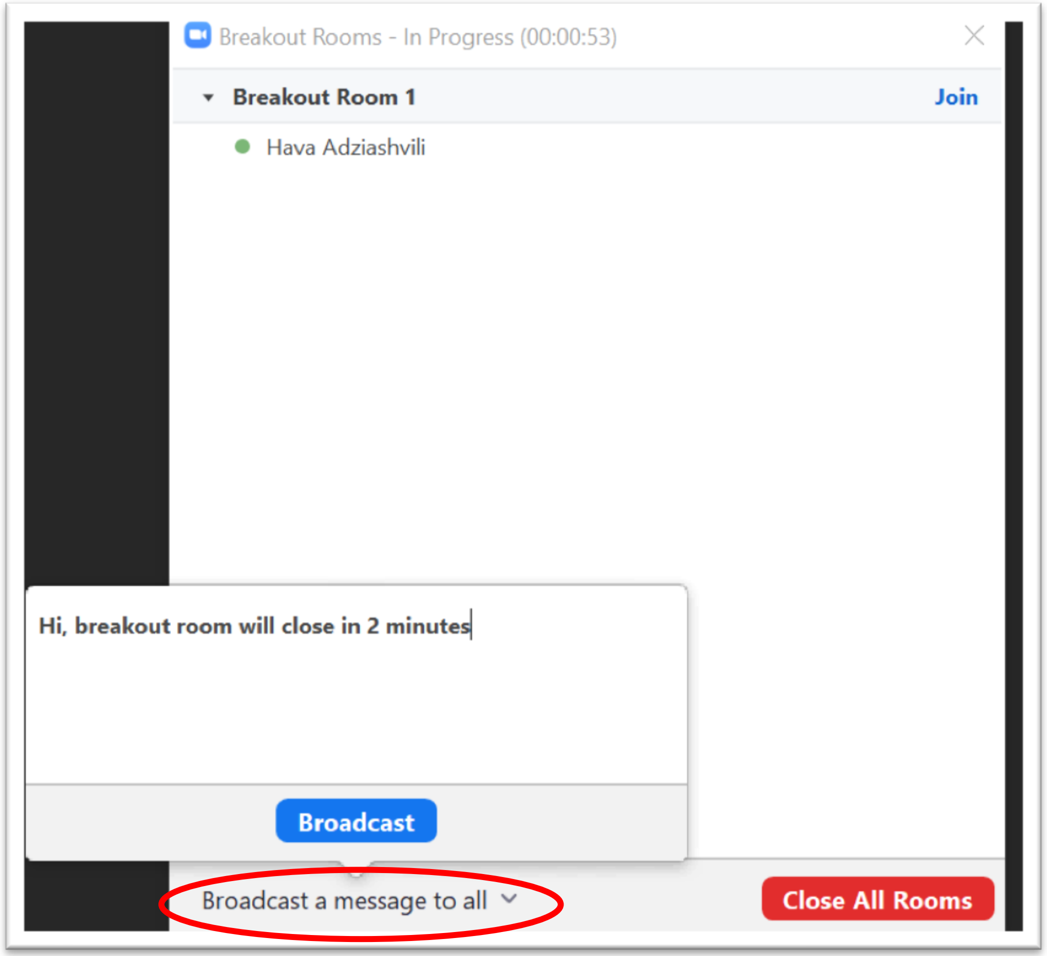
Breakout Rooms – Set timing and other options

You can use the Options menu to adjust settings, including timing





Breakout Rooms – Broadcast to all rooms (host view)



1

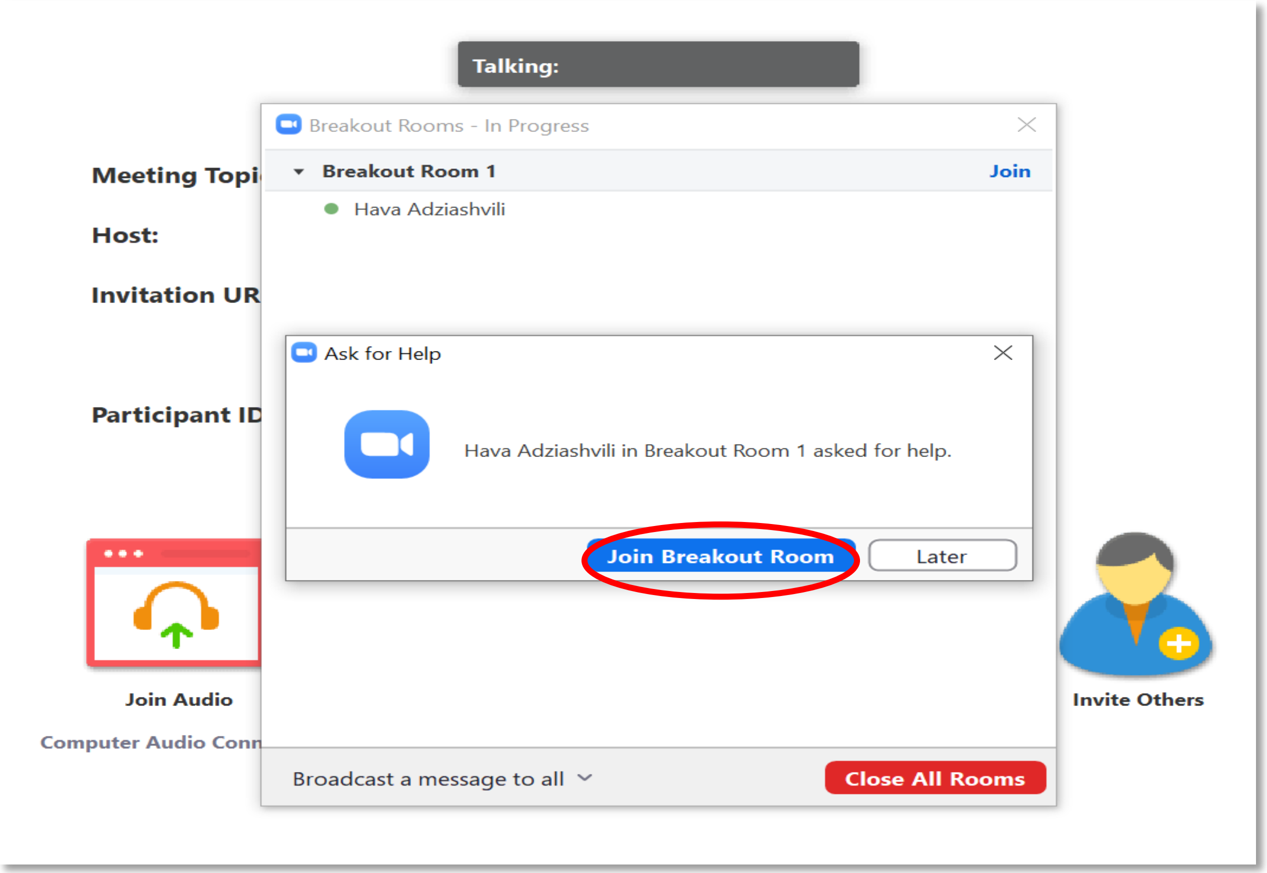
To broadcast a message click on "broadcast a message to all"

2

Type your message and click broadcast

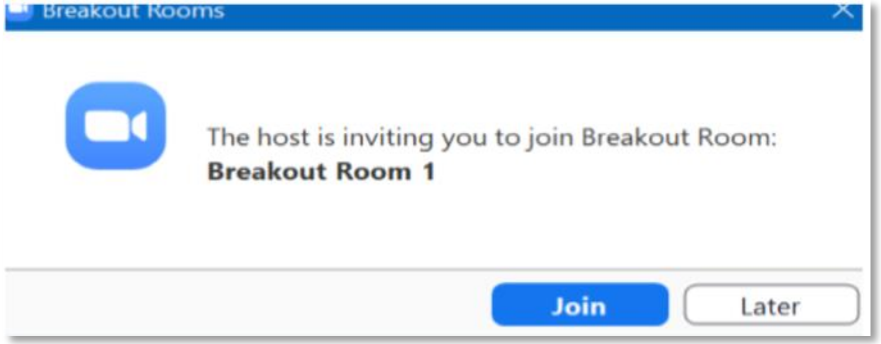
Breakout Rooms – Manage participants who “Ask for help”

1 If a participant in any of the rooms asks for help, the host can join the corresponding Breakout Room directly

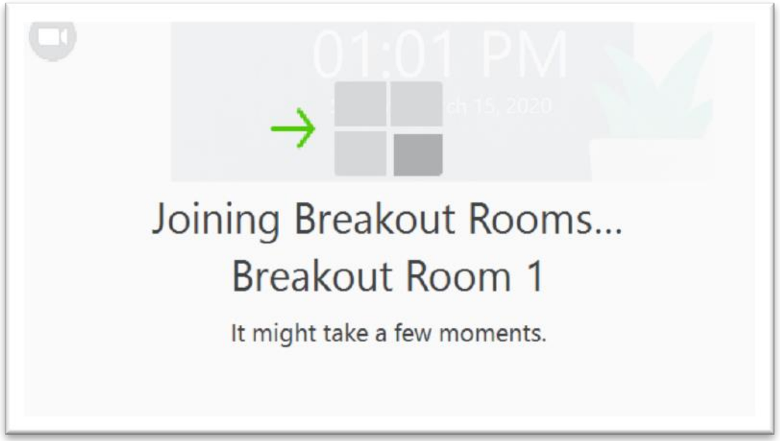


Breakout Rooms – Participant view

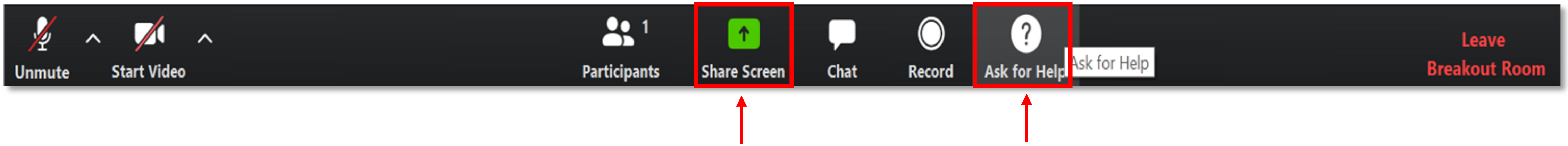
1 Press the Join button to be directed to your meeting room



2 It will take a few seconds to be directed to your Breakout Room



3 While a participant is in the Breakout Room, he/she can share screen and ask for help from the host



Breakout Rooms – Links to detailed tutorials on breakout rooms

Go to this link for detailed instructions: → https://mckinsey.service-now.com/ghd?id=mck_ghd_kb_article&sysparm_article=KO69814&search_term=zoom%20breakout%20rooms#enable

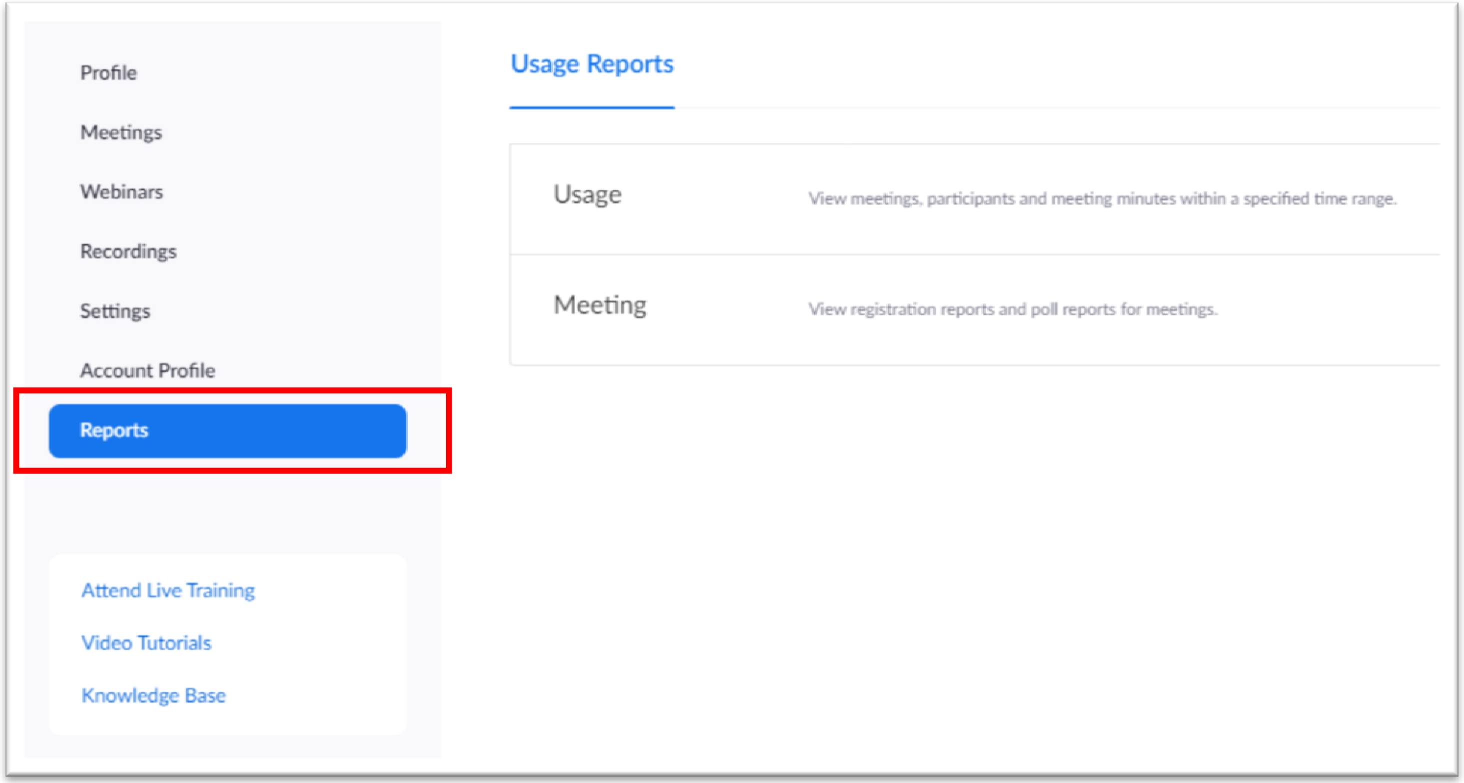
YouTube tutorials available for various topics like

– How to set up rooms

– How to message rooms

After the Meeting

Access meeting reports

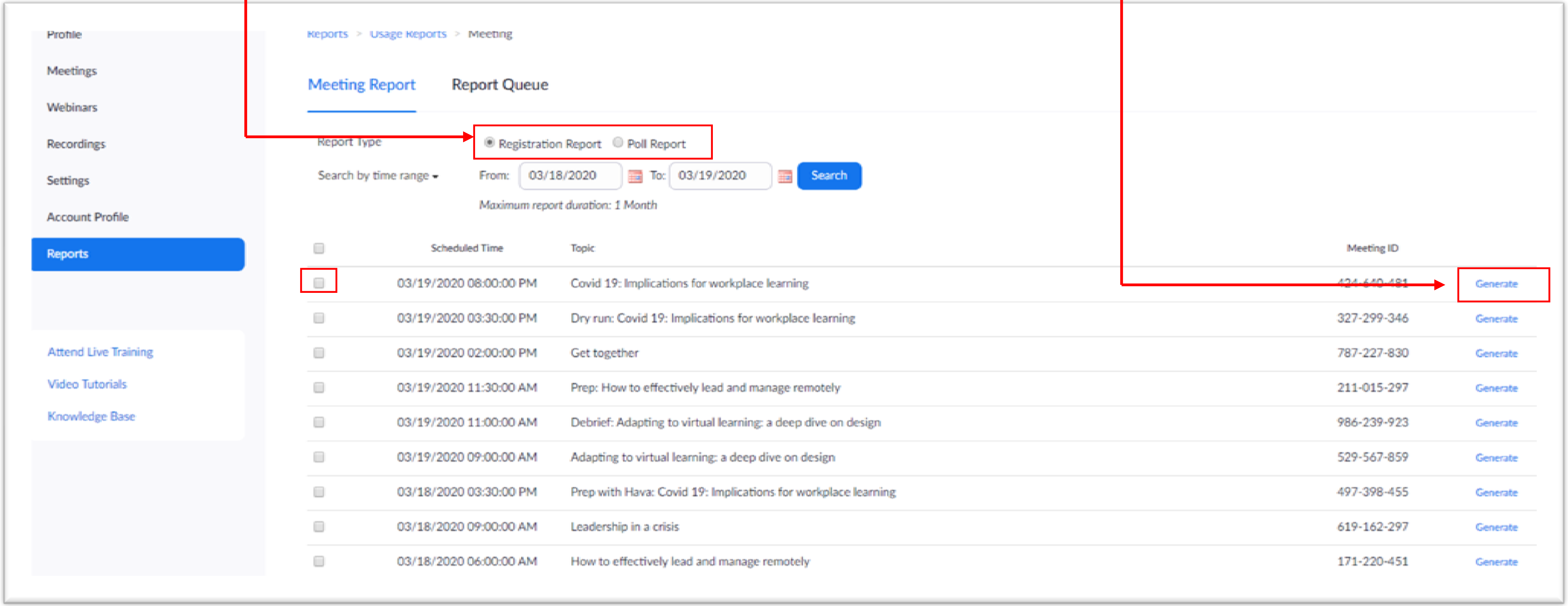


Usage will direct you to attendance/participant report.

Meeting will direct you to polling report and registration reports.

Generate reports

1 Choose type of report **2** Choose the class and check the box **3** Click generate



Type of reports

Registration reports: pulls information from registration page

First Name	Last Name	Email	Registration Time	Approval Stat	last_name	Institution	Title	Would you like to receive information on future webinars?
Ankur	Kumar	ankur_kumar@r	3/20/2020 9:49	approved	Kumar	McKinsey	AP	No
Åsa	Lafleuriel	asa_holmstom_	3/20/2020 10:00	approved	Lafleuriel	mck	comms manage	No

Participants reports: provides information of the attendees

Name (Original Nam	User Email	Join Time	Leave Time	Duration (Minute	Attentiveness Score	Recording Consent
Ankur Kumar	ankur_kumar@mckins	3/20/2020 9:49	3/20/2020 10:39	50	75.38%	Y
Åsa Lafleuriel	asa_holmstom_lafleu@	3/20/2020 10:00	3/20/2020 10:39	39	40.96%	Y

Poll reports: provides poll results

#	User Name	User Email	Submitted Date/Time	Poll	Response
42	Ankur Kumar	ankur_kumar@mck	3/20/2020 10:19	Does your organizat	Yes
80	Ankur Kumar	ankur_kumar@mck	3/20/2020 10:10	Is your company cu	Yes, through end of May
110	Ankur Kumar	ankur_kumar@mck	3/20/2020 10:25	Have you adapted i	Yes
135	Ankur Kumar	ankur_kumar@mck	3/20/2020 10:12	How many of your i	~60%

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General support

To learn more about existing assets and programs, contact McKinsey_Academy_First_Alert@mckinsey.com

For support producing an upcoming virtual event (i.e., managing the technology and functionality), contact McKA_ProducerRequest@mckinsey.com