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Chapter 14: Zoom Conferencing Best Practices for Professional Presentations, Conferences, and Events

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**Instructional Message Design:
Theory, Research, and Practice
(Volume 2)**

**Chapter 14: Zoom Conferencing Best Practices for
Professional Presentations, Conferences, and Events**

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14. Zoom Conferencing Best Practices for Professional Presentations, Conferences, and Events

Brian Watkins & Miguel Ramlatchan

Key Points:

- Pre-planning, organization, attention to logistics, and presenter support is critical for complex multi-day, multi-track Zoom webinars and events.
- Pre-configuration and practice with the tools used to deliver a Zoom conference are key to the delivery of an effective presentation.
- Best practices in location, lighting, sound, camera setup, and presentation design are essential to holding the audience's attention and engagement.

Abstract

The adoption and diffusion of online web conferencing has allowed for expanded access to professional seminars, workshops and webinars. However, unlike in-person, face-to-face presentations, delivering a Zoom Meeting or Webinar creates a number of new and different concerns and configuration challenges that are not present in an in-person event. This chapter summarizes instructional message design best practices for Zoom conferencing and serves as a guide for how to set up your computing environment, physical location,

presentation, and how to keep your audience engaged. This section of our instructional message design book also presents a guide to planning for the delivering of more complex events that could feature simultaneous sessions across multiple days to thousands of participants. While Zoom is used to to illustrate the affordances and features of online web conferencing, these best practices can also be used to support events using other platforms.

Introduction

This guide is not meant to be a ‘how-to-use Zoom’ guide, but rather collects and consolidates the best practices that work for us when we coordinate and support online events. Given today’s current climate, experience with limited opportunities for in-person meetings and presentations have escalated the transition to virtual presentations. Giving a presentation online using a web conference application is very different from delivering a presentation in person. A live presentation allows for immediate feedback from the audience, and there are fewer moving parts for something technical to go wrong. Audio and video quality and the availability of technical support are often cited as barriers to communication and the overall decreased effectiveness of meetings and events (McGill & Fidler, 2021; Wooten et al., 2020). Using an online web conferencing application requires one to think differently about the design of the presentation and how to keep the audience engaged.

Zoom is a very popular tool and is used to illustrate the webconferencing and instructional design heuristics in this guide. At the time of this writing Zoom Meetings are a great interactive solution for meetings. Zoom Webinars are great for larger conferences where participants can see presenters but can only interact via chat and Q&A. Zoom Events is an emerging service though is still in its beta testing phase. Many of the lessons learned presented here can apply to all three of Zoom’s options. With so many moving parts to a Zoom Meeting or Webinar (computer, Internet, microphone, camera, lighting, location, etc.) the possibility for something to go wrong or to distract is extremely high. To deliver an effective presentation, certain precautions should be taken to minimize or eliminate those issues. Ensuring that a large, complex event goes smoothly requires the

support and coordination of the efforts of technical staff, presenters, and participants (Catanzano, et al, 2020; Wlodarczyk, et al., 2020).

Attention should be paid to the design of the presentation so that the message is clear, concise, and easily readable. Delivering a presentation virtually can be distracting. The audience is tempted to work in other applications, look at email, or surf the Internet. It is important to minimize any extraneous cognitive loads as much as possible so that the viewer is motivated to focus on the intrinsic cognitive load, or the message that we are trying to deliver. In this guide a virtual online event is any professional workshop, seminar, symposium, or single-day and multi-day conferences, where event organizers, or facilitators, connect subject matter experts and learners using web conferencing technologies. The applied theories that form the foundation of instructional message design and the real-world experience of virtual and online event management staff, are presented here to inform and assist others planning for their own online events.

Instructional Message Design

Instructional message design is the use of tools, techniques, technology, and instructional design theory and best practice to create communication and learning systems. Zoom and other web conferencing technologies are one example of tools that can be used to connect learners and conference participants with presenters and subject matter experts. Applying research from communications theory, systems theory, cognitive load theory, and multimedia design theory can all lead to best practices in instructional message design for use in web conferencing (Ramlatchan, 2022). Communications theory describes a process where messages are encoded and distributed to devices that can decode those messages, with as little interference as possible. In a web conference this means a focused consideration on the presenter's audio and video setup, the reliability of their Internet connections, the ability for conference participants to see and understand the message being sent to them, and the ability for participants to interact with presenters. Systems theory teaches us to consider all aspects of the resources, components, subsystems, and processes that lead to our overall system objectives. In complex Zoom

events this means considering the needs of presenters, panelists, moderators, question screeners or chat ambassadors, and providing technical support for these participants as well as virtual attendees. Cognitive load theory tells us to reduce extraneous distractions so that our learners can focus their cognitive resources on intrinsic learning. In a Zoom conference that means minimizing distractions potentially caused by bad audio, poor video, and dysfunctional presentation design. Multimedia design theory teaches us that humans learn best when words and visuals are presented together. Applications like Zoom are an effective tool to natively accomplish multimedia presentations through real-time, interactive audio, video camera, and content visuals. We also know from previous research that viewers prefer the online social presence created by seeing both the presenter and the presenter's content at the same time (Ramlatchan & Watson, 2019). Conference participants also appreciate the immediacy and social presence in synchronous online environments (Ramlatchan & Whitehurst, 2019).

These instructional message design best practices can be used to enhance our professional presentation and create effective seminars, workshops, conferences, and other engaging events.

Applied Theory and Best Practices for Delivery of Business or Professional Presentations

Zoom is a cloud-based video or web conferencing service that can be used to virtually meet with others. Delivery of a business or professional presentation using the Zoom Webinar application presents unique challenges for both the presenter and the audience. The technology is ever changing, new features are always being added, and best practices are ever evolving to take advantage of these options. The following are some instructional message design best practices that a presenter can use to minimize technical issues, engage with the audience, and deliver a professional presentation.

Check your Computer

Technical problems will happen. Computers will crash and hard drives and applications will fail, especially at the most inopportune time. There are sometimes no way to predict when any one of these technology issues may happen, but there are steps and measures one can take to minimize computer issues. For instance, the computer(s) being used to host the Zoom presentation should be updated no later than 48-72 hours ahead of the presentation. This will allow for any troubleshooting and/or reinstallation of software that could be causing an issue. Keeping the operating systems of your devices up to date is also generally a secure computing best practice.

Your web conferencing and presentation software should also be updated as far in advance as possible with a minimum of 48-72 hours ahead of time. Caution should be taken when updating an operating system as there can be an unintended domino effect. For example, updating the operating system may require an update of the suite of Microsoft applications or could render an application not compatible. You'll want to test your systems in a live web conference with another online colleague to provide you feedback after you complete any major updates to your device. Also consider having a backup device, an older laptop or a tablet that you can add into the conference if your original experiences an issue. Examples of applications that should be updated, and other device setup considerations to employ prior to an important Zoom presentation include:

- ☐ Your installed Zoom application should be updated to the latest version (use the "Check for Updates" feature in Zoom),
- ☐ Your Presentation applications should be updated (PowerPoint, Keynote, Prezi...etc.),
- ☐ Close out any applications that are not needed, especially large applications that use memory and CPU resources, and applications that will send you alerts during your presentation (e.g. chats, email, Teams, etc.)
- ☐ Turn off screensavers and adjust the device's power settings to keep the device on during your presentation,
- ☐ Disconnect any peripherals not needed during the

presentation.

Internet Connectivity

Nothing can be more disruptive to an online webinar than a disruption or drop in Internet connectivity. Wireless connectivity makes it possible to work from many different locations but also comes with some issues that can disrupt a webinar like network traffic interruptions, susceptibility to interference, and wireless access reliability issues. It is always best to wire your Internet connectivity, a wired Internet connection provides the following benefits:

- ☐ Dedicated bandwidth improves connection stability,
- ☐ A wired Internet connection provides:
 - ☐ Faster Internet access,
 - ☐ Better reliability,
 - ☐ Better security,

If wireless (WiFi) connectivity is the only available option, position the presentation computer to be as close as possible to the network router or wireless access point. To conserve available bandwidth, consider limiting or removing any devices that might be sharing your wireless connectivity.

- ☐ Test your WiFi connectivity (e.g. using a site such as www.speedtest.net),
 - ☐ For minimal connectivity your sustained Internet speed needs to be at least 1 Mbps upload and 600 Kbps download (Zoom, 2022),
- ☐ If you are sharing your WiFi with any other devices, disconnect them until after your presentation,
- ☐ If you are presenting from a hotel or conference center, ask the support staff there for their high speed business or professional grade WiFi services or options (these services will cost more than the free guest WiFi but the success of your presentation is worth the cost).

Location

Location is important; the presenter should be free from any external distractions while trying to present. External noises may also distract the audience from focusing on the presenter and from information that is trying to be conveyed. For the presentation, find a location that is quiet, preferably a room with a door that can be closed. If the presentation is taking place in an office or home office, place a note on the door that says “Live Presentation in Progress”. Please, no presentations from moving cars.

- ☐ In general, select a location with few distraction for yourself and the audience,
- ☐ A second monitor (or second device) for presenters is helpful, this way you can see your presentation, video from participants, and the chat at the same time.

Lighting Considerations

Good lighting can make the difference between a dark, grainy video and a bright, high-quality one (Rademacher, 2021). Proper lighting is often overlooked when presenting virtually but it is important to the success of making a connection with the audience and delivering an effective presentation.

- ☐ Position yourself with your light source in front of you,
- ☐ Windows are great light sources, though try not to have a window directly behind you,
- ☐ An LED light ring for your cameras, or just a strategically placed lamp, can significantly improve your camera quality.

It is important to light from the front and not from behind, and remember to keep the lighting source in front of you so it provides for even light and minimizes any shadows. The web camera will try to auto adjust to the light and if the source of the lighting is behind you, then the camera will adjust to the glare. The potential auto adjustment

of the webcam can make the presenter appear to be blurred or dark. Dark video (or a presenter who doesn't appear to care about/know to care about their lighting on camera) could negatively impact viewer perceptions of presenter credibility and social presence.

Windows can be tricky. Natural light is the preferred light source as it is balanced and makes you look your best. Try to position yourself with the window in front of you, or consider closing drapes or covering the window if it is creating too much glare in your video image. If natural light is not an option, then using a lamp or LED ring light is preferred. Diffused light is key, this will give you the soft video lighting you need with minimal shadows (Lopez, 2022).

Audio: Headsets & Microphones

Using a headset with a built-in microphone, preferably with noise canceling capabilities, during the presentation can provide a clear and consistent sound. Use of a headset and microphone helps to block out background noise, not only for the audience but for the speaker as well. Most general purpose built-in microphones in computers pick up many sounds in the background. For example, kids screaming, keyboard clacking, mouse clicking, fire truck or police sirens, or the occasional dog barking can likely all be picked up in most laptop microphones. External USB, table-top microphones designed for web conferencing and conference room environments could also be great options for quality audio.

If a headset or microphone is not available, presenting in a smaller room or office could provide better sound quality (Koon, 2021). In addition, smaller rooms help to reduce the “echo” sound from speaking in a larger room. Additionally, a room with rugs, cushioned furniture, bookcases, and other objects will tend to have ‘warmer’ acoustic properties and sound better in a meeting. Also, be careful with the placement of your computer speakers and your microphone, if they are too close together then this could cause distracting audio feedback. When in doubt, test your setup with someone who can let you know how your microphone sounds. In general your audio will sound best when you are comfortably close to your microphone (typically 3 to 4 feet).

If the Internet connection is strong, preferably wired, using

voice over Internet protocol (VoIP), or Zoom’s “Join with Computer Audio” is a good (actually the preferred) solution. If the Internet connection is slow, or unreliable, your best backup option would be to use a telephone to dial-in (though a phone may not sound as good as your computer’s voice over Internet protocol audio). In summary:

- ☐ Try to present from a location with minimal noise and distractions,
- ☐ Consider a noise canceling headset with a built in microphone for noisy environments,
- ☐ USB microphones designed for small conference room environments can be effective,
- ☐ Stay close and speak into to your microphone,
- ☐ Use your phone to dial into the conference if you experience bandwidth related audio issues,
- ☐ Avoid excessive typing or mouse clicks during your presentation,
- ☐ As always, mute your microphone when not in use,

The Visual Background

Backgrounds are great. They can say something about you and your interests, but they can also serve as a distraction to your audience. Remember, the goal is to keep the focus on you and the information that you are trying to convey, and so try to limit distractions in your physical background. The choice of presentation backgrounds are very personal though consider for example:

- ☐ A simple house plant or a vase with flowers to add depth,
- ☐ A painting on the wall to add some visual interest,
- ☐ Light colored walls,
- ☐ Maybe include your framed degrees to add to your credibility,
- ☐ Or use a blurred or virtual background,
 - ☐ This could also be a good option if you would like some consistency in the backgrounds of your presenters and moderators.

- ☐ Consider trying to limit the following items:
 - ☐ Distracting books, toys, or other objects,
 - ☐ Personal pictures,
 - ☐ Posters, unless these objects send an intended message,

It is important to consider the message in your background, similar to clothing selection, consider what you want your background to say? Will having your home library behind you support your credibility? Would flowers and movie posters be more fun and engaging?

Or you could simply use Zoom's ability to blur your physical background or use a virtual background, both are great options if you have any concerns over the unprofessional appearance of your physical background. Though please note that when using a virtual or blurred background, when the presenters move, they can become blurred which would be a distraction to the audience. Virtual backgrounds are helpful and presenters may feel less self conscious about their surrounding and more comfortable during their presentation (Duhart et al., 2020).

Your Camera

Equally as important as the background is the position of the camera. Nothing is worse than a camera that is positioned so that the audience is looking up the nose of a speaker or at the presenter's forehead. Almost just as entertaining as exploring sinus cavities are camera shots of the tops of heads, a tiny person in a corner of their video, half a face, or ghostly silhouettes (also see "Lighting Considerations" a few pages ago). The camera on the laptop or stand-alone camera should be positioned so that it is pointed at or just very slightly above eye level. Even slight deviations from eye level can impact the perceived credibility of the presenter (Ramlatchan & Watson, 2020).

To test how you are positioned on the screen, you can open Zoom, Photo Booth, or another application that uses your camera (Loosvelt, 2020). This will ensure that the camera is positioned correctly, and it will also show any objects that could possibly be

distracting. Additionally, make sure you as the speaker are positioned so that the camera is capturing just your shoulders and up. That way the audience can see your eyes and facial expressions. Often the built-in cameras on laptops do not lend themselves well to eye-level camera positions, though propping your laptop to make it sit higher can help. External USB cameras that mount on the top of your laptop, or on top of your workstation monitors, or on its own tabletop tripod could also facilitate better eye-level camera placement. In terms of good instructional message design, being able to communicate with nonverbal cues and facial expressions is one of the key affordances of online web conferencing, these advantages can be maximized with good camera setup. In summary:

- ☐ Keeping your camera eye-level is critical and conveys your credibility and enhances social presence,
- ☐ Plan for a medium shot of yourself, not too close, not too far,
- ☐ Try to keep yourself centered on camera,
- ☐ Preview your video in Zoom before unmuting your video, to confirm that you are portraying yourself the way you would like to be seen.

In the “Settings” menu in your Zoom application, under the “Video” settings, also select “HD” for your camera settings and “Auto” for adjust for low light. These settings will give Zoom a comfortable range of auto-adjustment to changing camera conditions.

Clothing & Jewelry

Clothing is also an important consideration during a Zoom webinar. For instance, you don’t want to wear a turtleneck that blends in with your wallpaper and makes you look like a floating head. Stick to monochromatic colors if you really want to wear them (Page, 2020). Clothing items that are acceptable for in-person meetings don’t always translate to the virtual world which can become a distraction to the audience. In terms of message design the presenter should consider the audience and the tone that they want to create during the presentation. For instance, formal business attire to portray subject

matter expertise? Business casual to communicate business informality? Or casual dress to communicate fun and engagement? But whatever you decide, please do not make the mistake of not wearing pants.

- ☐ Formal, business casual, or casual dress?
- ☐ Shiny jewelry can cause reflections and noise,
- ☐ In general, with on-camera clothing and jewelry options you still want to avoid distracting your audience from your message.

Also consider your jewelry options, even the shine from an Apple Watch can give the green screen functionality in Zoom issues when processing your virtual background. Jewelry that jingles or otherwise makes noise when you are moving can be picked up in your microphone and can also be distracting.

Importance of Host, Co-hosts, & Alternative Hosts

As other participants, such as conference facilitators, moderators, or other technical staff join the conference, the Zoom host can make them co-hosts. As a co-host, other staff can now also monitor and provide operational and technical support along with the host. An additional colleague or technical person responsible for the computer allows the speaker to focus on delivering the presentation. The co-host or alternative host can also help moderate questions, manage the recordings, or troubleshoot any technical issues. The technical Zoom host can also add other staff and team members as alternative hosts when the meetings and events are originally scheduled in Zoom. Thus, if the original host becomes unexpectedly unavailable (sudden Internet loss, power loss, laptop issues, flat tire on way into office, etc.) then the alternative host can start the event in the host's place. It is always helpful to have business continuity options.

There will be some audience members who will also have technical issues. They may not be able to hear the audio, see the speaker or see the presentation. The tech person can help determine if it is one person or if it is an issue impacting the whole audience and

need to stop the presentation. Technical staff serving as the meeting host will typically connect early, confirm the settings of the conference, help test audio, video, and content with presenters and help troubleshoot any issues before the presentation starts. Having a second computer logged in as an audience member will allow the tech staff to see what the audience sees. This is valuable for getting ahead of the issues the audience might be experiencing.

Zoom has an impressive speech to text engine that creates a live transcript for viewers who can benefit from the auto-generated captions. However, this feature of Zoom is very susceptible to diverse accents and audio quality. The result could be a live transcription that reads like bad text messaging. Until the technology catches up, true ADA closed captions that are 98%+ accurate for our learners with specialized needs requires an external service provider who will log into your event and offer live transcription services (some options include <https://verbatim.ai>, <https://captionmax.com>, & <https://www.ai-media.tv>).

- ☐ Co-hosts and alternative hosts can help support the host and provide business continuity when unforeseen issues arise:
 - ☐ The host should assign co-hosts during the event,
 - ☐ The host should also assign alternative hosts when events are scheduled,
- ☐ The host sets up the initial configuration of the event, and continues to monitor the event for any technical issues.
- ☐ Live captions:
 - ☐ The host activates Zoom's auto speech-to-text captioning feature,
 - ☐ The host can also schedule and coordinate external ADA captioning services,
- ☐ Technical support staff should have another set of laptops to log into the event as general participants, to help monitor and confirm the participant experience during the event.

Presentation Design & Pace of Presentation

A number of Powerpoint tips, tricks, and techniques can be used to improve our instructional messages. The design and the pace of the presentation plays an important role in keeping the audience's attention. Our viewers learn best when extraneous, distracting material is not included (Mayer, 2014). Thus, if the design is flawed, it can be a distraction, pulling the audience away from its intended purpose. Numerous animations or transitions can also easily be disorienting and annoying. Static bullet points and graphics can summarize information, but hard to read font sizes, bright colors, and too many extraneous graphics will be a distraction. In addition, a slide with a lot of text will also serve to unnecessarily increase intrinsic load. The audience will then tend to focus on (and try to make sense of) the text and may no longer have cognitive resources to focus on the speaker. Mayer's multimedia design principles also teach us that humans learn better from words and pictures than just words alone (Mayer, 2014). Presentation designers should integrate images with words but should be sure that the image helps to enhance or clarify the information. It can also be helpful to have someone preview your slides/presentation, a second set of eyes will have a different perspective than yours will.

Always perform a dress rehearsal and record yourself giving the presentation. Doing so allows you to gauge your pace, adjust the microphone, adjust the camera, listen/see if there are any external noises or distractions in your location, and determine if the presentation has any design flaws. This practice and rehearsal is especially important when your presentation has a time limit. Time yourself when practicing to ensure that you stay well within your given limit, and leave some time at the end for an audience question and answer session. Also be sure before your presentation to close any applications that you are not using so that you do not inadvertently share them during your session.

Equally important to the design of the presentation is the amount of information that is presented. When possible, the material should be designed so that it reduces the amount of extraneous load. Heavy extraneous load leads to the audience missing the important information that is trying to be conveyed. Presenters should also consider the needs of the audience. For instance, viewers on mobile devices would benefit from having the font sizes in presentation slides a little larger than what would be used in a face-to-face presentation

on a conference room projector. Other Powerpoint best practices should be followed in addition to appropriate font sizes such as font selection, light fonts on dark backgrounds, or dark fonts on light backgrounds. Please be sure to test any embedded video, audio, or other multimedia components of your presentation early before your presentation session (and remember to select Zoom's 'Share Sound' & 'Optimize for Video' options when Sharing). Instructional message design using PowerPoint can be quickly summarized as:

- ☐ Manage the cognitive load of your audience by dividing the content in your slides into manageable 'chunks',
- ☐ Use appropriate, professional fonts (Times New Roman, Helvetica, or other easily readable fonts), and font sizes,
 - ☐ Do not over saturate your slides with walls of text.
- ☐ Use light color fonts on dark backgrounds, or dark colored fonts on light backgrounds,
- ☐ Eliminate unnecessary distractions from your slides,
- ☐ Embedding multimedia (audio, video, animation) can help foster engagement and motivation in your presentation,
 - ☐ Be sure to test the multimedia in your presentation before your presentation to improve your audience's perception of your credibility.

Audience Attention

In a live presentation, the presenter receives immediate feedback from the audience. Looking over the audience, the presenter can easily tell if they are engaged, heads nodding, eyes focused, and attendees following along. In a Zoom presentation, the audience must view it on their computer which is a distraction. The audience may have other tabs or websites open, may be checking email, or could be working in other applications. The online presenter must work harder to keep the audience's attention. Some instructional message design suggestions to improve audience attention include:

- ☐ Welcome your attendees and use your voice to draw

attention to the slide,

- ☐ Point out or ask questions about a picture or figure,
- ☐ Make the titles on the slides more descriptive,
- ☐ Frequent movement of slides – you do not want the audience getting bored, if one slide required you to speak for a long time, consider having multiple slides for it.
- ☐ Include multimedia (video, audio, animation) to gain attention, act as an introduction, or describe objects and concepts that move and change over time.
- ☐ Do not include Powerpoint's 'bells and whistles' or noises and animations that do not add to your presentation and could distract or annoy your audience.

If a slide requires the speaker to speak for more than a few minutes, to keep the audience's attention, stop sharing the presentation. This will put the speaker back in full screen mode and help to keep the audience engaged. Including polls, using the built-in whiteboard, planning for breaks in long presentations, and designing places in your presentation to ask questions and engage your audience are other techniques presenters can use to keep their audience's attention.

Best Practices for Professional Conferences and Events

Planning for a professional conference is challenging enough, now add to that online presenters and audiences, and now that conference becomes much more complicated much more quickly. However, the most successful events are those where the conference facilitators and planning teams have paid the greatest attention to detail. While this guide focuses on many of the technical aspects of virtual events, consider Alicia Riley's *The Virtual Event Planner* for a strategic and detailed approach to event planning, including a Run of Show block scheduling technique (Riley, 2021). A systemic task analysis, good project management, and a well organized schedule are essential when elaborate online, virtual events.

For complex events consider having a moderator, question screeners or co-moderators, and a technical host along with the

presenters or panelists. In terms of cognitive load, it is tough for a single person to be the content presenter, provide technical support, screen and reply to questions in the chat, and keep the entire conference on track. This workload becomes even harder to manage as the conference audience becomes larger. Having operational support available to presenters in complex events helps alleviate this workload and allows presenters to focus on content, dialog, and discussion and not on event logistics or technology.

To help our events go well it helps to divide the workload and reduce overall workload on our team. For instance, the facilitator in the context of this guide is the conference owner, the client of the technical host, and the overall event organizer. The technical host creates and schedules the meetings, gets those links to our web developers or whoever is organizing the conference launch page. On the day of the event the host logs in early to the meeting or webinar to test audio, video, presentation content, and connectivity before moderators and presenters arrive. A moderator guides and helps the presenters and is often a key member of the overall conference administrator team. While they do not focus on the technical aspects of the meeting, they are involved in the subject matter of the content, introduce the presenters at the beginning of the session, and guide the question and answer activities. In large events it could be difficult for the moderator to focus on guiding the discussion and also monitoring the Zoom chat, the Zoom Q&A, prioritizing questions, and passing questions onto the presenters. In this case it is helpful to have co-moderators or question screeners who can help.

Pre-planning & First Steps

Among the first steps in organizing a professional event or conference is determining the level of online access that presenters and participants will have. Organizing a professional conference is not an easy task. Along with arranging and scheduling presenters, finding a keynote speaker, managing catering, and coordinating needs at the venue, when you add the online virtual component you add another layer or technology complexity. However, the added benefit of extending access to your event to an online audience is the increased outreach, engagement, and involvement of participants who would

otherwise not be able to attend. Zoom meetings and webinars can originate from physical conference venues with the inclusion of audio and video systems and reliable Internet connections. This strategy would allow for both a local physical audience as well as an online audience. Preplanning becomes especially important when the setup for these events include multiple cameras, multiple speakers/microphone systems, on location lighting kits, audio mixer systems, and laptops or workstations to connect to and from the Zoom conferences. Or the conference could be completely virtual without a physical venue, and potentially avoid the added cost of facility renting and catering. Confirm that presenters are okay being recorded, depending on your audience there could be more viewers of the anytime, anyplace recording than there were when the event was live. Also consider advanced planning, the sooner you are able to plan and organize the event then the sooner you can begin advertising the event and increasing awareness, registration, and participation.

It is important to note that back to back sessions may require your team setting up one session while another is still in progress. For instance, if our conference keynote starts at 9 am then our technical hosts are probably connecting at 8 am, and moderators, question screeners, presenters, and panelists are connecting between 8:30 and 8:45 am. If multiple concurrent meeting sessions start at 10 am, that means the technical hosts for those are connecting around 9 am to prepare for their new set of moderators, question screeners, presenters, and panelists who are connecting between 9:30 and 9:45 am. To accomplish this smoothly may require a choreography of multiple Zoom licenses and multiple teams of staff who are working multiple simultaneous sessions throughout the conference.

- ☐ Start your pre-planning early, and confirm at least the basics of your conference schedule, this will enable you to announce and advertise your event early to increase registration and attendance.

Registration Systems and Conference Launch Pages

From an instructional message design perspective we want our participants to be able to register as easily as possible and to also be

able to find the sessions that they want to attend during the day of the event as easily as possible. There are a number of great online services where you can organize your event and create a registration system for your attendees such as www.event.com, www.eventbrite.com, <https://www.webex.com/events.html>, and events.zoom.us. The costs of these systems will vary and are typically based on the number of participants in your event. Some platforms will have native integration with the web conferencing system of your choice, or will at least allow you to paste and include the links to pre-arranged conference meetings or webinars. If you have access to a web designer or web developer you could also have your own custom registration systems and launch pages created. The registration process should be minimalist, only collect the demographic and contact information that you need, let attendees register for all or just the sessions that they are interested in, and easily collect payment information if you are charging for this event. Once registered, the system should automatically send the participant the link to the conference launch page.

The conference launch page is the site that participants see when they log into your event. Event attendees should easily be able to find the conference sessions they want to participate in. While it is important for attendees to see descriptions of the sessions, find the names of presenters, and potentially read brief biographies of speakers, care should be taken to not overload and confuse attendees. Access to any technical support services should be available, and recordings should be available from here when the event is complete.

- ☐ Design an easy registration system that will automatically send event login information to newly registered attendees.

Figure 1 illustrates a recent example, where a concerted effort to reduce extraneous load and present a clean, easy to understand conference interface.

Figure 1

Custom Conference Launch Page Example

vs.prod.odu.edu

HER HEALING PLACE
2021 VIRTUAL CONFERENCE

powered by
ODUOnline
OLD DOMINION UNIVERSITY

Day 1
June 18, 2021

Day 2
June 19, 2021

Main Room - June 18, 2021 - Time: 6:00pm - 8:30pm ET

6 pm Virtual Room Doors Open
6:20 Welcome by Visionary, Megan Jenifer-Harris
6:30 Beverage Segment by Chef B. Sydel (Prep ingredients ahead of time)
6:40 Gratitude is Gangsta by Licensed Counselor, T.C. Mason
7:15 Meal Segment by Chef B. Sydel (Prep ingredients ahead of time)
7:30 Intentional Activities by Clinical Psychologist, Dr. Barbara Shabazz
8:15 NightCap Beverage Segment by Chef B. Sydel (Prep ingredients ahead of time)
8:20 Closing Remarks by Megan Jenifer-Harris

Click to Join

HER HEALING PLACE
conference & retreat

RE-IMAGINE
Begin to consider what a new normal can look like after what we collectively weathered in 2020. Allow

Note. This example takes an effective, simplistic approach, conference attendees can switch between conference days, and see the schedule of events on each day from the same page. There are no Zoom links for them to remember, participants can scroll down for a digital booklet that describes the conference speakers and conference sessions, and the Zoom links behind the pink ‘click to join’ button can be changed by web design staff as needed. Not visible in this screenshot are links to vendor rooms and contact information for technical support (used with permission: https://vs.prod.odu.edu/events/her_healing_place/).

Testing and Rehearsals

The affordances of technology enables communication, but our communication systems are deceptively complex and a multitude of things can go wrong - which is why testing is so important. Setup and schedule time before the event for your technical team to connect with your keynote speaker, presenters, and panelists to ensure:

- ☐ A reliable Internet connection from the exact location where they will be connecting on the day of the event,
- ☐ Please ensure that they are connected to this test from the exact device that they will be using on the day of the event,
- ☐ Test their audio, video, and presentation content, especially any multimedia in their presentations, and
- ☐ Test how they receive your audio and video.

For complex events it would be helpful to have a rehearsal that goes beyond just technology testing. A rehearsal session before the actual event would be especially helpful to confirm that session moderators, question screeners, and technical hosts are all sure what each other are responsible for on the day of the event. Practicing the question and answer session, where question screeners pick the best questions to either answer themselves or pass them onto the moderator to ask of the presenters via private chat, will help the team become comfortable with event logistics.

The Day of the Event

Goal of the pre-planning, testing, and rehearsing is so that the day of the event goes as smoothly as possible. While these items have been discussed earlier in the chapter, here they are presented in convenient checklist format as the day of the event is when these need to happen:

Technical Hosts:

- ☐ Connect early (typically 60 to 30 minutes early)

depending on event complexity),

- ☐ It can often be helpful to also connect with another device to serve as an attendee or another presenters,
- ☐ Confirm audio and video, especially if a presenting from a venue where cameras systems and audio systems had to be setup,
- ☐ Confirm conference settings such as:
 - ☐ Breakout rooms enabled (if they will be used)
 - ☐ Speaker View (based on preferences of the facilitator or moderator),
 - ☐ Spotlight Presenters Video (and whoever has a speaking role),
 - ☐ Enable mute of all participants upon entry,
 - ☐ Allow presenters to share screens, but disable participants can share screen,
 - ☐ Enable Waiting Room (allows presenters to setup and practice without attendees seeing them),
 - ☐ Turn on Zoom “Live Transcript” & “Enable Auto-Transcription”.
- ☐ When the presenters connect, test their audio, video, and presentations,
 - ☐ If the presenters have multimedia (Audio, video, and/or animations) in their presentations ask them to select Zoom’s “Share Sound” & “Optimize for Video” when Sharing.
- ☐ Be prepared to help the presenters, moderators, question screeners with any last minute technical issues,
- ☐ Start the conference once the presenters and moderators are ready,
 - ☐ By ending the Zoom Meeting’s “Waiting Room”,
or
 - ☐ By starting the Zoom Webinar and ending the Practice Session.
- ☐ Double check that the Meeting or Event is being recorded,
- ☐ Also be prepared to monitor the ongoing session, the chat, and the Q&A for any participants having any issues,

provide help as best you can, and refer those participants to technical support as needed,

- ☐ Mute participants (attendees and presenters/moderators) audio and video, as needed (e.g. when they forget and leave themselves unmuted),
- ☐ Remove unprofessional participants, as needed.
- ☐ Communicate with moderators, question screeners, and other panelists/presenters via the private chat, as needed.

For Moderators and Co-moderators:

- ☐ Connect early (typically 10-15 minutes early) and check-in with the technical host,
- ☐ Wait for the presenters and panelists to connect and confirm that any last minute needs are met,
- ☐ Ask the presenter to share their presentation, especially the opening slide.
- ☐ A few minutes before the event start time,
 - ☐ Confirm that the presenters are ready, and
 - ☐ Confirm with the technical host that they can now let participants in from the Zoom Meeting's Waiting Room, or starting the Zoom Webinar.
- ☐ As you start the event,
 - ☐ Turn on your camera,
 - ☐ Unmute your audio,
 - ☐ Introduce the presenters to the audience,
 - ☐ Turn the session over to the presenters,
 - ☐ Turn off your camera and mute your microphone until needed again.
- ☐ Monitor the chat and Q&A during the presentation and answer or ask questions from participants to the presenters as needed,
 - ☐ Also be on the lookout for private chats from question screeners.
- ☐ To keep the session on time it may be necessary to gently interrupt the presenters to alert them of their remaining time.

- ☐ Typically at the predetermined start of audience Q&A, or
- ☐ About 5 to 10 minutes from the end of the session.
- ☐ At the end of the session,
 - ☐ Thank the presenters and attendees, and
 - ☐ Let participants know where to go for the next session.

For Question Screeners or Co-moderators:

- ☐ Connect early (typically 10-15 minutes early) and check-in with the technical host and moderators,
- ☐ Monitor the Zoom chat and answer any questions that arise there,
- ☐ During the presentation, prioritize and send relevant questions to the moderator via the private chat functionality in Zoom (the moderator can then verbally answer these questions or pass the questions onto the presenters).
- ☐ Keep your camera off and microphone muted during the presentation, unless you need to step in to help the moderator.

Recordings and Attendance Reports

After the event is complete you will ideally want to capitalize and build on the event's momentum by having the recordings of your event's sessions ready as soon as reasonable. This way attendees who missed sessions have access to the content while it is still fresh and relevant. Some video editing may be required to remove any presenters practicing, extraneous moderator and presenter discussion, or dead time from the beginning of the recording. We typically want the playback of the file to start a few seconds before the moderator starts to introduce the presenter to give the most professional appearance. Large, day-long files where multiple sessions were recorded onto a single file may need to be segmented into the

individual presentations. These final files can then be added to a content distribution service provider (e.g. Youtube, Vimeo, Kaltura, etc.). Some registration and event hosting platforms (e.g. Webex Events, Zoom Events, others) will let you host the recordings from the same online location where participants accessed the links of the live sessions. Offering the recordings from the same conference launch page reduces confusion and is much more convenient for viewers. Also consider presenting the recording such that viewers can see both the video of the presenters as well as the visuals of the presenter's content or slides. In summary, after the event the final steps are to:

- ☐ Edit the recordings,
- ☐ Post the recordings and inform participants of their availability,
- ☐ Send final attendance reports to the conference organizers,
- ☐ Gather feedback and lessons learned from the event, and apply those lessons on the next project.

After the event it will also be helpful to send to the conference facilitators and organizers the event attendance reports. This data is important, can tell organizers which sessions were well attended, give an indicator of overall event success, and help with planning for future events. Be sure to ask the events organizers how the event went from their perspective, and for ways the event could have gone better. Sending feedback surveys to participants is also a great way to collect data and can let organizers know the effectiveness of the event.

Conclusions

While Zoom is used as our example, the best practices presented in this guide can be applied to Cisco Webex, Google Hangouts, Microsoft Teams, or any of the newly emerging web conferencing technologies. These are only some of the ways one can prepare to host a Zoom conference and deliver an effective presentation. Technical problems are going to happen; computers will crash, applications will freeze, and Internet connections will fail at the most inopportune time. Following these best practices will not eliminate any of these problems from happening, but they do give you

a higher probability for success. Viewers of a Zoom conference presentation are susceptible to many distractions. Following these best practices will also help to keep the audience engaged and focused on the message being delivered. For instance, keeping your camera eye-level, having a great looking background, having your light source in front of you, and having a good quality microphone system will help ensure a professional looking presentation.

Being able to participate in a relevant, professional development conference and engaging with colleagues from home without having to travel is an attractive option. However, the key to successful events is organization and preplanning. Preparing and organizing your technical support, moderators, question screeners, presenters, and panelists will go a long way towards a successful and effective online event. Face-to-face event organizers were making themselves available online even before COVID increased the general adoption and diffusion of web conferencing technologies like Zoom. Having a virtual hybrid registration option can increase your audience size during the event, continue audience engagement after the event with viewers of the recordings, and enhance the overall outreach of your conference. While the specifics of your events will dictate the custom setup of your seminar, workshop, or conference, we present what works well in our experience and hope that these instructional message design insights help your event be successful!

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