

HORIZONS

Top tips for virtual meetings and events

Slide Deck 2 – meeting set up & pre planning



Microsoft Teams

BT Conferencing

Video Conferencing



There are numerous platforms for virtual meetings

NHSEI are currently using Webex, Zoom & MS Teams

Choosing your platform

Tool	Zoom	WebEx	Microsoft Teams	Skype
Virtual Meeting Space	✓	✓	✓	✓
Webinar Space (Broadcasting)	✓	✓		
HD Video and Audio (HD - High Def / SD - Standard)	HD Audio and Video	SD - No computer audio on N3 version	HD Audio and Video	HD Audio and Video
Expanded Audio - Integrated global toll-free telephone calling to your webinars.	✓	✓		✓
Screen sharing	✓	✓	✓	✓
Annotation tools	✓	✓		
Q&A and Polling	✓	✓ - No polling on N3 version		
Chat - including private chat	✓	✓	✓ - No private chat	✓ - No private chat
Virtual hand-raising	✓	✓		
Cross device access - mobile and tablets	✓	✓ - limitations for Apple	✓	✓
Cloud recording	✓	✓	✓	✓

Tool	Zoom	WebEX	Microsoft Teams	Skype
Breakout Rooms	✓	✓ - Not on N3 version		
Whiteboard	✓	✓	✓	
Transcripts	✓			✓
End-to-end encryption for all meetings	✓	✓	✓	✓
Remote management	✓	✓	✓	
Live broadcasting across social channels - YouTube, Facebook Live etc.	✓			
Registration pages	✓	✓		
Full-Host Control - Mute/unmute attendees	✓ - Partial control	✓	✓ - Partial control	✓ - Partial control
Reporting and analytics - Reports on registrants, attendees, polling, attendee engagement and Q&A for follow up.	✓	✓		

Tool	Zoom	WebEX	Microsoft Teams	Skype
Attention indicator - Track how engaged your audience is with your content and which viewers show the most interest	✓	✓		
Ability to upload documents		✓		
Testing and automated grading on platform		✓ - not on N3		
Associated platform in background for collaborative working			✓ - Only if member of NHSE/I	
Allow panelists to be listed separately	✓ - Only in Webinars	✓ - Not on N3		✓ - Limited to account holders
Integrated evaluation (questionnaire) system post session		✓		

Suggested wording to invite participants to a zoom session

Zoom details:

Topic: Ambulance Chief Executive Group

Time: Feb 15, 2019 8:30-9.30 am London

You can join Zoom via your laptop, tablet or smartphone. If you are joining by smartphone, you will need to download the free Zoom app first.

You can join Zoom by telephone only but you will only be able to hear the audio (similar to a telephone conference call). The phone number is at the bottom of these notes.

If you have never joined a Zoom call before, you might want to watch this short video before you do: YouTube video [Joining a Zoom meeting](#)

If you have problems getting onto Zoom, please call add the name of your tech host here] on [telephone number here] who will give you technical support.

Once you have joined the Zoom meeting, click on the tab that says 'join audio conference by computer.' Zoom will automatically pick up your microphone and speakers.

If you encounter a problem with this (for example, you are unable to hear others on the Zoom or others are unable to hear you), you can choose to join Zoom by telephone (the numbers are at the bottom of these notes).

You can watch a short YouTube tutorial on connecting your audio here: [Joining & Configuring Audio and Video](#)

Dial in details

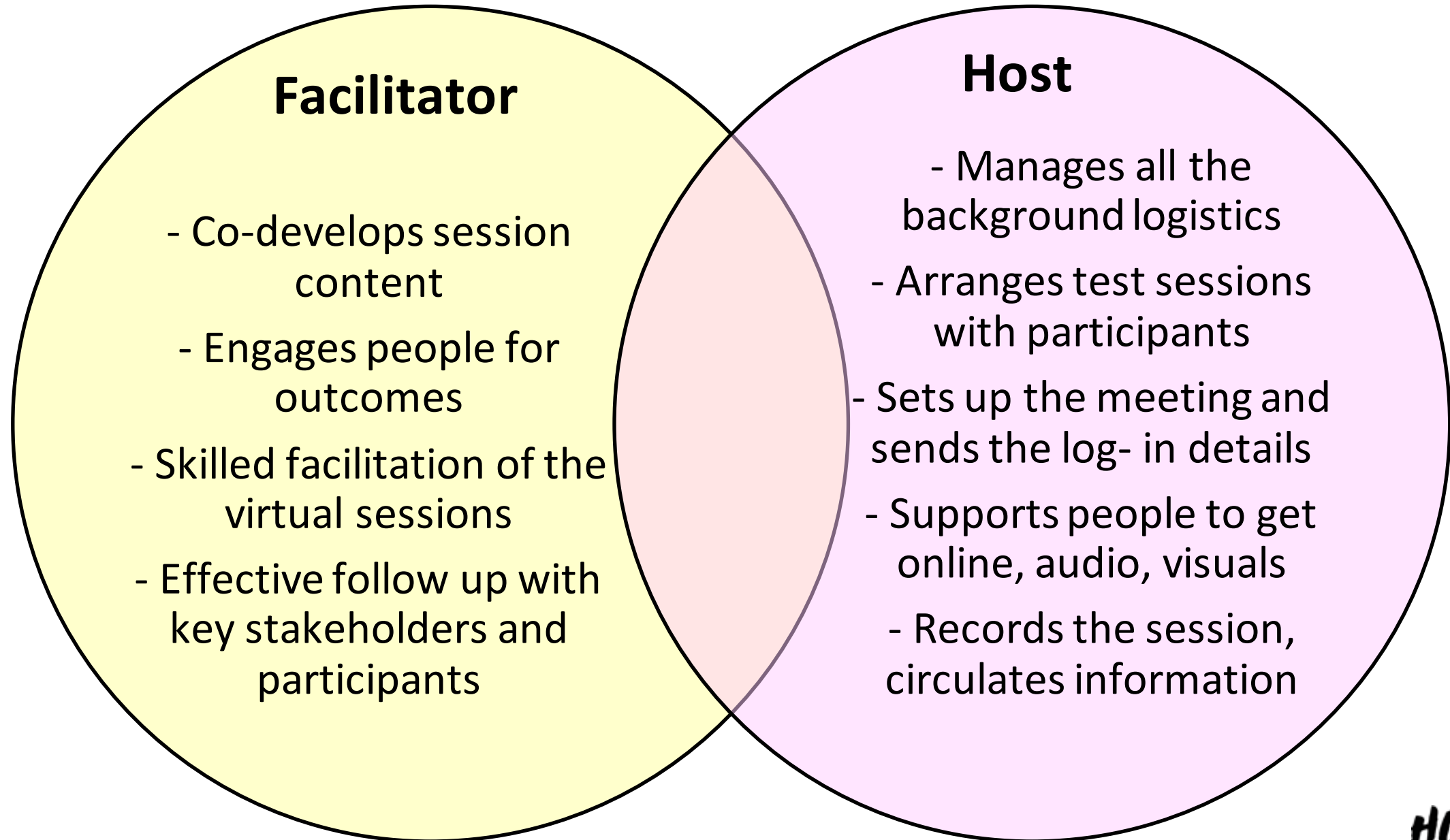
To call in to the Zoom call by telephone, ring 02036950088.

You will be asked to enter your meeting ID: 436649105#

Communication with participants

- Getting the participants comfortable with the technology before the session will help everything be a little smoother on the day and also enable you to start your session on time.
- Ask participants to test their technology well in advance of the meeting/event.
 - Provide them with a test link from the platforms webpage ie for Zoom - <https://zoom.us/test>
 - Provide them with a couple of scheduled times that they can join you to test their connection, audio and video

There are two distinct roles in virtual facilitation



Our competency framework

Facilitator

Technical agility

Uses the tools spontaneously and confidently, not letting them become the focus of the discussion and not holding up the meeting

Set-up

Skilled in the design of virtual meetings; organised in advance of the session: equipment, content, process and role of participants

On-air presence

'Webcam ready' and works with the camera; manages voice and tone of the meeting; engages participants throughout

Engaging people for outcomes

Uses tools and approaches to encourage virtual interaction, discussion and collaboration; flexible/adaptive approach

Host

Technically agile – knows the features of the specific online meeting platform being used completely

Able to lead technical rehearsals; trains inexperienced participants to use technology; pre-loads materials and pre-programmes virtual tools

Supports the facilitator; creates discussion, manages tasks and timing; helps keep everyone calm and fully present

Supports engagement activities such as whiteboards, chat rooms, polls and virtual breakout meetings; provides timely and accurate responses

Other roles to consider when running a session

- **Host** – Someone to set up and run the technicalities for the session
- **Facilitator** – Someone to introduce the presenter and facilitate the virtual meeting
- **Presenter/Speaker** – Whoever will be presenting (Can be more than one person)
- **Chat room monitor** – To engage with the audience through the Webinar’s interactivity and feedback to the chair/presenter at scheduled times
- **Social media monitor** – To carry out the same role as the chat monitor but with whichever social media you use
- **Secondary host** – Back-up to the primary host just in case they can’t launch the virtual meeting, they are on standby just in case the host can’t launch the virtual meeting. The host and back up should not be located in the same building/space just in case there are connectivity issues.
- **Support role** – To be ready to step into any role should there be an issue
- **Minute/Note taker** – If you record the session this role may be unnecessary

Briefing your facilitator / presenters

Think about:

- Running a test tech sessions for these key individuals
- Camera positioning
- Lighting
- Background - is it mess free? Is there any confidential information on boards?
- Clothing - bright, plain colours or bold print works well
- Voice & tone
- Engaging participants - using the top tips in these packs...
- Mirroring tone of meeting
- Quiet space away from interruptions – not in an open plan office or in a room with lots of other people.
- Back up internet plan – NHSEI staff can hotspot on their work phones.
- Set up a Whatsapp channel so that you can communicate behind the scenes – It's best to turn emails off and this will take up your bandwidth.

This pack has been brought to you by the NHS
[Horizons team.](#)

For more information contact:
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