

Some Advice for Hosting Large-scale or Formal Zoom Meetings

Attendee Etiquette

At small and informal gathering it may be OK to let attendees speak freely and interrupt each other but this quickly gets disruptive for larger and formal gatherings. Attendees should therefore be asked to follow some simple guidelines. The aim is to minimise distractions and avoid unwanted background noise, not to stifle sensible dialogue:

- Keep yourself muted most of the time unless you have something to say. No-one wants to hear your front door bell, your telephone calls, your dog barking, your kettle boiling, your loo flushing... I've heard all these during Zoom meetings! Even a squeaky chair or a cough can grab the audio focus briefly spoiling any presentation .
 - It doesn't take long to unmute yourself to make a comment. If you have a keyboard a simple trick is to press on the spacebar while you speak; you will be unmuted until the key is released again.
- If two attendees of the meeting are using different computers in the same household, please locate yourselves in different rooms with a closed door between them, otherwise a feedback loop can be created which is very disruptive for all attendees.

Host's schedule

The host has a lot to coordinate during the meeting. I recommend making a schedule. I took a copy of the meeting agenda and interspersed my schedule in red, right justified on the page, covering the following types of directives:

- Start meeting early (advise committee to join meeting early)
- Start meeting recording
- Opening remarks
 - Inform attendees if the meeting is being recorded
 - Remind them of the audio etiquette
 - I also ran a poll to find out how many people were watching each screen – this allowed us to get a better estimate of the number of actual attendees and it also gave an early voting practise before the serious polls.
- Start/stop/switch screen sharing
- Scroll screen share presentations
 - My main (PowerPoint) presentation followed the agenda and displayed relevant documents as appropriate: annual accounts, committee nominations, etc.
- Run polls/display results
 - In our case I had to combine live voting numbers with proxy votes received in advance (and display combined results – more on this later)

Co-hosts

Consider appointing co-hosts to help with some of the above tasks, and also:

- If you are starting the meeting with a waiting room use a co-host to manage it.
- If you cannot get (some) attendees to follow the audio etiquette, consider appointing a co-host to enforce muting if necessary.

Screen Sharing

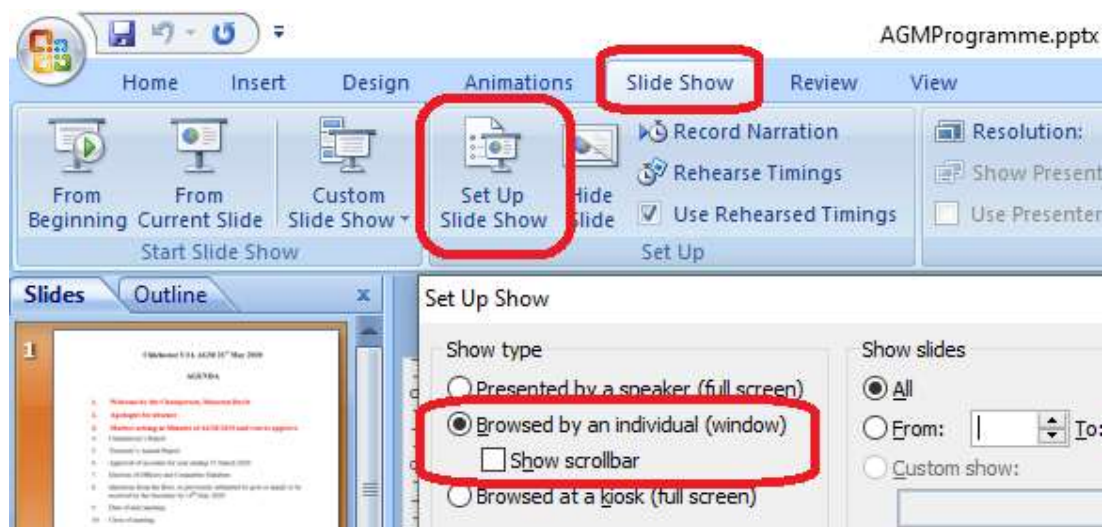
I juggled screen sharing between 2 separate PowerPoint presentations and the pages of an Excel spreadsheet (to display combined live and proxy voting results). You might also want to display Word documents. If you want switching between screen shares to run smoothly here are some suggestions to help.

Why did I use 2 different PowerPoint presentations? The first was used before the meeting started so attendees would see it immediately on joining. It scrolled automatically through the agenda and a couple of other key slides relating to the coming meeting. The second (main) presentation followed the agenda and displayed the relevant documents as the meeting progressed. It is too clumsy to change between an auto scrolling setting and the normal click advance setting so I made them 2 separate files.

During the main part of the meeting I needed to switch between the PowerPoint presentation and the Excel spreadsheet several times. The following paragraphs explain how to do this with minimum fuss.

PowerPoint tricks

Normally when you do a PowerPoint slideshow you use full screen mode, however this makes it difficult to do screen share switching. Instead change the set up to “Browsed by an individual (window)” as shown below.

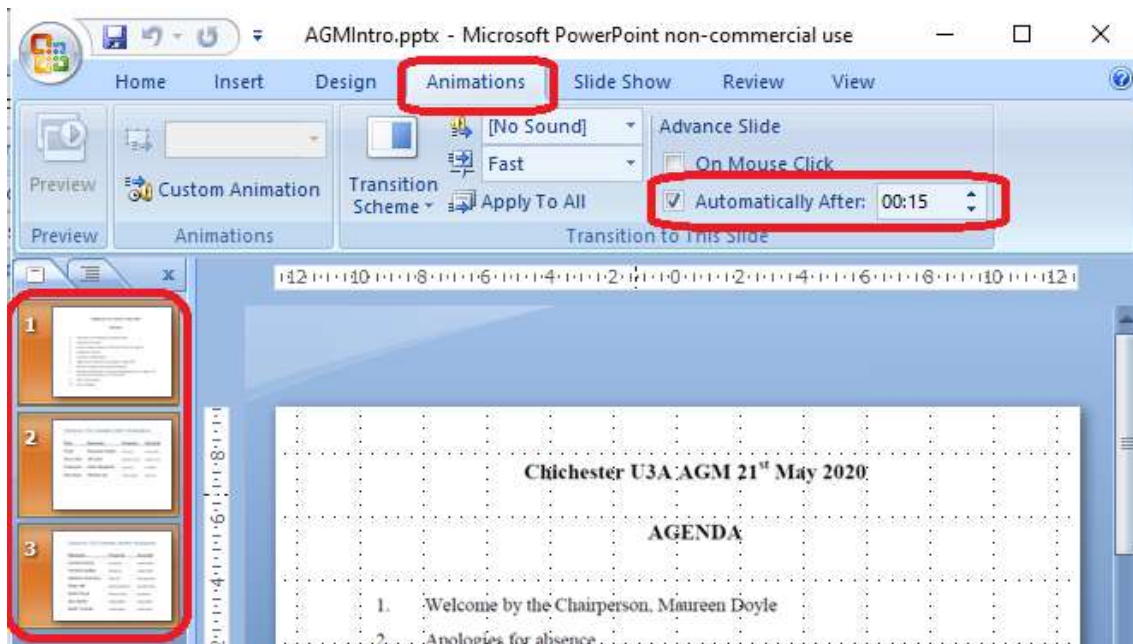


You will hardly notice the difference to the display, but the advantage is that you can set the slideshow going in advance so that when you begin the screen share you can choose the window

directly, and if you switch to another screen share (eg Excel or Word) you can leave the slideshow running. Later you can simply return to it and move on to the next slide.

(Note that PowerPoint won't let you have 2 separate slideshows going simultaneously, so this wrinkle didn't help me to switch from the auto-scrolling show to the main slideshow the first time round! You can't win them all.)

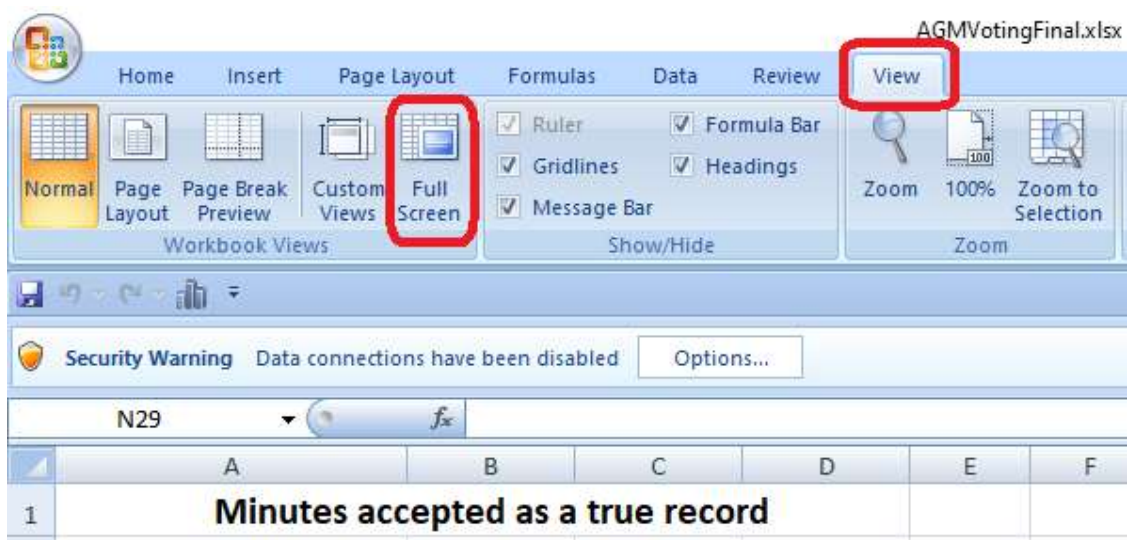
If you do want to **set up an auto-scrolling presentation** here's how you do it:



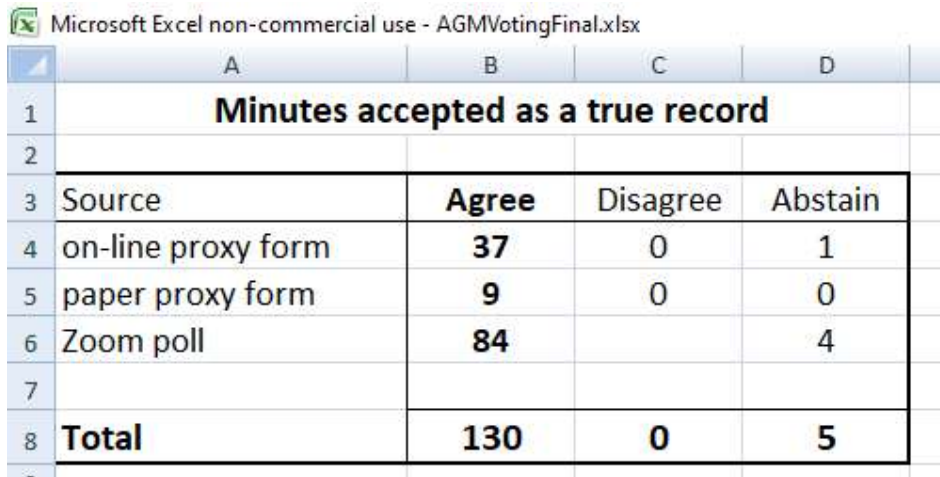
Select all the slides you want to scroll through, and the pause time.

Excel/Word tricks

There is a lot of clutter at the top of an Excel or Word screen – the tool bar and command ribbon – distracting for a presentation. Instead you can select a full screen mode as follows:



This gives a much cleaner display:



The screenshot shows a Microsoft Excel spreadsheet titled "Microsoft Excel non-commercial use - AGMVotingFinal.xlsx". The spreadsheet displays a table with the following data:

	A	B	C	D
1	Minutes accepted as a true record			
2				
3	Source	Agree	Disagree	Abstain
4	on-line proxy form	37	0	1
5	paper proxy form	9	0	0
6	Zoom poll	84		4
7				
8	Total	130	0	5

Like the PowerPoint "Browse in Window" mode the Excel spreadsheet or Word document can be started in this mode in advance making it easy to start the screen share. It is also straight forward to switch screen share between running Word, Excel and PowerPoint presentations when they are in these modes.

Excel and Proxy Voting

If the spreadsheet is set up properly in advance it is a simple matter to merge a live Zoom poll result with the pre-processed proxy totals. In this example it is only necessary to copy over the figures from the Zoom poll and type them into the waiting cells (B6, C6 and D6). The final totals will adjust automatically using the following formulae:

- In cell B8: **=SUM(B4:B6)**
 - This formula responds immediately a value is typed into cell B6.
- In cell B4: **=COUNTIF('Raw Online Poll'!D2:D101, "*Agree")**
 - This formula counts the number of occurrences of "Agree" in the cells of column D on the Raw Online Poll sheet.
 - (The * in the formula is a wild card allowing other characters before the word Agree – in this case some of the cells contained "Chair Agree" for the case where the proxy voter had requested the Chair to "vote as she saw fit".)
- Cell B5 contained a similar formula referencing the Raw Paper Poll sheet. The paper poll and the on-line poll were separate because the format differed slightly.