Zoom Pre-Webinar Checklist for Hosts

Consider following these steps in order to ensure a great Zoom webinar experience for panelists, co-hosts, and attendees.

2 Weeks Prior to Zoom Webinar		
	Confirm the date and time of your webinar.	
	Determine webinar roles such as host, co-host(s), panelist(s), and attendees.	
	Determine webinar preferences and settings:	
	• Require attendees to register?	
	• What is the approximate number of attendees?	
	• Does your webinar license accommodate the number of attendees?	
	• Enable Q&A?	
	• Allow anonymous questions in Q&A?	
	• Allow attendees to view answered questions only or all questions?	
	• Allow attendees to chat? With whom?	
	• Allow attendees to raise their hands and then unmute them individually to speak?	
	• Send reminder email(s) to Panelists and Co-Hosts?	
	Meet with panelists to confirm the webinar's structure.	
	Schedule webinar in Zoom.	
	• Add alternative hosts (if any).	
	• Enable Q&A (if desired).	
	• Enable the webinar Practice Session mode. *NOTE: This is recommended for all webinars.*	
	• Enable only authenticated users to join (if desired).	

	• Enable **Record the webinar automatically in the cloud** (if desired).	
	• Schedule webinar with registration or without registration.	
	• Enable or set other optional settings as applicable, e.g., add branding, create polls, etc.	
1 Week Prior to Zoom Webinar		
	Review the webinar and account settings on the Zoom web portal to confirm they're to your liking.	
	Check list of attendees to see who registered (if applicable).	
	Encourage participants to download the Zoom app before the webinar if they've never used Zoom.	
	Create a slide with webinar "ground rules" if applicable, to display when attendees join/before presentation begins.	
	Schedule and host a **dry run** webinar with co-hosts and panelists to review the features of Zoom webinars and roles, check the webinar settings, and conduct a practice run of the webinar content. *NOTE: It's recommended that one person also join the dry run as an Attendee in order to check that the Attendee experience is as expected.*	
	If applicable, designate a co-host to manage the Q&A during the webinar.	
30 Minutes Prior to Webinar		
	Start the webinar* from the Zoom web portal or using the webinar link generated previously. **NOTE: The webinar will start in **Practice Session** mode automatically; only the host, co-hosts, and panelists can enter the webinar in Practice mode.*	
	Adjust the webinar settings based on your preferences:	
	• Click the up arrow to the right of Share Screen and allow All Panelists to share screen (if applicable).	

Click **More** at the bottom of the **Participants > Panelists** window and check or uncheck your preferred settings. For example:	
o Mute Panelists on Entry	
o Allow Panelists to Unmute Themselves	
o Allow Panelists to Start Video	
o Allow Attendees to Raise Hand [if you plan to unmute individual Attendees and allow them to speak]	
Click **More** at the bottom of the Participants > Panelists window and check or uncheck to **Set layout for attendees**:	
o Follow host view mode	
o Active Speaker View	
o Gallery View	
Click **Chat.** Click **More** and select your preferred Chat settings, e.g., disable Chat for attendees and allow Chat for hosts and presenters only. To do this, select **Allow attendees to chat with: No one**.	
Click **Participants**. Review the list of panelists to ensure all panelists are listed, know how to share their screens, and their microphones are connected.	
Greet panelists and review the plan for the webinar.	
Ask panelists to practice sharing their screen/slides (if applicable); ensure that participants are able to see/hear audio/video. *NOTE: If a panelist is sharing an audio or video file, they **must check "Share computer sound"** in the Share Screen window before selecting which application they will share. If they do not check this, participants will not be able to hear audio being shared.*	
10 Minutes Prior to Webinar	
Check that audio and video are working for host and presenters.	

	• Click the arrow next to the microphone button to change/check the audio settings. • Click the arrow next to the video camera to change/check the webcam settings.	
	Ensure all panelists are on mute when they are not speaking. If necessary, mute all panelists. *Note: In Active Speaker View, any panelist or co-host whose microphone is not muted may appear to attendees as active speaker. To prevent this, mute microphones of any panelist or co-host when they are not speaking.*	
5 Minutes Prior to Webinar		
	When you are ready to **go live and allow attendees to join**, click the **Broadcast** button to move from Practice Session to live webinar. *NOTE: Click **Broadcast** only if you are prepared to go live and allow attendees to join the webinar.*	
	Attendees join with their microphones muted, but they can see and hear panelists.	
	When ready to address attendees, unmute yourself, welcome the attendees, and let them know you'll be getting started soon.	
During Webinar		
	Confirm that the presenter who is speaking is unmuted with video on (if applicable).	
	Check that the webinar is being recorded (unless you disabled this feature intentionally).	
	Check attendees list to ensure there are no inappropriate names (i.e., zoombombers) and Remove the attendee if needed.	
	Monitor audio, video, slides, etc. to ensure there are no issues.	
	Host or co-host designated to monitor the Q&A reviews questions and handles them appropriately (if applicable).	

	If a presenter's video/audio experience a delay or choppiness for an extended period of time, recommend that the presenter turn off their video and present via audio only.	
After Webinar		
	Review the webinar recording (if applicable) and edit if necessary.	
	Review the transcript (if applicable) and edit if necessary.	
	Review webinar reports (if applicable).	
	Send a follow up email to attendees including the recording (if applicable).	