How to Lead a Videoconference

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You’ve probably participated in webinars or online meetings that used videoconferencing technologies. Now, you need to organize, plan, and offer a class or event using these tools. The steps you take to prepare will make the difference between an engaging and productive opportunity, for a frustrating and boring experience. Let’s look at the what, why, and how of video conferencing in professional and academic contexts.

• Why are you videoconferencing?
• How can you use varied communication options when videoconferencing?
• What hardware do you need?
• How should you prepare for a videoconference?

Why Are You Videoconferencing?

Videoconferencing can be used to accomplish a variety of goals. It is important to be clear about your purpose, because the ways you use the platform are quite different depending on a few critical factors, such as:

• The number of participants,
• The availability of broadband,
• The type of computer or device used by participants to access the event,
• Styles and presence of presenters or facilitators,
• The ability of participants to speak and/or to communicate in writing.
• The availability of broadband,
• The type(s) of content.

For our purposes, we will distinguish two main types of videoconferencing as presentation and meeting. In an educational context we might use the terms lecture and small group discussion. The two types are differentiated by size, goals, communication modes, and expectations for
participants. While there is not a firm dividing line, an online meeting should involve no more than 12 people, while a presentation can involve hundreds. We will describe the person responsible for the meeting as a facilitator and the person giving a presentation as the presenter. In an academic setting the instructor typically serves as presenter or facilitator, with the potential for guests or students to also take those roles.

**Meeting.** A meeting involves a small group who are interacting electronically to collaborate, make plans or decisions. For meetings, we only invite the people who need to be there—a small group is preferable if we intend to get work done. Others can view the archive.

Agenda, stated purpose, and background information are provided in succinct form prior to the meeting, with time for preparation. While, as with any meeting, someone facilitates, everyone needs the capability to communicate and participate in a group process. Use collaborative features, including open microphones, and shared whiteboards so participants can add notes. You can use features that allow group members to share documents or slides associated with the project at hand.

**Presentation.** In a presentation, one or more people are communicating to an audience of listeners. The goal is to inform, and there is little expectation for audience involvement beyond asking questions. Participants’ microphones are muted to minimize background noise or disruptions.

For the presentation to be successful, the content should be presented in a clear, visually-interesting manner. Slides with dense, small print or ambiguous diagrams will not capture the audience’s attention. If you do not have visual content, it would be preferable to use a conference call or audio only platform.

<table>
<thead>
<tr>
<th>Question 1: Why are we here?</th>
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<tbody>
<tr>
<td><strong>MEETING</strong></td>
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<tr>
<td>Goal: to involve participants in decision-making and collaboration.</td>
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<tr>
<td>Communication: Many-to-many, to share information as needed to move work forward.</td>
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<tr>
<td>Participation: by small group of people with a stake in the purpose.</td>
</tr>
<tr>
<td><strong>PRESENTATION</strong></td>
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<tr>
<td>Goal: to inform.</td>
</tr>
<tr>
<td>Communication: One-to-many, to share information in a way that engages listeners.</td>
</tr>
<tr>
<td>Participation: by anyone with an interest in the message.</td>
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</table>
Purpose and Process for Presentations and Meetings

Define a clear purpose for the online meeting or presentation and select a videoconference process that aligns with your goals. Online events are most successful when:

- Participants buy into the purpose and know why they are there.
- Participants have the agenda and any background information needed to fulfill the purpose.
- Presenter or facilitator is prepared and ready to focus attendees toward achieving the stated purpose.
- Presenter or facilitator selects videoconferencing features that are accessible to participants and accommodate those with low-bandwidth or mobile devices.

Does your purpose involve providing information or engaging participants? You might use the same videoconferencing platform for meetings or presentations, the ways you use it will be somewhat different. One differentiation is in expectations for timing: do you expect immediate response, or is timing for your interactions more flexible?

Synchronicity, Synchronous or Asynchronous Communication

The terms *synchronous* and *asynchronous* have until recently represented an either/or principle: communication either at the same time or at a different time. The *time–response continuum* (Salmons, 2015, 2016) offers a way to categorize the level of immediacy and timing of responses in a way that offers more subtle gradations than the typical synchronous/asynchronous dichotomy. Additional refinements include the concept from Dennis et al. (2008), which he called *synchronicity*— and a concept we will call *near-synchronous* conversations (Salmons, 2012).
**Synchronicity** occurs when communications partners are devoting full attention to the dialogue—no multitasking or other simultaneous conversations. **Synchronous**, then, describes a more basic definition of communication with a technology that allows for real-time message and response. If you want the single-focus attention of participants, then clear expectations need to be set. You’ll also want to make sure you have material and interactions that attracts their attention!

In **near-synchronous** communication, one party may post, text, or send a comment, update, or question to the receiving party with the expectation that the other party will respond the next time he or she is online. Near-synchronous communications may take the form of an extended conversation. Near-synchronous communications include text-messaging or social media posts where we expect a response soon, but not at instantaneously.

The term **asynchronous** still remains a descriptor for communications involving the expectation of a time gap between message and response. Email is an example of asynchronous exchange.

- In a videoconference meeting where decisions are being made or problems resolved, you might expect synchronicity, that is, you want participants’ full participation. If that is an expectation you need to clearly state it, and at the same time, keep the meeting interesting enough that it merits full attention!

- In a videoconference presentation you might expect that while the audience is in a synchronous mode, they might be attending to other matters. Again, if you want full attention, engage the audience and add in interactive polls, voting, or Q & A intervals.

- Videoconferences can also be the basis for near- or asynchronous communication. You might record a meeting or presentation for people who cannot attend in real time. Or you might intentionally use the videoconference platform to record ideas or information you want people to watch at their convenience, then discuss. What response do you want to your shared recording, when? Do you want a response today, or next week? Note any deadlines and signal the way you want to receive follow up or input.
Integrating Presentations and Meetings
Efforts in professional or academic life are not always easily segmented. You might have the need to present ideas and information or demonstrate techniques that form the basis of a meeting. You have a few options:

- Alternate presentation with discussion. If you have a small group, it will work to proceed as you would in a face-to-face event, with raised hands and turn-taking by those who are speaking. In a larger group it might be preferable to use chat features for writing comments and questions, which the presenter/facilitator answers.

- If you want the large group of participants present so they can ask questions, use a platform that allows for break-out rooms and divide into small groups.

Academic Presentations and Meetings
Choices about how to manage online teaching, and what technologies to use, depend on some important factors that must be considered in addition to pedagogical and curricular priorities.

- Does the institution provide a Learning Management Systems or digital tool for faculty members and students to use, or are you using free online communication?
- Are the students and instructor in the same time zone?
- Do all students have headsets and microphones so they can participate in a discussion?
- Do all students have broadband, and computers or devices that allow for active videoconference participation? If not, can they view recorded presentations?

When higher education courses are online, they typically involve more than one channel for communication across the spectrum from synchronicity to asynchronous. Faculty or student presentations can be offered in real-time or made available for viewing at convenient times. Interactions around the subject matter of the course and assignments can include a mix of real- and any-time discussions. Secure spaces are available for submission of assignments and their return with private reviews and assessments from the instructor.

Learning Management System or DIY Technology?
Established online programs use learning management systems (LMS), which are closed websites accessed only by the instructor and registered students. Services include both enterprise commercial (BlackBoard, Canvas) and open-source or free options (Moodle, Google Education). They have places for posting the syllabus, readings, media, and assignments. They have electronic rubrics that feed into gradebooks. An LMS also offers a threaded discussion
area where faculty post questions and students respond in near- or asynchronous dialogue. Discussion areas often allow you to divide the class into small groups, with space their own interactions and team project documents. Videoconferencing in such courses can be used to complement ongoing work in the LMS.

If you are in a situation where you must transition to online instruction without the benefit of an LMS, you will need to look for ways to share readings and other course materials, and ways for students to submit assignments. If you need class interactions to remain out of the public Internet, for the protection of students’ privacy and for their comfort levels when sharing work in progress, look for free tools you can use. Most blogs that allow for password-protected access. You can set up shared folders, or a class email list. Videoconferencing is even more important in such courses, because it might be the main forum for class dialogue.

Record lengthy presentations for individual viewing, and leave meeting time for engaging activities and student engagement. This “flipped classroom” approach avoids having the whole group in listening mode for the videoconference. Similarly, for courses that expect students to complete some hands-on activities or projects, students can videorecord their work and share with the instructor and peers.

**Small Groups and 1-1 Meetings**

Students who are unaccustomed to online learning might find a large, presentation-oriented class leaves them feeling isolated. Consider using your videoconference platform to connect and build social presence. Meet with small groups who are working on a team project, or who have similar questions or coaching requests. Depending on class size, make appointments for periodic 1-1 meetings. Set videoconference office hours where students can drop in.

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**What Hardware Do You Need?**

Videoconferencing meshes three kinds of communication: audio, visual, and written. If you have used video chat, then you have the basic hardware for a visual conversation: a computer or device that includes a microphone, speakers, and a screen. These options are adequate for a 1-1 or small-group meeting, however, if you are planning a presentation and you intend to record it, you might need more than the basics.
Computer, Tablet, or Phone?
If you have a choice, use a computer, particularly when you want to use multiple platform features. A tablet with keyboard would be also acceptable for a simple meeting or presentation. Running a videoconference from your phone would be the last resort.

How will your participants connect? Keep in mind that if they are connecting on tablets or phones, without keyboards, it might be difficult for them to simultaneously view the screen, speak and/or write.

Audio Options: Pros and Cons
Most video conferencing platforms offer two alternatives for audio: computer audio or telephone. If you have a microphone and speakers built into your computer or tablet, they may or may not be adequate. Try using them in the selected videoconference platform, and try recording a test message to determine whether the quality will meet your needs. Sometimes the microphone picks up ambient sounds that can be distracting. Another potential problem occurs when the sound coming from your computer speakers feeds back into the computer microphone, causing echoes. To avoid these distractions, use a computer headset with microphone. Alternatively, use your computer’s microphone with headphones instead of your computer’s speakers.

For the best audio, only the person speaking should have a live mic and everyone else should be muted. Some platforms allow you to mute all participants, which is preferable in a presentation where background noise from a large audience can be distracting and reduce recording quality.

Depending on the platform, calling in and using the telephone is another option. When using the telephone, you bypass the problems that can be experienced with the computer’s microphone and speakers. That said, using a cell phone is generally discouraged if you are trying to record the videoconference.

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Best case: Headset with microphone
Second best: Headphones or ear buds with computer mic
Acceptable for small group meetings: computer speakers and mic
Avoid if possible: cell phone
Visual Options for Videoconferencing
Videoconferencing is a visual medium. What visual content do you want to share? Most platforms offer three options:

- Webcam(s)
- Screen share or window
- Whiteboard

Using a webcam.
We use webcams to establish visual presence, so participants know there is an actual human being on the other side of the screen. We want to compensate for the informal camaraderie and warmth we can miss when communicating online. Eye contact is a natural part of face-to-face communication and is considered by many people to be essential in building trusting relationships. On a desktop monitor, position the camera above the display to support eye contact. With a laptop, position the screen so the camera is as even as possible to your eyes.

When a presenter or facilitator looks down from the screen and not at the camera, it might appear to the other that they are looking away and breaking contact. This can easily happen when you are trying to read prepared remarks or take notes. If you are broadcasting from your desktop, notes on your computer screen will be visible to attendees. Consider propping printed notes or placing notes on another device, next to the monitor.

Depending on the nature of your meeting or presentation, you want to consider what is in the background. A simple, neutral backdrop is usually best. If you do not want to share your office or other setting, look for features that allow you to use a photo or virtual image as your background.

Keep in mind that webcams use a lot of bandwidth. If the presenter/facilitator and participants are on webcams together, your risk of a system freeze or shutdown increases. People without broadband will have a difficult time accessing the event. One option: use webcams for introductions, one person at a time, then turn them off. Another option: only the person speaking uses a webcam. If bandwidth is too limited to use webcams, share photographs.

Using screen share or window.
We upload the slides or documents into some videoconference platforms before starting the event. Our own desktops are shared in other programs. If you choose to share slides, avoid dense, text-heavy slides. Think about slides as a way to give structure to the live event so you can stick with the agenda, not as the event itself.
You can also share media or applications. Keep in mind that media and applications are bandwidth-intensive. Is it important to watch media at the same time? Might it be preferable to share a link to the media for viewing by individuals?

Needless to say, when using screensharing, make sure to clean up your desktop and remove any personal information you prefer that others not view. Social media is full of screenshots with views of embarrassing content inadvertently broadcasted!

**Using a shared whiteboard.**
A shared whiteboard allows you to write, draw, or diagram during the event. A shared whiteboard is to videoconferencing what a flip chart is to a face-to-face meeting. You can take notes, record brainstorming, outline plans, etc. The shared whiteboard allows for more participation in small groups, in platforms that allow attendees to access the tools.

**Written Options**
Videoconference platforms typically include text chat options. Depending on the nature of the event, and factors such as bandwidth limitations, you might choose text chat as a primary or secondary form of communication.

As a secondary form, behind the spoken and visual options described above, the chat area is a space where participants can record questions or comments while the event is underway. You can use it as a place to share links to background or related resources. In absence of webcam introductions, decide whether you want to share images, a recorded introduction, or other information about yourself.

Keep in mind the time it takes even the quickest thumbs to write comments or responses. It is preferable to break larger questions into smaller ones that can be answered more quickly, to avoid getting bogged down while waiting for participants to finish typing. Write out questions or key phrases in advance so you can cut and paste them into the text window to save time and keep the exchange flowing.
Keep in mind that everyone does not have fast Internet, or a computer or laptop that allows them to participate via talk or text while viewing the screen. This is particularly true when attendees are joining from their homes, rather than an office or educational institution. Some rely on using computers in a library or study center, and just use their phones for personal internet use.

When videoconferencing as part of an academic class or meeting where you want everyone to be able to fully engage, determine limitations and adapt. Avoid trying to do everything at once in the videoconference, for example:

- If you do not need participants to be there when you present, record it and send a link so they can view it before the meeting. If you more than 12 people, you might share the link then break them into small groups with instructions about the desired outcomes.

- Create a shared email list or discussion thread where small groups report out and exchange ideas in follow-up to a presentation.

**How can you prepare for a videoconference?**

After clarifying your purpose and thinking about the how and when you want responses from participants, you will want to prepare for the technical side. Participants quickly lose interest when the presenter or facilitator fumbles with the videoconference set up so preparation is essential.

Sometimes you have the luxury of having another person who can manage the videoconferencing platform so you can focus on the content. If you must do both, familiarize yourself with the platform. Look at relevant tutorials and try various features.
Make time to practice. Practice timing of presentations, so you allow adequate time for questions or discussion. Run through and record a major presentation so you can review it for clarity and pace.

Invite participants. If they are new to videoconferencing, offer links to how-to guides. Provide whatever background material is available so they have adequate time to prepare. If participants will need to download an application or go through other steps to log in, let participants know in the announcement and set first videoconference start time to allow for access.

Plan to log in early. Make sure you have time to test your audio and webcam. Be there so when newbies log in, you can greet them and help troubleshoot any problems.

Clarify how you will communicate. Is this a meeting or presentation, or a mix?

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**Question 3: How do we communicate & achieve goals?**

**MEETING**

- Facilitator shares agenda, plan and desired outcomes.
- Facilitator sets process for calling on participants and setting time limits.
- Everyone has mic or headset and the ability to speak and interact with the group.
- Use shared whiteboard and other collaborative features.

**PRESENTATION**

- Presenter shares agenda, plan and desired outcomes.
- Presenter makes time for questions or discussion, and explains ground rules.
- Everyone is muted unless presenter calls on them.
- Chat area is open for posts throughout event; presenter or assistant monitors chat.
Preparing to meet in Zoom

Videoconference platforms have fairly similar features so once you learn one, you can quickly adapt to services from other brands. This walk-through uses Zoom.com. You sign in with a free or paid account, depending on your needs. The free account is for “meetings,” while a larger webinar presentation requires a paid account. https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-Webinar-Comparison

Time spent on preparation will save tedious trial and error, embarrassment, or disgruntled participants.

Preparation also means taking steps to ensure meeting security.

Here are a few tips:

- When planning an online meeting, do not publish the link on social media. Use an invitation or registration process.
- Ask attendees to use their own names for log-in so you aren’t confused by pseudonyms. Disallow renaming themselves once in the meeting.
- Set a password, and use the waiting room feature that allows the host to grant individual entry. Lock the meeting once invited/expected attendees are present.
- Consider recruiting a co-host to help with event management.
- For improved audio quality for the event and the recording, mute all participants, and use the setting that restricts them from unmuting themselves. Use use the hand-raising tool to choose people to call on if you want them to speak. In larger groups, use the text chat or Q & A area for input, comments, or questions.
- Use the setting that only permits the host to share the screen. To further restrict unwanted messaging in large meetings, turn off the annotation tool that could allow an intruder to deface your presentation. Make sure anyone you’ve kicked out cannot return. Disable the “allow removed participants to rejoin” option here. See more about host controls for large meetings.

Obviously, if you are in a situation where all avenues for participation must be blocked to avoid disruption, the event is no longer a meeting. Attendees in listen-only mode are not engaged in brainstorming, decision-making, or other interactions essential to collaboration. If you want those interactions, limit the size of attendance and take the steps described here in order to restrict entry so you can ensure that those who are present are the ones you invited.
Step-by-Step Guidelines

Once signed in, you have the option to join or host a meeting. You will see from the dropdown that you can choose webcam video on or off. If you chose “video off” you can opt to have an audio-only call, or audio plus shared screen. You can jump right into a meeting, or schedule one and get a link to share with people you invite.

For this demo I am using “video on.” Once clicked, the Zoom window will appear with the video showing your smiling face. Depending on whether you have a free or paid account, you will be given the option to use computer audio or to call in by telephone. Click “computer audio” and run the tests to make sure your speakers and microphone or headset are working, and adjust the volume.

At the bottom of the window you will see this toolbar.

Mute: When you are not speaking, click the microphone icon so you are muted.

Stop video: Because I choose “video on” initially, the video starts automatically. If you want to stop the video after your introduction, click this button. Also, under this button are options to change cameras, adjust settings, or to create a virtual background when you would prefer not to show the setting from which you are hosting.

Security: Select option to lock meeting, and choose levels of participant sharing.

Manage participants: Invite participants. You can mute all if you are recording or have a large group, then unmute all if you want to allow participants to speak. Under the more button is another option to choose participation levels, and lock the meeting once attendees have logged in.

Chat: Click to allow text chat. Under the “more” button you can select options to allow everyone to chat, or to only allow you to chat with other hoses. You can also share files by clicking the “file” icon under this button.

Share screen: When you click this button, participants can view your desktop. You want your slides or materials ready to view. Also, under this button you see the options that allow participants to share screens. These features are useful for student or employee presentations.
However, under “advanced options” you will want to click “only host can share” when you have a public presentation and want to avoid having hackers or others take over your event by sharing unwanted content.

**Record**: Click to record your event.

Once opened, Zoom gives you a quick-start dashboard from which you can choose to start a meeting, join meetings, schedule meetings, or see meetings on your own calendar. You can choose to fully videoconference, or select lower bandwidth meetings with chat-only, audio-only, or shared screen alternatives.

**Learn more!**
Zoom, and other platforms, offer tutorials and how-to resources that will help you get acquainted with the features of the platform.
## Suggestions for Videoconference Presentations or Meetings

<table>
<thead>
<tr>
<th>Stages</th>
<th>Suggestions</th>
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<tbody>
<tr>
<td>Preparing</td>
<td>• Create and share an agenda and background material to participants, with adequate time to read so they come prepared.</td>
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<td></td>
<td>• Survey students or meeting attendees to determine whether they have access and hardware necessary for full participation, and adapt plans as needed.</td>
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<td></td>
<td>• Create or select slides, images, media, or applications you plan to share. Generate handouts to post during the event.</td>
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<td></td>
<td>• Upload slides and other materials, or arrange on shared desktop.</td>
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<td></td>
<td>• If you have general information to post in the chat area, or questions to pose, write them out so you can cut and paste quickly during the videoconference.</td>
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<td>• Carefully review speaking points so you can minimize the need to look down at notes. If possible, position notes so you do not need to look away or look down. If you must shift from the camera, take the time, before looking down to read notes, to make the best “virtual eye contact” possible.</td>
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<td>• If it is a presentation or large meeting, recruit someone to help manage the videoconference interface, including watching the text chat for questions or problems.</td>
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<td>• Identify technical support available for people with problems accessing or using the videoconference and post a link or phone number.</td>
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<td></td>
<td>• Test microphone and audio.</td>
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<td>• Adjust the webcam to allow for close-up, straight-on view.</td>
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<tr>
<td><strong>Opening</strong></td>
<td>If people log in before the event starts, initiate conversation in the chat area, or point to any pre-event materials.</td>
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<td></td>
<td>Introduce yourself and your role, and others who are presenting or facilitating.</td>
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<td></td>
<td>Review videoconference purpose, process, and agenda.</td>
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<td></td>
<td>Establish expectations, including how and when participants can contribute or ask questions.</td>
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<tr>
<td><strong>Presenting</strong></td>
<td>Stick with agreed-on purpose and time frame.</td>
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<td>Vary tone and visuals to keep audience attention.</td>
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<td>Try to keep eye contact, with minimum time spent reading notes.</td>
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<td>Allow time for questions and discussion.</td>
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<td>Consider including some Q &amp; A time at a mid-point, rather than leaving all to the end. This is of particular importance if the chat area is going off-topic or people are text-chatting questions.</td>
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<tr>
<td><strong>Facilitating</strong></td>
<td>Establish and agree to ground rules for participation.</td>
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<td>Establish and agree to timing and system for letting speakers know they need to wrap-up.</td>
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<tr>
<td><strong>Summarizing</strong></td>
<td>Highlight important points or decisions from the videoconference.</td>
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<tr>
<td><strong>Closing</strong></td>
<td>Signal last question so participants know you are ready to close the event.</td>
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<td>Reiterate any follow-up steps or action items.</td>
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</table>

**Resources for Engaging Meetings and Presentations**

**Avoid death by PowerPoint! Classic but still relevant:**

- http://www.slideshare.net/thecroaker/death-by-powerpoint, and
- http://www.youtube.com/watch?v=KbSPPFYxx3o&feature=related

**Resources for Zoom:**

- 13 Zoom video chat tips, tricks and hidden features - CNET
- Top Zoom Tips for Better Videoconferencing in a Locked-Down World
- OK, Zoomer! How to Become a Videoconferencing Power User
- Tips & Tricks: Teachers Educating on Zoom

**Books:**

(See: http://www.youtube.com/watch?v=hT9GGmundag)
