Zoom Meetings & Webinars Best Practices

**Introduction**– This document lays out our recommendations for settings configurations in Zoom Meeting and Webinars. Because Zoom pushes out frequent feature updates, we provide links to specific instructions on how to use the features. Finally, we will also provide guidance on a select number of general settings configurations that will benefit whiteglove events.

**Meeting vs Webinar** – Zoom’s Meeting and Webinar offerings have grown closer since their original release, however, there are still some key differences. Since all meeting participants are close to having the same permissions level, Meetings should be used for more collaborative event. Webinars are built for one-to-many events, or when the audience is mainly external. See [Meeting and Webinar Comparison](https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-webinar-comparison) for the most up to date information about the differences between the two platforms.

**Meeting Settings** – To access all the meeting settings below, schedule the meeting from the web portal. (See [Scheduling Meetings](https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings))

## Basic Meeting Settings

* **Topic/Description** – Both of these will appear in the invite and be displayed in any type of custom branded object.
* **When/Duration/Time Zone** – Only schedule the meeting for the actual event start time. You will be able to join the meeting before the scheduled time. See [Time Limits for Idle Meetings](https://support.zoom.us/hc/en-us/articles/202460676-Time-limits-for-idle-meetings) for information about meeting length.
* **Recurring Meeting** – We recommend using recurring meetings for multi-day conferences. If the meeting will start at a different time on subsequent days, use the “No Fixed Time” option. (See [Scheduling Recurring Meetings](https://support.zoom.us/hc/en-us/articles/214973206))
* **Meeting ID** – We highly recommend never using the Personal Meeting ID for a scheduled meeting.
* **Passcode –** We do recommend passcodes on all whiteglove meetings. Zoom now requires either a passcode or a waiting room to be enabled every meeting, so having a passcode will allow you to use the waiting room like a webinar practice session. Turn the waiting room on from inside the meeting, admit your presenters and support staff, and then turn the waiting room off once you are ready to start the event. (See [Meeting and Webinar Passcodes](https://support.zoom.us/hc/en-us/articles/360033559832))
* **Waiting Room –** See “Passcode” for our recommendations or [Waiting Room](https://support.zoom.us/hc/en-us/articles/115000332726-Waiting-Room) for more information.
* **Require Authentication to Join –** We recommend using this option sparingly. For most events, the potential for user issues is a much higher concern than the security benefit. ([See Authentication Profiles for Meetings and Webinars](https://support.zoom.us/hc/en-us/articles/360037117472))
* **Encryption -** As of early 2021, Zoom is in the process of making significant changes to their encryption features. While we understand the need for meetings to be secure, we do not recommend using E2EE for all but the most sensitive events because of the large number of features that are disabled or degraded. (See [Encryption for Meetings](https://support.zoom.us/hc/en-us/articles/201362723), [End-to-end (E2EE) Encryption for Meetings](https://support.zoom.us/hc/en-us/articles/360048660871), and [Zoom Security Center](https://zoom.us/trust/security))
* **Video/Audio** – Most of these settings are up to the user’s preference. We always recommend allowing both “Telephone” and “Computer Audio” unless this setting is overridden by a security setting above.
* **Allow Participants to Join Anytime –** We recommend turning this off for any whiteglove event. (See [Allow Participants to Join Before Host](https://support.zoom.us/hc/en-us/articles/202828525))
* **Mute Participants upon Entry –** We recommend enabling this setting for any whiteglove event.
* **Request Permission to Unmute Participants** – We recommend enabling this setting for any whiteglove meeting. (See [Using Pre-approved Consent to be Unmute](https://support.zoom.us/hc/en-us/articles/203435537#h_01EGHB8TMFSCBYGV4C4VP8KCZY))
* **Automatically Record Meeting** – If the meeting will be recorded, we recommend setting the meeting to automatically record. Recording to the cloud allows for more flexibility with the recording. We review recommended recording settings in “General Settings” below.
* **Alternative Hosts** – This feature is extremely useful for whiteglove events. We recommend having at least one Alternative Host and would give this ability to any technical and non-technical support member who is eligible. (See [Alternative Host](https://support.zoom.us/hc/en-us/articles/208220166))

## Advanced Meeting Settings

* **Registration** – Meeting registration is useful to capture additional information or can even be used as the only landing page for the rare public meeting. (See [Setting up Registration for a Meeting)](https://support.zoom.us/hc/en-us/articles/211579443)
* **Breakout Room Pre-Assign -** As of early 2021, this feature is still very broken. Please do not use without extensive testing. (See [Pre-Assigning Participants to Breakout Rooms](https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms))
* **Polls –** Polls are one of the best options for getting an audience engaged in a Zoom event. We recommend using them often. They will need to be pre-configured in the planning stage. (See [Polling for Meetings](https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings))
* **Live Streaming** – Live streams can be useful when trying to reach audiences that are too large for Zoom, or if you want as much exposure as possible for the event. These require careful planning and might need additional resources to monitor the streams and audience interaction. Be aware that without the use of a re-broadcasting service, only one destination is available at a time. (See [Live Streaming Meetings or Webinars using a Custom Service](https://support.zoom.us/hc/en-us/articles/115001777826-Live-streaming-meetings-or-webinars-using-a-custom-service), [Live Streaming meetings or Webinars on YouTube](https://support.zoom.us/hc/en-us/articles/360028478292), [Live Streaming Meetings or Webinars on Facebook](https://support.zoom.us/hc/en-us/articles/115000350406))
* **Language Interpretation -** See [Language Interpretation in Meetings and Webinars](https://support.zoom.us/hc/en-us/articles/360034919791-Language-interpretation-in-meetings-and-webinars)

**Webinar Settings** – Webinars must be scheduled from the Zoom web portal. All the features shared between Meetings and Webinars are covered above. See [Scheduling a Webinar without Registration,](https://support.zoom.us/hc/en-us/articles/204619235-Scheduling-a-Registrationless-Webinar) and [Scheduling a Webinar with Registration.](https://support.zoom.us/hc/en-us/articles/204619915)

## Basic Webinar Settings

* **Q&A -** We recommend turning off chat for webinar participants and forcing them to use the Q&A feature. It is much easier to keep track of conversations in the Q&A box, and this frees up the chat for presenter/support communication. (See [Using Q&A as the Webinar Host](https://support.zoom.us/hc/en-us/articles/203686015-Using-Q-A-as-the-webinar-host))
* **Enable Practice Session –** We always recommend using webinar practice sessions. (See [Webinar Practice Session)](https://support.zoom.us/hc/en-us/articles/206316975-Webinar-practice-session)
* **Make the Webinar On-Demand –** On-demand webinars are good for times where you want to capture registration information after the event has ended. There are other platforms that can be used for this, so we recommend testing this feature against other options that you may have. (See [On-Demand Webinars](https://support.zoom.us/hc/en-us/articles/360000489183-On-demand-webinars))
* **Panelist Invite** – This setting is where you will invite webinar panelists. This should include all speakers, moderators, and support resources. (See [Adding or Importing Panelists to a Webinar](https://support.zoom.us/hc/en-us/articles/115005657826-Adding-or-importing-panelists-to-a-webinar))

## Advanced Webinar Settings

* **Registration –** Webinars offer a more robust registration system than meetings. Unless this information is captured in a 3rd-party platform, we recommend using Zoom’s registration capabilities for all external and most internal events. (See [Scheduling a Webinar with Registration](https://support.zoom.us/hc/en-us/articles/204619915))
* **Email Settings –** These settings are completely up to the event groups’ preference and may require marketing assistance. (See [Customizing Webinar Email Settings](https://support.zoom.us/hc/en-us/articles/203686335-Customizing-webinar-email-settings))
* **Branding -** These settings are completely up to the event groups’ preference and may require marketing assistance. (See [Customizing Webinar Branding Settings](https://support.zoom.us/hc/en-us/articles/115002548166-Customizing-webinar-branding-settings))

**General Settings** – The settings below are the most important settings to have configured for a Zoom event. We recommend reviewing all Zoom’s settings from time to time in order to confirm that you are getting the most out of the platform.

## Meeting Settings

* **Waiting Room** – Enable
* **Embed Passcode in Invite Link for One-Click Join –** We recommend turning this feature on to make the joining process easier for all users.
* **Only Authenticated Users Can Join Meetings –** We recommend disabling this feature unless absolutely necessary.
* **Require Encryption for 3rd party Endpoints (SIP/H.323) –** This feature can cause issues with some codecs, even if encryption is turned on in the device settings. If this feature is turned on, test any codec that may join the meeting.
* **Always Show the Meeting Control Toolbar –** This comes down to preference, but it tends to make managing the meeting easier.

## Recording Settings

* **Cloud Recording Settings –** These settings allow for the user to determine what views are recorded to the cloud. While this comes down to personal preference, we prefer to at least have Active Speaker and Content recorded separately in case that footage is needed for an edit.
* **Add a Timestamp to the Recording –** We will normally turn this off since it makes editing more difficult and can be distracting.
* **Display Participants Names in Recoding –** We also tend to turn this off, especially if we are using title slides or lower thirds.
* **Optimize the Recording for 3rd Party Video Editor –** This feature is critical if the recording will be edited. Not turning this on could cause significantly more work for video editors using almost all major editing tools.