

Facilitating a Program Using Zoom: 8 Tips & Best Practices

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The following is a list of eight tips and best practices that I've come up with from my experience as a facilitator, a learner, and an instructional designer. You don't need to be an expert in zoom or web and our technology to run an engaging and interactive virtual program. The tips below can be helpful regardless of your experience level using zoom to facilitate a workshop or a training. I hope you will find them as useful as I have when using new platform for facilitation.

1. **Be the first to log-in.**

I always try to log into my session 15-20 minutes prior to the start time. Logging in early gives you time to make sure the technology is working, to get any presentations or materials uploaded and ready, and to set up any Zoom features (like a [poll](#)) you plan to use for the program.

2. **Set ground rules.**

It is so important that you start off a Zoom session by getting everybody on the same page. In my experience, the easiest way to do this is by establishing some ground rules. Setting “ground rules” helps your learners feel comfortable about what to expect during the program. Check out the template I've put together of ground rules – I typically start my Zoom session by showing this PowerPoint slide using the [screen share function](#).

3. **Check in with your audience.**

Unlike an in-person program, you won't be able to see the faces of your audience to “read the room.” Instead, you have to be intentional about checking in with your learners – do this by asking for feedback regularly to ensure they understand you and are paying attention. This feedback can be in the form of verbal responses, [typing in chat](#), or [changing emoticons](#). The Association for Talent Development recommends checking in or engaging your audience around every three minutes.

4. **Pause... longer.**

A good facilitator knows the power of pause – in a face-to-face training, we often have to embrace a long pause to give our learners a chance to process and respond. The same goes in a virtual environment... except that you likely need to pause longer. Remember, there may be a lag, so your audience may need a few extra seconds to understand what you say and formulate a response. Don't hesitate to embrace the pause – especially if it means your audience will have the chance to actively participate and engage in your program.



5. Use Zoom's tools to boost participation.

Zoom is full of handy tools that can be used to engage your audience – just because your program is virtual doesn't mean it can't be interactive. Start with one or two of Zoom's features. As you get comfortable, try adding some new ones in! Even small moments of interaction make a big impact for learners. Below are some of my favorite interactive features in Zoom – click the links for video tutorials on each.

- [Non-verbal feedback \(emoticons\)](#)
- [Chat feature](#)
- [Breakout rooms](#)
- [Polls](#)
- [Annotations](#)

6. Anticipate technical difficulties.

This is an online program – undoubtedly, someone's microphone won't work, or someone will share a screen by accident. Take time to become familiar with the [host controls in Zoom](#) so that you (1) won't be too surprised or flustered by any technical mishaps and (2) can quickly find a solution for minimal interruption to your program. Zoom's help center is excellent and worth exploring.

7. Practice!

Still feeling a little nervous about facilitating a program on Zoom? Give yourself a practice run! Find a willing participant (or two) and test out your program. This will help you feel more comfortable and confident facilitating your program virtually. Can't find a guinea pig? Test it yourself! I have done this by logging into Zoom on my computer as a facilitator (host), and on my phone as a participant. This allows me to get a sense for what my audience sees when I implement various Zoom features.

8. Give yourself grace.

Probably the most important tip on this list – when first facilitating your program(s) on Zoom, be kind to yourself. In these unprecedented times, we are all learning new technology and adapting our programs at a rapid pace – most likely, your audience will be more than understanding of any blips in your program. So keep this in mind when something goes awry during your program – because it probably will. All you can do is shake it off and learn from it for your next program.

