

ESSENTIAL TIPS: VIRTUAL MEETINGS IN *Microsoft Teams*

Helpful tips and tricks for using Microsoft Teams to host effective virtual meetings and webinars.



BEFORE THE MEETING

Privacy Considerations

Depending on the needs of your attendees/audience/organization, here are some options you may wish to consider:

- Disable automatic recording so you can announce when recording starts.
- Hide attendee names in large meetings and webinars.
- Give participants the option to change their display name.

Meeting Settings

You can easily include people from outside your organization, even those without Teams, by using their full email address to invite them.

The **Scheduling Assistant** will allow you to see when invitees within your organization are available.

After a meeting is created, a shareable link can be found in the calendar event. This link can be used by anyone.

Enabling the Registration feature will automatically put attendees in a lobby until a presenter lets them into the meeting and prevent non-presenters from sharing content. In public meetings, it also mutes attendees and turns off their video by default when they join. You can customize the registration form.

You can add up to 10 co-organizers to assist in running a meeting.

Facilitation Preparation

You can include the planned agenda for a meeting in the meeting invitation and have the option to allow attendees to edit it.

Always have a dry run that includes the host or facilitator, any co-organizers or presenters, chat monitors, and tech support if possible. Even if this isn't possible, factor in time before a meeting to do a quick tech check.

Familiarize yourself with the process of screen sharing, content sharing, camera/audio options, etc. prior to running your first meeting. Running a test meeting is a great way to do this.

Using Apps

Apps can and should be added to meetings prior to the start.

If you intend on running polls, quizzes, surveys, games, or other audience engagement apps during a meeting, ensure they are prepared beforehand.

Invitees to meetings will be able to access added apps prior to the start of the meeting. You can take advantage of this and encourage pre-meeting discussion, brainstorming, etc.

DURING THE MEETING

Privacy Considerations

Use a lobby to control when participants enter the meeting.

During large meetings and/or webinars, keep attendees muted with cameras off by default.

You can disable attendees' ability to copy, forward, or screenshot the meeting chat.

Meeting Settings

Familiarize yourself with the different roles you can assign to meeting participants and the capabilities allowed to each.

- **Organizers** and **co-organizers** both have all permissions and capabilities.
- **Presenters** have most capabilities, including content sharing and control of recordings, but cannot manage breakout rooms or change meeting options.
- **Attendees** may only speak/share video, use the meeting chat, view files shared by others, and use apps.

If you use a lobby, you can choose to make all attendees wait there until admitted or allow specific subsets of users to bypass it. This setting can be changed during meetings.

Using Apps

Although it is recommended that you prepare meeting content using apps before the meeting, apps can also be added to a meeting already in progress.

Some apps can be highlighted for all participants by selecting "share in meeting." This can be especially useful for live feedback, interactive features/audience engagement, brainstorming/mind mapping, etc. See next page for a list of popular apps.

Useful Keyboard Shortcuts

Function	Windows	Mac
Raise/lower hand	Ctrl+Shift+K	Cmd+Shift+K
Toggle mute	Ctrl+Shift+M	Cmd+Shift+M
Camera on/off	Ctrl+Shift+O	Cmd+Shift+O
Temporary unmute	Ctrl+Space	Opt+Space

Facilitation & Presenting

Help ensure meeting attendees can easily focus on presenters and important content using these features:

- **Spotlight** up to seven video feeds, including yours, to ensure they will be displayed for all participants.
- When using the screen share function or presenting slides, use a **presenter mode** that shows attendees both the content being shared and your video at the same time. This can help keep participants engaged.

Presenter mode types:



Standout



Side-by-side



Reporter

You can choose to share your entire screen or only a specific window.

When sharing PowerPoint slides, you can make use of a virtual laser pointer as well as drawing tools to point out specific information to your audience.

Teams will automatically choose a meeting view it thinks will work best based on who is speaking and/or sharing content. You can also change the view by pinning or spotlighting a video or showing more videos.





Etiquette/Presence

Whether you are a presenter or just a participant, here are important tips for looking and acting your best:

- Sit in a bright room and make use of Teams' "adjust brightness" option. Avoid having light sources aimed at your back/toward the camera. Make sure the light is aimed at your face instead.
- Blur your background or use the stock image background options. Consider using a background that makes use of your organization's branding and colors.
- Sit in a quiet room and/or use a headset; mute your microphone when not speaking. Turn on Teams' auto noise suppression.
- Make use of the meeting chat and the "raise your hand" feature to avoid interrupting the person speaking. Emoji reactions can also show non-intrusive engagement with the meeting.

Accessibility Options

Teams has a live transcription feature that can be used in any meeting. The text is shown next to the video in real time and shows the speaker's name and a time stamp. Live captions, which display at the bottom of the screen, may also be used. Transcripts are saved, captions are not.

(Users have the option to hide their name in captions and transcripts.)

Teams also has the ability to provide multiple languages during a meeting. If you enable interpretation, particular meeting attendees can be designated as interpreters. Others joining the meeting will then be prompted to choose which language to access.

Note: live captions and meeting recordings only function for the audio coming from the main/original speaker's channel.



AFTER THE MEETING

Meeting Settings

When a meeting ends, the meeting chat will remain accessible to all participants and can be used for follow-up, feedback, etc.

If the meeting was recorded, the finished recording will be posted there. Expiration dates for recordings can be changed by the creator/host of the meeting.

Transcripts are made available immediately after a meeting ends and can be accessed in the meeting event on your Teams calendar.

If enabled, attendance reports can be accessed by meeting organizers and co-organizers in the calendar or in the meeting chat. Individual privacy settings can change whether or not users appear in these reports.

Suggested Apps to Use With Teams:

- Games for Work
- Forms
- Whiteboard
- Poll Everywhere
- Ricotta Games & Trivia
- Kahoot
- Mentimeter
- MindMeister
- ask.it
- Slido
- AhaSlides
- Beekast
- Nearpod