Zoom and Video Conferencing Best Practices

The COVID-19 pandemic has presented numerous challenges to our daily routines. In order to stay connected and continue with our work responsibilities, we have turned to video conferencing. Video conferencing allows us to connect with dispersed individuals in an easy to use, low cost format. However, as we continue to progress through months of social distancing, individuals are finding the constant engagement in video conferencing an added mental strain. Here are the top tips that you can incorporate in your practice to ensure your video conferencing meetings are productive and efficient.

Before the Call Begins	
Arrange Your Space	Designate a space in your home for video calls, this may be separate from your designated workspace. Having a separate space for video calls will prepare you from them mentally and can even make you more productive during these calls.
Set Boundaries	Make sure others at home are aware that you are going to be on a video call and request that they not interrupt you. This can help you focus during the call and can make the process less stressful for you.
Use Time Blocking	Schedule time specifically for video calls and try to limit calls to this time only. This can help you mentally prepare for video calls during this scheduled time slot and also provide a few hours each day that are entirely free of video calls.
Switch Devices	If possible, use a phone, iPad or other portable device rather than a laptop to conduct video calls. This will allow you the freedom to walk around and/ or move your body while you are on the call. This can reduce the physical strain of video calls on your body.
Assess Necessity	Determine if a video call is necessary. Define an agenda for a scheduled video call. Ask others participating to note what they want to achieve from the call. If an agenda can easily be discussed via emails or other communication, avoid having the video call altogether.
Setup Your Equipment	1. Ensure your video call space is appropriate and conducive for working. 2. If required, download a McMaster Virtual Zoom Background. 3. Test audio equipment (headphones and microphone) before joining the meeting. 4. Review Screen Sharing and ensure documents to be shared are available. 5. Close unnecessary tabs on your browser. 6. Turn off email or messaging notifications.
Look Your Best	Lighting should come from in front of you (behind your monitor) or from the side in order to best light your face. The recommended setting is to use one steady lamp, directly by your face, for even lighting. Avoid sitting with your back to the window, as the camera will often expose for the light and make you into a silhouette.
Perspective	Avoid the "wide-angle face" by stepping or sitting back from the camera. Most cameras on smartphones or webcams are wide-angle perspectives. By sitting too close, you will look distorted to other meeting participants. For the best results, it is recommended that the camera be placed far enough away so that the video participants are able to see your shoulders and above, approximately the top 1/3 of your body.
Camera Height	The position of your webcam, laptop or device is equally important as perspective or lighting. Best practice is to make sure your camera is at or just above eye level, so you're looking slightly up and into it. Test your video settings and adjust the camera as required to ensure you are putting your best image forward. Also, make sure your camera is on a steady surface to prevent shaking.
Ground Your Attention	Take a few moments before clicking "Join" to notice whatever is present in your mind and allow yourself to arrive fully to the moment at hand. If you're feeling unsettled or preoccupied, you might place your hand on your heart in a supportive and comforting way.

Share the Agenda	Share the agenda with your participants in advance of the meeting. It can often be difficult to follow visual cues in a virtual format. Therefore, accidental interruptions are common. Setting an agenda can help ensure that everyone has an opportunity to speak and participate in the meeting.
Share Meeting Link and Instructions	Share the appropriate meeting link and instructions on how to connect approximately 48 hours in advance of the meeting. Ensure participants are aware of the meeting platform, and any requirements for account creation, software download, etc. Keep the information brief while ensuring details including time, date, purpose and materials are included appropriately.
Consider the Appropriate Platform	McMaster University Office of the AVP and CTO has provided the McMaster community with a brief but informative table of the campus-supported video conferencing software available and best uses for each. Ensure you are using the best tool available.

During the Call

Break the Ice	Start the call by greeting each individual joining the meeting and take a few minutes for small talk and greetings. This can help ease the tension and can create a connection amongst everyone on the call.
Keep Distractions Away	Build a habit of single-tasking. Avoid responding to emails, talking to others, playing games or getting other work done while you are on the call. This will help you avoid multitasking and can lessen the mental load of the video call. If you aren't talking, mute or turn off your microphone and avoid having side conversations which will distract from the meeting. If you need to take care of business outside of the meeting, turn off your camera. Turn the camera back on when you are present in the meeting again.
Use Earphones	Try using headphones or earphones during your call instead of relying on your phone or laptop's built-in microphone. This will prevent ambient sounds from disrupting the call.
Use a Microphone	Use a microphone when speaking; ensuring the microphone is on when speaking. Make sure the microphone is close enough to puck up your voice, no matter what location you are in.
Screensharing Etiquette	When screensharing, if you are referring to something on the screen, describe where your cursor is going or what it is that you are referring to. Avoid "here" or "this" when describing something. Instead use more descriptive language this will increase access for everyone attending the meeting.
Use Pen and Paper	Take notes down by hand. This will push you to pay attention to what is being said. Making physical notes can also improve your retention of what was discussed in the conversation.
Choose Speaker View	In Speaker View, the individual speaking will be projected with a large window in the centre of the Zoom window. This view provides a more direct attention view, similar to one which we are used to having in a conference room. This also allows you to direct attention to the individual speaking. Zoom provides the option to change between Gallery and Speaker view.
Utilize Platform Built-In Tools	Most platforms have built-in engagement tools that allow participants to actively engage in meetings in a variety of ways beyond speaking. Some of these features include: • In-Meeting Chat • Raise Hand • Polling • Sharing Multimedia Content • MS Teams Whiteboard

Do the Call Without Video	If you are anxious or uncomfortable in front of the camera, switch off your video. Be proactive in letting others know about this decision and also be flexible enough to switch on the video when it is absolutely required. This can also help to reduce anxiety if you are feeling self-conscious of your own appearance and/ or surroundings and allow you to focus on the meeting.
Transcription Services	While the close captioning of all recorded material distributed as part of a course must be included, this may also be a consideration for meetings among the McMaster community depending on topic, content and audience. McMaster University offers solutions for transcription services for faculty and staff using a variety of campus-support software including Microsoft Teams, Zoom and WebEx. For support contact UTS.
Recording Services	Record the call and let attendees know that you are doing so. Internet bandwidth can vary so recording the call ensures that everyone can access the information. Each campus-supported software allows for the recording of meetings. For more information, visit: • Zoom • WebEx • Microsoft Teams

Video Conferencing Security

Passwords	Depending on the number of participants and content of the meeting, you may choose to disable embedded passwords. This will keep the password separate from the meeting link and will require participants to manually key in the password upon entering the meeting. Organizers are entitled to disable the embedded password option when creating the meeting link in Zoom or WebEx.
Waiting Rooms	Turning on the waiting room allows organizers to admit individual participants into the meeting at their discretion. This can pose problems when identifying each and every person trying to access the meeting. It would be exceptionally difficult to monitor for large meetings or conferences. Both Zoom and WebEx have waiting room settings that can be customized per meeting. In this scenario, participants must identify themselves by full name to be admitted into the meeting space. Your profile can be customized in Zoom and WebEx.
Host Settings	There are a variety of host settings that can be utilized to mitigate the risk of intrusion during a video conference. These settings include: • Locking the Meeting (Zoom and WebEx) • Control Screen Sharing (Zoom and WebEx) • Screen Annotation (Zoom and WebEx) • Mute Participants (Zoom and WebEx) • Remove Participants (Zoom and WebEx)
Appoint a Co-Host	Appoint a trusted meeting attendee to Co-Host. This allows the attendee many of the same privileges and control features as the host and allows for an extra individual to help monitor and oversee activity as well as allow participants into the meeting. A Co-Host can be enabled in Zoom and WebEx.
Closed Registration	Closed registration helps to mitigate the risk of potential intruders; however, it does restrict the ease of participants joining the meeting. Participants must register and wait for further instructions to join the meeting. • Enable Registration on Zoom • Enable Registration on WebEx • Allow Only Authenticated Users Zoom

After the Call

Take a Break	Cool down, take a break after a call is done in order to allow yourself time to unwind from the constant digital stimulation. Take a few deep breaths and have a glass of water. Stay away from gadgets and the internet at this time.
Get Moving	Do a few light stretches and splash some water on your face and eyes once your call ends. The stretches can help combat the physical strain of video calls and the water can help your eyes feel cool after looking at a screen for long.
Move Workspaces	Shift to a different workspace to help yourself fully unwind. If you can't shift to another space, change the lighting in your room or sit in a different position.
Go Offline	If you can, follow up a video call with in-person interaction of some kind. Whether this is speaking to your partner, children, parents or just playing with a pet for some time. If you live alone, you could spend time in nature or picking up a good book.
Build in Breaks	Build in time in your schedule for breaks in between video calls or meetings. This time can be as little as 15 minutes but will allow you the opportunity to transition from one meeting to another.

Supports

McMaster UTS Zoom Application Support
Faculty of Health Sciences CSU WebEx Support
McMaster WebEx Account Request
McMaster CTO Zoom Quick Start Guide
Faculty of Health Sciences CSU Working From Home Resources
University Technology Services Office 365 Hub for MS Teams

Related Articles

How to Avoid Zoom Fatigue While Working from Home	An article from Thrive Global by Sweta Bothra, Lead Therapist at InnerHour, a Mental Health Platform, speaks to the disadvantages of the video conferencing and how these types of communication can lead to burnout.
How to Combat Zoom Fatigue	Why do we find video calls so draining? In part, it's because they force us to focus more intently on conversations in order to absorb information. They also require us to stare directly at a screen for minutes at a time without any visual or mental break, which is tiring. To make video calls less exhausting for yourself, try using a few research-based tips from this article from the Harvard Business Review.
Zoom Fatigue is Setting in: What it is and how to Prevent it	This article from CBC speaks to the term 'Zoom fatigue', the mental effects of constant video chat meetings and provides several possible measures that can be taken to prevent the drain individuals may feel from continually meeting by video conferencing.
The Ethical Advantage of Video Conferencing in Medical Education	The COVID-19 pandemic has mandated drastic changes not only in the manner in which patients are treated, but also in the way that medical education and knowledge is disseminated. The risks and potential consequences of viral transmission among medical staff have necessitated replacing convention face-to-face interactions with video conferencing. Although this change may be regarded by some as troublesome or inconvenient, we believe that it can have several clear advantages.
Experience With Nursing Students Using Interactive Video Conferencing	This article shares the author's personal experience with Interactive videoconferencing with Nursing students.