A Zoom Success Guide to Webinar Scheduling & Customization

How to use this guide

This is not a comprehensive how-to, but a quick reference guide through the process of scheduling and customizing your webinars. You will find best practices and tips included, as well links to our full support guides found in our Help Center.

Zoom hosts weekly deep dive training sessions Zoom Webinars, free and open to the public. Register for the next live training session at Zoom.us/livetraining

If you are unable to join us live, please note that we also have recordings of each of our training webinars accessible for your convenience on the same page.

Contents

Schedule Your Webinar

Set the Date, Time, and Duration of your webinar. The time zone should be the same as the webinar host. Attendees join time will vary by time zone. Duration allows for easy time-blocking on calendars and does not limit your actual event live time. View the full guide to scheduling webinars on our support site.

When	12/20/2019	📅	9:30	⌄	AM ⌄
Duration	1 ⌄ hr 0 ⌄ min				
Time Zone	(GMT-8:00) Pacific Time (US and Canada) ⌄				

Will you host this webinar again?

Schedule a Recurring Webinar. Best if you are hosting a series or set of webinars. Choose a specific daily time, a custom weekly schedule, a specific day of the month, or set to "no-fixed" time for maximum flexibility. View the full guide to scheduling a recurring webinar on our support site.

☑ Recurring webinar   **Every month on the First Tue, until Oct 20, 2020, 11 occurrence(s)**

Recurrence	Monthly ▾
Repeat every	1 ▾ month
Occurs on	○ Day 3 ▾ of the month
	⦿ First ▾ Tuesday ▾ of the month
End date	⦿ By 10/20/2020 📅 ○ After 7 ▾ occurrences

Requiring Registration for a Recurring Webinar

Customize registration enablement. Which webinars will registration allow your attendees to access?

Registration
☑ Required
⦿ Attendees register once and can attend any of the occurrences
○ Attendees need to register for each occurrence to attend
○ Attendees register once and can choose one or more occurrences to attend

- **Attendees register once and can attend any of the occurrences -** Registration allows registrants to attend all of the occurrences. All dates and times of the webinar will be listed and the registrant will be registered for all occurrences.

- **Attendees need to register for each occurrence to attend** - Registrants need to register separately for each occurrence to attend. They can only choose one date and time on the registrant page.

- **Attendees register once and can choose one or more occurrences to attend** - Registrants register once and can choose one or more occurrences to attend. They will need to select which dates and times they would like to attend and they will only be registered for those occurrences. They can choose multiple options.

See the full guide to scheduling a webinar with registration on our support site.

Have your own registration tool or don't want to use registration? Schedule a webinar without registration.

Invitations & Registration

Invitations   Email Settings   Branding   Polls   Q&A   Integration   Live Streaming

Invite Your Panelists

Who are your Panelists? Invite your guest speakers or presenters as *Panelists.* Panelists are allowed to use their microphone and webcam as well as share content. Panelists also have access to view and manage the Q&A* or chat during your event. Zoom supports up to 100 panelists on any webinar and they can all be on video.

Invite Your Attendees.

Your attendees will be in "Listen & View Only Mode" Attendees will not be able to activate their webcam nor their microphone. If you scheduled your webinar *without registration*, your attendees will use your "Link to join Webinar" to join you.
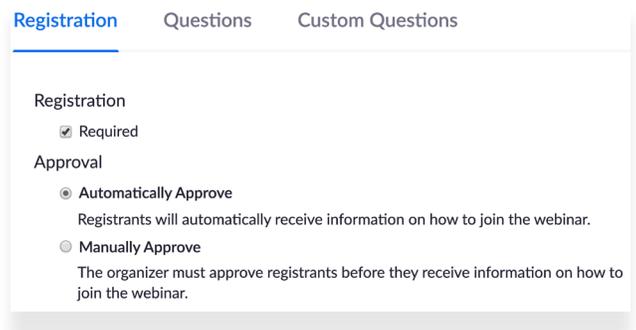
Customize Your Registration

Learn about your audience

Draft a registration form that gathers all of the information that you need to collect and be sure to remove any questions that are not completely necessary for your event analysis.

Registration   Questions   Custom Questions

Registration
☑ Required

Approval
◉ Automatically Approve
    Registrants will automatically receive information on how to join the webinar.
◯ Manually Approve
    The organizer must approve registrants before they receive information on how to join the webinar.

If you scheduled your webinar with registration, send your attendees the "Registration URL" so that they may register to join your webinar.

Promoting across multiple communication channels like social media and email? Consider using Zoom's Source Tracking URL tool. View the full guide to webinar registration source tracking on our support site.

Create different registration link for source tracking ❓   Add

Source tracking allows you to see where your registrants are coming from. You can create unique registration URLs for each type of medium you use to invite attendees. You can add up to 20 source tracking URLs.

Source Name	Tracking URL
Facebook	https://livetraining.zoom.us/webinar/regis
LinkedIn	https://livetraining.zoom.us/webinar/regis
Export report in CSV file	

View the full guide to webinar registration customization on our support site.

Select Email Language:English

Email Contact: Zoom Training, success.training@zoom.us

Invitation Email to Panelists

Confirmation Email to Registrants Send upon registration

Reminder Email: Send 1 hour and 1 day before webinar

Follow-up Email to Attendees: Send 1 day after the scheduled end date

Follow-up Email to Absentees: Send 3 day after the scheduled end date

Using Email Settings

Use registration to get the most from Email Settings

- **Confirmation Email**: Use the body this email to describe the event your attendees signed up for. Provide any other information you want your attendees to have before joining the webinar.

- **Reminder Emails**: Zoom will send a brief reminder email to all registrants 1 week, 1 day, and/or 1 hour prior to the event.

- **Follow Up Email to Attendees** and **Follow Up Email to Absentees**: Both emails default to sending one day after the event. Edit these emails as needed and add custom text. This is a good opportunity to reiterate your call-to-action and provide a link to the recording of the event, next steps to keep the conversation going, links to resources, or a brief FAQ based on questions received during the event.

View the guide to editing your webinar email settings on our support site.

You may also disable these emails to have follow-up emails sent from an external service if you prefer.

Using Branding for your Registration Page

You can customize your webinar registration page with a color scheme, banner, logo, and speaker information, including descriptions and profile picture for up to three speakers. Speaker information is also included in the webinar invitation email and webinar attendee confirmation email.

Banner   Your banner is displayed at the top of your invitation page.

Change   Delete   Add Description

Image requirements:
- GIF,JPG/JPEG or 24-bit PNG
- The suggested dimensions: 640px by 200px
- The maximum dimensions: 1280px by 400px

Logo   Your logo is displayed on the right side of the webinar topic on your invitation page, registration page, and in the email invitation to the webinar.

Change   Delete   Add Description

Image requirements:
- JPG/JPEG or 24-bit PNG
- The suggested dimensions: 200px by 200px
- The maximum dimensions: 400px by 400px

Speakers   You can add information for up to 3 speakers in your webinar. Attendees see the speaker information in the email invitation and on the registration page.

Add a speaker

Post Attendee URL   https://zoom.us/livetraining

Post Webinar Survey   Zoom will open a survey page in attendees' browsers after leaving the webinar

- **Banner -** Your banner will be displayed at the top of your registration page.

- **Logo -** Your logo will be displayed on the right side of the webinar topic on your invitation page, registration page, and the invitations to the webinar.

- **Post Attendee URL** can be used to redirect users to your organization's website or any other page you specify after they leave the Zoom Meeting or Webinar. View the article on this feature from our support site.

- **Post Webinar Survey** allows you to configure a *post webinar survey* to launch at the end of the webinar. You will need the web-link to your survey which will be provided by your preferred surveying tool or service.

View full guide to webinar registration branding on our support site.

Polling for Webinars

The polling feature for webinar allows you to create single choice or multiple choice polling questions for your webinars. You will be able to launch the poll during your webinar and gather the responses from your attendees. You also have the ability to download a report of polling after the webinar. Polls can also be conducted anonymously, if you do not wish to collect attendee information with the poll results.

"Polling questions are a great way to get an audience engaged. These little breaks keep the content dynamic while giving everyone a change to participate and refocus. Just remember the golden rule – make this about them, not you."

Add a Poll   ✕

Enter a title for this poll.

☐ Anonymous? ⓘ

1.

Type your question here.

⦿ Single Choice   ○ Multiple Choice

Answer 1

Answer 2

Answer 3 (Optional)

Answer 4 (Optional)

Answer 5 (Optional)

Answer 6 (Optional)

Answer 7 (Optional)

Answer 8 (Optional)

Answer 9 (Optional)

Answer 10 (Optional)

Delete

+ Add a Question

Save   Cancel

View the full guide to Polling for Webinars on our support site.

Webinar Question & Answer

The Q&A feature for webinars allows attendees to ask questions during the webinar and for the panelists, co-hosts and the host to answer their questions.

The Q&A settings configured is for the default settings when you start this webinar.
☑ Allow anonymous questions

Allow attendees to view
◉ answered questions only
◯ all questions ☑
    ☐ Attendees can upvote
    ☐ Attendees can comment

[Save] [Cancel]

- **Allow anonymous questions**: Check this option to allow participants to send questions without providing their name to the host, co-host, and panelists.

- **Allow attendees to view**: Check either if you want attendees to be able to view **answered questions only** or **view all questions**.

Note, if you choose for attendees to view all questions, you can choose if you want attendees to be able to up-vote questions and/or comment on questions. With the public Q&A feature, attendees can answer each other's questions and if enabled, they may also up-vote each others questions.

View the full guide to getting started with Question & Answer on our support site.

Integrations

Integrations help connect Zoom to your existing workflow enabling more productive lead generation or automating payment and data collection processes.

Zoom app integrations support a best-of-breed technology strategy and offer flexibility in how you do business.
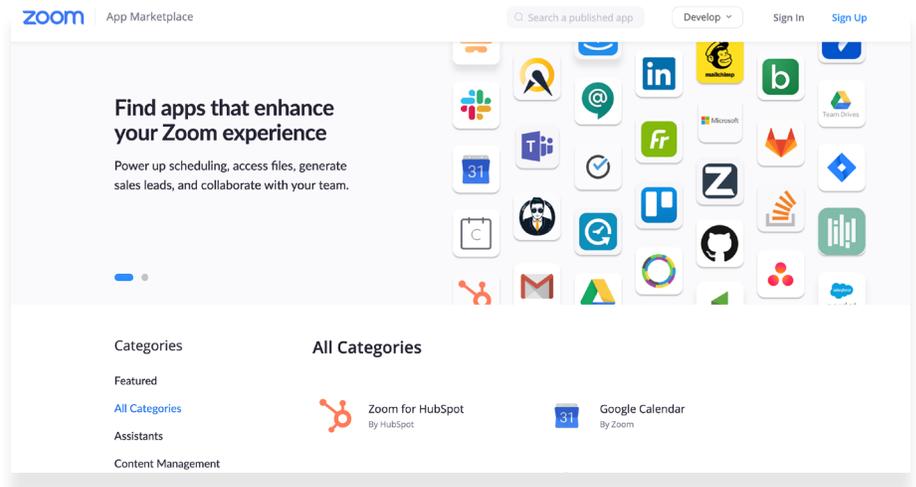
Works with
- ☐ Zoom Meetings
- ☑ Zoom Webinars
- ☐ Zoom Rooms
- ☐ Zoom Phone
- ☐ Zoom Chat

Explore the Zoom App Marketplace and check the **Works with Zoom Webinars** box to see what app integrations are available to extend your platform.

Can't find an integration in our Marketplace? You may find the integration is available with Zapier – You can search all Zoom application integrations enabled by Zapier on the Zapier website.

View the full guide to getting started with integrations on our support site.

Live Streaming Your Webinar

Zoom makes it easy to live stream your webinar to another service. Live streaming can help you to reach a wider audience, build your community, and be an influencer. If you're trying to prospect or build a list, you will want people to register to join the webinar. Consider streaming a portion of your webinar, share the link to register in a comment, and encourage them to

join the webinar in progress. This way you capture their registration details.

Facebook Live

You can stream a Zoom Webinar or Meeting live on Facebook to your Facebook timeline or a group or page that you are an admin for. This allows your participants to join via Zoom or viewers to watch and comment on Facebook Live.

View the guide to streaming to Facebook Live on our support site.

Workplace by Facebook

You can stream a Zoom Webinar or Meeting live on Workplace by Facebook pages or groups that you are an admin for. This allows your participants to join via Zoom or viewers to watch and comment on Workplace by Facebook Live.

View the guide to streaming to Workplace by Facebook on our support site.

YouTube Live

You can stream a Zoom Meeting or Webinar live on YouTube. This allows participants to join your meeting via Zoom to view it and comment on it via YouTube. During the live event, there will be an approximate 20-second delay between the actual Zoom Meeting or Webinar, and the Live stream.

View the guide to streaming to YouTube Live on our support site.

Custom Live Streaming Service

If configured by your account administrator, you can live stream a webinar to a custom platform. If you configure this before the webinar, you can begin streaming with one click after your webinar begins.

View the guide to setting up your custom live stream on our support site.

Online Event Consulting

Our Goal

Enable all Zoom users and encourage exceptional results in deploying Zoom Video Webinars and Zoom Meetings by providing expert guidance throughout your event process.

Preparing for Your Live Event

If online events fail to meet expectations, it is often due to a lack of planning and adherence to best practices. Please use our Online Event Best Practices guide to help you meet and exceed expectations in your online events. You can find the guide **here** and if you want help, we're here for you! **Visit our support page** to learn more about our Online Event Consulting Services and let us help you get the most out of your online events.

Zoom Online Event Consulting Services

Maybe you're a bit new still and feel like some advice would help with that big meeting or webinar. Or perhaps you're looking to host a large-scale event with many moving parts. Our Zoom Online Event Consulting (OEC) team is here to assist you. Whether you want to take a deep dive into the platform and become a Zoom expert, or have the extra, on-hand support from your provider, we have a solution for you and look forward to helping you run smooth online events with confidence.