Tips for Large Meetings

Some Technical Info &
Some "Best Practices"
to use as you wish
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ZipDX

Large Conference Challenges

- ## Noise!
  - With so many participants, one or more will likely inject unwanted noise
  - In a "normal" (in-person) meeting, only one or two people would talk at once
  - The conference call challenge is to have only the "real talkers" heard by others
- ## Knowing who's on the call
- ## Getting stragglers on board
- ## ZipDX has several tools to help make this happen
- ## Lecture Mode
  - Only a few people are enabled to talk; others are muted
  - Can be set in advance or invoked during the call
- ## Conference Dashboard
  - Real-time status and control via the web
  - Identification of talkers and noise-makers and talkers
  - Invocation of Lecture mode and individual muting
- ## Keypad Commands ("Star" codes)

The Problem with Noise

- The job of the conference bridge is to merge all the voices
- With a large number of participants
  - Several people making "a little bit of noise" will sound quite bad when it's added up
  - The chances of once person making a lot of racket is pretty high
- Advice to participants (and hosts too!):
  - Mute yourself if you aren't active in the current conversation
    - Press *6 to toggle ZipDX muting on and off (you will hear an announcement)
    - Use the mute button on your phone (if there is one)
    - Use ZipDX muting before placing the conference on hold (if you have "music on hold")
  - If you are at your desk, pick up the handset when you speak (vs. speakerphone)
  - Connect using a "land line" instead of a mobile phone if you have a choice
  - Check the quality of your headset (some are great, others are awful)
  - Avoid Skype and similar networks if a conventional connection is available
- ZipDX has some automatic technology to reduce noise
  - "Buzz Off" filter removes most noise associated with Blackberry's
  - "Talker Detection" tries to determine who is talking
- Soon we'll show you tools the host can use to manage noise

Knowing Who Is On The Call

- People usually want to know who else is on the call
- Name announcements and even the chime can be tedious
  - Everybody always asks, "Who just joined?"
  - In large conferences this is disruptive
  - Especially a problem with late joiners & early leavers
- ZipDX lets you turn off the announcements & chimes
- ZipDX dashboard continuously updates the participant list
- Press *33 and ZipDX will play participant names
  - Takes a long time for a big conference; press * to cancel
- The host should manage attendee announcements
  - Let people know as you start the meeting who is present & missing
  - Give occasional attendance updates at natural breaks
  - Direct attendees to the dashboard if they "need to know"
  - It may not be necessary or desirable to share all the detail

Getting Started on Time

- **Starting on time is always a conference call challenge**
  - Even tougher when you have a large group
  - Make it a practice to start promptly and hopefully people will get the hint!

- **Use the ZipDX Call-Me feature**
  - Invite participants using their E-mail addresses
  - Encourage participants to activate Call-Me in their ZipDX profile
  - Participants can program multiple numbers; all can be called at once
  - If no response, ZipDX will call back after 3 minutes, then give up
  - Dial-in option is always available
  - Call-me call can serve as a reminder, even if you can't join at that instant
  - Once set, the feature is automatic for future conferences

- **As a host, you can DIAL OUT to any number right from the bridge**
  - If a required participant failed to connect (or you didn't invite them in advance)
  - Use the ZipDX dashboard or the *98 command to dial their number
  - The new guest will be connected directly into the conference
  - If you get voice-mail or need to disconnect, use the Dashboard or dial *991
  - You can add as many people as you wish this way
  - If you need to converse with the guest prior to joining them to the conference, move into a "subconference room" before placing your outbound call

ZipDX Lecture Modes

- Lecture modes impose muting automatically
    - Rather than everybody having an "open mic" participants are muted when they join
    - This keeps the noise level down; only those needing to talk are un-muted
    - ZipDX announces to participants individually when they are muted and un-muted
    - The conference automatically goes into "soft lecture" if participant count exceeds 50

- "Hard" Lecture Mode
    - Participants <u>cannot</u> un-mute themselves
    - Hosts control muting via dashboard
    - Hosts cannot be "hard muted"
    - Participants can indicate they want to speak by pressing *1
    - A "hand raised" icon will appear on dashboard
    - Hosts can "call on" raised hands to let those people speak
    - Best for true "lecture" or "panel discussion" format followed by Q&A session

- "Soft" Lecture Mode
    - Participants can un-mute themselves by dialing *6
    - Can be applied to hosts as well as participants
    - Can be controlled from dashboard by hosts (can mute anybody) and participant (can only mute self)
    - Participants can use *1 (hand-raising) if they wish
    - Best for well-behaved groups!
    - Hosts may need to remind participants to re-mute themselves (or do it for them)

ZipDX Tools

- ## Before the conference starts:
  - Use the Portal at www.ZipDX.com to set conference preferences
  - Set up conference templates customized for your various meeting types
  - Schedule the conference via the Portal or your electronic calendar
  - REMEMBER: ZipDX can call you at meeting time
    - List your co-hosts so that it can call them also
    - Invite participants using their email addresses, if appropriate
    - Use the "Host advance start" setting and ZipDX will call hosts ahead of time

  Host advance start   15 minutes ▼ (Explain)

- ## Once the conference is underway
  - Launch the ZipDX Dashboard
  - Use "Star-Codes" from the phone

- ## View your conference at www.ZipDX.com

Mark your co-hosts so they can help, and so they will not be subject to "hard" muting.

If using the electronic calendar interface to set up the meeting, put "(HOST)" in the "Display Name" to mark an invitee as a host.

Make your selections regarding chimes, name announcements, waiting room, recording, transcription.

Date/Time

Conference start time   Jun ▾ 17 ▾ , 2010 ▾ [📅] PM ▾ 02 ▾ : 00 ▾   Timezone US/Pacific

Set start time to now

Settings

Topic   Budget Review   Account   ZipDX Advisors ▾

Conference Code   [   ] (optional) (Explain)

Participants

Note: You must click on the "Save" button for participant changes to take effect.

[   ]   Add   Add participants one at a time by entering the E-mail address in the box and clicking ADD.

	Email	Host	Status
(remove)	mquayle@zipdx.com	Yes ▾	Registered
(remove)	mrichards@zipdx.com	No ▾	Registered
(remove)	asolomon@zipdx.com	No ▾	Registered
(remove)	noel@zipdx.com	No ▾	Registered

Participants can invite others? Yes, all participants can invite others ▾

Meeting Type   Audio & WebShare ▾   (Explain)

Project Tracker   [   ]   (optional) (Explain)

Organizer   dfrankel@zipdx.com ▾

Audio Features (hide)

Play Entry and Exit Chimes?   Yes ▾

Announce Participant names?   No, do not play names ▾

Waiting Room active?   Yes, host must move participants into meeting ▾   (Explain)

Launching the Dashboard

- Once the conference is active, log in at www.ZipDX.com
- Click on "HOME" tab (refresh if necessary)

- Click on Dashboard & it will open in a new window

Using the Dashboard

"Lecture" shows the current lecture setting and lets you set/clear hard and soft lecture modes.

These tabs let you select ALL participants, or just "active" (hosts, talkers, & those with hands raised or votes cast.)

If any votes have been cast, the vote tally will appear.

The Room summary is shown when all participants are not in the main room. Click a room number to view just that room.

Choose how participants are sorted by clicking the column heading.

⭐ Host
📶 Wideband
✋ Hand Raised
👋 Called On
🎤 Talking
🎙 Recently Talked
❌ Soft Muted
🔒 Hard Muted
6 Vote Cast
↪ Sub-Conference
↪ Waiting Room

"Settings" gives you access to things like chimes & announcements, conference locking & waiting room.

The top row of "Host Controls" are only available to hosts. The buttons "light up" when certain features are active (like recording or lecture mode).

The "activity box" shows who is talking, joining & exiting.

The "chat box" lets dashboard users communicate with each other.

The participant list shows who is here … and who is not!

Screenshot — ZipDX Participants: 11, Duration: 3?m - Mozilla Firefox
https://dev.zipdx.com/Dashboard/init/5239

Host Controls Lecture (HARD) Settings Rooms Record/Transcribe (ON) Dialout End

All Participants: 11 | Active Participants: 8 | Show Conf Stats

Vote	1	2	3	4	5	6	7	8	9
Tally	0	1	0	4	2	0	0	0	0

Rooms All — Main 9 | 1 2 | 2 0 | 3 0 | 4 0 | 5 0 | 6 0 | 7 0 | 8 0 | Wait 0

Sort » Name Hand Audio Vote Room

Alex Thompson (IBM)
Alice Remington (Aetna)
Chuck Wilson (Exxon)
⭐ David Frankel (ZipDX)
Fred Swanson (IBM)
Hillary Ascott (Microsoft)
Keith Brown (Exxon)
Nancy Fillmore (PWC)
Peter Shaw (NASA)
Sarah Watson (Oracle)
Victor Ingles (Microsoft)
Mike Quayle (ZipDX) — Invited
Trevor Waite (British Petroleum) — Invited
Zach Cornish (Microsoft) — Exited

Activity help
Alex Thompson / IBM joining
David Frankel / ZipDX recently talking
Fred Swanson / IBM now talking

Conference-Wide Chat
David Frankel -- ZipDX
Mike warned me that he would be late, or maybe a no-show. [1m19s]
Make sure we give Keith time for his pitch. [11m29s]
Peter Shaw -- NASA
I also need 3 minutes before we end. [16m8s]
David Frankel -- ZipDX
No problem Peter. [16m14s]
Sarah Watson -- Oracle
Chuck, do you have the latest numbers from Texas? [17m53s]
Chuck Wilson -- Exxon
Yes Sarah, let's move to room 2 to discuss. [18m4s]

Msg:
☐ Check to send only to hosts.

Done

Participant Interaction

Click a participant's name to open the control menu.

All these options operate on a single participant.

• Change the name displayed for this participant

• Promote a participant to a host (or demote a host)

• Adjust muting.

• Move the participant between rooms.

• For larger meetings, lecture mode (hard or soft) should be enabled

• For informal meetings, use soft lecture:
  – Announce: "If you would like to make a comment, press Star-Six on your phone to un-mute."
  – Participant presses *6 and hears: "You are now un-muted."

• To conduct Q&A (conference in hard lecture):
  – Announce: "If you would like to ask a question, please press Star-One on your telephone"
  – Participant presses *1 and hears: "Your hand is now raised. You are number three."
  – On the participant display, click "Hand" for the "Sort Order" – the raised (blue) hands will come to the top
  – Click the top participant, and select "Call On Participant"; their hand will turn green.
  – They will hear "You have been called on by the host. Please begin speaking" and they will be un-muted.
  – When you are finished with that participant, call on the next participant, or re-select the first and click "Lower Hand."

• To take a survey (mute setting does not matter):
  – Announce: "We need to decide where to have the sales off-site. If you prefer Oahu, press Star-2-1; for Orlando, *22"
  – Participant presses *21 and hears "Your vote is set to 1."
  – Dashboard will show individual vote settings, and a tally of all votes at the top.

Using the Waiting Room

With the Waiting Room enabled, new participants hear music instead of joining the main conference. They can only be moved out of the waiting room by a host.

The host(s) hear a "knock-knock" sound every minutes when somebody is in the waiting room.
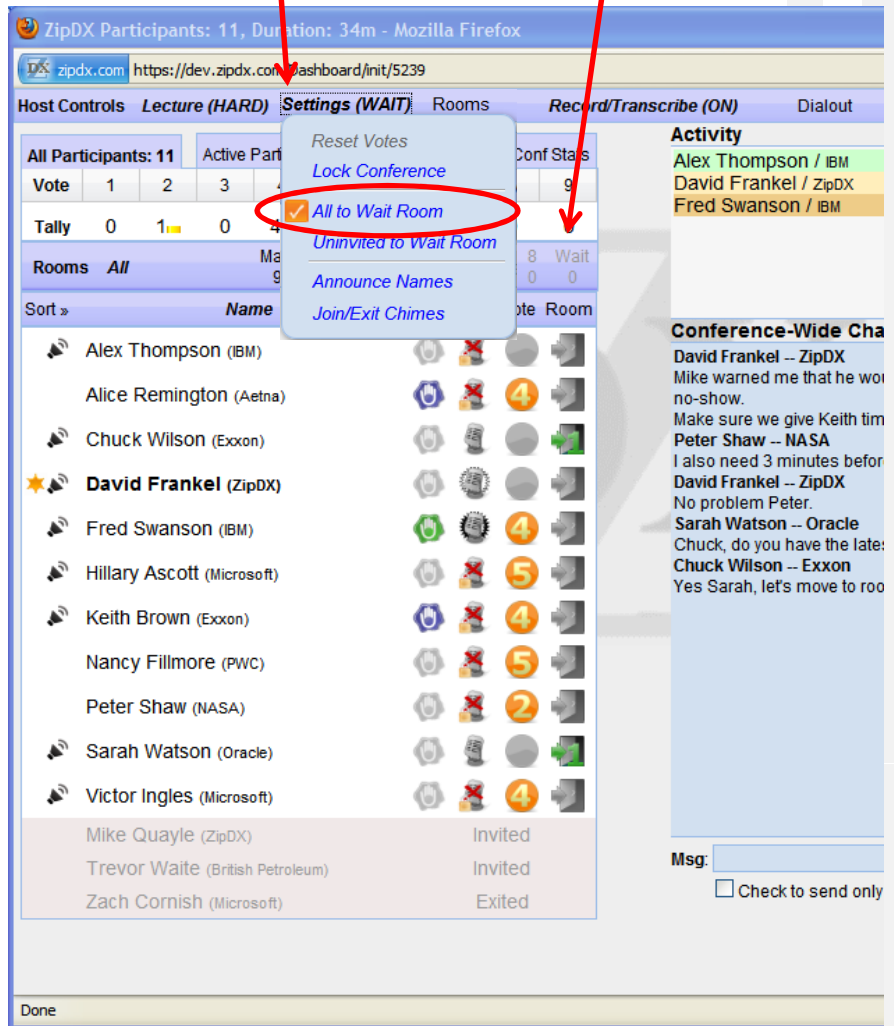
Participants in the waiting room are marked with the red-arrow room icon:

As a host, you can move people one-at-a-time into the main conference by clicking on their name and moving them to the Main Conf.

You can move everybody from the Wait Room into the Main Conference by un-checking "All to Wait Room" under "Settings."

To "screen" the newcomers, move yourself into a subconference room, and then move the waiting parties in to speak with you before placing them into the main conference.

Click "Settings" to enable/disable Wait Room. The display shows how many are waiting.

Adding Someone to the Bridge

If you need to add somebody to your call, you can dial out to them.

Just enter the phone number (1+Area Code for North America; 011+Country Code int'l) and click OK.

You can also dial out from your phone keypad: Enter *98, followed by the number, then #.

If you reach voice-mail, disconnect them via the Dashboard, or dial *991 from your phone.

If you want to talk privately with the party before adding them to the bridge, move into a subconference room before dialing out.

Dial-out features are only available to hosts.

* Codes from the Phone

*1 Raise Hand	*2x Vote for X	*3 Roll Call
*4x Move to Room X		*6 Self Mute
	*88 Enable VTX	*9.. Host Cmd →

*91 Hand Mgmt	*92 Conf Settings	
*94x Recall Room X	*950/1 Recording Off / On	*960/1 Soft Mute Clear/Set
*970/1 Hard Mute Clear/Set	*98nn# Dial-Out To nn	*99 Cancel Dial-Out

These codes are available to all participants:
- *1: Raise (or lower) hand
- *2X: Cast vote for X (*20 to clear)
- *3: Hear count of participants; *33 to read names
- *4X: Move to room X (*40 for main conference)
- *6: Toggle soft muting

These codes are available only to hosts:
- *91X: *91 to hear Next Hand; *912=Call On, *913=Skip
- *92X: *920=Unlock, *921=Lock, *923=Disable WaitRoom *924=Retrieve Next Waiter, *925=Disconnect Next *926=Move Others to Main; *927=Custom Announcements;*928=Record Votes; *929=Project
- *94X: Recall all in Room X to Main (X=9 for Wait Room)
- *95X: Recording: *950=Off, *951=On, *952=Transc Off; *953=Scribble On, *954=Scribe On
- *96X: Soft Lecture Mode: *960=Off, *961=On
- *97X: Hard Lecture Mode: *970=Off, *971=On
- *98n: Dial out to nnn; finish with #
- *991: Disconnect last dial-out call (if busy or voice-mail)
- *992: Disconnect others in room (except hosts)
- *993: End the entire conference
- *86: Save 60 seconds of audio for analysis (host only)

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Other Tips

- Don't let participants endure silence
  - Use the Waiting Room to play music until you are ready to start
  - If there are "gaps" in the meeting, make periodic announcements
    - "We're taking a short break and will resume in 2 minutes"

- Record a custom announcement to greet callers
  - "Welcome to the Acme Training session. You'll hear music until the program starts. We appreciate your patience and thanks for joining us today."
  - The HOST records this greeting from the phone. Once you are in the conference, dial *927 and follow the prompts.
  - The greeting can apply to just this meeting, to all meetings with the same conference code, or to ALL of your meetings.
  - The greeting will play as each person joins (prior to entering the waiting room, if it is active, or before joining the main meeting, if waiting room is NOT active)

- When you are finished, END the call
  - Some participants may not immediately hang up
  - Use the dashboard "End" option
  - Or dial *993 on your phone
  - This disconnects everybody (even those that walked away from their phones)

- Practice & Experiment
  - Set up a test call with a few colleagues
  - Experiment with the dashboard and * commands

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