
HOW TO START AND RUN A ZOOM MEETING FOR THE FIRST TIME

A GUIDE FOR NEWBIES (OR “OLDIES” NEEDING A
REFRESHER)



A publication of the

Evolution Foundation

www.facebook.com/OKevolutionfoundation

Introduction

This modern plague we are enduring has turned our existence upside down, forcing (or encouraging) us to rethink virtually everything we do. The dynamics of conducting our coalition meetings are no exception. Face-to-Face meetings are no longer the norm, and will not be for the near future, at least.

It is quite possible that this current limbo we are experiencing could last for months, even years. If community coalitions are to survive, even thrive, and continue as relevant partners in shaping community-based strategies to counteract the cascade of woes that are raining down on us, we need to change the way we communicate in our coalitions, because communication is more important now than ever before.

I suggest that coalition facilitators consider using a video teleconferencing platform as an alternative to face-to-face meetings. There are a number of free applications on the market today, including Cisco Webex, Monday, Google Hangouts Meet, Microsoft Teams, and Zoom Basic. I personally prefer the Zoom platform for its ease of use.

There are dozens of free live trainings, recorded trainings, webinars, YouTube videos, etc. that will cover all of the ins and outs and nuances of Zoom use, so I am not going to provide any sort of primer here. What I am going to provide is a straightforward path to scheduling your first Zoom meeting. This will take about five minutes and requires 11 steps.

Jeff Tallent, Executive Director, Evolution Foundation

Part 1: Set Up Your Account

Step 1: Go to <https://zoom.us/pricing> in your computer's browser. Click on the "Sign Up" button. It's free. Notice what you get with this free account. You can host up to 100 participants at your meetings, and you can have an unlimited number of meetings. The downside to this free account is that your meetings are limited to 40 minutes. If you are planning a coalition or committee meeting that will last longer than that, contact the Evolution Foundation and we can host your meeting for you with our Pro Account.

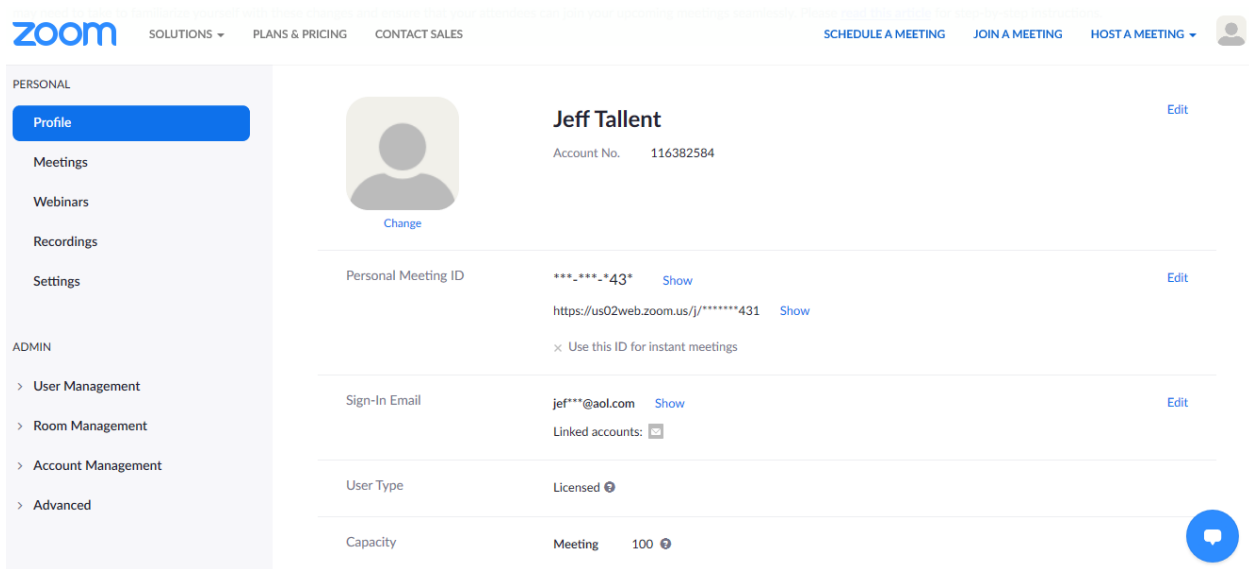
The screenshot shows the Zoom pricing page with four columns representing different plans. The 'Basic' plan is highlighted with a red circle around the word 'Free' and a red arrow pointing to the 'Sign up, It's Free' button. The 'Pro' plan is \$14.99/mo/host, 'Business' is \$19.99/mo/host, and 'Enterprise' is \$19.99/mo/host. Each plan lists its features and a 'Buy Now' or 'Contact Sales' button.

Basic	Pro	Business	Enterprise
Personal Meeting	Great for Small Teams	Small & Med Businesses	Large Enterprise-Ready
Free	\$14.99 /mo/host	\$19.99 /mo/host	\$19.99 /mo/host
Sign up, It's Free	Buy Now	Buy Now	Contact Sales
Host up to 100 participants	All Basic features +	All Pro features +	All Business features +
Unlimited 1 to 1 meetings	Includes 100 participants	Includes 300 participants	Enterprise includes 500 participants
40 mins limit on group meetings	Need more participants?	Need more participants?	Enterprise Plus includes 1,000 participants
Unlimited number of meetings	Meeting duration limit is 24 hrs	Dedicated phone support	Unlimited Cloud Storage
Ticket Support	User management	Admin dashboard	Dedicated Customer Success Manager
+ Video Conferencing Features	Admin feature controls	Vanity URL	Executive Business Reviews
+ Web Conferencing Features	Reporting	Option for on-premise deployment	Bundle discounts on Webinars and Zoom Rooms
+ Group Collaboration Features	Custom Personal Meeting ID	Managed domains	
	Assign schedules		

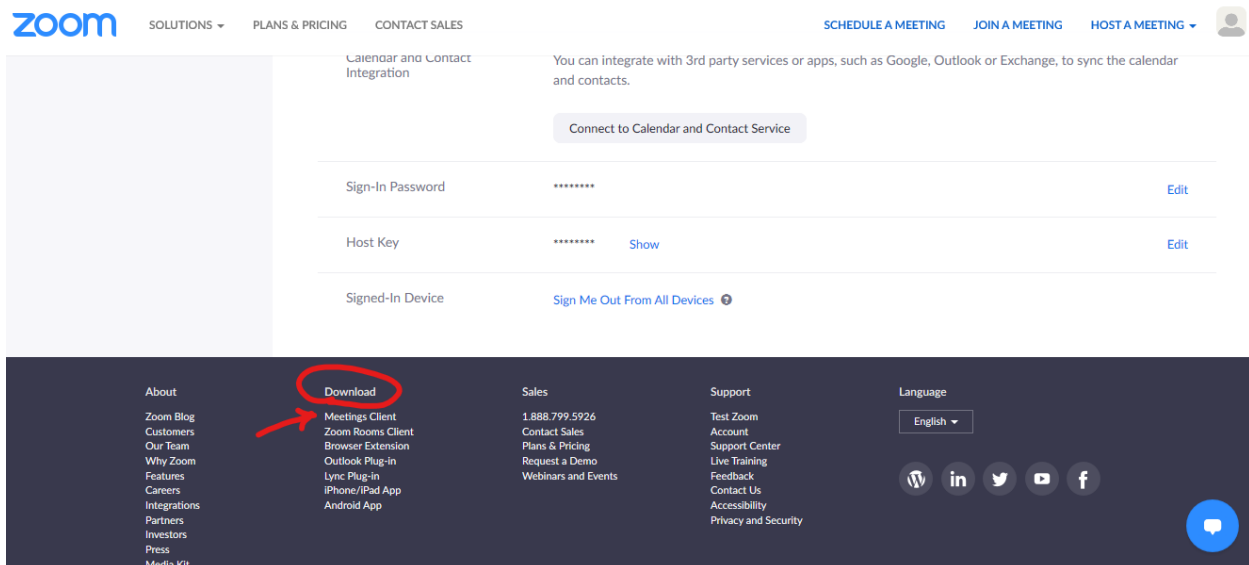
Step 2: Create an account and sign in. You know how to do this. Put in your email address and create a password.

The screenshot shows the 'Sign Up Free' page. It has a form for 'Your work email address' with a text input field. Below the form is a 'Sign Up' button. There is also a link for 'Already have an account? Sign in.' and three social login options: 'Sign in with SSO', 'Sign in with Google', and 'Sign in with Facebook'.

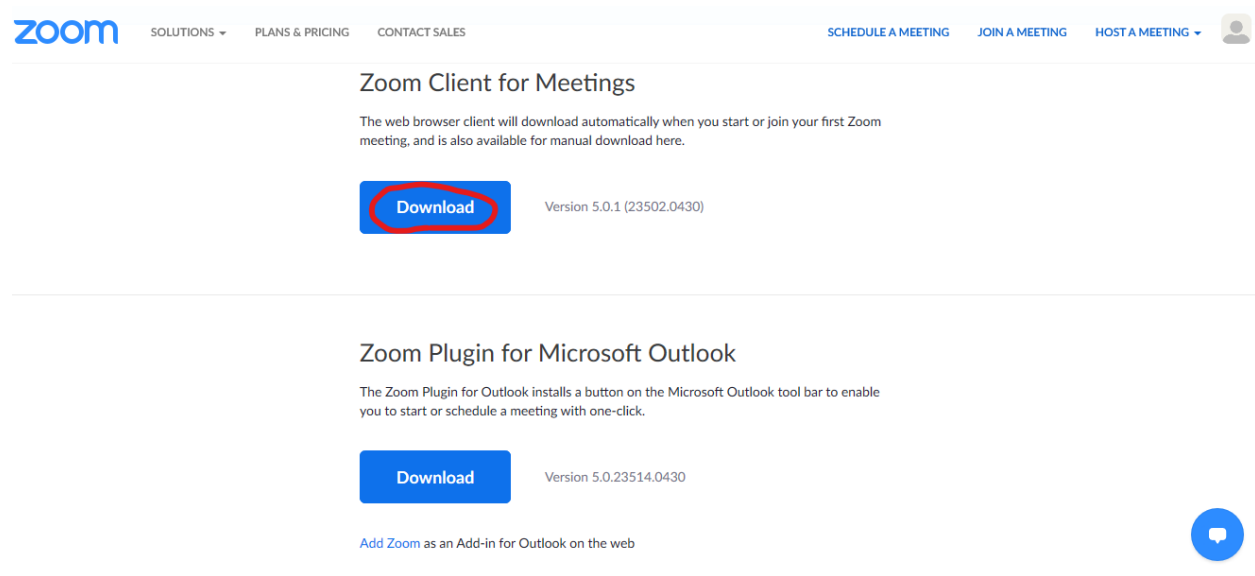
Step 3: Take a look at your home page. Obviously, yours won't have Jeff Tallent's name. It will have yours! The "Settings" link in on the far left under "Personal" can be used to establish your meeting profile preferences at a later date. Don't worry too much about those right now.



Scroll to the bottom of your home page. Find the 2nd column with the heading "Download." Right beneath the heading is the "Meetings Client" button. Click on it.

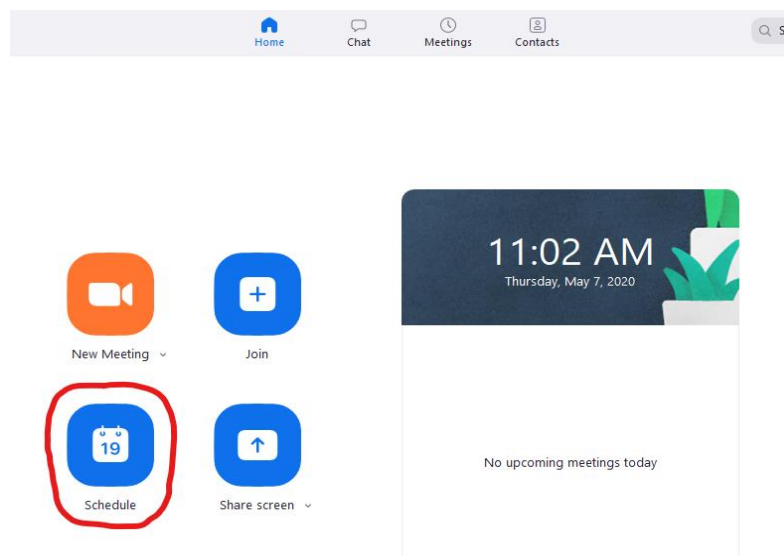


Step 4: Download the “Zoom Clients for Meetings.” By clicking on the “Download button,” Zoom will load the necessary software for running meetings on your computer. This step should also place a “Zoom” app on your desktop or wherever your apps tend to go. The app will allow you quick access to setting up future meetings. Congratulations. Now you’re ready to host your first meeting.



Part 2: Start Your First Meeting

Step 5: Click to schedule your first meeting. If this screen does not appear after downloading the “Zoom Client for Meetings” then locate your Zoom app and click on it. When this screen is visible, click on the “Schedule” button.



Step 6: Schedule your meeting. Fill in the date and time for your first Zoom meeting and click the blue “Schedule” button. You will notice in the “Calendar” section of this screen shot, just above the “Schedule” button, you have three options (Outlook, Google Calendar, and Other Calendars). If you choose Outlook or Google Calendars, it will skip you to Step 8 of this tutorial. If you choose the “Other Calendar” option, you’ll get a different screen which you’ll see in Step 7.

Schedule Meeting

Topic
Jeff Tallent's Zoom Meeting

Start: Thu May 7, 2020 10:00 AM

Duration: 1 hour 0 minute

Recurring meeting Time Zone: Central Time (US and Canada) ▾

Meeting ID
 Generate Automatically Personal Meeting ID 649-126-1431

Password
 Require meeting password 134417

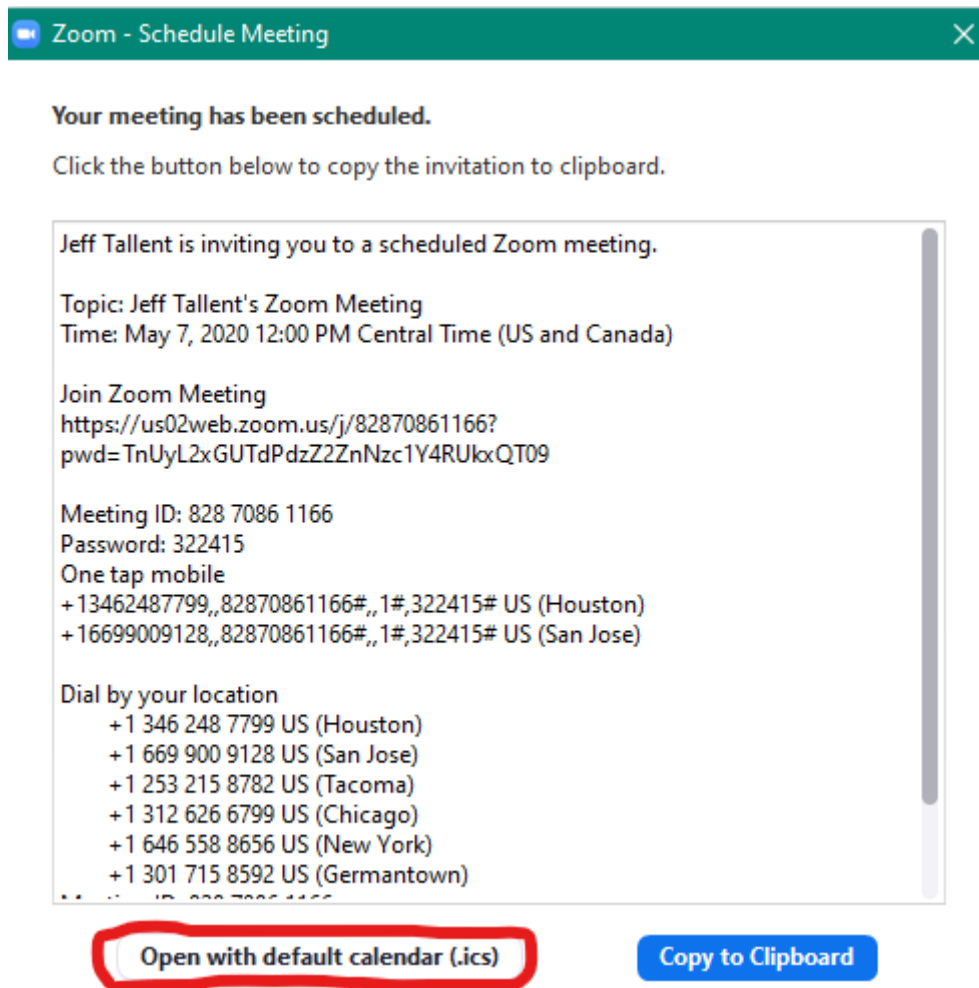
Video
Host: On Off Participants: On Off

Audio
 Telephone Computer Audio Telephone and Computer Audio
Dial in from United States [Edit](#)

Calendar
 Outlook Google Calendar Other Calendars

Advanced Options ▾

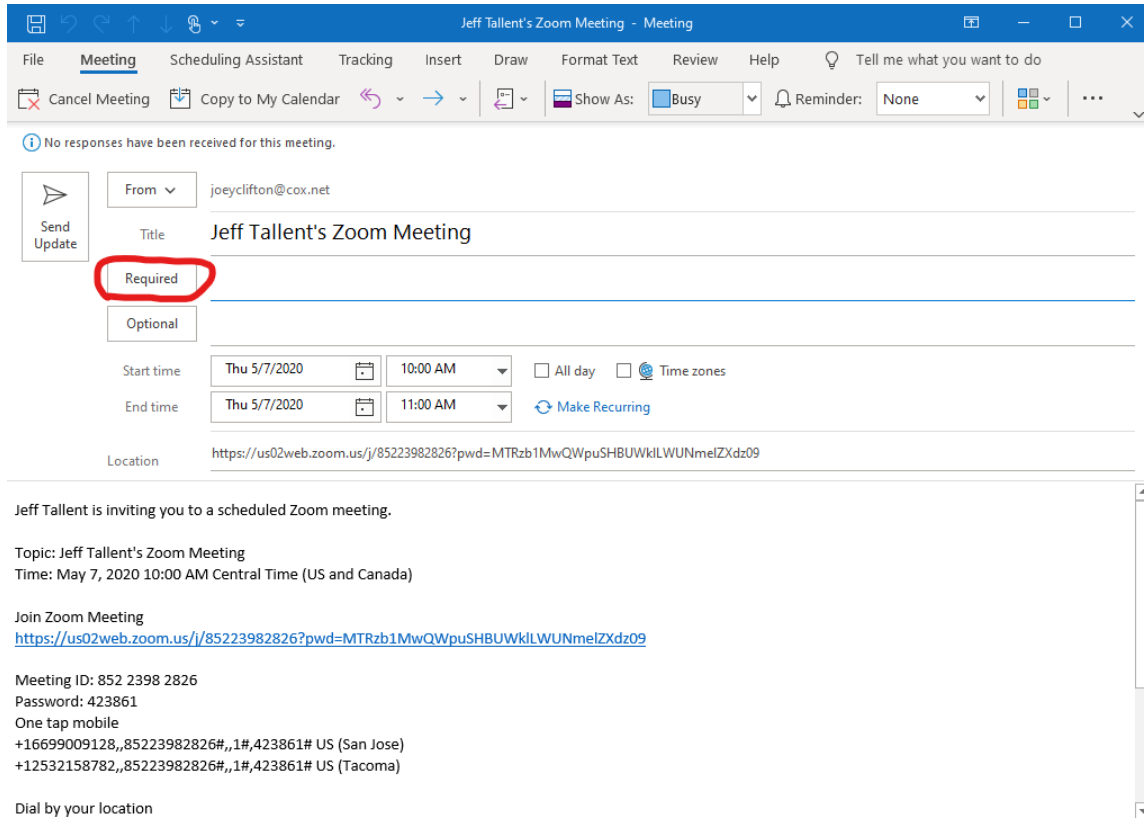
Step 7: Open your default calendar. Let's assume that you chose "Other Calendars" in the step above. You should now see this screen that gives you two choices. If you choose the "Open with a default calendar" it will take you to a screen where you can tell Zoom which calendar program you are using. It will then use that calendar for the next step. On this screen you can also click "Copy to Clipboard" which simply allows you to copy and paste this information into an email without placing the event on your calendar.



Step 8: Invite your friends. Depending on your default calendar you will get a screen that looks something like this. This one is from Outlook. You will see something that says, "Required" or "Invite Someone" or something similar. This is the place you put in the email addresses of those you want to invite. You can invite up to 100 people with your basic membership.

Hint: For your first few meetings, I would suggest a limited number of invitees. This will allow you to work out any bugs with minimum embarrassment.

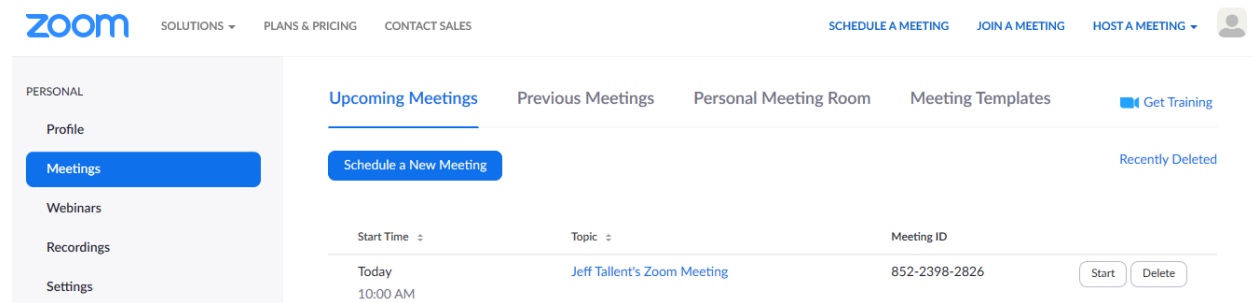
Your invitees do not have to have a Zoom account to participate in the meeting. However, they will need access to a computer, a smart phone, an iPad or something similar. Once you have put in all the necessary email addresses, click the “Send” button and your invitation is on its way.



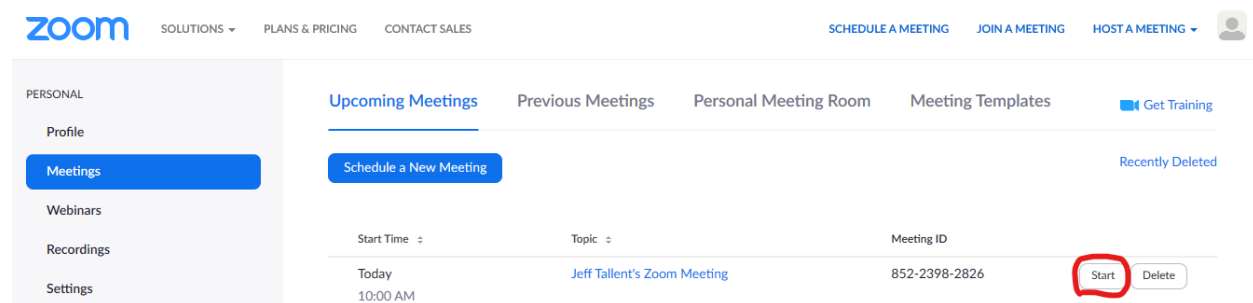
Step 9: Confirm your meeting is scheduled: Go to your calendar program and check to make sure the meeting is scheduled. Congratulations!

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 26	27	28	29	30	May 1	2
3	4	5	6	7 10:00am Jeff Tallent's Zoom Meeting	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	Jun 1	2	3	4	5	6

Step 10: Return to your Zoom home page. Click on the “Meetings” button and you should see your scheduled meeting listed under “Upcoming Meetings.”



Step 11: Start your meeting. On the day of the meeting, and shortly before the scheduled time, return to the home page once more. Click on the “Meetings” tab. Find your scheduled meeting in the listings and click the “Start” button. Your meeting will begin.



Conclusion

You're on your way, and you know enough now to schedule and start a meeting. Your next goal is to become proficient in all the features of Zoom. That sounds more daunting than it really is. The Zoom interface is user friendly. I encourage you to start a meeting and invite one good friend to do a little practice. Once on the meeting, explore all the buttons and features. You'll figure them out pretty quickly. If you want more tutorials check out the Zoom video tutorials produced by Zoom ([Click Here](#)). My favorite from Zoom is called “Zoom Meeting Controls” ([Click Here](#)). It walks you through all the basics of the Zoom interface.

If that's not enough, check out the hundreds of videos on YouTube related to Zoom ([Click Here](#)). Several are pretty good. Good luck. You can do this!

We have more guides for you and your coalition.

Check out our other

[Newbie Manuals](#)