



Protocol for Scheduling a Zoom Meeting

Step-by-Step Guidelines for Organizing Virtual Meetings

Introduction

Scheduling a Zoom meeting efficiently ensures all participants are informed, prepared, and able to join the session at the designated time. This protocol outlines the recommended steps and best practices for organizing Zoom meetings.

1. Create the Zoom Meeting

1. Log in to your Zoom account via the web portal ([URL]) or desktop/mobile app.
2. Navigate to the **Schedule a Meeting** option.
3. Fill in the meeting details:
4. Topic: Enter a clear, descriptive title.
5. Description: Add a brief summary or agenda (optional).
6. Date & Time: Set the meeting date, start time, and duration.
7. Time Zone: Confirm the correct time zone for participants.
8. Recurring Meeting: Select if the meeting repeats on a regular schedule.
9. Meeting ID: Choose to **generate automatically**.
10. Video & Audio: Set host and participant video preferences and audio options.
11. Advanced Options: Configure settings such as **enabling 'join before host,' muting participants upon entry, or recording the meeting**.
12. Click **Save** to schedule the meeting.

3. Communicate Zoom Meeting Details

1. After saving, copy the meeting invitation details (link, dial-in numbers, passcode) **(SEE SAMPLE OF MEETING INVITATION)**.
2. Enter meeting invitation details on [VFN calendar](#).

4. Confirm and Remind

- Send a reminder 24 hours and/or 1 hour before the meeting, including the Zoom link and agenda.
- Verify that all technical requirements (internet connection, Zoom software, camera/microphone) are met by participants.

5. Conduct the Meeting

- Start the meeting on time.
- **Assign 2 co-hosts** from the participant list. This is so if there is a technical issue that the co-host can continue the meeting.
- Review the agenda and meeting ground rules.
- Manage the discussion, share screen/documents as necessary, and record the session if required.
- Conclude with a summary of decisions, action items, and next steps.
- Unless there is a co-host, closing out meeting stops recording when host leaves.

6. Follow-Up

- Distribute meeting notes, recordings, and action items to participants promptly.
- Schedule follow-up meetings if needed.

Best Practices

- Test your Zoom setup before the meeting.
- Maintain a professional environment and respect participants' time.
- Ensure accessibility for all attendees.
- Keep meetings concise and focused on objectives.

By following these protocols, you can ensure that Zoom meetings are scheduled and conducted smoothly, maximizing participation and productivity.

SAMPLE OF COPIED INVITATION

Cindy Graunke is inviting you to a scheduled Zoom meeting.

Topic: Communications Training

Time: Dec 3, 2025 02:00 PM Eastern Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/83068693072?pwd=KNFKPvZejq9a0Oo2ingHCqEN6sUTO1.1>

Meeting ID: 830 6869 3072

Passcode: 745653

One tap mobile

+13092053325,,83068693072# US

+13126266799,,83068693072# US (Chicago)

Join instructions

https://us02web.zoom.us/join/83068693072/invitations?signature=o37oDwTrwJ1X3N1alxyoXdBSayyseGrpJO_HzsVQLnA

Cindy Graunke's Zoom Meeting

11/6/2025

3:30 PM

→

4:00 PM

11/6/2025

(GMT-05:00) Eastern Time (US and C) ▾

Repeat

Never ▾

Meeting ID

Generate Automatically

Personal Meeting ID 545 809 3646

Meeting agenda

[Create agenda](#) **NEW**

Attachments ⓘ

[+ Add attachments](#)

Meeting Security

Passcode ⓘ

Only users who have the invite link or passcode can join the meeting

Waiting Room

Only users admitted by the host can join the meeting

Only authenticated users can join: Sign in to Zoom

AI Companion

Automatically start AI Companion ⓘ

Automatically start meeting questions

Who can ask questions about this meeting's transcript?

All participants only from when they join

Automatically start meeting summary

Who will receive a summary after this meeting?

Only meeting host and meeting invitees in our organization

Meeting summary template

General template

[Change default summary template ↗](#)

Meeting chat

Enable Continuous Meeting Chat ⓘ

Added invitees will have access to the Meeting Group Chat before and after the meeting.

Video

Host: Off

Participant: Off

Audio

Telephone

Computer Audio

Telephone and Computer Audio

▼ **Advanced**

Allow participants to join 15 minutes before start time

Mute participants upon entry

Automatically record meeting

Enable focus mode when meeting starts

Approve or block entry for users from specific countries/regions

Alternative hosts:

john@company.com

Allow alternative hosts to add or edit polls