**Facilitator Team Protocols**

*MS Team’s Meeting Prep Steps*

A close up of a logo

Description automatically generated

**Purpose**

MS Teams provides meeting rooms to support facilitators in delivering our courses to our clients. This document’s purpose is to provide a single source document to support facilitators in creating and delivering a positive experience using MS Teams.

**Intended Results**

* Ease of use/better experience for Facilitators
* Fewer errors, resulting in increased client feedback and additional revenue booked.
* Improved process and experience for Facilitators and participants

**Facilitator - Set up Prior to Delivery**

* RECOMMENDATION: A second monitor significantly increases the Facilitators ability to successfully facilitate the class and monitor activities while doing so. You may have a 2nd monitor in your home office however having one while traveling is also beneficial. Here are two portable 2nd monitor recommendations:
  + [ViewSonic VA1655 15.6 Inch 1080p Portable IPS Monitor with Mobile Ergonomics, USB-C , Mini HDMI for Home and Office (amazon.com)](https://www.amazon.com/Viewsonic-VA1655-15-6-Full-Monitor/dp/B09237LL5Q/ref=sr_1_1_sspa?crid=OVO481IOUUWF&keywords=viewsonic%2Bportable%2Bmonitor&qid=1678496808&sprefix=viewsonic%2Bportable%2Bmonitor%2Caps%2C165&sr=8-1-spons&ufe=app_do%3Aamzn1.fos.f5122f16-c3e8-4386-bf32-63e904010ad0&spLa=ZW5jcnlwdGVkUXVhbGlmaWVyPUExMVM3UlJPSDRLWlpPJmVuY3J5cHRlZElkPUEwODA3MTc2MzREVTUzRDlSU042RSZlbmNyeXB0ZWRBZElkPUEwMjgwMzQyMUlBUkJIR1AyMEhWTCZ3aWRnZXROYW1lPXNwX2F0ZiZhY3Rpb249Y2xpY2tSZWRpcmVjdCZkb05vdExvZ0NsaWNrPXRydWU&th=1)
  + [KYY Portable Monitor 15.6'' FHD 1080P Portable Laptop Monitor USB C HDMI Gaming Monitor Ultra-Slim IPS Display w/Smart Cover & Speakers, Plug&Play, External Monitor for Laptop PC Phone Mac Xbox PS4 (amazon.com)](https://www.amazon.com/dp/B088TLQR3K?psc=1&ref=ppx_yo2ov_dt_b_product_details)
* Log into the MS Teams meeting room 30 minutes before the start of the meeting.
* Got to Meetings Options and review these settings. Set to the level you prefer when delivering.
  + Lobby – “who can bypass the lobby?” (Note: there could be a setting here that is toggled off while in the room early, then changed just before the class starts, to start allowing participants to come in directly when you are delivering.)
  + Sharing – Everyone or limit sharing?
  + Select Save.

**Facilitators – While Presenting**

* Use alt+ Tab to toggle through screens when moving outside of the MS Teams and PowerPoint.
* BEWARE: using Control + Shift + K while in MS Teams will raise a hand.
* BEWARE: If showing Control + Shift + M in Outlook to create a new Email, watch when going to chat in Teams as C+S+M will MUTE you.
* BEWARE: clicking on the MS Teams Room itself puts the MS Teams Meeting room display overtop of the PowerPoint slides.
* Make sure to have a way to see both the Meeting Room itself AND also the Chat in MS Teams. It is recommended that you use 2 screens while delivering in Teams to better see both screens at the same time.
* Choose the “View” icon on the top toolbar and select “Gallery View” to see everyone in the meeting. NOTE: You must have 9 or more individuals in the meeting to utilize this feature.
* Sharing a document in the meeting is best done by uploading the document from your computer. Choose the Paperclip in the chat box and select the document to upload. Using OneDrive may block you depending on where the document is located.
* Break Out Rooms
  + Select how many people you want in each room.
  + Select how you want to create the rooms: automatically or manually.
  + Under the Settings gear – select how long you want the breakout rooms to last.
  + You may name each room by using the 3-dot ellipsis next to each room assigned.
  + BEWARE: When returning from break out rooms, Teams mutes the speaker (at times). Click the microphone to ‘unmute’. If this does not work, then click the 3 dot ellipsis in the toolbar > Go to Device Settings (cog wheel) > select unmute.

**Facilitators – Post Presentation**

* Stay in the meeting until everyone has left.
* Select the down arrow next to the Leave box in the upper right corner and select “End Meeting”. This will fully close the meeting and not leave it open for outsiders to reconnect.
* Attendee/participation list will be available in the meeting chat once the meeting is ended. This list may be downloaded and shared as needed.
  + A good back up best practice is to take a screenshot or picture with your phone of the attendees. You may have to scroll down and take a 2nd picture to get everyone, but it is a great back up.