



## HOST CHECKLIST

### | Preparation

- **Meeting Start**
  - Suggest you plan to join your zoom phone bank approximately 15 minutes prior to the start time
- **Deck & Chat Posts**
  - Ensure any materials you are using are updated based on the day's calls
    - Include posts specific for the day's calls
- **Breakout Rooms -**
  - You may want to use Breakout Rooms for training, experienced callers, tech support, etc.
  - Set up Breakout Rooms and label as indicated

### | Zoom Opening / Introduction

- **Welcome**
  - General intro and logistics
- **Debrief Reminder**
  - We do suggest you allocate time at the end of your phone bank (approximately 10 minutes) for callers to share their experiences
- **Today's Calls**
  - Review where we are calling and for which candidates
  - Go through key information points and asks in today's script

- **Zoom Audio**

- Provide instructions on how to mute Zoom audio

**TO SILENCE ZOOM AUDIO:**

**See the Bottom Left Corner: MICROPHONE ICON > Click on the Up ^ Arrow > Select "Leave Computer Audio" (second option from the bottom).**

**Tablet / iPad / Smartphone Users: See the Upper Right Corner: Touch the 3 dots labeled "...More" > Scroll down and select "Disconnect Audio"**

- This allows callers to remain on zoom and not be disturbed by any necessary talking in the Zoom session - helping callers with questions, assisting late callers, etc.
- The caller's computer audio will still work for making calls.
- Before Debrief provide instruction on how to rejoin Zoom audio

**TO RE-JOIN ZOOM AUDIO:**

1. **Click the HEADPHONES ICON  (bottom left of zoom screen)**
2. **"Join Audio"**
3. **Then, "Join with Computer Audio" from the pop-up window.**

**iPad/Tablet Users: Top of Screen: Touch the HEADPHONES ICON labeled "Join Audio"**

## **Zoom Phone Bank Debrief and Closing**

- **Lead Up**

- Post 10 and 5 Minute Debrief notices
- Post 2 minute alert to stop making calls in Call and Main Room

- **Rejoin Zoom Audio**

- Ensure instructions posted

- **Promote Upcoming Events**

- Emphasize importance to joining your next phone bank / other events

- **Debrief**

- Suggest recognize new callers to share their calls first – to encourage them to participate and return

- **Closing**

- **Thank all your Callers! And again highlight upcoming events**