ClickMeeting

Run better online meetings!

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Introduction

Can't imagine your workday without online meetings? Or perhaps you provide lessons and training remotely and share your knowledge this way? This is exactly how millions of experts worldwide work, plus so much has been said and written about the advantages of virtual events that certainly no one needs persuading.

Instead, we will focus on another field: let's think about what you can do to make your online meetings even better, that is:

1. More convenient and intuitive for you and your attendees
2. Providing data and room security
3. Giving you access to as many features as possible but not overwhelming with complexity
4. Providing flexibility and tailored to your current needs
5. Supporting the work of your company regardless of its size or industry
6. Helping you build an expert, professional image.

In this guide, you'll read how to set up online meetings and get the most out of them for your business with ClickMeeting. Whether you need tools for daily team meetings, online lessons, consultations with your patients, coaching, or recruitment sessions.

For even more practical tips for perfect online meetings, see the second part of the guide:
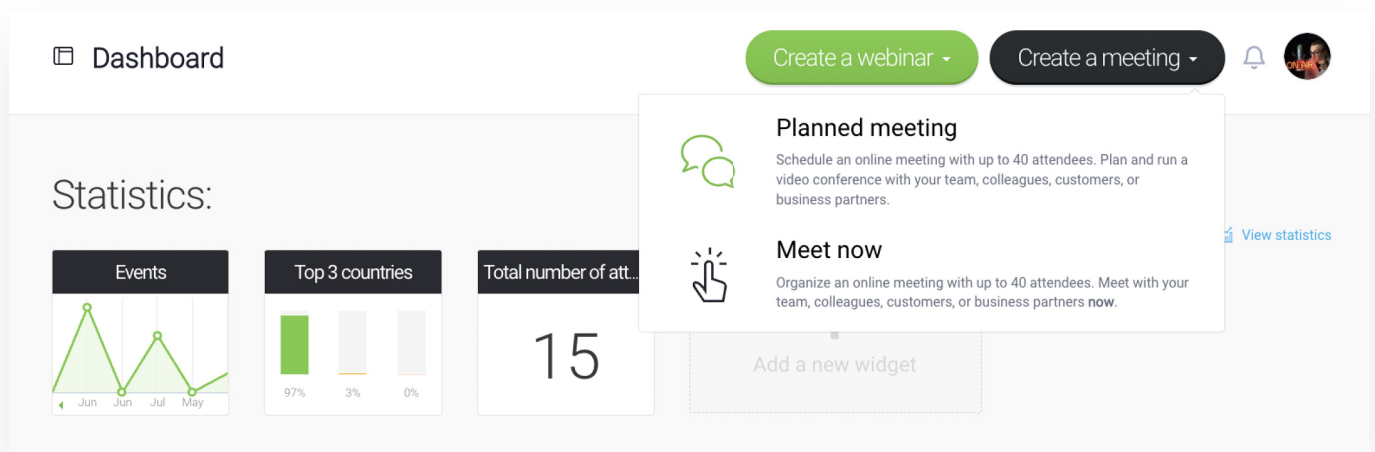
Run even better online meetings!

ClickMeeting Guide #2

Enjoy your reading!

ClickMeeting Team

01

## What do you need to know about ClickMeeting meetings?

Within your ClickMeeting account you get two basic event formats: webinars and online meetings. You'll find them in the upper right corner in your account panel, right next to your profile thumbnail.

During your online meeting in ClickMeeting:

1. 40 users simultaneously can see and hear each other

2. You can use, among others, presentations, virtual whiteboard, screen sharing and surveys and tests

3. You can use breakout rooms: divide participants into groups and let them work together simultaneously in separate sessions

4 You can meet in one-off rooms or create permanent rooms for recurring meetings

5 You have full control over your participants - you can give them presenter privileges, mute participants, and turn off their cameras as needed

6 You and your participants can log in from a browser as well as the desktop and mobile app.
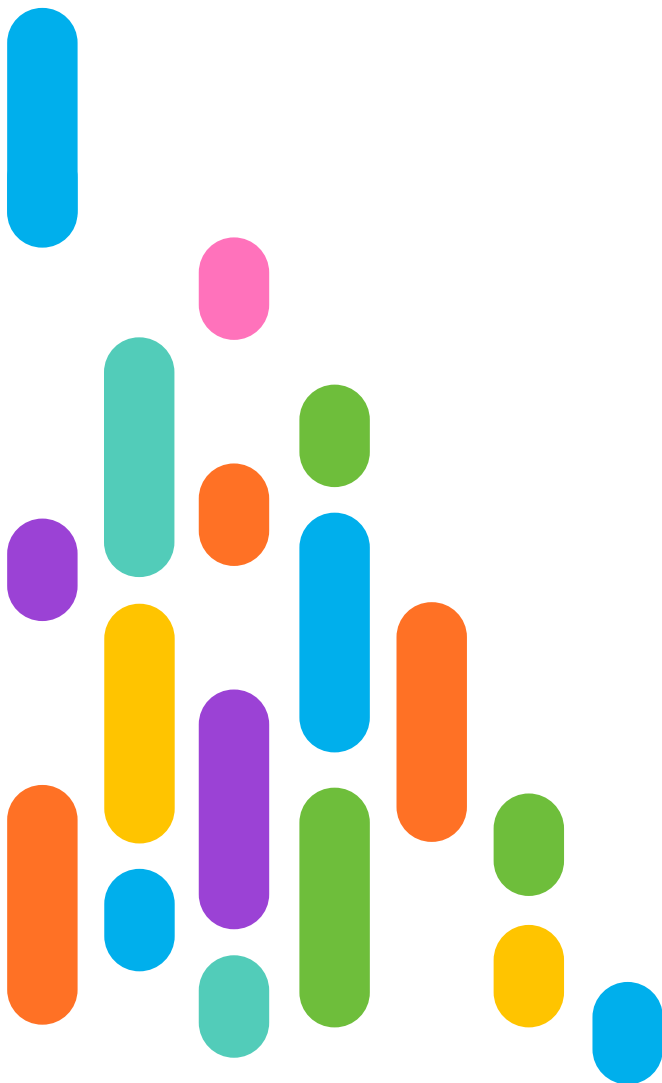
02
A quick meeting?
Use Meet Now mode!

Let's take the following situation: you are working in a team on an important project and suddenly an unexpected problem pops up that requires urgent consultation in a larger group. Or you're chatting with a co-worker and get to the point where you just need to talk to each other face to face and use additional materials. Sounds familiar? It sure does.

What to do in such a situation? The answer is simple: you need to create a meeting as soon as possible, log into it and pass access to other interested people. You don't need extensive room personalization.

It is for such situations that Meet Now mode was created! It allows you to create a meeting exactly in...
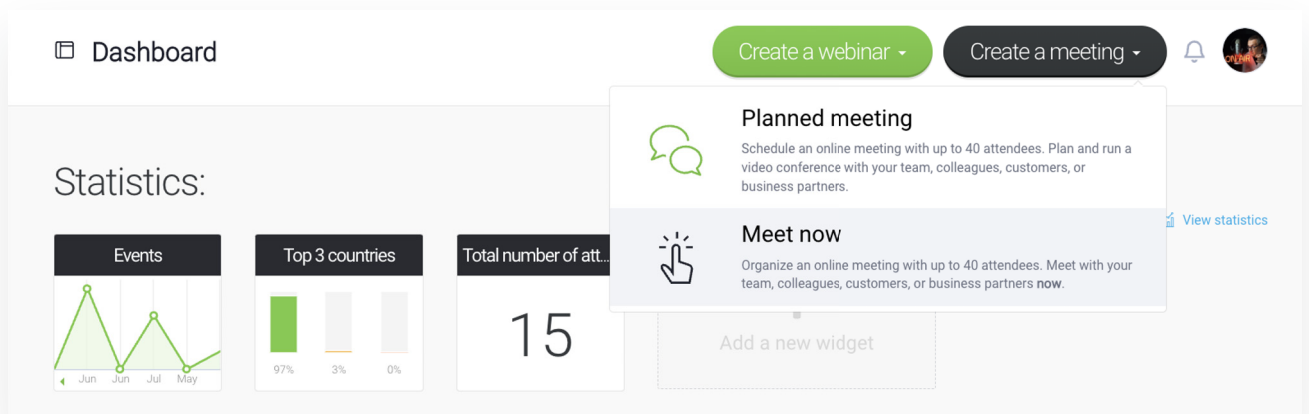
00:03,62

That is, in less than 4 seconds.

Can't believe it? Let's check.

1 You are on the home page of your ClickMeeting account panel. Now hover over the "Create a meeting" button and select the "Meet Now" option.
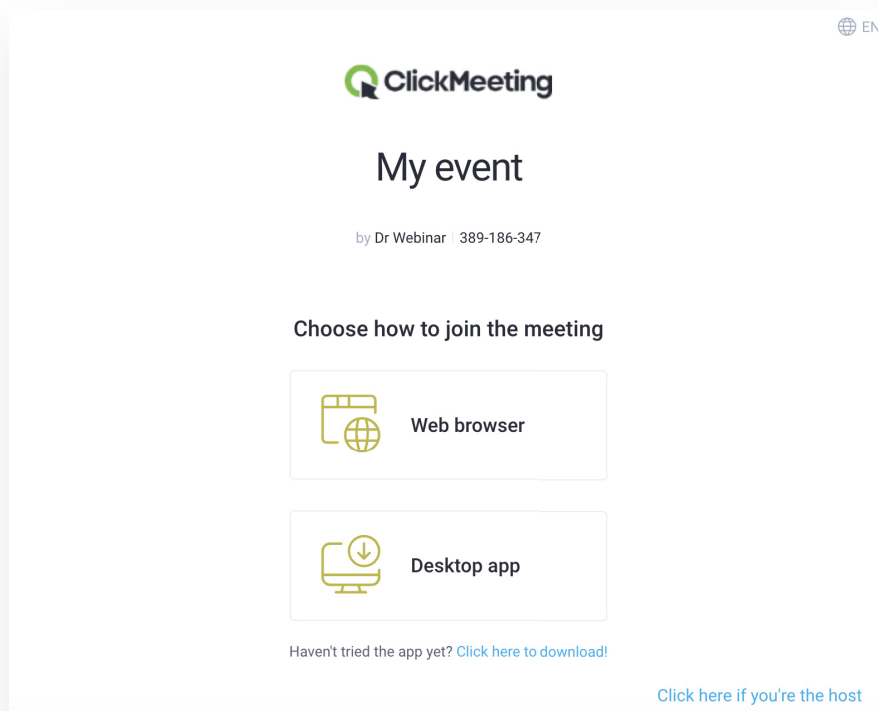

2 You will see a window that lets you immediately send invitations to people who are already in your address book. If you don't want to do that, you can start the event room right away.
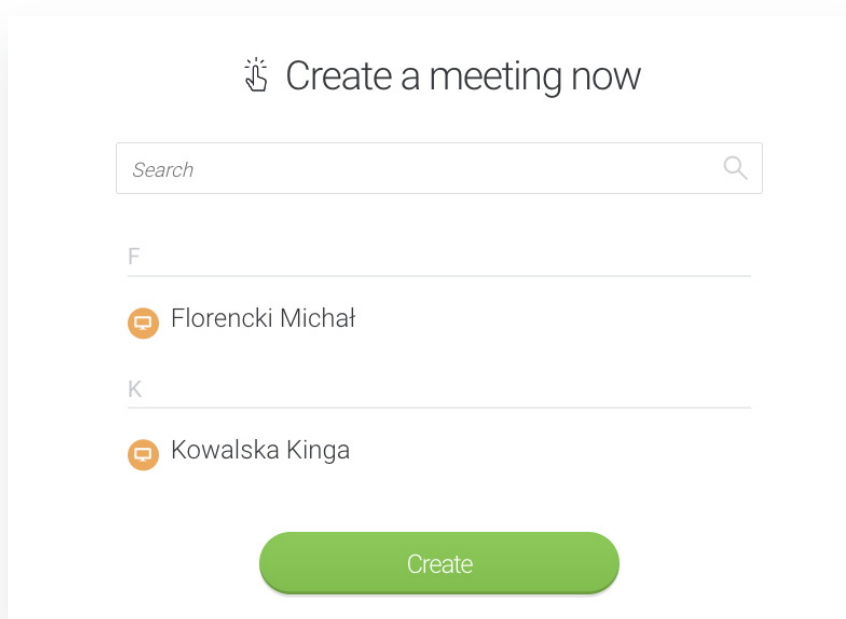
3 Done! Now just decide whether you want to enter the room through the browser or the desktop app.

As you can see, literally three clicks are enough, so you might be tempted to break our record.

All right, but the meeting can't take place without attendees. You can send them an invitation message right at the event creation stage. This is a great way to do it, especially if you regularly create ad hoc meetings with a specific group. Simply add contacts to your address book and then decide who you want to invite to a specific meeting.

What if you want some "outsiders" to attend the meeting? For example, a colleague who recently joined your company or a client who wishes to

participate in a brainstorming session? The easiest way would be to provide them with a link directing to the room.
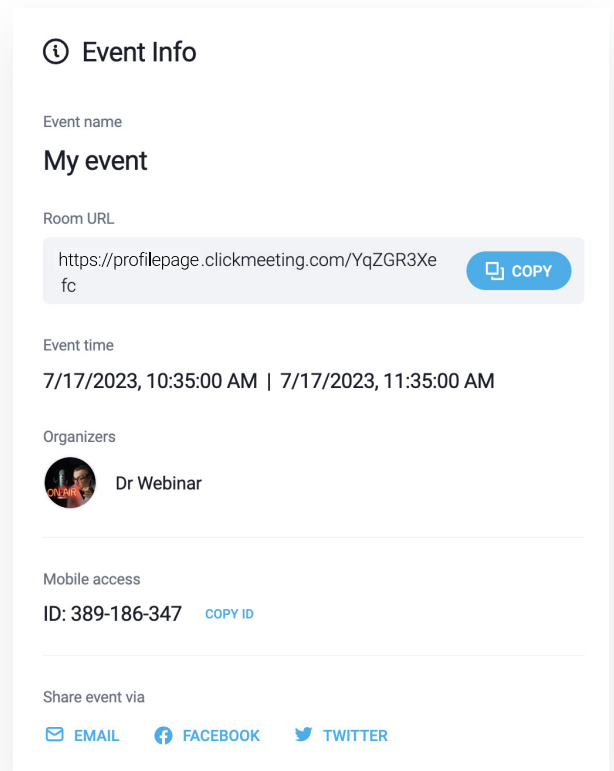
You can do this two ways.

1. Click on the thumbnail of your profile and go to the "Event Information" tab.

⚡ Here you will find the link to the room: copy it and send it to interested people, for example, through the communicator you use.

As you can see, there is also an ID for mobile access - so your attendees can instantly join the room via the mobile app.

Event Info

Event name
My event

Room URL
https://profilepage.clickmeeting.com/YqZGR3Xefc   COPY

Event time
7/17/2023, 10:35:00 AM | 7/17/2023, 11:35:00 AM

Organizers
Dr Webinar

Mobile access
ID: 389-186-347   COPY ID

Share event via
EMAIL   FACEBOOK   TWITTER

2. You can also send invitations by email or text message directly from the event room. To do this, click the add attendees icon in the "Attendees" section, then enter the email addresses or phone numbers of the people you want to invite. Done!
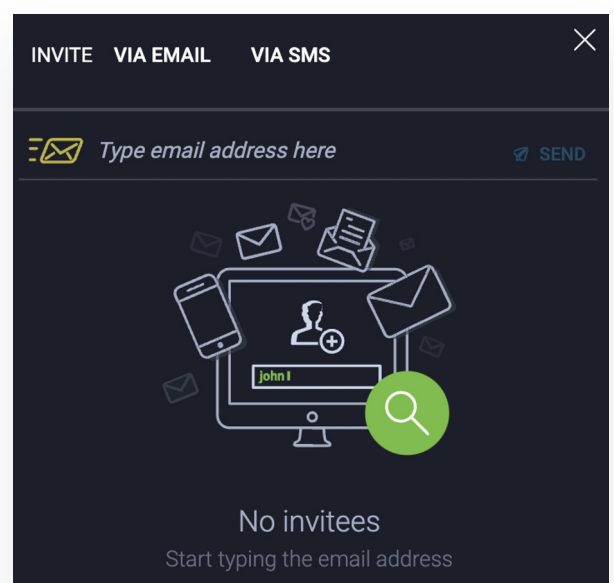
INVITE   VIA EMAIL   VIA SMS

Type email address here   SEND

No invitees
Start typing the email address

03

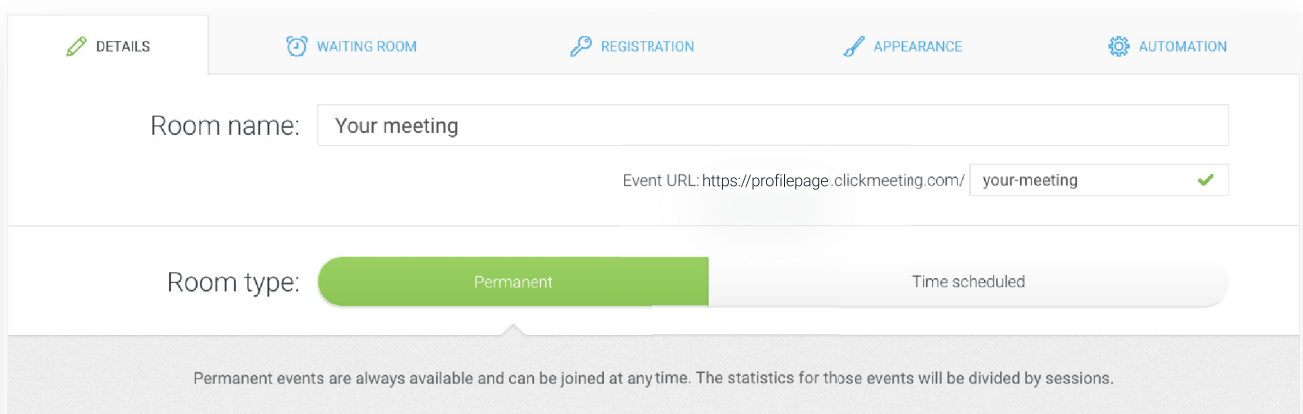# Always available room for you and your team

Let's turn to the non-virtual part of reality for a moment.

To hold a meeting, you need a room. And usually you have an office or conference room at your company's headquarters or a classroom at school, for example, waiting for you. Very often, you and your colleagues can use them as you need them: when you want to talk to each other or make a presentation, you just walk in and get to work. Of course, such a meeting can also be attended by other people - for example, a consultant from another company, a client or a candidate taking part in a job interview.

There's no denying it: having your own meeting space is an extraordinary convenience. So it's worth thinking about such a venue for virtual meetings as well. It will work on a similar principle: **you and the people you specify will be able to enter the room at any time and get to work.**

How to do it? You will create your permanent meeting room in five steps:

1 Move the cursor over the "Create a Meeting" button and select the "Planned Meeting" option.

2 Enter the room name. A URL will be automatically generated based on it. But you can change it as you wish to make it easier for you and the attendees to use the virtual room.

3 Select the room type. If you want it to be always available for you and other participants, set the "Permanent" option.

4 Set the access type. In an office or school, you can lock the room to prevent unauthorized people from getting into it. You can do the same in a virtual room. If you set a password, only people who know it will log in. You can also "leave the door wide open" - in this situation, any person who knows the link can participate in the meeting.

5 Click "Create and invite." Done! Your room is now all set up.

Now you can send invitations or skip this step and go directly to your room.

Note that attendees will only be able to join the meeting after you, as the

organizer, have logged into the room and clicked the "Start Event" button. Before that, the waiting room is at their disposal. You can place additional materials inside so that they can prepare for the meeting.

⏻ Your event has not been started

START EVENT
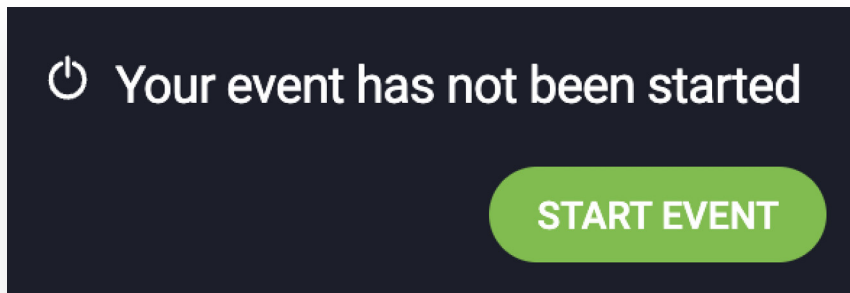
The permanent room is great for day-to-day collaboration within teams. You can use it for both regular, recurring meetings and more spontaneous ones. But it's also great for experts who meet with a lot of people on a daily basis - for example, recruiters, teachers, or trainers. It keeps you from having to set up a new room each time, and the people you share the link with will get convenient access.

04

Inviting attendees

If your meeting is already set up, you can proceed to sending invitations. When you click on the "Send invitations" button, several options will pop up.

Which way would you like to invite attendees
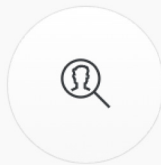
| Copy and paste | Search | My groups | Past sessions | Copy details |

You can use ClickMeeting's address book, manually enter addresses, or invite attendees of your recent events. They will receive emails with the most important information and a button leading to the room.

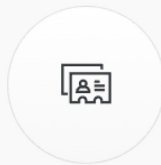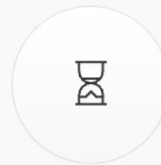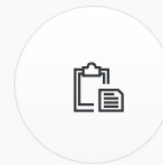To make it easier to send invitations and other materials, use your address book. In it you can assign contacts to specific groups, which will allow you to quickly direct messages to the right people. You don't have to enter the data manually: you can also import contacts from files or use integration with Google services.

Advanced search helps you create highly detailed groups. Use the fields below to narrow your search to the contacts with specified criteria.

English lesson   × ▾   👤 5
                                       Clear

Search

Advanced settings ▲

✎ Change contact name
× Delete group

| ☑	Name	Email address	Company	Phone	
✓	Kowalska Kinga	kokokokok@kokso.pl			Details
✓	Maciek Inga	ingagag@maciekkk.pl			Details
✓	Malinowski Adam	amamam@amama.pl			Details
✓	Tom	fdsa@dsdf.com			Details
✓	Tomasz	fas@fdas.com			Details

Invite all

It will be very convenient to simply send interested people the link generated at the very beginning. It will help them get easy and quick access to the meeting.

By clicking on the "Copy details" option, a set of information will be automatically copied to your clipboard, which you can then send to attendees via chat or email or put in your calendar. In addition to the room URL, you will also find the password and event ID for joining via the ClickMeeting mobile app.

You can also invite attendees directly in your event room. To do this, find the icon in the attendees menu, click and enter the email address of the person you want to invite.

ClickMeeting
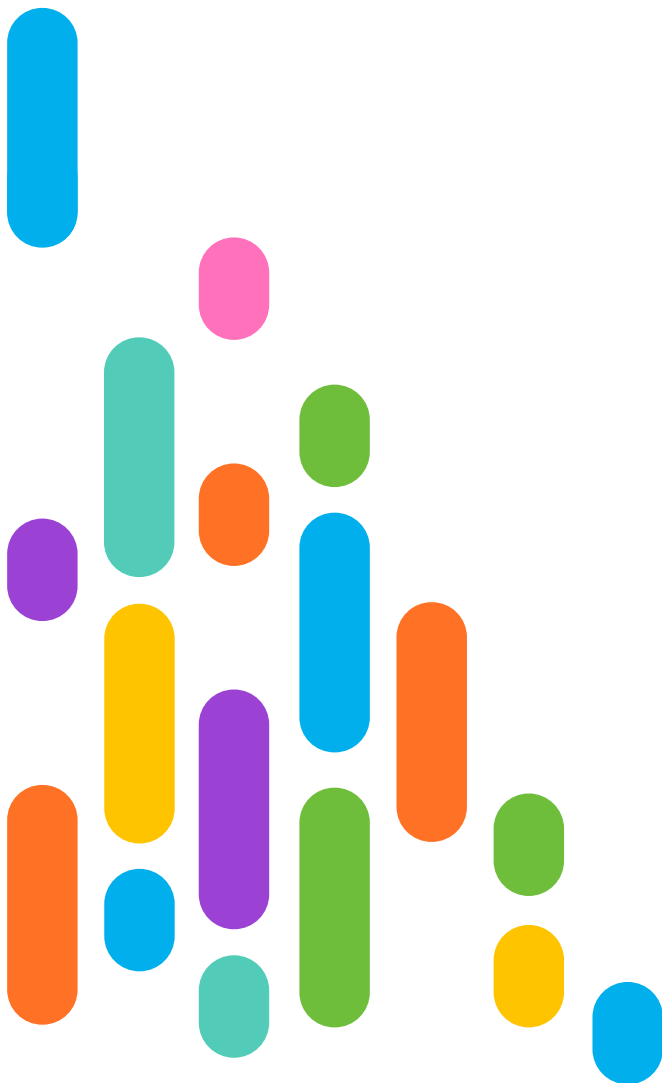
05

A way to have recurring and one-time meetings

Many meetings are held regularly - on the same days of the week and at the same time. We are talking, for example, about classes in various types of schools and educational institutions, therapy, coaching or consultation sessions, or regular team meetings - for example, in a daily or weekly formula.

What to do in such a situation? Of course, you can create a permanent room and just meet your attendees in it at a certain time. **But you can also create a time scheduled room and set rules for the event recurring.**

To do this, name the room and select the "Time scheduled" option.

✏️ DETAILS	⏰ WAITING ROOM	🔑 REGISTRATION	🖌️ APPEARANCE	⚙️ AUTOMATION

Room name: English lesson 1

Event URL: https://profilepage.clickmeeting.com/ english-lesson-1 ✔

Room type: Permanent | Time scheduled

In the next section, indicate how often and for how long you want the meeting to recur. For example, you can set an event to be held every week at the same time for the entire semester.


Again, you can set a password granting access to the room, but you don't have to.

When you click on the "Create and Invite" button, as before, you will gain the ability to send invitations to attendees. Of course, you can also do this later.

On the same principle, you can also create one-off meetings - just select the "Do not repeat" option. This is the ideal format if you want, for example, to hold an annual general meeting online, a company board

meeting, a conversation with a client or a joint project work, which - at least according to the first assumptions - will not have a follow-up.
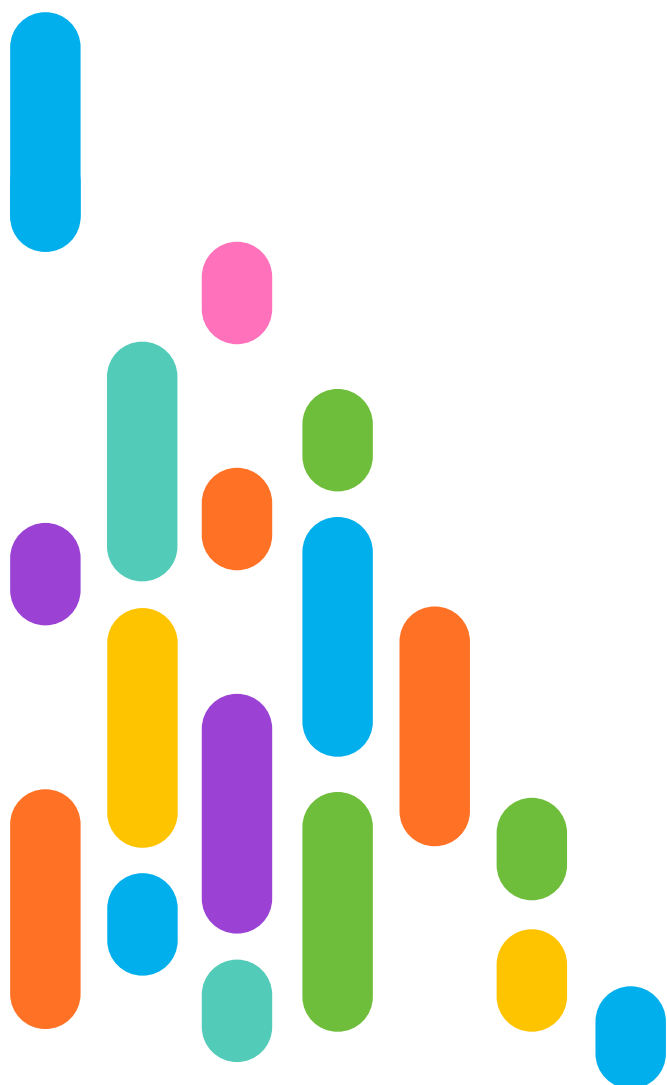
06

QR code for flexibility

But that's not all!

Have you ever experienced an unexpected (or completely expected) situation that interrupted a meeting that had been going on for some time, forcing you to leave home or the office? A quick switch between devices is then at a premium. And we have a solution for that.

⚡ You can find the QR code in the event room under the "Go mobile" tab. Then just scan it, for example, with your smartphone and open the link in your browser.

You will be automatically transferred to the event room and you can continue attending the meeting without having to enter any login information.

ClickMeeting
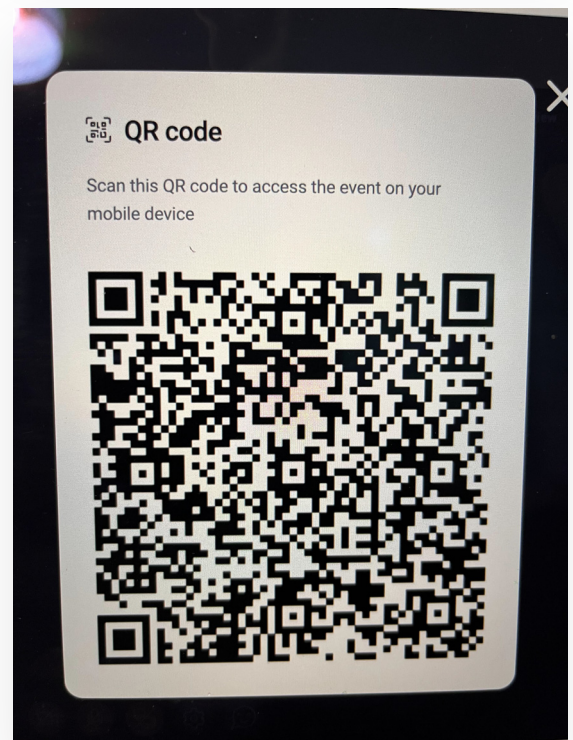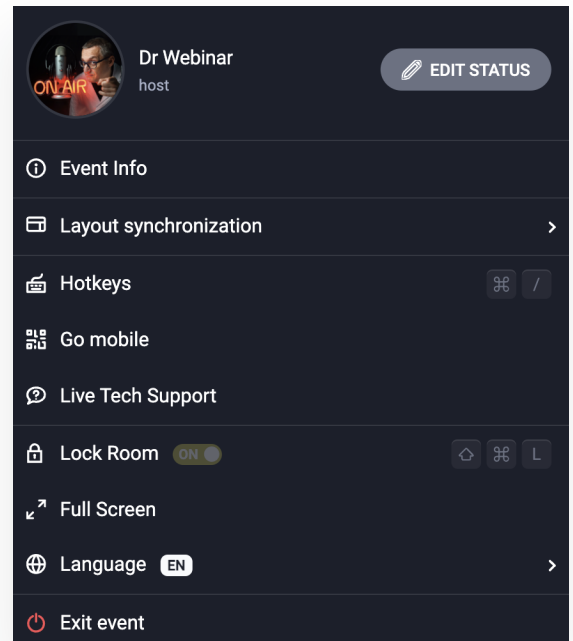
07

Want perfect meetings?
Checklist for the host!

As you can see, creating professional online meetings really doesn't have to be complicated. To stand out and build an expert image, you first of all need a good tool.

Let's summarize the most important information about online meetings on ClickMeeting in the form of a short checklist:

1 Decide what kind of event you want to create: for spontaneous, instant meetings the Meet Now mode will work perfectly, in other scenarios, you can reach for scheduled meetings.

2 Choose a permanent or timed room: if you are creating a scheduled meeting, determine whether you want your room to be available all the time, or whether you prefer to specify the exact time of the session. Remember that you can create both a one-time event and a recurring event!

3 Take care of room security: if you want to control access to the meeting room, set a password. Otherwise, any person who knows the link will be able to participate in the meeting.

4 Invite attendees: remember that you have several mechanisms to choose from to invite users. You can either send them their login credentials any way you like, or you can send invitations by email through ClickMeeting. You'll also find your address book useful for this purpose.

5 Learn more with the second part of the tutorial: in second part of the tutorial you will find more advanced advice. Among other things, you'll learn how to configure your profile page, registration form and customize the design of all content to match your brand's style.

Good luck!

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