**Peter E. Cohan**
The Second Derivative
1532 Scenic Drive
Trinidad, CA 95570
T: +1 650 631 3694
E: PCohan@SecondDerivative.com
W: https://GreatDemo.com

**The Zoom Scan – What It Is, Why It Is Important, and How to Do It**
**–**
**Translating Face-to-Face Meeting Audience Scans to the Web**

Many presales and salespeople report that they find it difficult to consume and act on the various inputs when presenting demos and presentations over the web using Zoom and similar tools.

They note it is hard enough to present over the web – and taking in audience impressions via webcams, checking chat, scanning the participant pane, the Q&A pane, monitoring audio and one's own video is tough to observe and incorporate.

It is *very* important, however. Why?

When we are face-to-face delivering a demo or presentation in a conference room, we have developed – almost unconsciously – skills to scan the room while we are presenting. We talk and drive our software while also watching people's expressions for comprehension, questions, agreement or disagreement, and whether people are paying attention.

In these face-to-face meetings we have learned to perform a Face-to-Face Scan. As seasoned face-to-face presenters we do this naturally. If we simply ignored the audience, it is likely our demos and presentations would be *much* less successful.

We now need to translate our Face-to-Face Scan to web meetings…!

So, here are some simple guidelines for developing your personal Zoom Scan (or WebEx Scan etc.):

1. **Get familiar** with your web collaboration tool (Zoom, WebEx, GoToMeeting, etc.). Set up sessions for yourself (even better with a colleague, who can give you feedback) and explore all of the tools and relevant settings so that you know what is available and how to use them.

   This is very similar to what we do in face-to-face meetings – we make sure we are comfortable with our laptop and software, our plan for our demo or presentation, and any other materials or visual aids that plan to use. We organize and have ready our equipment, presentation tools, visual aids, notes, phone hotspot, etc. that we might expect to need.

2. **Launch** your Zoom (etc.) meeting **5 minutes early**. This gives you time to test and make sure things are working properly before your customer arrives. Check latency, audio, video, and screen sharing with a colleague or key customer contact. Then open the participant and chat

  

panes, organize the video pane to see all the participants, as well as the annotation toolbar – arrange them where you can see what you need of your presentation/demo *and* have good visual access to the various audience panes. Ensure your webcam pane is showing as many of your audience members as possible ("Gallery" mode shows the most but may cover more of your screen than desired).

This is again what we do in face-to-face meetings – we typically arrive in a conference room before the meeting to familiarize ourselves with the layout, arrange chairs, connect to the projector, find pens and clean whiteboards, and generally organize in accord with our needs.

And like face-to-face meetings, we may need to move things around during the meeting – to more clearly see a person asking a question, to draw on a whiteboard, or access a visual aid. When operating over the web, we can expect similar needs – and have to rearrange our screen. For example, we may need to move a pane aside to annotate on a specific part of our display.

3. **Greet** and **Meet** attendees as they join. Ask them to turn on their webcams and unmute their microphones as they enter. Monitor the participant pane to note new arrivals and the status of their video and audio, accordingly (hey! you are now building a scan element).

   In a face-to-face meeting, we greet people as they come in the conference room, shaking hands and doing brief mutual introductions – now you are doing exactly the same thing over the web!

4. **Build** your **Zoom Scan**. As the meeting begins and you share content, glance at your slides or software as you start presenting – then glance at the participant pane (anyone new?). Scan the participant faces in the video pane for comprehension, questions, attention (any confusion or comments?). Now repeat: content, participant pane, video pane, content…

   After a session or two this will begin to feel natural – and you can expand your scan to include the chat and Q&A panes. Note that chat and Q&A often have red "alert" marks, which means you only need to glance to see if an alert is present – if yes, then scan the pane.

   Next, incorporate the use of annotation tools – these really help to make an online demo come alive…! Select a tool, annotate, then erase – and remember to click the mouse cursor on the annotation pane to re-enable "normal" mouse control.

   Your scan now includes content, participant pane, video pane, alerts, annotate, erase, repeat…

   > Pro Tip: let your audience know what you are doing. For example, rather than have your audience wonder why your mouse moved to a blank part of the screen (from the audience's perspective), tell them, "OK, let me grab an annotation tool…"

   Is there an analogy with face-to-face meetings? Absolutely! You have just translated your face-to-face scan to Zoom: You are talking and driving your software while also watching people's expressions for comprehension, questions, agreement or disagreement, and whether people are paying attention. Congratulations!

Here's another analogy:  Driving a car.  Most of us likely don't recall how overwhelmed we felt when we first learned to drive – but most of us can appreciate the differences between being a passenger in a car vs. driving.

Most of us are passengers in web meetings (even if we host the sessions) – we join the session, listen, talk, and sometimes present content.  But we aren't really driving, compared to what we do when we drive a car.

Consider – when driving a car, we are managing the speed (accelerator, brake), direction (steering wheel), checking the speedometer, glancing at road signs, occasionally checking for problem lights on the dashboard, using the turn signals – and quite likely also eating, drinking, listening to GPS instructions as well as music or a podcast, and chatting with passengers.

Our scan for driving a car has become natural to us.  And note (I hope!) that the majority of the scan is on the road ahead…

When presenting over the web, the same type of scan can take place – and again, note that the majority of your time will likely be spent presenting your content – but you'll still want to check on the "passengers" (participants' video), the "GPS" (participant pane), "road signs" (chat and Q&A), as well as sip your tea or coffee, etc.

5. **Practice** your **Zoom Scan**.  Now practice your Zoom Scan with each session – you'll find you get more and more comfortable with the process.   *And* you won't have to *think* about doing the scan – it will begin to become a habit.

   Establishing your personal Zoom scan is a key element in transitioning to our "new normal" of operating over the web for our meetings.

   Pro Tip:  Many presenters report that they focus (too much) on their own webcam video.  While you *do* want to include yourself in your scan, occasionally, the main focus should be on your *audience*.  Experiment (with a colleague or by yourself in your own web sessions) to get comfortable with how you appear – your physical location and size with respect to your webcam, the lighting (is your face clearly visible – is there distracting backlighting?), what else is visible (or use a Zoom background), how much space you have for hand motions and the use of physical visual aids or props, etc.

   Even Better Pro Tip:  Record your sessions and occasionally play them back…  Very humbling, but *very* effective!  You'll hear your voice, your tone, your word choice; you'll recognize if you cut off somebody's question or if you forgot to close a question; you'll see your mousing and use of the annotation tools.  This is an opportunity for some very rapid improvement and growth!

It only took a few face-to-face meetings (hopefully) to develop and grow comfortable with our face-to-face meeting scans – which then became second nature.  Now it's time to fully translate our face-to-face practices to the web!

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