



Using Zoom for Lawyer-Client Meetings – One Office Account on Zoom

Zoom has fast become one of the most used platforms for online meetings. There are other platforms (i.e. Webex, GoToMeeting, Google Teams). However, Zoom is the only platform which offers the easy breakout room ability.

The comments and outline below is based on a firm having only one Zoom account that will be used by multiple lawyers.

EVERYONE LOGGING ON TO ONE ACCOUNT

It is possible to have each lawyer or assistant set up their own meetings using one account with one 'user'. This will require:

1. Each lawyer and assistant to have the login credentials
 - a. May be a security issue
 - b. Each lawyer will have to have the competence to assist their clients to get on
2. Lawyers using the same account will not be able to book meetings at the same time

The work around to this is for the firm to purchase a multiple license account on Zoom at a current cost of \$27 USD per user per month.

THERE IS ONE BOOKING MANAGER

Just like when everyone is in the office, there is likely a central 'room booking' system. In many cases, this is managed by the receptionist.

In the office, the receptionist is responsible for:

1. Booking rooms for lawyers when contacted
2. Greeting clients and visitors on arrival and determining who they are to meet with
3. Contacting that person (or assistant)
4. Asking the client to wait in the reception area or moving them to a meeting room

The lawyer(s) come to reception to escort the client to their office or meeting room or join them in the designated room.

This same type of system can be employed virtually, with the booking manager handling the same tasks they did in the physical office.

Here is how it would work:

Pre-Booking Tasks

1. Every day there would be a general Zoom meeting scheduled
2. Lawyers or assistants must contact the Booking Manager
 - a. Provide the name(s), phone number(s) and email address(es) of the clients or other lawyer(s) who are to be in the meeting



- b. Confirm the date and time of the meeting
3. The Booking Manager will create a Breakout Room for the lawyer as part of the meeting for the day in question
4. The Booking Manager will send an email to the parties involved (including the lawyer from your firm and their assistant) with the log in information:
 - a. url link
 - b. Telephone number, meeting ID and password, if required, in in case they are unable to use a computer or device and password if required
5. Pre-assign parties to appropriate breakout room (will need an email address for each)
6. The booking manager will record the information for each breakout room on an index card or other piece of paper that they can use to keep track of and move people into appropriate breakout rooms as they arrive online

Day of Meeting

1. Start up the meeting at the beginning of the day
 - a. Rename all of the breakout rooms with the appropriate firm lawyer name and time of the meeting – this will help keep straight
 - b. Start all of the breakout rooms at the same time – you will move people in manually as they arrive
2. As clients, lawyers or other persons arrive online they will be put in the waiting room of Zoom
 - a. This allows the booking manager to admit them into the meeting one at a time
 - b. Booking manager can confirm their identity. If they have not named themselves properly the booking manager can rename them
 - i. First and Last Name
 - ii. Firm's lawyer involved in brackets
 - c. These persons will be moved to the breakout room
3. If the lawyer is not already online, the booking manager can text or email them to ask them to come online. When they arrive
 - a. Make them a co-host
 - b. Move them to their breakout room

Note: The reason you make the lawyer a co-host is it allows them to leave the breakout room and come back to the main room to speak with the booking manager

4. When the lawyer's meeting is complete, their client and others will the breakout room but are not able to re-enter the main meeting room. The lawyer, as co-host, will be able to return to the main meeting room and speak with the booking manager – and close off their meeting. This means that the Booking Manager can:
 - a. Close that breakout room
 - b. Mark the index card or paper with the lawyer's meeting details as complete
 5. At the end of the day, once all individual breakout room meetings are done, all the breakout rooms and then the main meeting room will be closed



SETTINGS CONSIDERATIONS

There are Account Settings that are universal to the account and Meeting Settings that can modify the universal settings for each individual meeting. See the attached sheet.

Some basic tips on settings:

1. Do not require a password unless your firm determines this is policy – if cutting and pasting the link sometimes the link breaks when the password is embedded
2. Make sure that you use a different meeting ID for each day – do not use your personal ID (think about it – if you use the same ID day to day people can get in who have been on before – or they could pass along, even without their knowledge, the meeting ID)
3. Enable the use of a phone to call in – although this is not the preferred choice
4. **Always enable waiting room – this is your best security measure**
5. Ensure that people sign in with their full name – again a security measure
 - a. You can admit them and then rename them
 - b. While they are in the waiting room you can ask them to leave the meeting and go back out and come back in using their full name. If they are on a phone line only you will need to admit them, ask them for their name (good verification) and who their counsel is and then as host you rename them.

Sample email to participants

This confirms that you have a meeting with *LAWYER* through video conference on *DATE at TIME*.

We use the Zoom platform for our online meetings. To connect, please click the link below. We recommend that you a few minutes early so that we can check your video and sound.

URL Link to Zoom Meeting

You will need speakers, a webcam and a microphone. Here are some suggestions if you do not have these:

No Microphone or Webcam

Log in using your computer, laptop (although most laptops have cameras and mics built in if less than 5 years old) and then call in on your phone.

Use a device such as your tablet or smartphone. Most newer models have both webcam and microphone built in.

No