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Phil Simon

Author of *Slack For Dummies*

Zoom

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Author of *Slack For Dummies*

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Zoom For Dummies®

To view this book's Cheat Sheet, simply go to www.dummies.com and search for “Zoom For Dummies Cheat Sheet” in the Search box.

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Introduction

Depending on your age, you may take today's powerful communication technologies for granted. (I have done it myself.) Trust me, however: Not that long ago, communicating with others was a dramatically different experience.

As recently as the early 1990s, the most pervasive methods for exchanging messages included instruments of which you may have never heard: landlines, intra-office memos, typewriters, and Telex and fax machines. For personal correspondence, handwritten letters were commonplace, not relics of a bygone era.

The following statistic illustrates the extent to which communication has changed over the last 30-plus years.

On January 24, 2001, the Federal Communications Commission (FCC) released a study on the telecommunications industry. Remarkably, the FCC found that the average per-minute rate for interstate calls in 1984 was roughly 17 cents. (Read the study yourself at bit.ly/fcc-zoom.)

Say that you lived in northern New Jersey in 1984, as I did at the time. You called your friend in New York and talked for an hour. You could expect to pay $10 for the privilege. And forget about international calls. Back then, talking to someone in another country was prohibitively expensive. (And you think that long-distance relationships are hard now?) Even worse, the quality and reliability of audio calls usually left more than a bit to be desired. As for video calls, they were pipe dreams back then.

Fast forward to today. Put mildly, we're not in Kansas anymore.

Communication has undergone a veritable sea change. Thank the usual suspects: increasingly powerful computers, the Internet, the World Wide Web, email, Moore's Law, social networks, smartphones with their über-addictive apps, the explosion of affordable broadband connections, improvements from telecommunications carriers, ambitious entrepreneurs, and cloud computing.

The most recent addition to this formidable list is Zoom. Its suite of tools allows hundreds of millions of people to communicate and collaborate easily, affordably, and reliably with others no matter where they are. Both professionally and personally, Zoom allows people to stay in touch with each other, especially during pandemics and stay-at-home orders.

Zoom's products help teachers conduct virtual classes with their students. Pilates and yoga instructors use Zoom in similar ways. Rock bands jam via Zoom, including Marillion — one of my very favorites. Rabbis and priests rely upon Zoom to connect with their congregations from their homes. Journalists conduct interviews with it. In the corporate world, Zoom helps salespeople close deals, host untold numbers of employee- and customer- training sessions, and allow executives to address their troops from distant locations.

No, Zoom doesn't solve every conceivable communication problem. No software program can. Still, when used properly, Zoom promotes simple and effective communication — and more than 300 hundred million people have taken notice.

About This Book

Against this backdrop arrives *Zoom For Dummies* — the most extensive guide on how to use this powerful, flexible, affordable, and user-friendly suite of communication and collaboration tools. It provides an in-depth overview of Zoom's most valuable features — some of which even experienced users may have overlooked. The book you're holding goes beyond merely demonstrating how to install, configure, and customize Zoom's flagship Meetings & Chat product, though. It also offers practical tips on how individual users, groups, and even entire firms can get the most out of Zoom's tools. Finally and perhaps most important, I describe how to secure Zoom from prying eyes.

As with all titles in the *For Dummies* series, you'll find the book's organization and flow straightforward and intuitive. My tone is conversational, and I drop the occasional joke. (Whether or not it ultimately lands is your call to make.) Ideally, you'll have fun while concurrently learning how to use an increasingly important, popular, and useful set of tools. I certainly enjoyed writing it.

Foolish Assumptions

I wrote *Zoom For Dummies* with a number of different cohorts in mind:

- People who want to adopt a contemporary videoconferencing tool.
- People who generally want to know more about Zoom's different products and how they work. Perhaps

they have subscribed to one (usually, Meetings & Chat) and want to learn more about the others.

- Employees at companies that have already experimented with or purchased Zoom but haven't explored most of its powerful features.
- Organization decision-makers who believe that their employees can collaborate and communicate better and be more productive. (Make no mistake: They are right.)

REMEMBER The target audience for *Zoom For Dummies* is everyday users, not application developers. To be sure, I mention a few resources for people who want to know more about creating third-party apps. Coders looking for a text on how to build Zoom apps, however, will have to go elsewhere.

Zoom For Dummies presumes zero prior use or even knowledge of Zoom's suite of tools. Zilch. Fret not if you're not exactly tech-savvy. You'll be fine. Perhaps you just want to understand more about what this "Zoom thing" does and how you can do it. In fact, even if you have used Zoom's tools, reading this book will teach you a great deal.

Congratulations. You've found the right book.

I do, however, make a few assumptions. Specifically:

- You are curious about how you can use Zoom to communicate with your colleagues, partners, customers, vendors, and/or friends.
- You know how to use a proper computer, whether it's a Mac or PC.

- You can navigate a mobile device, such as a smartphone or a tablet.
- At some point in your life, you've accessed the Internet via a web browser.

I'm a firm believer in truth in advertising. By way of background, my editor and I wanted to keep this book at a reasonable length and cost. Accomplishing this objective forced me to make some conscious decisions about its content that I want you know from the get-go.

First, the book that you're holding is no 700-page opus. *Moby Dick* it is not. At the same time, though, it certainly isn't slim. *Zoom For Dummies* does not include step-by-step directions to configure and tweak every setting or feature for a single Zoom service, never mind all of them. Please understand this choice going in. Such a task is simply impractical. Even if it were, Zoom adds new features on a regular basis and, on occasion, changes and retires existing ones. All software companies do today. Way it goes…

At a high level, *Zoom For Dummies* highlights

- Its essential and frequently used features
- Some relatively obscure functionality that people should use or, at the very least, ought to know about

In some cases, I describe a feature without spending valuable space on how to actually do it because Zoom makes it self-explanatory.

Second and along these lines, I have intentionally written all the instructions in this book in a device-agnostic manner. In other words, I demonstrate how to do things in Zoom by using its desktop client and, in some necessary cases, via a web browser.

No, I'm not living in the past. (Well, I am with my tastes in music and movies, but I digress.) I know full well that mobile devices arrived in earnest a long time ago. At times, I mention in passing how you can perform a specific Zoom task on a smartphone or tablet. Due to space considerations, however, I simply cannot replicate how to execute each Zoom action on all iOS and Android versions and devices. Minor differences persist.

Even if I somehow managed to pull off that remarkable feat in the following pages, odds are that you'd ignore large chunks of *Zoom For Dummies*. Very few folks use every mainstream operating system or OS. People typically pick one side or the other. As Mr. Spock says in the 1982 film *The Wrath of Khan,* "Logic clearly dictates that the needs of the many outweigh the needs of the few."

Fear not, young Jedi. (Apologies to sci-fi geeks for putting *Star Wars* and *Star Trek* references so close together.) The vast majority of users find Zoom to be remarkably intuitive. You'll soon be able to naturally perform many of Zoom's key functions. In the event that accomplishing something on your phone or tablet vexes you, the support portion of Zoom's website contains detailed instructions on how to do whatever you want on every OS.

Icons Used in This Book

Zoom For Dummies highlights key information in the margins. You'll find small pictures that indicate the following:

TIP This icon identifies shortcuts and/or tricks that should save you some time.

WARNING Be careful whenever you see this icon.

TECHNICAL STUFF This icon highlights technical information that may or may not interest you. If not, then feel free to skip it.

REMEMBER You'll want to keep these key points in mind as you work in Zoom. This icon emphasizes those points.

Beyond the Book

In addition to the book that you're reading right now, you can also access a free Zoom Cheat Sheet. It's full of pointers and shortcuts on how to immediately start using Meetings & Chat. Access it by visiting www.dummies.com and typing "Zoom For Dummies Cheat Sheet" in the Search box.

Where to Go from Here

If you like, you can start reading this book on page one and continue to the end. The option is yours. *Zoom For Dummies* isn't a novel or play. If you've already dabbled with Zoom's powerful suite of communication tools, then

you can jump around to the sections that pique your interest. I've written it in that vein.

If you're only considering hopping on the Zoom train or have only heard about it, then begin with the first three chapters. From there, you'll want to read in a relatively linear manner.

Regardless of where you ultimately start reading, you'll find it helpful to create a new, free Zoom account or log into your existing one at www.zoom.us. You should also download the Zoom desktop client for your computer. Over the years, I have taught myself plenty of new programming languages, applications, and technologies. I have found that getting my hands dirty and doing the exercises myself to be invaluable.

Thank You

Thank you for buying *Zoom For Dummies*. I hope that you find it useful, informative, and even a little entertaining. Throughout the book, I demonstrate Zoom's many potential benefits and how to take advantage of them.

I deliberately qualified the previous statement with the word "potential." Zoom's tools have never been an elixir. They don't let Zoom's customers magically solve all of their communication-related challenges.

Zoom will never be such a tool, nor will any technology or app for that matter. Despite being able to use Zoom, many employees will invariably revert to incessant email threads; these folks will use Zoom intermittently, if at all. In the process, they will fail to recognize its considerable advantages. As with any new tool, Zoom's ultimate individual, group, and organizational success hinges upon many factors. At the top of my list are opening your

mind and setting realistic expectations for what it can and can’t do.

Good luck on your journey for better communication and collaboration. Let me know if I can help.

Phil Simon | *www.philsimon.com*

June 30, 2020

Part 1

Staying Connected with Zoom

IN THIS PART …

Find out about Zoom and the core technologies behind it.

Discover how Zoom became the gold standard for videoconferencing.

Get to know Zoom’s robust suite of collaboration and communication tools.

Chapter 1

Communicating and Collaborating Better with Zoom

IN THIS CHAPTER

- **Explaining what Zoom's tools do**
- **Dissecting the reasons that Zoom grew so quickly**
- **Understanding Zoom's competitive landscape**

What is Zoom anyway? Where did it come from? Was it the result of long-term planning, a eureka moment, or a happy accident? Is Zoom only for large organizations, or can smaller ones benefit from it? And what business problems does Zoom solve, anyway?

This chapter answers these questions in spades. Further, it provides some background information about Zoom, the technologies behind it, and its main competition.

Introducing Zoom

Zoom provides a suite of simple, affordable, powerful, secure, and interoperable communication and collaboration tools. As of this writing, the company's self-purposed mission is to make video communications frictionless.

As you see in this book, Zoom has accomplished its mission in spades. Zoom's management and investors bet the company on the belief that it could build a better mousetrap. With it, people could accomplish more than they could without it. Again, you can check that box. That gamble has paid off handsomely. It has vastly exceeded its early aspirations.

Discovering Zoom's origins

In August 1997, Eric Yuan began working as a software engineer at Webex — one of the first enterprise-videoconferencing companies. Yuan grew his team from ten engineers to more than 800 across the globe. To paraphrase Ron Burgundy of *Anchorman* fame, Webex became kind of a big deal. On March 15, 2007, Cisco Systems acquired the company in a deal worth $3.2 billion.

At Cisco, Yuan rose to the level of VP of Engineering — a key role at a tech juggernaut. As part of his job, he spent a good chunk of his time talking to Webex enterprise customers about the videoconferencing program. To put it bluntly, many businesses disliked Webex's complexity and general clunkiness. (Apropos of nothing, I felt the same way back then.)

After a few years, Yuan began to doubt whether Cisco would be able to improve Webex as much as its customers were demanding. To boot, other software vendors were starting to catch up. Yuan questioned whether Cisco's management would invest the requisite time and resources required to build a new, better generation of videoconferencing products — one that could easily scale up and down as needed thanks to the rise of cloud computing.

Yuan wasn't guessing; he exactly knew what enterprise customers needed. He envisioned a single, modern app that would seamlessly work on any device: laptop, computer, tablet, and smartphone. Because of his background, Yuan realized that minor tweaks to Webex's legacy code base would not suffice. Rather, undertaking such an endeavor would require a ground-up product rebuild.

Yuan knew that transforming Webex at Cisco would require him to fight many bruising internal battles. After several relatively enjoyable post-acquisition years, the politicking was starting to wear Yuan down. As he told NBC in August 2019, "Every day, when I woke up, I was not very happy. I even did not want to go to the office to work." (Visit cnb.cx/zfd-123 to read the article.)

Yuan predictably left Cisco in June 2011 and took 40 talented engineers with him. Later that month, he founded Zoom Video Communications, Inc. He wanted to refine a concept that he first conceived during the 1990s as a college student in China. Back then, Yuan had to commute ten hours to his then-girlfriend, now his wife. (Read the entire interview at bit.ly/zfd-eric.)

The company launched its flagship Meetings & Chat service in January 2013. Its target customers remained the same from Yuan's Webex and Cisco days: other businesses. By May 2013, more than 1 million people used Zoom products. In March 2019, Zoom officially filed to go public on the NASDAQ. April 18, 2019, marked its first day of trading.

Understanding what Zoom does

Zoom's tools help individuals, formal and informal groups, departments, and even entire organizations communicate and collaborate better. In this way, Zoom