zoom

# 8 steps to better collaboration beyond meetings

Collaboration doesn't just happen during the moments we're actively meeting. With Zoom Workplace, your open collaboration platform with AI Companion included at no additional cost*, you can communicate more easily across the entire meeting lifecycle (time spent before, during, and after meetings), sharing files, continuing conversations, and accessing all your meeting resources in one place.

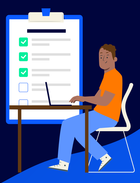
## 1 Schedule your meeting

Add your agenda and attach any whiteboards or relevant files. Don't forget to enable **continuous meeting chat**!

Start a meeting from an existing Zoom Doc for quick, easy collaboration.

## 2 Gather input

Launch a **pre-meeting survey** to gather input on project priorities or gauge your team's level of understanding of a topic. Use the results to **shape your agenda** and discussion items.



## 3 Start the conversation

Send a chat message to all invitees directly from the Meetings tab with questions or resources they can use to prepare for the meeting.

Keep the conversation in one place by messaging your attendees in the **continuous meeting chat** channel in Zoom Team Chat. This chat channel will be accessible before, during, and after your meeting.

## 4 Power meetings with AI Companion, your AI assistant

**Turn on AI Companion** for AI-powered note-taking to save time and focus on the meeting discussion.

Ask AI Companion questions about the meeting like, "Was my name mentioned?" or "What are the action items?"

## 5 Collaborate and manage projects

Share and collaborate on Zoom Docs, third-party documents, notes, and whiteboards directly in the meeting.

Use Zoom Docs to document the status of items discussed in the meeting and embed whiteboards, keeping everything in a single collaborative space.

Have AI Companion populate the Zoom Doc for you with meeting information and summaries.

## 6 Find your files

Check your continuous meeting chat channel to find all the files that were shared during the meeting.

Click the resources tab to see all the files from your meeting in one place.

## 7 Keep work moving

Continue the discussion in your continuous meeting chat, following up on questions or action items from the meeting.

Review the **smart recording** with AI-generated meeting highlights and coaching tips to help improve your skills.

## 8 Get caught up

For those who missed the meeting, it's easy to catch up on what was discussed. Look for the smart recording and AI Companion meeting summary in the continuous meeting chat channel and the meeting card.

From scheduling to ongoing collaboration, Zoom Workplace helps your teams stay connected, streamline communication, and improve productivity across the entire meeting lifecycle. Discover more ways Zoom Workplace with AI Companion can help you enhance collaboration, engagement, and productivity with our guide, **15 essential use cases for Zoom Workplace**.

**Access the guide**

*Note: AI Companion is included at no additional cost with the paid services assigned to Zoom accounts. AI Companion may not be available for all regions and industry verticals.*