A Comprehensive Checklist for Successful Virtual Events

If you're reading this, you've already made the decision to convert your in-person event to a digital event. And you may just be discovering that this process isn't a simple "lift and shift" from a ballroom to a computer screen.

Feeling overwhelmed with how to reset your event strategy? **You're not alone.**

Introduction

As with all successful events, it starts with a strategic plan that focuses on creating a compelling experience for attendees to learn and engage.

In the case of virtual events, special care must be taken to weave your essential content into a cohesive story, not a series of talking heads on screen.

You need options, platforms, and processes to continue as a convener. You need a partner who can help you package, pace, organize, and develop a strategic framework to guide new thinking on how to creatively plan and deliver the engagements you want to have. You need to embrace the idea of what you can do differently using digital.

And you need a team like Yes&, a Creative Virtual Event Producer who already provides end-to-end annual meeting support to organizations such as the American Society of Association Executives, and are helping clients navigate this shift with creative virtual experiences.

Here's how to get it right:

Set Clear Objectives
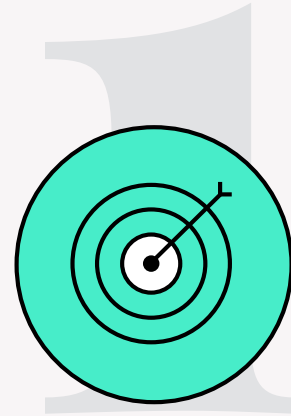
Start with the "why" so you gain alignment within your organization and maximize value for your attendees. Now's the time to take full advantage of the best of what virtual meetings provide. For example, it's hard to have meaningful breakout sessions in a 400-person keynote, but it's easy and effective with virtual events.

○ **Define event strategy and goals**

    ○ What in-person aspects do you need to reconsider or remove?

    ○ What are the best formats for delivering your content? *(i.e. livestream, webinar, on-demand)*

○ **Clarify the levels of interaction and interactivity you'll support**

    ○ How will you avoid viewer fatigue/ screen monotony

○ **Outline your success metrics and the data you'll gather**

○ **Discuss what pricing models and options need to be adjusted to account for the digital experience**

○ **Create an agenda and format that aligns with your audience's needs and (new) expectations. For example:**

    ○ Consider timing: will attendees prefer a full-day, half-day, or sessions and activities spread out over time?

    ○ Align different types of sessions (panels, lecture, townhall, peer-to-peer rooms) to optimize for different types of education and learning

    ○ Determine what level of content flexibility the agenda can support to allow for industry changes

Support Sponsors

One could argue that virtual events provide even more opportunities to position sponsors as thought leaders, with numerous avenues for meaningful co-creation to bring value to the community.

- ○ **Create strategic sponsorship models that take advantage of digital delivery**

- ○ **Determine what level of promotion they get leading up to, during, and after the event**

  - ○ Branded registration/event info emails

  - ○ Shared sponsor resources to supplement virtual event presentations, such as checklists, white papers, and "how to" guides

  - ○ On-screen branding during the event, including bridges between virtual event session "breaks" with pre-recorded sponsor insight videos that provide informative ideas to participants

  - ○ Provide useful content as panelists/co-presenters of virtual event sessions

  - ○ Lead-in videos before sessions

- ○ **Deliver metrics and engagement data from the event**

- ○ **Conduct joint social media campaigns with the event provider before, during, and after virtual events to disseminate relevant content**

- ○ **Book one-on-one meetings linking up exhibitors and attendees in breakout rooms or other virtual spaces**

- ○ **Sponsor tickets to a segment of the industry, such as student members**

  - ○ Allows for an isolated "thank you" message from the sponsor to the students, who would not have been able to otherwise

- ○ **Attend the event by engaging with the audience in the live attendee chat**

Set Goals, Then Pick The Platform
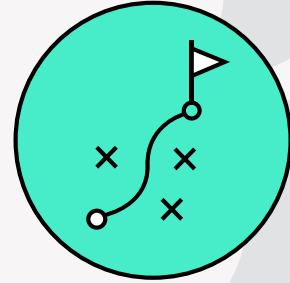
When you need to create human connections, don't depend on technology alone. You'll find an offering for nearly any type of event interaction you want, so let your objectives and audience needs drive the tool selection.

- Conduct platform review and recommendations, including evaluating the need for multiple platform solutions.

- Determine what levels of interaction are needed for:
  - Attendee networking
  - Virtual trade shows
  - Sponsor and exhibitor one-on-ones
  - Awards presentations

- Complete training for staff and speakers

- Rehearse, rehearse, rehearse

- Define what will be pre-recorded versus live content

- Brand and customize the platform for a polished, cohesive experience

Prep Your Attendees

We're all quickly becoming familiar with the different virtual platforms out there, but it's always good to let your attendees know what to expect ahead of time so they have the best experience. It's also a great way to stay at the top of your attendees minds prior to the event.

○ **Create FAQ's on your event website and send an email prior to the event directing people where to find them as well as other important information such as:**

   ○ Providing instructions on how to download software or what browsers to use for the most optimal experience

   ○ Think of engagement barriers for participating and offer tips on how they can create the best experience for themselves (i.e. "Familiarize yourself with these concepts")

○ **As people are filtering into the event, consider graphics that welcome people into the event and also:**

   ○ Tell them how to engage (i.e. "Submit your questions here. Raise your hand this way")

○ **Provide dedicated resources before, during, and after your event to assist attendees with technical or other kinds of support.**

Prep Your Speakers
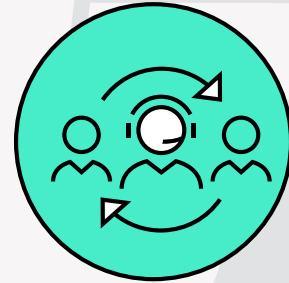
It's different to present to a screen versus a sea of people. A lot of speakers feed off their audience, and the first time they speak at a virtual event, they may need some guidance to get into a comfort zone.

- ○ Assist with tech checks and connectivity details

- ○ Provide green screen, lighting, microphones for a consistent experience:

  - ○ Provide themed virtual backgrounds or providing guidance on clean background

  - ○ Recommend the types of clothing/jewelry that are not distracting (like a newscaster wardrobe)

- ○ Create a checklist and guidelines, especially for those new to the nuances of presenting on video versus in front of a live audience or in a big auditorium

- ○ Work to co-create content and compelling interaction during their session (videos, slides, polling/other audience engagement, etc.)

- ○ Add interactivity every 5-7 minutes to keep your audience engaged

  - ○ Consider polls, questions for the chat /Q&A, games, whiteboards, etc.

  - ○ Don't just add a poll for interactivity — acknowledge the results and incorporate them into the conversation

- ○ Rehearse the timing and tech so presenters know what to expect— and also what they can do to deliver the best experience to attendees

- ○ Have a 'Green Room' on the platform where presenters can gather before 'going live'

- ○ Leverage the Presenter Only Area — it's an ideal way to chat with other presenters, keep track of the agenda, prepare polls and other content, and store notes as a quick reference

Choreograph the Event from End-To-End

Just like an in-person event needs a detailed show book that maps the cadence of the experience, so too should a virtual one. Timing is everything, and virtual events have their own rhythm that can differ in ways from face-to-face meetings.

○ **Outline the experience leading up to the event, on the day of, and post-event for a seamless and consistent experience**

○ **Account for the level of producer support needed**

  ○ Who will set up the meetings, handle registration, let in guests, control show flow, create/steer breakout sessions, manage polling/Q&A, etc.?

  ○ Who will provide technical support to attendees experiencing technical difficulties

  ○ Who will answer attendee questions during the event? (Plan ahead with your own FAQ list for easy reference)

○ **Determine the types of formats you'll support, such as panel, featured speaker, Q&A, and what mix of sessions will be live or pre-recorded engagement (when to intersperse polls, quick quizzes, breakouts, video snippets, etc)**

○ **Plan for strategic breaks and refreshes**

  ○ What kinds of breaks are most effective, and how will you entice them back to their screens?

  ○ Develop 5-10 min interstitials (pre-recorded) promos, sponsor messages, and "coming attractions" from the speakers to drum up interest

Sweat The Details

The production of the meeting and individual sessions requires essential event management skills. A Creative Virtual Event Producer like Yes& begins with the experience you want your audience to have and delivers a broad ability to create the content and experience that makes up the event. Virtual events need to be shaped, curated, timed, organized, and delivered to create that overall experience.

○ **Create a complete production plan**

○ **Assign team for day-of-show directing to run sessions and programming**

   ○ Stage management of remote or in-studio presenters

   ○ Oversee interactive elements

○ **Orchestrate video production, and determine what ratio of pre-recorded sessions and interstitials will keep engagement and focus high**

○ **Strategize the long-tail reach of the event content for post-meeting marketing. This includes the capture and editing of:**

   ○ Program materials, recordings, and handouts

   ○ Video editing of complete sessions into chapters, 5-minute highlight reels, etc.

   ○ Data and analytics

   ○ Repackaging program materials and write-ups of session content with learning objectives that can be used for lead generation, awareness, nurture campaigns, etc. (And leveraged for additional sponsorship!)

Promote, Promote, Promote

Virtual events provide enhanced opportunities to engage early and often with attendees, deliver increased value to attendees, and to adjust the event based on their feedback.

○ **Develop event theme and visual identity that optimizes for different screen sizes**

○ **Plan detailed campaigns and strategies that target attendees before/during/after the event**

○ **Launch a comprehensive website/ microsite for information, including:**

  ○ Smart pathways, search tools, and filters so attendees can match the presentations, networking, and interaction to their interests

  ○ Create-your-own schedule of events (and reminders)

  ○ Resource centers with handouts, videos, helpful online compendiums, etc.

  ○ Session recordings

  ○ Networking tools

○ **Create teaser videos with targeted messaging for different audience needs**

○ **Develop email campaign and automation to appeal to different audiences**

○ **Create a social outreach plan and curated schedule of posts to spread the word and promote pre-event content**

○ **Consider campaigns and pricing that allow larger groups of coworkers to attend in ways they couldn't at in-person meetings**

○ **Repetition of messaging is key — use every tool at your disposal:**

  ○ Multimedia teasers (video, animations, quizzes, infographics)

  ○ Countdown clock to generate excitement for the event kickoff

  ○ Content teasers

  ○ Opt-in for text/email reminders

Best Practices

Optimizing for virtual allows you to avoid tech headaches and lets you better leverage the content post-event. A few tips and tricks include:

○ **Conserve bandwidth by uploading content like slides and video instead of screensharing (requires significantly less bandwidth and provides a higher quality experience for end-users)**

○ **Ensure presenters know how to optimize their desktop resolution (and provide details especially if you're going to use the video recording for post-event content sharing)**

○ **Create a separate layout for each presenter and planned activity — this will automatically create indexes in the recording for each section so you can create content snippets or chapter breaks for post-event use**

○ **A virtual lobby layout provides you an opportunity to engage with attendees who arrive to the session early. Ideas include:**

  ○ Polls and trivia to lighten the mood

  ○ Looping slide deck along with music can inform and energize your participants and prime them for the session

  ○ Sponsor messaging

○ **Take the opportunity to add questions or a quick poll/survey to your registration page to collect information from attendees**

Yes&

Are your wheels turning?

So are ours. With the right strategy, tools, and creative team behind you, you can successfully carry on, and thrive, virtually.

Get in touch and let's get started.

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