Your Virtual Event Planning Cheat Sheet

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Care of **Ax3 Studios** your Corporate Event Producers Concept to Cleanup

Your Virtual Planning Cheat Sheet -

Virtual and hybrid events may be with us for the foreseeable future. Learning how to navigate the planning for these kinds of events, and to feel confident in our role as event producers while helping clients understand their strengths and weaknesses, will take some time and patience.

For some of us, this new reality is being foisted on us unwillingly and throws us far away from our comfort zone. The tactileness of the event, the physicality and the personal connections are what we love most. We want to stick to seating charts, catering menus and floral arrangements. Shifting to a virtual event may seem impossibly overwhelming for some.

For others this is an exciting new frontier of opportunity. The digital experience offers a wide range of possibilities for deliberate interactions and recordable actions. Not even this group of producers would say that the virtual event is the "same" but it definitely has some unique advantages. The virtual space is, by its very nature, more inclusive allowing access to anyone with a wifi connection regardless of location or physical ability. Additionally, virtual events are cheaper to produce, with catering eliminated, venue space and room reservations no longer needed. Finally, it is the greenest option with basically no carbon footprint involved.

Whatever camp you are in, it is going to be a while before conferences and meetings return to the way we knew them. At the very least, hybrid meetings will be with us for a few years while the virus makes its slow, uneven exit around the globe.

At the core of what we do as producers is build a community, bringing people and ideas together. If we focus on this, while we follow our well earned instincts, it will all be ok.

Thank you for reading,
Stay safe.

Aryn Chapman,
Principal and Senior Event Producer, Ax3Studios

Back to Basics

Virtual event planning 101

The first thing to overcome is that a virtual event is not really all that different from a live one to produce or plan. They need the same considerations, support and logistical planning in order to make them successful. Yes, the "venue" is now a website and the "stage" is a live stream of a speaker, but the principles are the same.

Where the virtual landscape deviates wildly is that there are no space or time limitations and that every moment the participant is in your site is an opportunity for engagement. That engagement is the key to keeping your audience involved and present.

Event Strategy & Discovery

In virtual event planning, the "why" will be more important than ever. Before you do anything else, you need to have a clear idea and vision of the experience you want to offer the participants.

- Why are you doing this event?
- When will your event be? Remember key holidays and popular vacation days.
- Who are your participants? What is their age, demographic, expectations and digital savviness?
- How big is this event? How many participants are you targeting?
- Will you have exhibitors?
- Will your content be available on demand after?
- Are you charging for this event?

Once you have figured out the answers to the above questions you can start building an event timeline with all the necessary benchmark dates included, as well as a preliminary budget with the projected revenue included.

Develop Your Event Goals and Objectives

- What are the outcomes and action items you want your participants to leave with?
- How important is networking for your participants?
- Will you have sponsors and what are their goals and expectations?
- What will engagement look like for your event? Are you interested in including polling or live Q&A?
- Are you collecting donations or will you have auctions?

Program Development

This is where we deviate from the live event world a little in that as the producer you will need to be more involved in the designing process of the program. You are no longer just assigning sessions to breakout rooms, and setting catering schedules. Since a virtual experience must be completely designed, every moment is an opportunity for content and an opportunity for engagement. Here are some things to consider when designing your event.

- What format will your virtual event be? Is it a webinar, live steam, web chat, panel discussions or some combination?
- Make sure you include people with disabilities with features like Closed Captioning.
- Will you have networking "lounges" and breakouts?
- Are you planning on executing a multilayered program with simultaneous sessions?
- Speakers will need coaching and rehearsals.
  - ProTip: ask them to include polling and questions to the audience regularly throughout their presentations.
- Keep time zones in mind when planning sessions. Not just for the speakers but the participants too.

Collect and Organize Your Team

- Source the platforms and apps that will support the above goals and strategies. Not all platforms are created equal and they vary in costs wildly. (Ax3 will have some additional tips on this coming soon.)
- Determine your A/V needs and find a partner experienced in virtual meetings to support you.

- Choose a team that is tech-proficient and digitally savvy. You will all need to learn some new lingo, but better to have a team that has a head start.
  - ProTip - This team can be entirely remote and does not need to be local.
- As always, choose team members you completely TRUST.

Establish Your Budget

Once you have your team selected, platform chosen and content list created, update your preliminary budget. Virtual events still cost money so keeping track of spending and revenue is a must. Your ROI report will thank you at the end .

> ProTip - You will still need event insurance. This time it will be for cyber security, loss/theft of data and, god forbid, in case the internet goes down. Remember the vimeo and YouTube blackout in June of 2019?

- Ask for updated estimates from all your partners throughout the process, you don't want any surprises.
- Create an emergency fund or a contingency as a part of your budget.

Content Creation & Coordination

The look and feel of your event has always been a fundamental part of the event strategy. Here, the event producer's role is slightly different than in live events, but only in the amount of content that will need to be created and delivered.

- Make a content list with delivery dates and share that with all the stakeholders. This should include all the videos, PPT slides, website designs, banner ads and anything a marketing team might need for various media outlets.
- Creat technical specifications cheat sheet will also be helpful for all the concerned parties so that file format, and where to upload it, is all communicated and transparent.

Identify and Establish Partnerships & Sponsors

This is obviously not for every event, but for those that have partnerships and sponsorships, it is very much the same relationship as before. Ax3 has written an article about this for more details click HERE.

- What are the expectations of the sponsors and partners?
- What are the opportunities for the sponsors and partners?
- How are you going to ensure their visibility and touch points?
- Will the sponsors and partners be able to collect leads?
- What is the price structure?

Create a Publicity Plan

Marketing largely is the same. Identify who will be in charge of this and support them with what they need. As with a live event it is good to have a minimum of a six-week runway to get the word out.

The Day-Of

Unlike the live events you have done in the past, a rehearsal for your virtual event is simply not optional. Everyone will need it, your platform administrators, your A/V team, the speakers and your team. This is all a bit new for most, so practice will make it better.
- Rehearse, rehearse and more rehearsing.
- Have a stage manager/director to call the show.
- Make sure your speakers are ready, their WIFI is working and they look good.
  - ProTip - Check their backgrounds and have them adjust the camera angle away from unmade beds, messy living rooms and the spouse reading in the comfy chair. More on this? Article here - LINK
- Make sure all the slides, scripts and visuals are up to date, delivered to the technicians and standing by.
- Moderate the chat. There are malevolent, mischief-making people out there. Keep them out of your chat rooms.
- Moderate all the social media channels, same as above and there may be something good you want to re-tweet etc.
- For some sessions, it may make sense to have a waiting room where you stage manager/director allows speakers into participant view or could also approve the entry to each participant. This waiting room can be used as your last double check on a speaker's microphone and camera.

Post-Event Review

In this digital world you have created data is king. Every movement, every interaction and every engagement can be tracked and recorded. (Depending on how detailed you want this information you may need a disclaimer in your registration language. More on that coming soon in another article.)
- What sessions were most popular?
- How long did participants stay engaged?
- How many participants went to the exhibitor booths and how long did they stay?
- Was the networking effective?
- Were leads generated?

- What were the donations and when did they come in during the program?
- Review the event planning strategy, the platform and the team.
- What did participants say in their post-event surveys?

These coupled with the revenue numbers should give you a clear picture of if the event was successful.

Event Timeline:

Six Months Out:

Complete:
>> Event strategy & discovery
>> Develop your event goals and objectives
>> Program development
>> Collect and organize your team
>> Establish your budget
>> Start selling sponsorships
>> Create the event registration pages and social media presence
>> Start reaching out to potential speakers

Three Months Out:

> Start all content creation for the event
> Start building your event platform
> Promote your event

Continue:
>> Selling sponsorships
>> Scheduling speakers

One Month Out:

> Confirm Speakers
> Collect all payments from sponsors and exhibitors
> Share all planning documents with your teams
> Start collecting and organizing final content
> Decide how teams will communicate on the day of the event

1 - 2 Weeks Out:

Demo your site
Have friends and family help you beta test every link and ensure that all copy is clear
Finish collecting payments
Finish collecting content
Finalize the Run of Show and all scripts

The Day Before:

Test, rehearse, test, rehearse - rinse repeat
Troubleshoot throwing Stream Bomber off the site - It sounds unpleasant and it will be
Watch every video, see every PowerPoint
Have all your speakers rehearse
    ProTip: Invite friends and family to help be your participants.
Send out all final schedules with links and contact information
Set dress code expectations for speakers and your teams

The Day-Of:

See [The Day-Of](#) above
Remember to have some FUN!
Check in with your teams constantly

After the Event:

See [Post-Event Review](#) above
Have a post mortem meeting ASAP
Review the budget
Tie up all loose ends
Settle any remaining bills for the event
Send surveys and "Thank You" notes

If you don't have six months, then you can compress this into three at the shortest. We really do not advise trying to put together any event with anything shorter than 12-16 weeks of preparation time. Firstly, you really are shorting yourself in marketing time and secondly, since this is a new medium, you really need to give yourself time to learn as you go. Trying to build the plane as you are flying it is hard to do.

Once you commit to this and start to dive in, feel free to reach out to us for support. We offer one-hour free consultations and we can also help take some of the workload if needed.

 Good Luck!

Clean Hands, Clear Heads & Open Hearts