Virtual Event Planning

Guide to Best Practices

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Overview

Planning a virtual event is much like organizing a traditional event—there are many details to consider, all of which are important. When approaching event planning, it is best to break the processes into smaller, more manageable components. The following guidelines outline the necessary steps you should take to ensure your virtual event is a success:

Strategy – Before you begin planning your virtual event, you must outline your strategy. You need to define your target audience, registration expectations, etc. Compiling an event strategy will provide you with the big-picture perspective you will need as your event progresses.

Registration – An event site allowing users to register online is critical when planning a virtual event. Most people will not attend an event where they cannot gather additional information and register online. Add a section or a registration page within your company's Web site or create one specifically for your event.

Marketing – Communicating with your audience and convincing them to register and attend your virtual event is the most difficult part of producing any seminar. Although Web events, unlike traditional events, are easy to join and are usually offered with no registration fee, it is still a challenge to build an audience. Marketing MUST be a key component of your pre-event planning.

Speakers – Finding and organizing speakers can be more frustrating than imaginable at times, but you cannot have a successful event without them. You will need to communicate with your speakers constantly, outlining how the event will unfold, when the training and dry runs will occur, etc. Keep up with communications and everything will come together.

Confirmations – Keeping your registrants informed is extremely important as your event unfolds. If registrants do not know crucial details, such as how to join the event, what time it will take place, or have not been reminded about the seminar schedule, they will not attend. An average of 70 percent of your registrants will NOT show up. You have to work to keep them interested in attending your production!

Logistics and Contingency Plans – Making sure everything is set up for your online seminar is one of the most time-consuming parts of virtual event planning. Ensuring the technology is working, everyone in the office has been briefed, etc. are just a few issues you will need to contemplate as the event date approaches. Over-prepare, have contingency plans and designate co-workers or others to help you with specific event logistics.

Follow-up – Remember that no amount of pre-event planning or success will help if you fail to end your event properly and in a timely manner, destroying all of your hard work. Complete a few simple steps and your attendees, team, speakers, and most importantly, your management will leave with a powerful impression of your virtual event.

Strategy

The first step in planning your event is to hold an Event Strategy meeting. Summarize the meeting in an Event Plan so everyone knows what to expect. Your document should outline the following information:

- Objective(s)
- Message/Title—only ONE!
- Moderator/Speaker(s)
- Target Audience
- Agenda
- Date/Time
- Technology (you will be using for your Web seminar)
- Incentive(s)

- Marketing Strategy (high-level outline)
- ROI Measurement (how you will measure success—measurement should circle back to event objectives)

After you prepare your strategy document, proceed with the following immediately:
- Create an event project plan and assign project team resources
- Develop a list of risks, including researching dates for conflicting events
- Confirm speakers can make the selected date and schedule a kick-off call
- Finalize an incentive – Determine process requirements, develop legal parameters and guidelines for any drawings, and procure a giveaway

Registration

As soon as your event strategy is in place, begin developing your event registration page. Create a document outlining all the details, such as content, page flow and technical issues and get approval before getting your programming or design staffs involved. Don't waste anyone's time unnecessarily. Listed below are some of the required steps to follow when working on your event site:

Page Structure - Determine your site registration requirements and include the following pages at a minimum:
- Information Page – This page should provide an event description, a bulleted list covering the event benefits and what attendees will learn, speaker pictures, bios and any incentives you are providing.
- Registration Form – ONE PAGE only. Do not try to gather a lot of information from registrants, as you will only annoy them and possibly lose registrations. Keep in mind that the average conversion rate of visitors who view your registration page or site is 50 percent. Having more than one page of information to complete will lower your registration percentage significantly.
- Thank You Page – A confirmation page that registrants see after the registration form is completed. Make sure this page is simple and straightforward. Thank them and inform them that they will receive an e-mail confirmation detailing the upcoming event.

Tracking and confirmations – Decide on how the data will be captured and assign a resource to monitor the process. Ideally, you should capture all event information in a database and the system should send automatic confirmation notes.

Home Page Promotion - Create a noticeable link from the Home page to drive visitors to the registration page. Don't forget that this type of promotion is at NO COST to you, so always take advantage of opportunities such as this. See more about marketing your event below.

Review Registration Numbers – Throughout the marketing process, occasionally check your registration numbers. Evaluate which channels are working best. You may need to adjust your marketing strategy to meet your registration goals.

Registration Validation – In some circumstances, you may want to decline certain attendees, such as competitors and e-mail accounts with yahoo.com, hotmail.com, etc. Decide at the beginning of your planning process how you wish to deal with these registrations. You can simply ignore these individuals and not send the access information or inform them that the event has reached its capacity.

Marketing

There are various ways to market any event. Listed below are a few commonly used and highly recommended promotions.

- The "Options" column refers to the different ways in which you can market your event through each promotion.
- The "Channel" column refers to possible sources for promotions. Contact different channels so you know your available options. Remember that oftentimes, channels also provide free or co-op promotion opportunities, so don't overlook them!

Also, make sure all promotions offer the ability to click through to your registration site.

Promotion Types	Options	Channels
Web Site Advertising	▪ Banners ▪ Standard ▪ Skyscrapers ▪ Large Format ▪ Buttons ▪ Event Listings ▪ Video Clips	▪ Your own Web Site ▪ Association or Analysts ▪ Magazines or Portals ▪ Partner Sites ▪ Sponsor Sites
E-mail Newsletters	▪ Text ▪ HTML	▪ In-House Newsletters ▪ Associations ▪ Analysts ▪ Magazines ▪ Portals ▪ Partner Newsletters ▪ Sponsor Newsletters
E-mail Blasts	▪ Text ▪ HTML ▪ Virtual Reality (Talking/3D head)	▪ FREE Databases - In-House - Partner's - Sponsor's - Speaker's ▪ Rental Lists – BUY OPT-IN ONLY! - List Brokers - Associations - Analysts - Magazines - Portals
Search Engines	▪ Submission-based ▪ Impression-based ▪ Click-based ▪ Registration-based	▪ Google ▪ Overture ▪ Yahoo

The Numbers

Planners often wonder how much promotion is needed to reach a certain number of attendees. Below is a standard calculation:

STEP	DESCRIPTION	NUMBERS
Impressions	Number of times promotions are seen	100,000
Clicks	Visitors to the registration page (2% avg.)	2000
Registrations	Visitors that complete the registration (50% avg.)	1000
Attendees	Registrants that actually attend the event (33% avg.)	333

Remember—if you record and archive your event, many of the original registrants will attend later. Do NOT tell them up front that the event will be archived. This will lower your live attendance.

Other Marketing Ideas

Press Releases – Send out a press release about your upcoming event. You may not generate a great deal of coverage, but the release usually steers the media to your event for data if they are researching your event topic for an article. Don't forget to add the release to your own Web site press section.

Articles – Develop contributed articles that correlate with your event topic. Make sure they are placed in advance and mention the event is coming in the article footer. Be forewarned. This marketing tactic requires advanced planning and careful strategy.

Viral Marketing – Viral marketing is difficult to do but worth taking on if you get it right! We have all received funny pictures or videos that we have passed to other people —that is the viral concept. People pass messages and interesting e-mail around free of charge.

Traditional Channels - Direct Mail? Print Advertising? Telemarketing? Traditional channels can be used for marketing virtual events, but they increase the barrier to entry. It is much more inconvenient and highly unlikely that someone will read a direct-mail postcard, bring up a browser, type in the URL (which will be long if you want to track each marketing channel and will probably be entered incorrectly,) and finally, go to the registration page. It is much easier and probable that your audience will click on a link in an online promotion.

Swap for it! – Don't forget that you have things to offer to other companies. Do you have a partner that has a great internal database? Perhaps they would want to be a sponsor of your event in exchange for helping you with promotions. Does your company offer services or products that you can promote to people for free in exchange for supporting your program? Think out of the box!

Speakers

The key to managing your event speakers is to be well prepared and provide a solid structure for them to follow. Listed below are the key steps for which you need to clearly outline and provide deadlines:

Kick-Off Call – All speakers must be in attendance during this initial call. The focus of this call is to discuss an event topic, decide who will be presenting and what, as well as how the event will flow. Below are a few things you need to make sure you cover:

- Schedule/Due dates – Required presentations, rehearsal, technology training, touchbase call, and live event.
- Items you need for promotions – Pictures, bios, titles, logos, etc.
- Discuss the technology you will be using and the features the speakers will have when using the technology.
- Give presentation guidelines, such as keeping slides simple and the number of slides speakers are allowed.

Technology Training – Provide training for those who are not familiar with the technology you are using for your event. Your vendor should provide this training.

Presentations – Drafts should be turned in one week before the rehearsal, and final slides are two days before the rehearsal.

- Review speaker content (Confirm presentation against objectives/messages).
- Review any special slides, video, or audio?
- Insert any polling questions.
- Develop the end-strategy – Survey? Downloads? Drive to Web site?
- Review presentation graphics.
- Discuss any changes with speaker(s).
- Submit presentation to technology vendor.
- Test presentations in the technology.

Rehearsal - The rehearsal should be about one week before the live event. Thus you will have time to make adjustments, if necessary. Below are some pointers for your event rehearsal:

- Schedule the rehearsal for the same time of day as the live event and get everyone used to that time.
- Send out the rehearsal access information at least one day in advance or your speakers will feel uninformed.
- Ensure that everyone has tested his or her access information hours before the rehearsal so this does not delay your start.
- Reserve and set-up all rooms and equipment. Ideally, the rehearsal should mimic the live event. Hold it in the same room(s) with actual equipment, test attendee dial-in, run through the presentations, practice Q&A with the operator, etc. Get the rehearsal environment as close as possible to the live-event environment. Plan for the worst.
- Make sure all speakers will be on handsets or headsets.
- Set up a modem/dial-up so you can test the presentation on a slow connection. Make sure you cover the following during the rehearsal:
- Finalize event flow – Discuss the flow and transitions between presentations.
- Finalize content for welcome or lobby slides that attendees will see before the event starts.
- Test any high-bandwidth components such as video or Flash (check this on the modem machine you have dialed in.)
- Finalize all polls.
- Define the Q&A and chat processes.
- Define the Incentive/Drawing processes.
- Finalize the end-strategy – Going to a survey? Surfing to a Web page? Leaving up a contact slide? Etc.?

Touch-Base Call – This call is held two hours before your event and is very valuable. Your call will allow everyone to do a final review of the slides, make sure nothing was destroyed during file transfer, calm everyone down (presenting in the virtual world can be unsettling), and enable you to make sure everyone remembers the event date. The touch-base call will be covered in more detail in the live-event section of this white paper.

Live Event – You should dial in about 30 minutes before the event to touch base with the operator and be available in case anyone is having difficulties. Your speakers and support team should dial in approximately 15 minutes before the event begins. This will be covered more in the live-event section of this white paper.

Debrief – Have the operator put the speakers and support team into a sub-conference after the event so you can do a quick de-brief while it the event details are still fresh. This will be covered more in the post-event section of this white paper.

Tips for working with speakers:

- Have ALL pertinent contact information – Office, cell, home.
- Know your speakers' assistants and befriend them.
- Know if anyone is techno-phobic and give them special attention.
- Push them to use the various features of the e-conferencing tool.
- Know group dynamics – How do they relate to each other? Who is in charge? Anything to which you need to be sensitive?

Confirmations

At this stage in the planning everyone is registered. Now you need to simply remind registrants they are registered and give them the information needed to join the event. You could give your registrants access information at the time of registration, but there are various reasons it is good to wait. You may want to weed out competitors, and not providing information at the onset gives you reasons to send reminders. In addition, something may happen to cause you to want to change e-conferencing vendors and you do not want to have to send new access information. Plan on sending three confirmation notes:

- One week before the live event – Calendar reminder/access check instructions.
- One day before the live event – Access information.
- Morning of the event – Access information again.

Confirmation Email Structure:

To: (If you are sending this through MS Outlook make sure you put all the e-mail addresses in the BCC space so that everyone does not see the other registrations.)
From: Your Company Name
Subject Line: Confirmation – XXXX Web event on XXXX (date)
Title: (event title goes here)
When: (date/time goes here)
Where: (access information here or in the first note tell them it will be coming soon)
Why: (remind them of the event highlights)
Who: (who to contact if they have questions)

Confirmation note tips:

- Make it clear in the subject line what you are sending.
- Keep it short!
- Have contact information for general questions and your vendor contact phone number or e-mail for technical questions.
- Watch out for words that will stop your e-mails in a spam filter, such as free, etc. No CAPS.

Logistics & Contingency Plans

Event setup is very important and normally easy to prepare for in advance so try to get as much planning out of the way as early as possible. Remember—you cannot have too much detail in a To Do list!

Staffing to schedule:

- Receptionist – Make sure they are prepped with a cheat sheet if people call.
- Technical Staff – Make sure they are standing by and know you need the servers to be free of any large processing.
- Runners – Get a few people to help as needed. Train Runner and Receptionist AND create information cards.
- Q&A Managers – Have someone assigned to handle the Q&A and chat.
- Plants or audience seeds – Have someone dialed in and armed with a few questions to get the Q&A rolling if necessary.

Reserve the following:

- Technology – Phone lines and Web technology for all calls (test yourself before sending out. AND—make arrangements for the archive recording.
- Rooms – Made available for presenters and support team for all calls.
- Equipment – Laptops, servers, phones, back-up equipment, etc. for all calls.

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Contingency Plans:

- Backup Equipment – Modem and remote.
- Communication Line – Have a direct line with the operator at all times.
- Send your team and speakers an e-mail with everyone's contact information in case there is a problem.

The little things make a big difference:

- Always do "one more check" to validate the logins and phone numbers.
- Have water near each speaker.
- Have notepads and paper available.
- Print hard copies of all the presentations – One copy for you and one for each speaker.
- Test backup equipment.
- Create and post "quiet signs."
- Two days before the event check your registration numbers and confirm the number of phone lines with your conference company. A good estimate is that one third of your registrants will attend. Ask how many lines you can be under before receiving a penalty and how well staffed they will be during your event if you exceed your numbers.
- REMEMBER – Over-communicating is better than under-communicating! Constantly send reminder notes during the event process and planning stages.

Event Day Schedule

2 hrs before Touch-base Call

- Brief / meet operator
  - – Speaker names
  - – Intro script
  - – Q&A structure
  - – Roles
  - – Recording line
- Review presentation and flow
- Test all equipment – Including back-up
- Give the speakers tips and reminders

30 min before You should touch base with the operator to go over any final details or changes.

20 min before Speaker's Dial-in

- Do a final sound check
- Final reminders to speakers
- Respond to access questions
- Get a number check
- Two minute report to audience

LIVE EVENT! Good Luck!

Immediately Following Debrief

- Have the operator pull the team into a sub-conference
- Feedback – What worked? What didn't?
- Changes for next time
- Next steps

Follow-up

To end your event properly, you need to make sure you complete everything that was promised and document what happened. Below are items for a good event wrap-up:

Attendees – Be sure to follow up with attendees within a week of the event. If you are not as prepared as you had hoped to be, let them know the items you promised them will be coming soon. Don't let them feel like they've been forgotten. Below are items you need to make sure you do not forget:

- A thank you for attending e-mail – Ideally with the archive notification included
- An incentive fulfillment – Send out any white papers or items you offered to entice them to attend.
- Drawings – Let the winner and everyone else know who won. This builds credibility and gives you one more reason to communicate with your attendees.

Leads – Within a few days of the event, hold a sales or lead meeting. Include as many representatives from the sales team as possible. During the meeting, sort the leads into the following categories and assign each lead to someone (document this and follow-up with them a week later.)

- Hot – Probably should be assigned to a sales rep.
- Warm – Possibly send a note or assign to an inside sales rep for further qualification.
- Cold – Add to your database and any newsletter or occasional communication lists.

Speakers/Support Team – At a minimum, be sure to send your speakers and support team an e-mail, thanking them the day after the event. If possible, send small gifts to show your appreciation. This will leave your team with a strong impression and help leave you in a position to ask for their help again. Also, once the survey results are tallied, make sure everyone is on the distribution list and make sure they are notified when the archive is available. Encourage your speakers to link to the archive from their Web site.

Post-Event Audit – It is important that you create a post-event audit to document the event and provide you a tool to justify the next seminar. Below are some items you could outline in the document, but most importantly, you need to evaluate if you met your objectives. If you did, make sure everyone knows—especially management.

- # of Impressions
- # of Clicks
- # of Registrations
- # of Attendees
- # of Leads
- Budget vs. Actual

Good luck with your next virtual event. Thank you for considering Infinite for your event management and conferencing needs.