The Complete Guide to Virtual Event Creation

EVENT GARDE

RICOCHET

Foreword

Associations grew over the past century to facilitate professional and practice development, often through in-person meetings. However, recent federal, state, and local government responses to the COVID-19 pandemic essentially eliminated associations' ability to deliver traditional in-person activities at a time when members actually needed more information and support.

By April 7, 2020, nearly all of the U.S. had implemented either statewide or major metropolitan stay-at-home orders. As the restrictions on travel and public congregations continued into the year, most associations were forced to reconsider their remaining 2020 in-person event plans. Organizations were left contemplating whether to cancel, to delay, or to pivot to virtual events.

We understand that organizers must consider at least their mission and education objectives, participant health and safety, government guidelines, and financial needs when making this difficult choice. For those associations that believe a virtual event is the best replacement for their in-person meetings, conferences and trade shows, we provide this resource as a tool to help with conceptual preparation and detailed planning.

Producing a virtual event is difficult and those with years of experience can anticipate and resolve all the challenges you will face, but the structures and checklists contained within this guide should help you avoid many of the more common mistakes. The face of associations will inevitably be changed by COVID-19, and virtual events — including the virtual components of hybrid meetings — will inevitably be a significant part of this future for most associations.

Chris Gloede
Chief Consultant
Ricochet Advice

Aaron D. Wolowiec
President & CEO
Event Garde

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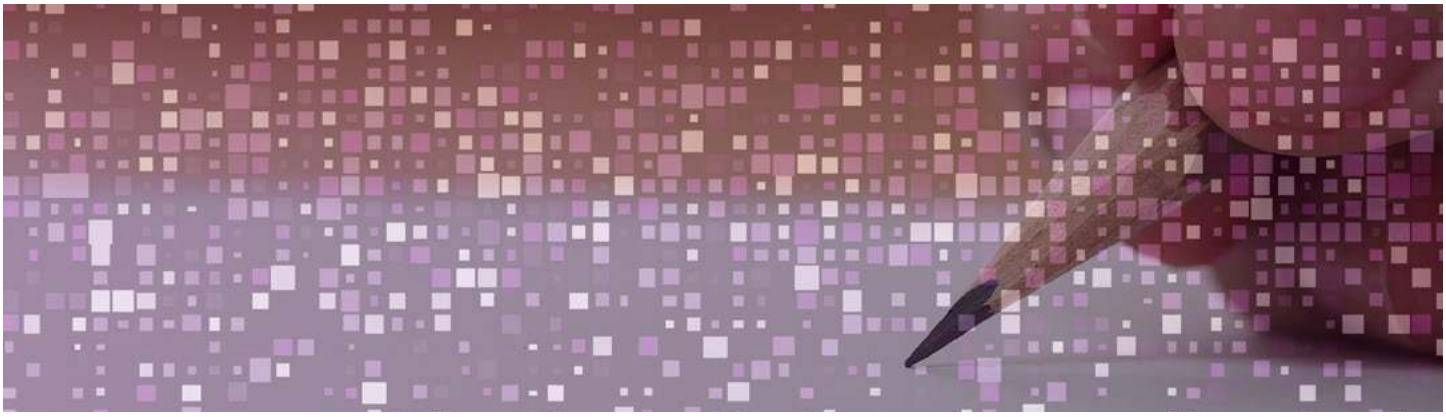

> **When your organization's primary function is creating communities for social engagement at every level, the impact of not being able to meet face-to-face requires you to re-imagine that world in a virtual environment. The health and safety of everyone is a priority, everything else we can work with."**
>
> ***Trevor S. Mitchell, MBA, CAE***
> ***Executive Director/CEO***
> ***American Mensa and the Mensa Foundation***

Abandoning In-Person Events, For Now

Associations are known for their in-person events. Organization staff are experts at creating memorable conferences, leadership meetings, educational sessions, and social gatherings. In fact, many associations rely on revenue from these events to fund a significant portion of their operating budgets.

So when the COVID-19 pandemic swept through our global society in 2020, many associations chose to transform their in-person events into virtual offerings. And as governments and businesses continue to restrict travel and gatherings, not to mention the reductions to the professional development budgets of our members, associations have realized that there will be few, if any, in-person-only events in the near future.

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> **"Digital events can be a powerful tool in an integrated content and marketing strategy. By incorporating best practices in experience design and production-quality presentations, they can drive brand engagement and business objectives in this time of disruption."**
>
> ***Annette Gregg, CMM, MBA***
> ***Senior Vice President, Experience***
> ***Meeting Professionals International***

Choosing a New Event Strategy

When in-person events aren't feasible, associations must consider their options. Of course, converting to a virtual event is a popular choice, but there are other alternatives. These options include full event cancellation, event delay, delivering content as written material, or conducting a series of periodic webinars.

Reformatting a traditional in-person event is a strategic decision associations shouldn't take lightly. When weighing their options, organizations must consider audience needs, government regulations, participant safety, legal obligations, and financial needs, among other key factors. The decision isn't easy and shouldn't be made in isolation.

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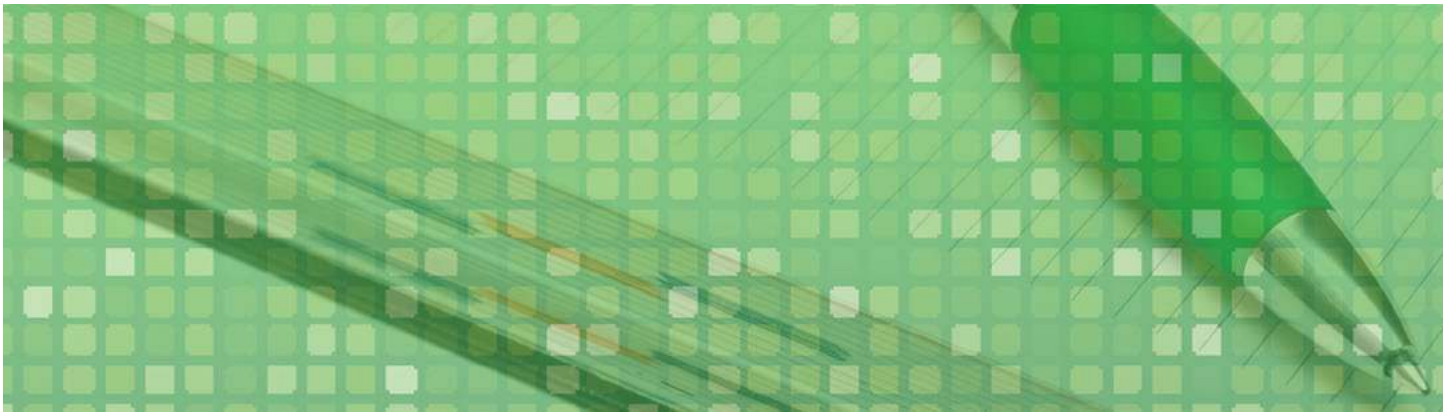

> **If a virtual event doesn't include networking or engagement, it's just a webinar."**
>
> ***Corey McCarthy***
> ***Chief Marketing Officer***
> ***Socio***

Starting Over with a Virtual Event

When an association decides to convert an in-person event to a virtual experience, it is committing to change most of the event characteristics. A conversion to a virtual format is not simply "copy and paste." The association will need to revisit all of its strategic plan and start fresh on fundamental decisions ranging from dates and registration fees to how best to engage and showcase presenters, sponsors, and exhibitors. As a virtual event of meaningful size is a new effort for many associations, it's important to engage the range of staff, leadership and volunteer perspectives, including that of the chief staff executive.

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The 147 Item Virtual Event Creation Checklist

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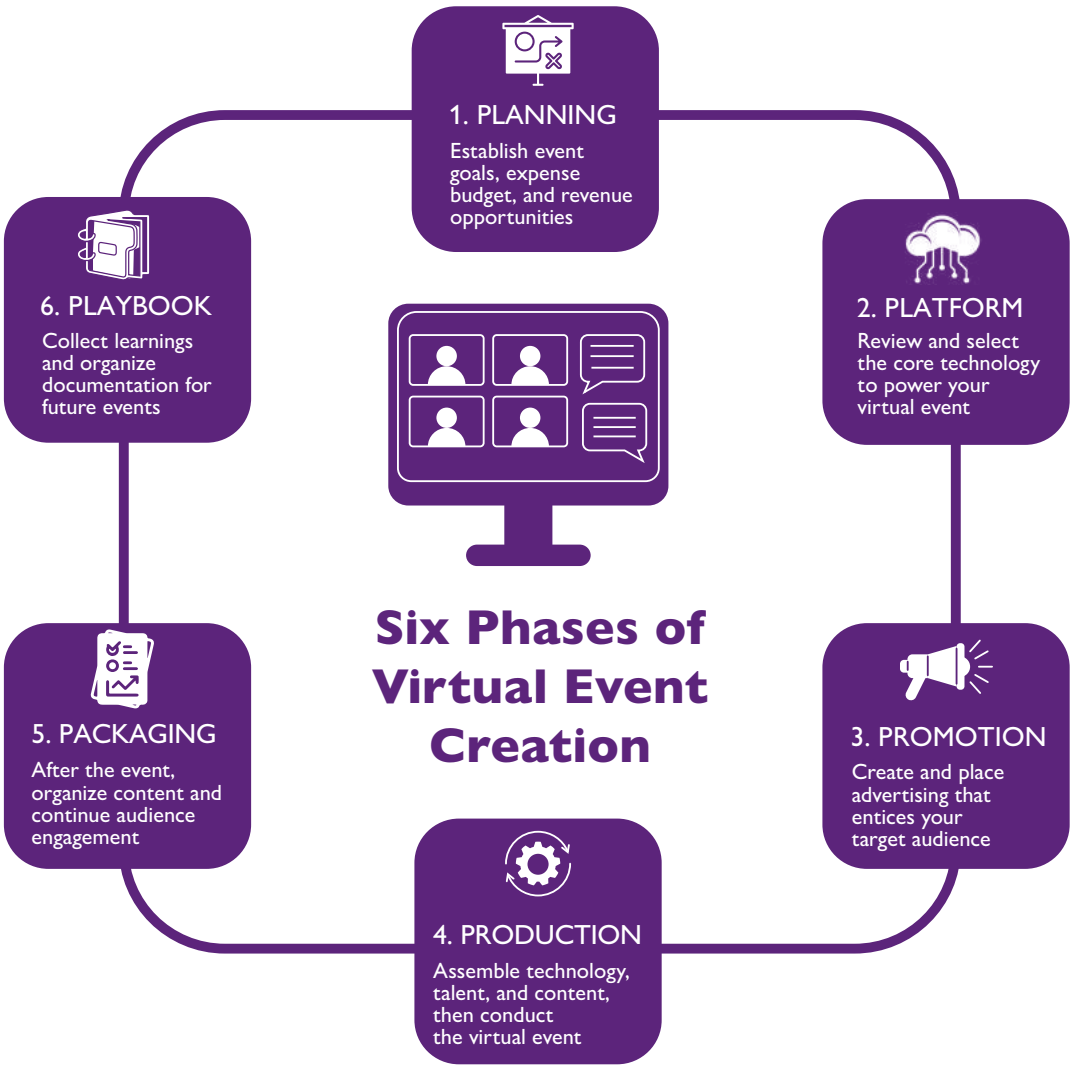
Six Phases of Virtual Event Creation

Virtual events can vary widely, from a few attendees to a few thousand, and from one session to weeks of activities. There is no one-size-fits-all approach to conducting a virtual event. However, we believe there are six phases of activities that are common across all virtual programming. These phases aren't entirely sequential as some simultaneous work is required across phases.



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1. Planning

Careful and complete planning is the key to a successful virtual event. There will always be time constraints impeding the amount of time you allow for this phase, but the Planning phase needs to be methodical and thoughtful. Time spent in Planning is saved later in the process. In this initial phase, you establish the team responsible for the virtual event success, select the event date(s) and times, define attendance and other goals, project expenses and revenue, solicit exhibitors and sponsors, and create a detailed plan for the remainder of event-related tasks.

2. Platform

Selecting a virtual event technical platform that meets your needs and helps fulfill your vision is a crucial decision. Most Platforms offer limited custom feature capabilities, so it's important to prioritize the features that are most important and seek out Platforms that offer the best functionality within your budget constraints. Platform work is never done as the landscape of providers is always changing and the expectations of attendees are always evolving.

3. Promotion

Changing an in-person event to a virtual event creates opportunities to reach incremental audiences that were geographically distant or otherwise unlikely to attend when physical attendance was required. But registering those new audiences will require new marketing approaches. In the Promotion phase, you segment your audiences, establish messaging, place media, engage the press, mobilize your communities, and plan all your in-event coverage.

4. Production

Combing the virtual event technology, talent, and content can be the most challenging—and rewarding—phase of the work plan. You will need to support your speakers, ensuring they are preparing content and focusing their messages. In the Production phase you finish the full schedule of activities, prepare your technical platform, develop content, establish customer service, select your speakers, and conduct the actual virtual event.

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5. Packaging

The work isn't over after the virtual event ends, despite the inevitable relief and exhaustion. The event content is a valuable asset for your organization that needs attention, along with completing contractual requirements for your vendors. In the Packaging phase, you complete analysis of the event performance, archive content, follow through on education credential requirements, fulfill financial obligations, and communicate with the event registrants and other key stakeholders.

6. Playbook

With the virtual event obligations all complete, the Playbook phase creates time and space to review successes and learnings. You'll take the opportunity to organize materials and lessons learned into best practices that will be helpful for future virtual events or replication by regional affiliates. This phase also completes the full financial analysis of the event, ending the entire project.

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1. Planning

Leadership

- ☐ Identify organization stakeholders
- ☐ Form task force/committee and schedule recurring meetings
- ☐ Select a single event production manager devoted to coordination
- ☐ Determine decision-making authority with concern for expediency

Strategy

- ☐ Select event name
- ☐ Gather and review member and past registrant data
- ☐ Determine virtual event target audience
- ☐ Develop segmented event value proposition

Calendars

- ☐ Review competitive/complimentary event dates
- ☐ Select event dates
- ☐ Select times-of-day with consideration for audience time zones

Goals

- ☐ Establish registration and attendance goals
- ☐ Establish attendee learning, networking, and satisfaction goals
- ☐ Establish membership conversion goal
- ☐ Establish sponsor and exhibitor count goals

Diversity, Equity & Inclusion

- ☐ Review commitment to diversity, equity and inclusion
- ☐ Align virtual event to organizational diversity commitments

Finances

- ☐ Project revenues (e.g. sponsorships, exhibitors, registrations, dues)
- ☐ Project expenses (e.g., staffing, promotion, speakers, technology)
- ☐ Establish registration fees with discounts and early-bird pricing

Sponsors and Exhibitors

- ☐ Identify sponsorship opportunities leveraging platform capabilities
- ☐ Create sponsorship and exhibitor pitch materials
- ☐ Pivot sponsors/exhibitors already contracted for in-person events
- ☐ Identify new prospective sponsors and exhibitors
- ☐ Solicit, negotiate, and contract sponsors and exhibitors
- ☐ Collect sponsor/exhibitor assets

Education and Credentialing

- ☐ Determine event educational theme
- ☐ Develop high-level education plan
- ☐ Plan CE application as approved provider or single-event provider
- ☐ Plan post-event communications necessary for CE compliance
- ☐ Determine CE application requirements for recorded/self-study content

Project Plan

- ☐ Establish registration open, close, and early bird dates
- ☐ Establish last date for event cancelation (go/no-go date)
- ☐ Schedule key event production meetings
- ☐ Create detailed plan for remainder of event tasks/milestone dates

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2. Platform

Needs

- ☐ Prioritize virtual event technology feature needs
- ☐ Identify potential platform providers
- ☐ Research platform reviews

Contracting

- ☐ Publish requests for proposal (RFP) or requests for information (RFI)
- ☐ Deliver RFP or RFI to desired platform providers
- ☐ Review RFP/RFI responses
- ☐ Select, negotiate, and contract platform provider

Implementation

- ☐ Orient platform provider and determine implementation timeline
- ☐ Configure platform functionality
- ☐ Upload graphics and content
- ☐ Integrate login/sign-on
- ☐ Integrate member/customer data
- ☐ Integrate commerce/registration systems
- ☐ Test and launch platform

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3. Promotion

Campaign

- ☐ Segment audiences
- ☐ Define messaging and supporting proof points
- ☐ Develop branding toolkit (e.g., event logos, fonts, colors)
- ☐ Develop full campaign calendar
- ☐ Create promotional collateral (e.g., microsites, emails, social posts)

Communities

- ☐ Identify and engage with existing forums
- ☐ Plan, establish and engage with event-only forums

Broadcast

- ☐ Plan live broadcast channels (e.g., FacebookLive, LinkedInLive)
- ☐ Plan live broadcast criteria and select sessions and activities

House Media

- ☐ Plan and execute in-house media placements (e.g., newsletters, emails)
- ☐ Plan and execute updates to association website
- ☐ Plan and execute event microsite
- ☐ Plan and execute organic social posts

Paid Media

- ☐ Plan and execute paid social media
- ☐ Plan and execute online impression media
- ☐ Plan and execute online pay-per-click media

Earned Media

- ☐ Invite reporters and news outlets
- ☐ Plan and prepare press badging and access
- ☐ Plan and prepare pre-event press releases
- ☐ Plan and prepare news embargoes and releases
- ☐ Plan and prepare post-event press releases

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4. Production

Content Guidelines

- ☐ Define content copyright rules
- ☐ Establish and post community standards policies
- ☐ Collect and prepare pre-recordings/ digital assets

Agenda and Sessions

- ☐ Select "star" speakers for top sessions
- ☐ Determine breakout tracks
- ☐ Schedule sessions (e.g., plenaries, breakouts)
- ☐ Prepare event attendee evaluation questions and system

Speaker Selection

- ☐ Release call for presentations
- ☐ Review presentation applications and select speakers
- ☐ Plan surprise and star speakers

Activities

- ☐ Schedule networking activities (e.g., virtual cocktails, hangouts, breaks)
- ☐ Schedule engagement activities (e.g., networking, polls, chats, contests)
- ☐ Schedule entertainment activities (e.g. performances)
- ☐ Schedule ritual activities (e.g., auctions, officer transitions, memorials, awards)
- ☐ Schedule exhibit hall activities (e.g. contests, demonstrations)

Speaker Preparation

- ☐ Educate speakers on virtual event learning best practices
- ☐ Collect and review speaker content and provide feedback
- ☐ Plan and conduct training and rehearsals
- ☐ Create and collect content/talent release forms
- ☐ Create and share troubleshooting and problem escalation plan
- ☐ Collect and share final presentation materials

Entertainers/Moderators

- ☐ Secure moderators, interpreters, closed captioners, and entertainers
- ☐ Plan and conduct moderator training and rehearsals
- ☐ Plan and conduct interpreter and closed capitioner rehearsals
- ☐ Plan and conduct entertainer rehearsals
- ☐ Create and collect content/talent release forms
- ☐ Create and share troubleshooting and problem escalation plan

Sponsors/Exhibitors

- ☐ Create success tools/coaching guides for exhibitors/sponsors
- ☐ Plan and conduct sponsor training and rehearsals
- ☐ Plan and conduct exhibitor training and rehearsals

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Customer Service

- ☐ Develop service center scripts
- ☐ Plan event staffing to troubleshoot participant needs
- ☐ Publish login/navigation information for attendees
- ☐ Document and publish text FAQs
- ☐ Create and publish video support for tech-challenged attendees

Virtual Event

- ☐ Pre-record sessions
- ☐ Conduct session activities
- ☐ Conduct networking activities, conversation seeding, and moderation
- ☐ Conduct engagement activities
- ☐ Conduct entertainment activities
- ☐ Conduct exhibit hall activities
- ☐ Conduct ritual activities
- ☐ Conduct press activities
- ☐ Conduct attendee evaluation process

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5. Packaging

Lockdown

- ☐ Confirm all registrations are closed
- ☐ Confirm all media has stopped

Analysis

- ☐ Extract event data from technical platform
- ☐ Analyze and report on event engagement
- ☐ Analyze and report on attendee evaluations
- ☐ Analyze and report on event performance against goals

Repurposing

- ☐ Transcribe sessions, including all chats and polls
- ☐ Package session content
- ☐ Tag and archive session content
- ☐ Load session content for post-event registrant/member access
- ☐ Load session content for ecommerce sale

Credentialing

- ☐ Conduct post-event communications necessary for CE compliance
- ☐ Submit CE applications for recorded self-study activities

Obligations

- ☐ Pay speaker/talent fees and honorariums
- ☐ Pay advertising and promotion fees
- ☐ Fulfill giveaways and other gifts
- ☐ Deliver physical awards
- ☐ Review vendor contracts and complete payments/deliverables
- ☐ Deliver sponsor and exhibitor fulfillment reports

Communications

- ☐ Plan and deliver post-event registrant communications
- ☐ Plan and deliver post-event non-registrant communications
- ☐ Plan and deliver post-event leader communications
- ☐ Plan and deliver post-event staff communications
- ☐ Plan and deliver post-event speaker/moderator communications
- ☐ Plan and deliver post-event exhibitor/sponsor communications

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6. Playbook

Appraisal

- ☐ Convene debrief/after action review meeting with stakeholders
- ☐ Review performance against goals
- ☐ Review participant evaluation data
- ☐ Summarize lessons learned
- ☐ Identify and record opportunities for future events
- ☐ Summarize financial performance

Archiving

- ☐ Document event steps and timelines
- ☐ Record event learnings and warnings
- ☐ Collect templates and forms for reuse

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About the Authors

Chris Gloede

chris@ricochetadvice.com

www.linkedin/in/chrisgloede

Chris is the Chief Consultant for Ricochet Advice, a consultancy serving professional associations. Chris helps associations leverage modern marketing technologies and strategies to build stronger connections to prospects, clients, and members. Previously, Chris was the first Chief Marketing Officer of the American Bar Association where he created a culture of innovation. At the ABA, he pioneered large-scale virtual events and developed the world's largest free virtual continuing legal education series, regularly attracting over 4,000 simultaneous virtual attendees from around the world.

Contact Chris

Aaron Wolowiec

aaron@eventgarde.com

www.linkedin.com/in/aaronwolowiec

Aaron is a learning/meetings strategist, certified Technology of Participation facilitator, and association author, coach, and speaker. He designs engaging, multisensory learning experiences for association learners, resulting in acquisition of new knowledge and skills, forging of new relationships, and applied learning and perspective in the workplace. As the President and CEO of Event Garde, Aaron is a serial learner and entrepreneur who is nationally recognized for his professional development and facilitation work with boards, learners, staff, and volunteers.

Contact Aaron

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About the Consultancies

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Ricochet understands that associations are constantly transforming through a perpetual cycle or renewal. We help your transformations through a partnered approach that inspires your staff and prepares them to meet business challenges. Ricochet develops new marketing and membership strategies empowered by new technology, new processes, new analytics, and a new culture of trial and experimentation. We mentor through implementation to teach staff new methods that prepare them to continue the transformation independently.

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