

# Virtual Event Guidelines

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## Overview

Virtual events are nothing new but — due to coronavirus many events need to pivot from in-person to digital. Virtual events present an opportunity for overcoming the obstacles of social distancing while still providing engagement and or educational experiences. This guide provides information to assist in this process. It has been recognized that best practices on virtual events are still in their early stages. Until more time passes, University Events put together this basic guide on virtual events.

*Note: The planning process is similar to that of any other event; so use the standard planning tips and tricks to create and execute a great event. (See the resources page at <https://www.winthrop.edu/universityevents/resources.aspx>)*

## Guide Goals

- 1) To serve as a resource for event organizers seeking to learn how their peers are approaching the evolving platform of virtual and hybrid events.
- 2) To help event organizers learn about virtual events.
- 3) To aid event organizers in planning their upcoming virtual events.

*Note: We will update this guide on a regular basis as new information comes to light.*

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## I. General Information

### A. What is a Virtual Event?

A virtual event is one where individuals experience the event and its content online rather than gathering in-person. Virtual events are not a replacement, but rather a new type intended to enhance an event program.

#### 4 Main Types:

##### 1. Webinars

Generally, webinars last from 45 to 80 minutes. They allow attendees from near and far to join in and listen as one or more speakers present the content. Attendees invited to join can be asked to pay a fee, using an online payment service, or they can attend for free. Webinars typically use video conferencing tools that allow Q&A, the ability to present live or a pre-recorded video, and be offered as on-demand after the fact. Webinars have a one-off educational nature. They can include internal and external trainings, thought-leadership, or some other content.

##### 2. Virtual Conferences

Virtual conferences are built around a live full-agenda that includes speakers, sessions, breakouts, and more. They include multi-session content and can involve community engagement tools. Virtual conferences allow attendees to view keynotes in real-time, build their own agenda from relevant, on-demand content, and interact with other attendees remotely.

##### 3. Internal Hybrid Events

This is an event that is part in-person, part virtual. These are “town halls”, campus wide events, trainings, department meetings, and more. Internal hybrid events are used to share a message to the entire campus/ college/ department/ division when attendees are not all gathered in the same place through a live streaming process.

##### 4. External Hybrid Events

These events are held for those outside of the university (conferences and so forth). These events require higher levels of video production so that virtual attendees are provided a similar quality to in-person attendees. These events allow attendees who are unable to attend the event in-person, to participate and learn.

### B. Host a Virtual Event, Why?

Virtual events are held for the same reasons as in-person events: to deliver a message, educate, to drive revenue, build loyalty, and add value. Meeting and event planners can choose between in-person, virtual, and hybrid events. Each type of event comes with its own set of pros and cons.

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When deciding whether or not to make the event virtual, consider what the audience is intended to gain from the event and how well those goals can be reached virtually versus in-person.

### Reasons to Host a Virtual Event:

- **Accessibility:** While the event is still being held in-person, virtual options allow accommodation of attendees who are unable to attend in person.
- **Budget:** Virtual events meet any needs to cut costs for the university and/ or attendees and thus make smaller events and webinars.
- **There's no other option:** Whether due to government safety requirements, university safety requirement, acts of weather, virtual events fit the bill.

### C. In-Person AND Virtual Event Planning Fundamentals

All events, in-person or virtual, are built by the use of several fundamentals. Hosting both requires the same attention; the need to effectively promote the event, engage attendees, create memorable moments for attendees, and prove event success. With the virtual event, the venue and the attendees simply are not on site. By thinking of virtual events as value-added, engagement-driven experiences, an impactful event can be created.

#### Event Fundamentals:

- The planning process is similar to that of any other event. Pick the event date and start planning backwards towards that date.
- Strong, intentional marketing with targeted, effective promotion aimed at increasing attendance.
- Content is vital. In a virtual event, **content is the event**. Powerful and engaging sessions tailored to the audience/ attendees are critical.
- Engage attendees and keep them engaged. Offer options that are relevant to each attendee type and utilize online event guides for virtual events.
- Data is the only way to prove event success. Measuring engagement and capturing attendee data prove event ROI and activate the attendees' journey.

## II. Preparing for the Virtual Event

### A. Considerations and Questions for the Planner to Ask

**BEFORE deciding to create a virtual event and then again AFTER deciding to plan a virtual event, consider:**

- What is the event objective?
  - Will the event generate income?

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- Or is it for lead generation or another objective?
- Is there a charge for the event or will access be for free? What price will be charged or will it be part of a subscription or membership offering or will it simple be free? Develop a pricing matrix if needed.
- How long will the event be, sessions within the event be?
- When is the event date? What is the timeline to work with and what can be achieved 'successfully' in the time period?
- What will the online "product" look like? What parts of a physical event will be replicated online? Can parts of the event be moved to a different physical environment, or offered different forms of engagement? How will all of this play out online?
  - Will content be live, on-demand, or a mix? Will the content be hosted and then add some moderated Q&A?
  - Many options exist: create a digital exhibition, have 1.2.1 meetings, virtual presentations, immersion experiences, and so on. But is it right for the event objective?
- What tools will attendees have to network and schedule appointments?
- Gauge and evaluate the digital suitability of the content.
  - Consider the digital audience to create interesting ways of delivering the content. Just pointing a camera at people on stage will likely result in a loss of audience focus and interest.
  - Look at the content; will people be interested in watching it, will it be engaging?
  - How will the content get translated it to a digital audience?
- What is the value proposition for each and all of the event attendees and or stakeholders?
  - What is at the heart of the online proposition?
  - The online event is a very different proposition from the physical event. Consider the role that each stakeholder will play.
  - Taking the event digitally means it is necessary to offer a different value proposition to stakeholders.
- What will the marketing/communications contain? What should be said and how will it be said? How will people be informed about the shift to virtual?
  - Who is the audience and how will the marketing and communications be geared to appeal and attract them?

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- Exactly how is this new proposition being sold? How is marketing going to happen digitally and how are stakeholders going to be engaged to help amplify the event?
- Consider looking at the online “product” as a “new product” and one may be more likely to come up with a better marketing approach.
- What technology is needed? Such as computers, mobile devices, cameras, and so on.
- What platform will be used?
  - Do not simply find a platform that is liked and then fit the event into that. Select a platform based upon the event needs, target audience, budget, and various other variables per each event.
  - Do decide on what is to be replicated online, what will be provided to attendees, what can be accomplished considering the timelines and THEN find the most appropriate platform.
  - Live stream platforms include: Instagram Live, Facebook Live, LinkedIn Live, TikTok Live, Twitter Live, Youtube Livestream, Vimeo, IBM Cloud Video, Brightcove, Dacast, Glisser, CrowdCast, HeySummit, REMO, Ecamm Live, Microsoft Teams, Blackboard Collaborate.
    - Approved university platforms (as the university has a license): Microsoft Teams, Blackboard Collaborate
    - Approved university social media streaming platforms: Facebook Live, Youtube Livestream, Instagram TV
- What happens if you have connectivity issues?
- What skills are currently within the team, to be used, and where can additional support be found if needed and in what areas?
- Do participants need to be given guidance and guidelines for the event? Is there a guide for attendees before the event that explains how to join, attend sessions, and use any messaging tools?
- Will the event be recorded, will it be made available for later? How long will on-demand sessions be available after the event?
- What goals need to be built around session registration and feedback surveys?

### III. Building Virtual Events

#### A. Virtual Event Parts and Elements

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Virtual events rely on technology. Attendance is made possible with the use of computers and mobile devices. But there's more to virtual event technology than video conferencing tools and computers. Virtual events can benefit from the use of an entire event platform, to help promote, execute and manage the event.

A virtual event is built around content, attendee engagement, and data. Video production quality and connectivity are important, as well as the site that houses the agenda and content.

### **Elements of a Virtual Event (note: not all are required for all virtual events):**

- Event website
- Event registration
- Live presentation content
- Live, one-way audio/video
- Question and answer
- Live polling
- Note taking/favorite slides
- Recorded content
- Interactive video conferencing
- Feedback surveys

### **The most important elements:**

- **Event Website**

Having an event website is the best tool to use for event promotion to interest potential attendees and entice them to register for the event. It needs to communicate the value of the virtual event, contain the event schedule, showcase speakers, include FAQs, and point potential attendees to registration.

- **Registration**

This is the first tool for data collection and critical to the event. Registration tools allow attendees to register for virtual events, submit preferences and personal information, and provide payment if required. A robust online registration tool allows attendees to register easily and provides planners and marketers with the data they need to plan a great event and prove event success.

- **Email Marketing**

Emails can drive demand for an event and increase registrations, keep attendees informed before the event and be used to engage attendees leading up to the virtual event, and finally through feedback surveys. Email is the best way to communicate with attendees at all stages of the event. Use an email marketing tool that can deliver branded, personalized emails, automate when emails are sent and to whom based on attendee data, and provide open rates and click-through metrics.

- **Event Feedback**

Event feedback is crucial for virtual events when planners don't have the ability to gauge reactions by the expressions or verbal feedback from attendees onsite. To collect feedback use post-event surveys to prove event success. Additionally, event feedback can be used as a tool to qualify virtual leads and drive them to further engagement.

### **B. Preparing Attendees for Virtual Events**

With technology involved, there is going to be some error in use. Virtual events are not all the same. There are many different types of video conferencing tools, as well as event technology options. Consider the amount of digital savvy (or lack thereof) of attendees.

- **Before the event**, create a guide for attendees explaining how to access the event, sessions, and more. This will ease attendee stress, decrease the flood of questions on the event, and provide an overall better attendee experience.
  - Will the event have a host of some kind? Consider having them record an introduction video that educates them while infusing humor into the content.

### **C. How to Keep Attendees Engaged During Virtual Events**

There are ways to make virtual events successful and it takes careful planning, great data, and agility. A reality is that, with virtual events, face-to-face engagement suffers. Attendee to attendee engagement and networking is not viable. If the event is virtual however, personal follow-up meetings to talk specifics can be planned to occur in the days that follow the event. After the virtual event, post-event follow-up needs to happen more quickly than usual and be on-point. Data is critical.

#### **Attendee Engagement Tips:**

- Presentations and the like, while viewed online individually, can employ live polling to engage attendees.
- Sessions can still involve live Q&A.
- With messaging capabilities in a mobile app, attendees can meet each other virtually and set up meetings.
- As always, social media is a tool to leverage engagement. For example, utilizing an event hashtag and having attendees post pictures of favorite takeaways from the day, office setups, and more can make attendees feel like they're part of a community.

### **D. Data from Virtual Events**

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The data available varies from in-person to virtual events. Data is gathered before, during, and after the event and can be used to qualify leads, prove event success, and improve the event for the next time.

### **Data Gathered at Virtual Events:**

- # of Registrations
- Demographic Attendee Information
- Session Registration
- Email Open and Click-through Rates
- Post-Event Survey Results
- # of Leads
- Buying Interest
- Session Ratings
- Session Feedback
- Social Media Engagement and Reach

### **E. Proving Virtual Event Success**

As with in-person events, virtual event success depends on aligning event and goals, identifying key performance indicators to define event success before the event, and analyzing event data and reviewing insights after the event. Proving ROI requires an analysis of costs and benefits. Costs are expressed as direct costs, indirect expenses, and opportunity costs. Benefits refer to direct revenue, attributed revenue, brand equity, and knowledge exchange. By using the data gathered during virtual events to weigh costs versus benefits, one can prove the success of the event. Articulate the event success metrics before the event begins. After the event, take time to understand if the event was successful based on the metrics and how to improve in the future.

## **IV. The Basics: How to Host a Virtual Event**

### **A. How To Plan a Virtual Event**

Treat the virtual event like an in-person event. This also means be mindful of the length of time attendees are expected to remain in their seats. The planning process is similar to that of any other event; so use the standard planning tips and tricks to create and execute a great event. (See the resources page at <https://www.winthrop.edu/universityevents/resources.aspx>) Also be mindful to review the list of considerations listed in Section II. A.

1. Take the vision, goals, and objectives of the event and generate an “image” of the event that can be shared with others (presenters, collaborators, stakeholders, partners, participants, audience...).



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2. Select the date after cross referencing all pertinent event calendars and schedules of vital attendees and key participants and presenters.
3. Once the date is set, begin creating and executing the marketing plan/ campaign and invite guests to attend and participate. Are sponsors needed? If so, engage them and include them in the marketing and consider cross marketing.
4. Generate a timeline working backwards from the event date.
5. Using the timeline, review all needs, tasks, roles and so forth to generate an action plan.
6. Using the timeline and action plan, create a staffing plan to identify who will do what. Pull the event planning team together to review the event vision and the timeline, action plan, and staff plan.
7. Select a platform to be used (See section II. A.) (Note: University approved platforms TBD). Pull the technology together. Make sure the technology is in working order. Obtain new technology as needed and learn new skills and techniques as needed. (See section III. A.)
8. Create programing for the event, including an itinerary and or agenda. Either do this now, with the input of the collaborating team or do this after step 1.
9. Work with presenters on event preparation and programing content as needed.
10. Conduct a dry-run of the event as needed.
11. Relay pertinent information to registered participants as needed. (See section III. B.)
12. Conduct event. Maintain engagement with participants throughout event. (See section III. C.)
13. Conduct event follow-up, expressing gratitude to attendees for attending and any other meeting requests, touches mailed via post, and so forth. Remind attendees of any future events and programing as needed.
14. Use event data collected to create analysis needed, apply results and outcomes. (See section III. D.)

### **V. How to Turn Your Live Event into a Virtual Event at the Last Minute**

There are times when a quick shift has to be made to make an event virtual. With the right infrastructure in place, this is achievable and not as difficult as one may think.

#### **A. Questions to Ask Before Moving to a Virtual Event**

- Can the agenda be translated to a virtual setting, or is an in-person event required?

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- How will attendance get tracked?
- Does the university have a virtual meeting solution?
- Does the university have staff members that can support and manage the technical aspects of a virtual event?
- Can the university handle the bandwidth?
- Do attendees have all the materials needed to attend virtually?

### **B. How to Pivot to a Virtual Event**

- Update the event website and email attendees to communicate that the event is going virtual and the reason for the change
- Provide attendees with a guide on how to attend the event virtually
- In the agenda, add links to the session recording or live broadcast

### **Sources**

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