A GUIDE TO
VIRTUAL EVENT PLANNING

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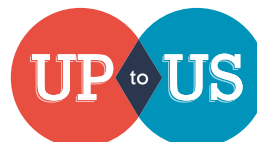
UP to US

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INTRODUCTION TO VIRTUAL EVENTS

What You Need to Know About Going Virtual

So, you've decided to put on a virtual event. Exciting! Here's the good news, and the bad news: While virtual events are easy to attend, they're just as easy to blow off as distractions are always one tab away. Similar to in-person events, it will be critical that your virtual events have a clear purpose, agenda, and promotion strategy. As a virtual event organizer, your job is to identify an exciting and relevant **event purpose**, and ensure that you're **promoting your event to the right audience**. This toolkit will help you identify your event's purpose, provide a timeline of suggested steps to create an event, and offer best practices for every step along the way.

First Things First.

Take a moment to reflect on your event scope & type. Just as with in-person events, virtual events can take all shapes and lengths. This toolkit has outlined the process for all possible virtual events— from a day-long symposium to a one-hour speaking event on Zoom. Before diving into the planning process, take some time to reflect on the scope of your event. How long will it be? Who's your main audience, and are they tech-savvy or will they need additional tech support? Will your event need external speakers or will you be able to do the entire thing with your internal team? What is your ideal event format—will it be a panel discussion, a fireside chat? Keep this in mind from the get-go to be judicious about which steps are relevant to you in this toolkit, and which aren't.

PSA: Virtual Events Are Here To Stay, For Now.

Perhaps the most important thing about planning for virtual events is realizing that you can do almost everything you would in an in-person event, minus the snack table, of course. Speaker Q&A? Check. Networking? No problem. Check out the FAQ section below for tips on how to conduct these on page 14.

As more and more of our world moves online, learning how to design and implement virtual events will be an increasingly useful skill. Whether you are acting alone or with a team, use this toolkit as your blueprint to create a purposeful virtual event that will leave your attendees feeling energized, engaged, and connected. Ready to roll up your sleeves?

BEST PRACTICES FOR VIRTUAL EVENTS

No matter what the scope of your event is, here are some fundamental best practices that you should be aware of.

- **State the event's purpose and agenda at the beginning.** This will provide your attendees with helpful context and ground them in the event's purpose

- **Be clear and explicit about how you want your audience to participate**. If you want your audience to be especially interactive, let them know! If you want your attendees to submit questions in the chat box, tell them. They're attending this event for a reason-- make sure to tell them how to get the most out of it!

- **Keep it quick.** Doing a speaker event? Stick to one hour! Be mindful of "Zoom fatigue," it's real. If your event goes longer than that, keep it to 90 minutes max, and offer a mid-way break.
    – Pre- and/or post-event activities, such as reading or watching something before or after the event that aligns with your event objectives

- **Build in interactivity**. Design moments where your audience can engage whenever possible. This could look like:
    – An ice-breaker question in the chat
    – A quick poll at the beginning of the event to understand what they're most excited about
    – Breakout groups with prompt questions related to your event purpose

- **Timeboxing.** As the event host, tell the audience how long they will spend on each activity. This increases transparency, increases focus, and helps the audience be more productive.

- **Incorporate visuals.** Use visuals that will help your attendees visually follow along with what they're hearing. Try this by using slides to remind them of who's speaking, using the screen share feature, and encourage any speakers to use slides.

Chat

Record

CC
Closed Caption

Use the Closed Captioning feature to make your event more inclusive.

THE PURPOSE-FIRST FRAMEWORK

What is the purpose-first framework and why is it helpful?

The purpose-first framework is an approach to planning that starts by getting crystal clear on your event's purpose. Once you know what your event's purpose is, it's easy to make decisions like choosing the format, speakers, and even your event platform.

The Anatomy of a Purpose Statement

AN EXCELLENT PURPOSE STATEMENT INCLUDES:

• Who is your primary audience

• Why is the event is important to the audience right now

• What are the main take-aways or objectives of the event

WHAT ARE SOME EXAMPLES OF A GREAT EVENT PURPOSE STATEMENT?

Event Type: Guest Speaker about Corporate Social Responsibility (CSR)

Event Purpose Statement Example:

In order to meet today's challenges with COVID-19, climate change, and racial inequality, today's business sector is rethinking what their fundamental role in society is beyond generating profit. Primarily designed for business undergraduate students who are interested in the intersection of business and sustainability, this event will provide attendees with tangible skills to learn for sustainable business strategy and a thorough overview of the principles of triple bottom line theory.
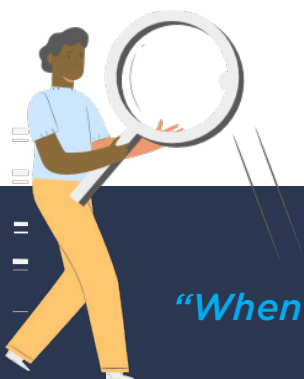
"When you know your 'why', your 'what' will have more impact."

Tools For Defining Your Event Purpose

Use the two exercises below to help you define your event's purpose. Note: It's helpful to have a rough idea of your event "type" and "scope" (see the Introduction section) before diving straight into these exercises.

EXERCISE 1

FROM:TO / THINK:DO MATRIX

Use the matrix below to generate your event outcomes or purpose. Under the "From" column, think about what your audience is thinking and doing before the event. In the "To" column, think about how their thinking and doing has changed as a result of attending your event.

	FROM (Before Event)	TO (After Event)
THINK	*Example:* • Sustainable business practices can only be implemented when the company was created for that. • Unclear how to implement sustainable business theory into practice	*Example:* • CSR can be implemented into any company, regardless if they were designed for that or not. • Clearer understanding of CSR applicability
DO	*Example:* • Not taking any sustainability courses or incorporating CSR into their coursework	*Example:* • Incorporating sustainability principles or questions into their projects and course load • Encouraged to learn more about sustainable businesses, get an internship in CSR

EXERCISE 2

PURPOSE MADLIB: DEFINE YOUR PURPOSE STATEMENT

Use this "Purpose Statement Madlib" to help you craft your event's purpose statement. Note that these words and sentence structure are optional. Feel free to restructure it as you see fit.

In order to / Given the / As the _____*[cultural, social, political context in the world]*_____. Primarily designed for _____*[insert target audience]*_____, this event will _____*[audience take aways/main event objectives]*_____.

Example Purpose Statement:
In order to meet today's challenges with COVID-19, climate change, and racial inequality, today's business sector is rethinking what their fundamental role in society is beyond generating profit. Primarily designed for business undergraduate students who are interested in the intersection of business and sustainability, this event will provide attendees with tangible skills to learn for sustainable business strategy and a thorough overview of the principles of triple bottom line theory.

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CHOOSING THE RIGHT PLATFORM

In choosing the platform for your event, form follows function! Only decide the platform once you've identified a clear purpose statement.

Below is a selection of popular virtual event platforms that you might use.

	KEYNOTE SPEAKER FORMAT	PANEL FORMAT	BREAKOUT ROOMS	CHAT FEATURE
Zoom (Free Account)	✔	✔		✔
Zoom (Paid Account)	✔	✔	✔	✔
Google Meet	✔	✔	✔	✔
Jitsi Meet	✔	✔		✔
Instagram Live	✔			✔
Facebook Live	✔			✔

SUGGESTED EVENT ROLES

These are suggested roles for a virtual event.

You should adapt these suggested roles depending on the size of your event planning team, guest speakers, and the size of attendees.

ROLE	RESPONSIBILITIES
Event Lead	• Identifies which roles are needed and supports each role in their preparation • Oversees the full event planning process to ensure role clarity and keep the planning process on schedule
Host or Emcee	• Welcomes the audience, introduces speakers, instructs the attendees on how to engage at the event
Tech Lead	• Oversees the registration process and ensures that all Speakers and Hosts have the appropriate log-in information • Point person for any technical difficulties during the event
Guest Speakers	• Should be briefed by your team on what the event objectives are and clear audience takeaways
Event Facilitators	• Facilitate any interactive components of the event such as breakout rooms
Schedule Keeper	• Keeps time for each session • Flags the host if the schedule is going over for the host to correct course
Chat Moderator	• Prepared to answer or capture any questions from the chat to inform Host / Guest Speaker • (Optional) Prepares questions for the beginning of the event to engage the attendees when they're first signing into the event
Data Collector	• (Optional) If you are planning to survey your attendees at any point during the event, this person administers all data capture. The Chat Moderator could also double as the Data Collector
Attendee Observer	• (Optional) Acts as a "planted attendee" to observe your event from an attendee perspective to provide feedback for future events

TIMELINE FOR VIRTUAL EVENT PLANNING

3-4 weeks
before Virtual Event

- Define your event's purpose statement and intended format
- Designate roles
- Decide on which platform you would like to use (i.e. Zoom, GoogleMeet, Jitsi)
- Reach out to any prospective guest speakers or event facilitators
- Build out your event agenda with key objectives of what your audience will take away. Keep your purpose statement in mind during this stage!
- Outline Promotion Strategy: How will you promote this event? Via social media, email, private Facebook or Linkedin Groups?

1-2 weeks
before Virtual Event

- Finalize the agenda and content of the virtual event. Build this down to the minute! Who's doing what at each moment?
- Test the platform you will be using
- Create a Contingency Plan in the case of technical difficulties. Who will take over the MC Role if the original team member is sick or has internet issues?
- Send the Event Invitation out to the intended audience (e.g. mass email, social media announcement)
- Launch your promotion tactics. Send out a "Save the Date" post via social media or email so that your potential attendees can mark their calendars, or get permission from your Guest Speaker to share their headshot and bio through these channels to get your audience excited.
- Create an event hashtag to start building excitement and momentum on social media with "sneak peeks" of your guest speakers or reminders to your audience about the perks of joining the event

1 week
before Virtual Event

- Send an Event Reminder to the intended audience
- Invite guest speakers and/or event facilitators for a 30-min Prep Call to go over tech details and the agenda for the event. Ensure they have the information they need for tech (ie., Join Link, correct meeting time, any specific platform instructions)

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Day of the Event

- Set-up event platform 30 minutes to 1 hour before the event
- Make sure all speakers and event facilitators are present 10 minutes before the event
- Send out a teaser post on social media or email to get your attendees excited! Ask your Guest Speakers to tweet about the event or post on Instagram using your event hashtag

During your Event

- Have a few ice breaker questions prepared in the chat for your attendees to respond to as they're trickling in such as:
    — "Where are you tuning in from today?"
    — "What's your favorite Net Impact/ Up to Us memory so far?"
- Play some background music to set the right tone as your event attendees are coming in **(If using ZOOM, go to "Share Screen" feature, and select "Share computer sound" for the best audio quality)**
- Break the ice between the event host and your attendees by having the host introduce themselves and share a bit about themselves
- Use polls during your event to understand your attendees interests or collect feedback
- If networking is a component of your event, incorporate Breakout Rooms by using the Breakout Room feature on Zoom, or creating separate rooms on Jitsi
- If applicable, reserve 3-5 minutes at the end of your event for any feedback polls or surveys you want to collect

After the Event

- Send "Thank you" communication to all attendees, guest speakers, and event facilitators
    — If applicable, include a quick 1-5 minute survey (available in Zoom or as a simple Google Doc)
    — Consider sending a curated list of take-aways, resources mentioned on the call, or any actionable next steps that came up during your call
- Debrief with your Event Planning Team to discuss what went well and what could improve for next time

VIRTUAL EVENT FORMAT

This is the suggested format for a 1-hour virtual event. You should adapt these suggested times for your event purpose and duration.

EVENT ELEMENT	PURPOSE	SUGGESTED TIMING
Buffer Time/ Welcoming Remarks	Acts as a buffer period for people to arrive and welcome everyone as they're entering. Consider having a welcome slide on a shared screen to welcome attendees.	2-3 minutes
Framing	Reminds your audience of the purpose of your event, what to expect from the event today, and sets expectations for engagement. It is highly recommended that you provide any "housekeeping" reminders (i.e. using the chat, keeping video on)	5-7 minutes
Main Content or Activity	Will vary depending on the purpose of your event and planned activities	45-50 minutes
Closing Remarks	To thank your attendees for their participation. You can also take this time to receive feedback by collecting a quick survey (i.e Zoom Polls or link to Google Form)	3-5 minutes

PRO TIPS

PRO TIP #1 ALWAYS HAVE A PLAN B

As with any event, planning for the unplanned is a must. In your contingency plan (a fancy name for having a plan B), it is highly recommended to designate an alternative person to take over any of the Event Roles should technical issues arise during the event. This would provide a smooth transition with little to no disturbance to your event.

PRO TIP #2 BEFORE SENDING OUT YOUR EVENT INVITATION

Take the time to reflect on the "Event Name" and "Description" of your event before sending your event invitation to your attendees. Ensure to include information that would help your attendees prepare for the event (i.e. logging in with a desktop instead of a phone, recommended attire, video lighting and sound tips). Consider requiring registration so that you can track and plan accordingly as to how many attendees you can expect at your virtual event. Note: Disregard if you're using Instagram or Facebook LIVE.

PRO TIP #3 CHECKLISTS ARE YOUR FRIEND

Plan time for the Tech Lead(s) to prepare the Event Platform 30 minutes to 1 hour before the event. This will be crucial to ensure that the platform is working correctly and the appropriate settings are made prior to the event. We highly recommend having a checklist for your Tech Lead(s) to reference (i.e. ensure that attendees cannot enter your meeting until you are completely ready to host your event, ensuring attendees are set on mute upon entering your event, etc.)

PRO TIP #4   CREATE A "GREEN ROOM" FOR YOUR SPEAKERS

Create a Green Room for your Guest Speakers before going "live." We recommend having a checklist of things to go over in the Green Room such as the event run of show, who will be introducing them, and any other information that might be relevant to them for the event. This is also a perfect chance to check lighting and audio for them to ensure it's rendering clearly. The steps for creating a Green Room will differ based on the Platform you choose, but the important thing is that you have some way to verify their audio, visuals, and have a moment to brief them on any details before the session is live. If you're using Zoom, you can create a Green Room by creating a separate meeting link for your speaker or using the waiting room feature.

PRO TIP #5   PREPARING FOR BROADCAST...

Make sure that all event speakers are looking their best on camera. Before going live for your event, ensure that all your event facilitators have good lighting and audio. Consider ensuring that the camera is at eye level and that they are facing towards the direction of light rather than against to reduce any glares. For audio, encourage them to find a quiet room or area with little to no noise distractions. More details and best practices can be found here.

At the beginning of the event, remind your attendees to mute themselves when they're not talking to reduce any background nose. (You can also "Mute All" on Zoom if you're the Host.)

PRO TIP #6   EXPRESS THANKS, GATHER FEEDBACK

Immediately send a "Thank you" notification to your attendees, and take this opportunity to get feedback on how to better improve your event or get ideas for upcoming events through a quick 1-5 minute survey.

FAQS FOR VIRTUAL EVENT PLANNERS
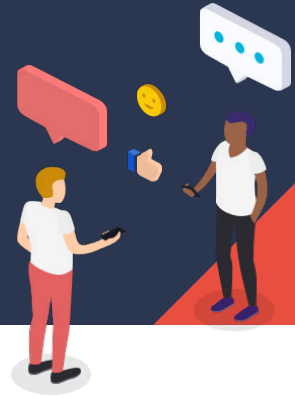
How much does it cost to do a virtual event?

Virtually free! (See what we did there?) Unless you're using a paid platform or paying a speaker to present, your cost should be minimal. Take advantage of all the great free platforms out there such as Jitsi Meet, Google Meet, and Zoom. Note: the free version of Zoom has a 40-minute limit on events. After 40 minutes, the event will automatically end for everyone on the call.

How would I incorporate networking into my virtual event?

This will depend on which platform you're using, but consider the following:
- Use breakout rooms for "structured networking" and give your audience specific prompts to respond to.
- Use a third-party platform such as IceBreaker to host structured networking. Check out the free plan and templates!

Any tips on managing an Audience Q&A with a Guest Speaker?

- We recommend sharing the event agenda at the beginning of the event. This way you can prompt them to start preparing their questions ahead of time.
- Continue to remind your audience to be thinking of questions so that there's no delay or awkwardness when the Q&A session begins.
- Logistically, you have two options for delivering questions to the speaker(s):
- We recommend you have your audience submit questions in writing to the chat and have a team member filter through the questions and read them aloud to the speaker.
- You can also allow the questions to be read aloud by the question-asker by unmuting their mic and video. This is a little harder to manage so proceed with caution, especially for large groups or contentious topics.

How can I keep the audience interested and engaged?

- Kick it off with a prompt question in the chat
- Select a high energy host that will keep their audience's attention and be interactive
- Use polls and quick surveys to get live data from your attendees
- Incorporate a Q&A session if you're hosting a live speaker
- Use pre and post work to leverage your event time more effectively (This could look like watching a video or reading an article beforehand, or having a call to action after the call)
- Have an official hashtag on social media for people to connect online

Help! No one has showed up at my event. What do I do?

- The best way to deal with this happening is prevention. After putting together all of your event's content, securing speakers, working through every detail of the agenda, you don't want an empty house! Plan your promotion strategy from your first day of planning. Who are your target audiences? Who will be most interested in this event? Where do those people get their news about what's happening in their community?
- If you do find yourself with an empty house, don't panic! Make some quick changes to deliver a personalized event for an intimate feel. For example, if it's a speaker event, consider doing a round-table discussion that is more interactive. Focus on making your attendees will feel welcome, comfortable, and delivering a personalized engagement experience.