

Virtual and digital-hybrid events will never replace the personal connection and feeling of camaraderie delivered by great in-person experiences.

With that said, virtualizing conferences, events and shows, or adding a virtual component to them, has become a necessary part of doing business, especially in the short-term.

Now more than ever, planners are being asked to provide solutions with very little time, and event teams are being pressed to deliver more results with fewer resources.

Fusion has put together this brief checklist to help you prioritize. Making the move from in-person to digital can be daunting (especially when it comes to the ocean of constantly-changing technology choices) but it doesn't have to be. A good event, whether digital or live, requires the impeccable planning, thoughtful design and flawless execution you're already used to providing.

Events have always been about bringing people together, communicating ideas, celebrating success, and building what comes next. We wish you luck with your future events, be they in-person, digital or some combination of the two.

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Before the Event

Define the Event's Goals & Objectives

- **Align With Your Stakeholder:** Some events lend themselves to going fully (or partially) digital, while others do not. For example, investor relations presentations, town hall meetings and training sessions can often be quite effective when offered digitally, but awards ceremonies, and incentive events may not translate as well, if at all. Product launches, sales meetings and team building usually fall in the middle of the spectrum. This spectrum underscores why understanding the context and the audience is so important. If your attendees aren't seeing a benefit from a digital version of an event, postponing until it can happen in-person is probably the better answer.

- **Start With Why:** In virtual event planning, understanding the "why", or the reason for the event, is more important than ever. Ask yourself (or your stakeholder): why are we doing this event? What is the purpose? What will our attendees take away from this? Are we providing value to our audience?

- **Event Goals:** What do you want to accomplish by planning your virtual event? Increase brand loyalty? Train employees or partners? Energize a team? Augment sales? Outline your event goals and share them with your entire team. This will be the mental roadmap associated with the event, and you should reflect on them often, course-correcting when necessary.

- **Determine Your Audience:** It's important to understand who your audience is and what they're looking for. Keeping your audience top-of-mind is key to successful planning and execution. Why are they tuning in? Where are they coming from? What do they want to experience? Is this event mandatory? The better you can identify the demographics (or personas), the better you can tailor your virtual event to them.

Develop Your Digital Event Concept

Developing the concept or theme for your digital or virtual event is just as important as when you're planning a live experience. During in-person events, it's easier to control the thematic narrative: where people go, who they're with and how they spend their time. With virtual events, there are more distractions and temptations for your audience – your content is competing for attention with email, social media and whatever is going on in your attendees' surroundings. Here are the essential steps for developing your concept:

- **Ideate:** The planning stage is your blank canvas. Walk yourself or your stakeholder through the virtual event and write down everything you imagine. While virtual events have their challenges, they also provide a lot of flexibility, especially when it comes to the agenda and format of the content; things you can play to your advantage.
- **Market Research:** Take a look at what's going on in your industry, or ask your digital production company for help. This field is still developing, so learn from others to avoid their mistakes and emulate their successes. Planners are doing some amazing work in the digital space. Look at what they're doing, and how that can inspire your own event.
- **Build A Theme:** Digital events need branding, too! As digital is becoming more popular (and necessary), you have to take fresh new approaches to stand out, whether you're working with internal or external audiences. Play with the elements of sound and vision in particular, since these will be the ones your audience will be engaging with more. Where do you want to take them? How do you want them to feel? How will those emotions translate into inspiration, action and value?
- **Build An Inspiration Library:** An inspiration book (or folder) is a great way to visually represent event concept to share with your stakeholders or production company. The content will come in handy when handing off tasks to partners and vendors, like marketing partners in charge of social media promotion, visual designers working on video, slides and collateral or your event production company as they're pulling it all together.

Follow Your Plan

Planners have amazing attention to detail. Planning, organizing and prioritizing is at the heart of what you do. Adding a virtual component to an existing event or building a

digital event from the ground up both require the high level of planning support you're already familiar with. Here are some tips as you expand your plan to include digital.

- **Create Your Team:** A big misconception about digital or virtual events is, because they're digital, they're simpler to execute and the planner can easily put the weight of the entire event on their shoulders. Make sure you have the support of your I/T team, art department, marketing and PR teams. Digital events are still a largely unexplored territory, do not think you have to go it alone. Choose your digital event production company wisely, and make sure everyone involved shares your vision and is united around the goals of your event.
- **Build Your Timeline:** You already know that having a timeline is an integral part of the event planning process. It will be your guide and will help keep others focused, stay on budget and avoid missed deadlines. Make sure this timeline is available to everyone involved in the virtual event planning process; consider hosting it securely online or in a shared location on your company's network.
- **Clarify Roles:** Make sure everyone on the support team, stakeholders and external partners are clear on who is responsible for what; clearly specify the goals, expectations and deadlines.
- **Set Expectations And Boundaries:** Set expectations and boundaries with your team, vendors and stakeholders. Let everyone know the set working hours and what is expected in terms of roles, response time, fiduciary responsibilities and anything else that you feel important to clarify. Just because an event is going virtual, it doesn't mean planning or execution is any easier. On the contrary; if this is your first digital event, you'll want to make sure these expectations and boundaries are crystal clear.

Build your Budget

Just like a successful in-person event, in order to successfully plan your virtual event, you need to know your numbers. Without a clear budget, you risk spending more money than necessary, or cutting corners you didn't need to cut. A clear budget will help you understand where to allocate money and resources. It can help you decide where you can spend more to delight the crowd, and where you may need to cut back when designing your virtual event.

- **List Event Income:** If you're hosting a paid event, be sure to list all of the income streams. This can range from vendor fees, online ticket sales, sponsorships, live auctions or live merchandise sales. Be as realistic as possible, your attendees' behavior may be different when they're online than in person.
- **List Event Expenses:** List all of the possible expenses you might encounter. When it comes to a virtual event, think of everything you need from a technology perspective; hosting platforms, entertainment costs, presentation, collateral and interactive design.

Check with your colleagues to see if there are technology resources (like hosting services, online storage or help desk resources). When in doubt, overestimate the expense. Remember, you may not have to worry about food and beverage or travel expenses, but you may need to increase the amount you spend on content development, speaker coaching and tech rehearsals.

- **Create a Contingency:** Unfortunately, Murphy's Law still applies to virtual events: "what can go wrong, will go wrong". Make sure you have a 10% to 20% contingency up your sleeve just in case there are last-minute, unexpected costs.
- **Keep Current:** With event planning it comes with the territory – things are bound to change. These changes will often affect the budget, so make sure to update your budget as changes are made by team members or stakeholders.

Think Through Logistics

As mentioned earlier, virtual or digital events give you an unprecedented degree of flexibility when it comes to session timing and agenda flow. Pre-recorded content and automated exercises can be offered right beside live content like keynote presentations, panel discussions and Q&A forums. Having a handle on what's going on, and how attendees can mix-and-match their agenda experience will keep things moving smoothly for your presenters and your audience.

- **Determine Dates and Times:** Select the dates and times of the live components of your event (make sure to have a backup date, as well). Steer clear from having your event at the same time as other large or conflicting events happening in the world, or in your own organization. Make sure that all key players on your team are available these days and mark it on their calendars. Make sure your stakeholders' calendars are also blocked for technical training, presentation coaching (if needed) and rehearsals. When managing a digital event where your presenters are connecting remotely, rehearsals are extremely important.
- **Be Aware:** Since the event is virtual, you must be mindful that you could be competing against other big events online. Are the Grammys airing? Is there a concert live stream that you know your target audience will be interested in? These details are important to consider so you can ensure your virtual audience won't choose another event, be distracted or double-booked.

Design the Format

Perhaps one of the biggest mindset shifts involved in planning a virtual event is how you consider the format for the event itself. Do you want the audience to only consume content? Should the audience be able to engage? Do you want attendees to be able to go between virtual rooms, are there breakouts? Are certain agenda items only available

live on a certain date and time? Are there chats or panels that should have an attendee cap? These are all things to consider. The answers impact your agenda, and possibly the technology you use and approach you take to content development.

- **Webcast:** You can opt for a webcast or webinar format if attendees simply need to tune in to listen to the speaker. Ideally, sessions should be in half-hour blocks. We've found issues retaining audiences if any presentation block exceeds this duration. If your content block is longer, consider breaking it up by adding a break, inserting a video, or doing a content hand-off between two presenters.
- **Streaming:** How will you live stream the event? Are you broadcasting from a studio or corporate headquarters? Will each speaker broadcast live from home?
- **Interactivity:** How will the attendees communicate to each other and the presenters? Are there specific chat rooms with moderators? Is there an app or service required by your audience to attend?
- **Panel Discussions and Forums:** What should your panels look like? How will attendees interact with panelists? Have you selected an emcee or host for the discussion? Who is behind the scenes moderating and selecting questions? What technology are you using to facilitate the flow of questions and requests?

Identify Technology, AV and Production Needs

Regardless of the format, you want to put on a show your attendees will remember for years to come. Virtual events have a unique set of technology, AV and production requirements. A good virtual event production company can help you align the requirements with your content delivery and value proposition goals. Great partners will help you push the envelope without putting your event or your stakeholders at risk of failure.

- **Connect Your Partners With The Talent:** Make sure your content developers and production company team members are connected to each other and are up to speed with your speakers and talent. This way they'll be able to coach them on how to be a part of a virtual event and engage with the audience, as well as build confidence around technical details like equipment requirements, sound and lighting - all important elements to getting their message across and delivering value to the audience.
- **Learn the Terminology:** Familiarize yourself with the technical terms, platforms and players. AV and production terms can seem like another language if you aren't familiar, and the digital landscape changes on a monthly basis. Remember knowledge is power when talking to your stakeholders, production company and partners.
- **Partnerships:** Ask your design agency, production company or event partner to walk you through their proposals line by line. Everything on the quote should be easily

explained and easy to understand. Don't be afraid to ask questions, especially if there are a lot of complicated technical details.

- **Connect with Your Event Producer / Manager:** Ask for regular reports from a person who will be managing the virtual event. This person understands your needs and is able to navigate technical and content issues on your behalf. This person will put you at ease ahead of the program and be ready at a moment's notice to assist during the event.

Understand the Strengths (and Limits) of Technology

- **Technology takes the driver's seat** when it comes to digital or virtual events. Without a doubt, this can be intimidating. Make sure you have the right internal and external resources by your side.
- **Integrated Systems:** One size doesn't fit all. Think twice before selecting an all-in-one platform that promises to deliver everything you need for your virtual event. Investigate the best options for each part of your event and find the right tool to for each. It may be a selection of integrated tools you need to deliver the best attendee experience.
- **Attendees-First Mindset:** Your attendees' experience is of paramount importance. The value they derive from their experience will define the overall success of the event. Make sure the technology you choose is user-friendly and provides the best experience for your audience. Be sure to try the technology yourself in a setting similar to how your attendees will consume event content (they might be at their desks or on their phones). If it's uncomfortable or difficult for you to navigate, it's not the right experience for your audience.
- **Privacy & Security:** Cybersecurity is just as important for a virtual event as security guards are important for a live event. Make sure your team and partners can report and explain the security protocols of the companies that are behind the tools and technology you are using to support your event.
- **Extend Your Reach:** The tools you choose will determine your success. With this in mind, consider tools whose features will extend the value of the event's content. Can the sessions be recorded and turned into perpetual content? Can attendee feedback be collected and acted upon? Are there ways to provide summaries, guidelines and collateral during and after the digital sessions? If so, can you track downloads and consumption to determine what mattered most to them?
- **There's an App For That:** A custom event app can provide accessibility to content, notifications, feedback and more. A great app experience will also allow you to track your ROI and potentially monetize sponsors. Push notifications, virtual scavenger hunts, feedback collection, augmented reality, polling, networking options and digital collateral are all ideas to consider. Custom event apps must also be private and secure, so if a

partner or internal department is developing one, make sure there is enough time and budget to support the effort.

- **Chatbots & Machine Learning:** Chatbots can be an amazing tool for in-person events, and they're almost essential for virtual events. A conversational tool providing automated chatting, their primary function is to give consistent responses to common questions via pre-programmed responses or artificial intelligence. When dealing with a remote audience, chatbots may help provide additional coverage to augment your human support team.

Know that Content is King

- **Check Credentials:** If you're hiring external content creators, ask them what experience they have with virtual events. Do they have a studio where they produce and broadcast their content? Are they able to deal with unexpected issues that might arise during a virtual event? Be sure to ask them for a brief demonstration.

- **Partner Portfolios:** Ask to review portfolios from past virtual events if possible. When evaluating design firms, make sure they provide examples of past designs and how that work supported the overall goals of the event.

- **Internal Stakeholders:** Make sure your internal stakeholders understand what's required to engage remote audiences. Work with your agency or internal communications department to set expectations with executives and build content that is visually appealing and compelling for the audience.

Evaluate Your Speakers

- When it comes to virtual presentations, it's important to remember that a good in-person presenter isn't always comfortable in front of a camera and people used to producing YouTube-style videos aren't always the best general session presenters. The point is, make sure the presenters' talents are showcased when developing the agenda. If a presenter needs an audience to feed off of, perhaps a pre-recorded presentation is the way to go, where the best take can be used. If a presenter is more comfortable in an intimate setting in front of their computer, a live stream format will probably suit them just fine.

- **Align Speakers with the Event's Purpose:** Your speakers should align with the purpose, goals and values of your event. When selecting external speakers, keep your target audience and the event's theme in mind to ensure relevance and engagement. Internal speakers' content should also support your agenda, making sure the content and level of interactivity make sense with each session's format.

- **Bring Value:** Speakers should have something valuable to offer your attendees. Ask your design firm or internal communication group to make sure visuals, video and interactivity are designed to build a connection to the virtual audience.
- **Set Expectations:** Just like with your content creators, you want to make sure your speakers know what's ahead. Ask them for examples of virtual events they've done in the past. Ask them what their concerns are. If it's clear that a speaker has trouble engaging with a virtual or remote audience, coaching may be required, or alternate speakers should be considered, if possible.

There's Room for Entertainment

- **Entertainment during virtual events is still possible and can be a big draw for your audience.** There are DJs, bands and artists who will live-stream for the event (you can find many examples on YouTube). If it makes sense for your program, go ahead and hire a band, actor or any other kind of entertainment for your virtual event. Just because the audience isn't physically in the same venue, doesn't mean they won't enjoy the show.
- **Find The Right Match:** Keep the audience, theme and event content in mind when you evaluate your options. Think carefully about whether or not a particular entertainer will resonate with your audience.

Marketing

Marketing a virtual event will help to promote it and drive interest, but it's also an opportunity to set expectations with your audience. For example, if your event has one-time-only sessions, make sure your audience knows when to tune in so they don't miss that part of the program. If there are panel discussions, breakouts or sessions that will be downloadable after the event, that content can be promoted ahead of time, too.

- **Build Your Marketing Plan:** Build a plan that targets where your attendees are. If it's an internal event, make sure corporate communications and specific internal departments provide you with the proper channels to promote and inform. Pre-event micro sites on the company Intranet or out on the Internet are a great way to drive interest and collect registration information. If externally facing, targeting potential attendees on LinkedIn, YouTube and Facebook will require custom content and messaging. Make sure your design firm or internal department preserves the event message and brand, while honoring your company's overarching brand guidelines. For external marketing, your legal and communications departments may need to get involved; make sure you're aligned with your company's policies.
- **Create a Strong Online presence:** Once you've cleared any legal, branding or communication hurdles, launch the web and social sites. Post your video promotional

video content and create hashtags to start generating interest. Your virtual event will take place online, so make sure you use that to your advantage.

Two Months Prior

- **Cross-Promotion:** With the event getting close, it's time to really build the excitement. Ask your speakers, influencers and stakeholders to post on their social channels about your event and what it's designed to cover. Let them promote the event by sharing the topics they will be discussing or problems they're trying to solve. If appropriate, send out press releases to media outlets to grow awareness.

One Month Prior

- **Confirm Dates and Times:** Contact vendors and entertainment to confirm starting times and see if there are any last-minute questions, concerns or needs. It is very important to get this confirmation, so expectations are clear. Once locked, contact your presenters and stakeholders to make sure they're aligned, too.

- **Distribute Key Information:** Distribute all available logistics information to your team. This includes the event timeline, the latest agenda, platform details, URLs, everyone's contact information, social media, PR and corporate communication guidelines, and any other information that will help them get prepared for the event.

- **Establish the Dress Code:** Make sure your stakeholders and team members understand what attire is appropriate for your show. Keep in mind, busy patterns or tiny prints may appear distracting or distorted on lower-resolution cameras or older screens. If you're using a green screen for background replacement effects, make sure your presenters know not to wear whatever color you're using to key your background (otherwise parts of your presenter may look strangely *transparent*).

- **Build Your Virtual Communication Workspace:** Designate a simple way for your group to communicate digitally. This could be a private chat room, group text or project management channel specific to your team, that facilitates constant contact in a private and secure manner.

One to Two Weeks Prior

- **Finalize Key Details:** Just like with live events, the entire team should meet to walk through each aspect of the event, from "arrivals" to "departures" and the entire agenda that falls in between.

- **Set Expectations:** Make certain everyone is clear on their roles and responsibilities; this includes your team and your stakeholders. Review any remaining technical details and make sure everyone has the latest contact information for everyone on the team,

including logins, URLs and phone numbers for all relevant behind-the-scenes communication channels.

- Review your event's security measures with your vendors and providers. Make sure there aren't any late-breaking changes or new elements that weren't accounted for in your original plan. If there are, this still gives your internal and external partners time to react.
- Schedule a technical rehearsal and walk-through with your staff and stakeholders. This provides a safe harbor for your presenters to get comfortable with presenting on camera while managing their technology (under time pressure). Not everyone will be able to rehearse on the same day, so scheduling slots convenient for your presenters is key. If a presenter absolutely cannot rehearse, walk through their presentation with your technical team anyway; rehearsals are just as important for the crew as they are for your speakers.

The Day Before

- Double-Check: Make sure your content producer is happy with the state of presentations, videos, panel configurations and exercises. Check-in with your technical or I/T team to make sure there is nothing else they need.
- Virtual Pre-Con: Confirm your call times / start times and program hours with your staff, vendors and partners. Make sure to take in to account any time zone differences.
- Sanity Check: Build a final checklist for yourself to ensure all last-minute tasks or concerns remain on your radar; you don't want anything to slip through the cracks while you're busy managing the event.

During Your Event

- Feel Proud: This work is not easy. Try to take a moment to appreciate what you and your team have accomplished, be grateful and have fun.
- Stay Comfortable: Make sure your work environment is neat and organized. You want all of your resources at your fingertips while stationed at your workspace. Minimize any distractions in your room. After all, this is your command center.
- Meet and Greet: Try to meet everyone on your extended team; make sure your vendors know how to reach you during the show. Addressing people by their name is the mark of a good leader. Set your expectations, be open and grateful. You want to build a rapport where team members feel comfortable approaching you, this is especially important under pressure when there's something not-so-good to report.

- **Easy Does It:** Put your stakeholders at ease, just as you would in a live setting. Check in with them as you would if you were in person.
- **#manage:** Have one person on your team manage your event's social media channels. If you're using hashtags, make sure they're displayed prominently so people use them consistently. Ask your social media manager to check in with you regularly.
- **Check-In:** Just as you would during your live event, use down-time to keep your finger on the pulse of what's going on. It always helps to have a friend in the audience who is consuming content to let you know how the experience is for an actual attendee. Course-correct, if possible, as you need to.
- **Collect Feedback:** Since this is a digital event, it's easy to manage collecting feedback through your event app, secure site or online survey software. Make sure you have distinct sections for attendees, stakeholders, team members and vendors. Collecting information from all of these angles will give you incredible perspective on the event.
- **Housekeeping Notes:** If you've already set dates for the next event, or have company announcements, don't miss the opportunity to announce and promote them.

After the Event:

- **Congratulations,** you've successfully completed your virtual event. You already know from planning live events that your work doesn't end here. From debriefs to loose ends, managing the post-event work will help you to successfully close your project and set you up for even greater success next time.
- **Post-Con:** Have a post-event meeting as soon as you can, that way information will still be fresh in people's minds.
- **Discussion:** Make sure to talk about all of the successes and problems out in the open. Discuss everything openly and in a positive way.
- **Goal Review:** Review and document how the event goals were achieved. What worked well, what could be done even better.
- **Communicate:** Share the information with your team, vendors and partners. If you've received specific feedback from the audience or a stakeholder, make sure to share whenever possible.
- **Financial:** Review your budget, any income, and actual expenses versus your projections. Note why things were on, over or under budget. Calculate your ROI and seek validation. Settle any remaining bills, up-charges or refunds.

- **Handle Loose Ends:** Send stakeholders any relevant data from the event and thank them. Also send thank-you notes to any sponsors, talent, media, partners and team members who were involved. If you can customize your notes to address a specific point of gratitude, the recipient will greatly appreciate it.
- **Attendee Wrap-Up:** If feedback hasn't been collected, be sure to ask for it. Distribute any after-mailings, email or text messages thanking them for attending. Links with relevant event data, videos or content are a great way to keep them involved long after the event has concluded.