Week 1-3 — Phase One

Week 1: Assess Your Landscape
- ☐ Consult with employees and third-party event stakeholders.
- ☐ Understand which objectives cannot be met without face-to-face interaction.
- ☐ Know your current position in each event phase.
- ☐ Assess pros and cons or potential roadblocks.

Week 2: Target Your Audience
- ☐ Identify your main target as well as demographics and geographic.
- ☐ Understand the limitations and requests of your audience or event prospects.
- ☐ Learn your audiences' criteria and preferences by reaching out through emails, survey or on social media.
- ☐ Ensure all event participants have reasonable access to videoconferencing from their location.

TIP: Avoid scheduling events or video conferences around meals and consider the time zones of others.

Week 3: Define Your Event Strategy

Event Type:
- ☐ Decide if the virtual event is live, on-demand or both. Examples: Social Livestreams, Social Stories, Live Tweeting, Webinars, Conferences and Networking.
- ☐ Choose a hosting platform that will make the most sense for you, your audience and event purpose.

Stakeholders:
- ☐ Speakers –– Who are your speakers, industries and main contributors?
- ☐ Presenters –– Who will be leading the conversations, topics and Q&A?
- ☐ Event Sponsors –– Will you need event sponsorship? Will you break sponsors into tiers?
- ☐ Marketing Team –– Who will run the event promotional campaigns to collect date, insight and consumer reactions?
- ☐ IT Team –– Who will handle the technical setup and ensure that all stakeholders receive the proper training?

Website:
- ☐ Create a virtual event website or landing page. Event sites typically communicate the purpose, event schedule, group of speakers and a call-to-action driving potential attendees to register.

Booking and Registration:
- ☐ Decide who's responsible for booking the systems and conference room if needed.
- ☐ Ensure your virtual event has a built-in registration page on your website. (Registration is a critical part of the process as it collects data needed to make informed decisions and actions.)

Hosting Platform:
- ☐ Decide how you will host your event. Hosting software includes: *Facebook Live, Instagram Live & IGTV, YouTube Live, Zoom and WebX*
- ☐ Learn the technical requirements for your team and presenters.
- ☐ Send out a calendar invitation in advance with login instructions of the hosting software to speakers.

Weeks 4-12 — Phase Two

Week 4: Coordinate Event Logistics
- ☐ Event Date(s)
- ☐ Event Times
- ☐ Time Zones
- ☐ # of Sessions
- ☐ Duration per session
- ☐ # of Speakers per session
- ☐ Estimate of total event participants (This will help you effectively allocate resources as needed.)
- ☐ Prepare an agenda to include this relevant information.

Week 5-12: Gather Content & Assets
- ☐ Session Content
- ☐ Session Details
- ☐ Speaker Information: Headshots/Bios
- ☐ Sponsor Materials
- ☐ Logos or Event Imagery

Week 6-12: Prepare Presentation & Content

Choose the format type for each session:
- ☐ Audio
- ☐ Video
- ☐ Video with slide presentation
- ☐ Audio with slide presentation
- ☐ Prerecorded material
- ☐ Live recording

Create presentation material:
- ☐ Does it need to be updated, re-designed, adapted for digital?
- ☐ Will it be in PowerPoint format etc?

TIPS:
1. Presentation design & content should be in clear language, with large fonts and high color contrast to touch on high points.
2. Provide captions and visuals wherever audio is being played.
3. House and maintain your presentation material in a Google Document that can be shared with attendees, while linked to a QR code and posted throughout the entire event.

Week 7-12: Campaign Planning
- ☐ Ensure your marketing plan is re-adapted to fit current event needs.
- ☐ Identify current target audience & potential prospects.
- ☐ Form your event marketing team, assign roles & responsibilities.
- ☐ Map out event promotional campaigns and timelines.
- ☐ Decide on paid advertising or traditional marketing strategies.
- ☐ Select marketing tools, software and channels.
- ☐ Start promoting as earlier on in the process across all channels.

Weeks 7-12 — Phase Three

Week 7-12: Event Promotion

Email Marketing:
- ☐ Pick an email platform that will help you communicate all stages of your event. (I.e Constant Contact, Mailchimp)
- ☐ Decide whether to send branded, personalized, or automate emails.
- ☐ Build your email list using opt-ins and free downloads.
- ☐ Send regular pre-event news, teasers and useful information.

Social Media Marketing:
- ☐ Work with your marketing team to see which social channels you are currently using and how the virtual event will play into them.
- ☐ Decide what social strategies, campaigns or tactics you will use. Key channels to focus on include: *Facebook, Twitter, Linkedin, Instagram*
- ☐ Leverage your social channels by posting information and updates frequently.

Ad Banners:
- ☐ Create banners for social media posts and advertising campaigns.

Email Templates:
- ☐ Deploy weekly or monthly email campaigns to attract leads, record attendance or inform on event updates and changes.

Social Channels:
- ☐ Update current social media pages with event information and details. Utilize in platform networking and fundraising tools if applicable.

Video:
- ☐ Develop evergreen virtual event video content that can be shared on your website, landing page, social media or email platforms.

Week 8-12: Train Your Event Team

Train Staff:
- ☐ Get training on how to integrate your presentation into your hosting platform.
- ☐ Train your event staff on timing and communication protocol, before, during and after the event. This will help to ensure a smooth transition when time for the event.
- ☐ Train your speakers by scheduling calls between them and the digital platform. This ensures they will be technically prepared when the actual event launches.
- ☐ Give moderators extensive instructions, especially if coordinating in-person as well as online presenters.

Rehearse:
- ☐ Perform a test run of your digital platform by conducting a rehearsal presentation with your team.
- ☐ Give moderators extensive instructions, especially if coordinating in-person as well as online presenters.

Tech Preparation:
- ☐ Properly set up and configure your tech equipment.
- ☐ Always prepare for unforeseen tech troubles.
- ☐ Test your internet connection.
- ☐ Plan for backups of visuals and presentations as well as any crucial A/V or software components.

Launch — Event Day and Post Essentials

Event Day

Event Recording:
- ☐ Learn how to start the event recording.
- ☐ Record the event. (This serves as valuable content for your website or for further promotion)
- ☐ Learn how to end and save the event recording.

Engagement:
- ☐ Encourage the audience to participate in social live streaming and tweeting.
- ☐ At the end of the presentation, encourage your speakers, moderators and attendees to participate in a timed Q&A session.

TIPS:
1) This allows all participants to remain engaged in the conversation and ask any questions or concerns they may have.
2) It's also a great time to network and brainstorm ideas for future events.

Onsite Event Promotion:
- ☐ Actively promote across your social media channels to help everyone stay on top of recent updates or changes.

Post-Event

Follow Up:
- ☐ Follow up with speakers, attendees, presenters and sponsors with a personalized and targeted message.
- ☐ Include a thank you message, relevant information and the recording of the event.

Feedback:
- ☐ Track and collect event feedback before, during and after the event. Feedback will allow you to understand the needs and desires of your audience, and fix any obstacles or challenges that may have been encountered.
- ☐ Send out frequent surveys and listen to social media activity and buzz to collect event feedback.

Post Event Promotion:
- ☐ Write a blog about the event, highlighting key topics and contributions, as well as thanking people you made it a great experience.
- ☐ Create post-event social posts and email blasts.
- ☐ Thank people and summarize key points or any further dates for content and event information.

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