Guidelines for Virtual Experiences

Fall 2020 events at Candler will be hosted online. Many people are familiar already with the Zoom platform. This is an appropriate platform for program area meetings, lunch and learns, and student/faculty appointments. However, deciding to take annual events virtual will require additional central services support. Zoom Webinar or Big Marker can be used for the larger, public facing events.

Deliberate and thoughtful decisions on virtual public events will incorporate the events and communications offices 8 to 12 weeks prior to the virtual event date. Consider partnering with other program areas for virtual annual events. This approach may best use limited and valuable resources while increasing programming reach!

I. **Strategy**
   A. Understand what your audience needs
      1. Poll the audience about the topic to know what interests them most.
   B. Start with the end in mind.
      1. What are the intended audience takeaways?
      2. What new information will be shared to help the audience affect change?
   C. Determine the best format and timeframe to deliver the content
      1. **Zoom Meeting**
         Registration not required. Attendees are instructed to get password from host.
         Meetings with internal audiences to conduct the business of the program. and other general meetings.
         Attendees have full access to microphone and video.
         Raise hand, Q&A, chat functions available.

      2. **Live Webinar**
         Registration needed to assist with security.
         Real-time presentation of all content.
         Host regulates attendee access to microphone and video.
         One speaker, interview, or panel formats are options.
         Raise hand, Q&A, polling, chat functions regulated by the host.

      3. **On-demand Webinar**
         Registration needed to assist with security.
         Content pre-recorded.
         No need for attendee access to microphone and video.
         One speaker, interview, or panel formats are options.
         No need for raise hand, Q&A, polling, chat functions.

       4. Simulive Webinar

         Registration needed to assist with security.

         Some content is pre-recorded. Real-time hosting of all content.

         Presenters interact with attendees in Q&A

         Host regulates attendee access to microphone and video.

         One speaker, interview, or panel formats are options.

         Raise hand, Q&A, polling, chat functions regulated by the host.

         Distribute recorded content on-demand for expanded reach.

II.   Audience engagement plan

Virtual events must overcome the multiple demands on audience attention

    A. Design virtual events to capture audience attention:

        1. Create an appealing virtual environment

        2. Create a theme and weave it throughout the experience

        3. Poll the audience to customize content. The goal is to change attendee behavior.

        4. Include a story arc to increase the drama and therefore the audience interest.

        5. The content should be transformative. The audience take-away helps change audience behavior.

    B. Deliver content in multiple ways to meet the audience need:

        1. Share through multiple channels

        2. Produce in varied formats (streaming, pre-recorded with speaker engagement in real-time chat, on-demand, podcast)

        3. Increase availability using a variety of scheduling options

    C. Foster audience interaction with platform tools

        1. Pre-populated polls, surveys

        2. Q&A, live chat interactions with speakers

        3. Breakout rooms for audience discussion of speaker topics - share observations in plenary

        4. Scheduling one-on-one meetings between attendee and sponsor via platform

    D. Promise post-event follow-up content and engagement opportunities

        1. Speaker slide deck and links mentioned during presentation

        2. Answers to all Q&A

        3. Links to what's next

III.   Virtual experience timeline

A. Eight to twelve weeks out: Email and social save-the-dates for your client personas. Create registration for public events
B. Four weeks: Establish event website, invite VIPs through email outreach
C. Three to four weeks out: Email invites to other core personas
D. Two to three weeks out: 1:1 follow-ups via phone, LinkedIn and email
E. One to two weeks out: Remind your invitees to register
F. One week out: Reminder to attend via 1:1 follow-ups
G. Two days out: Email webinar link and password to registered attendees
H. Day-of: Reminder to attend through social channels

IV. **Virtual experience team**
Program director calls initial team meeting no later than 12-weeks prior to event date, sooner if large public-facing event
A. **Virtual Experience Design**
Program Area Staff
Overall management of the project
1. Content customization based on attendee needs
Understand the target market - who they are, what they want
a. Develop content based on activating the gap between where the audience is today and where they want to be
b. The ability to change an attendee's behavior brings the most value to the attendee
c. Design content to be transformative
2. Theme development
a. Music
b. Landing page
c. Graphics (in conjunction with communications)
3. Registration
4. Timeline
5. Attendee Management
6. Speaker Management
7. Q&A and Chat questions

B. **Host/emcee**
Program Director if not involved in the event, someone else if Program Director is moderator or involved in speaking
1. Audience engagement, Q&A
2. Welcome and closing announcements
3. Housekeeping
4. Manage event timing
5. Work with technical staff on Q&A and chat management

C. **Technical Support**
Events and/or IT staff

1. Post speaker links, bio in chat
2. Troubleshoot technical difficulties
3. Plan technical back-up
4. Participate in rehearsal
5. Test equipment day-of event

D. Promotion
Communications staff - for public-facing events
   a. Virtual experience graphics
   b. Web promotions
   c. Social media coordination

V. Duties of the virtual host/emcee
A. Should not be one of the speakers
B. Works with technical support to troubleshoot
C. Programs the structure of the webinar: turns on speaker privileges, pre-populates polls and surveys
D. Encourages speakers to go deep on subjects that get buzz in the chat feed
E. Kicks off virtual experience
   1. Works with technical support to allow attendees into event
   2. Runs the pre-event music and landing page
F. Welcomes attendees verbally and in chat box
   1. Mutes all attendee microphones and videos for webinars
   2. Unmutes if allowing individual attendees to interact with speaker
G. Makes housekeeping announcements
   1. How to use webinar tools
   2. Post-event Promise - speaker slide deck, links to resources, answers to Q&A, next up
H. Acts as timekeeper
I. Closes event
   1. Reminds of post-event promises
   2. Tells what's coming up and how to get involved

VI. Speaker management
A. Help educate speakers with this virtual experience tips and tricks template
B. Always conduct a technical rehearsal. Have technical back-up plans
C. Request speakers show up 30-minutes ahead to test equipment
D. Set expectations about how the speaker will be involved in audience engagement

VII. Speaker engagement plan
An engagement plan ensures speakers know the best ways to interact with the audience for maximum results.

A. Pre-event promotion - Create short content for social media distribution, pose questions to target audience, poll target audience (with help of program area staff)
B. Pre-populate surveys, polls, and questions relating to content to be used during live content delivery. Work with technical staff on day-of delivery
C. Prepare a slide deck that includes media-rich content like music and short video clips that support event content.
    1. Work with technical staff on day-of delivery
D. Audience engagement in chat during pre-recorded content
E. Answers to Q&A
F. Supply, in advance, links to bio, website, resources mentioned in content delivery, slide deck to Design team for posting during and after the event.
G. Answer all unanswered questions from Q&A
    1. Design team compiles all Q&A for a post-event deliverable

VIII. **Virtual engagement promotional planning**
    A. Design with Promotional Team identifies personas and media plans to engage
    B. Inform speaker of content needed for pre-event promotion
    C. Create timeline and execute

IX. **Technical**
    A. **Match virtual experience category to best platform**
    B. Ensure speaker(s) has the correct equipment to participate in a virtual experience
    A. Helps speaker(s) with rehearsing screen sharing, virtual backgrounds, audio for media-rich content, interactive platform features
    B. Participates in the rehearsal
    C. Manages day-of technical issues
    D. Help with Q&A collection if needed

X. **Create community and extend reach**
    A. Poll target audience early to gauge the gap between where they are and where they want to be on the subject
    B. Share speaker soundbites ahead on social media
    C. Request speaker tweets
    D. Create Facebook group
    E. Polls, surveys, Q&A, live chat interaction with speakers
    F. Use breakout rooms for audience discussion on speaker topics. Share discussion takeaways back in plenary
    G. Create breaks with "birds of a feather" topics for networking
    H. Create simulive experience (Pre-recorded keynote with live introductions , polls, and discussions) and live stream on Facebook and YouTube
    I. Record live experiences

        J. Work with Candler IT to edit content & add branded bumpers for on-demand distribution on Vimeo

        K. Convert recorded content for podcast

XI.   Resources

[Online Events Best Practices](#)
[How to Master Virtual Event Timezone Planning](#)
[Prevent Zoom Bombing](#)
[Enabling oom to Facebook Live and YouTube](#)
[Virtual Event Planning Checklist](#)