virtual BLUEPRINT

Presented by the Event Strategists
@ Conference Managers & Sponsorship Boost

CONFERENCE MANAGERS

sponsorship BOOST

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Building a Strategic Plan: Identifying Goals and Outcomes

Colleen Campbell, CMP, Conference Managers

Erica Platner, Conference Managers

Nicole Guy, CMP, Conference Managers

A methodical, strategic planning process with steps to identify how and whether to shift an in-person event to a virtual platform is critical. A decision of that magnitude should not be made in a vacuum. It must be made with quantifiable data. Establishing goals, formulating analyses, and collecting data will help guide each decision along the implementation process and ultimately will facilitate an objective review of the event's desired success.

Perform an Overall Risk Assessment

A risk assessment will help you determine which path has the lowest level of risk and offer the least disruption.

Evaluate all contracts (primary and subcontractor) and calculate liabilities. What can you cancel, renegotiate, or defer?

When and where is the in-person event (some state bans/stay-at-home orders are being lifted; how does that impact Force Majeure clauses?) Do you have event cancellation insurance with communicable disease coverage?

Calculate the Impact on Organizational Operating Budget

Calculate the potential impacts on cash flow and reserves. Look at your "sunk cost" calculations. Create payment refund/roll-over scenarios for each separate revenue stream - sponsorships, exhibit booths, attendee registration fees.

Evaluate Stakeholder Needs

Identify your stakeholders' needs, limitations, and concerns through surveys of attendees, speakers, exhibitors/sponsors, organization leadership, co-sponsoring organizations and co-located/ICW organizers, and association staff.

Designing a virtual or hybrid event with everyone in mind delivers value to all; transparency encourages buy-in over criticism. Your stakeholders may determine that the best decision for your organization is a complete cancellation of the event, with no

Building a Strategic Plan: Identifying Goals and Outcomes

follow-on virtual component. Survey responses have been very high among association clients; people want to give their opinions!

Sample survey questions are included on page 9.

Identify the Event Type that Aligns with the Needs of Your Stakeholders

When thinking about virtual and hybrid events, consider possible constraints such as budget, staff time/capabilities, event lead time as well as professional membership type. For example, scientific presenters will need to get back to labs once stay-at-home orders lift and healthcare workers on the front lines may not be able to present or attend any kind of event for a while.

Additionally, it will be important to note travel restrictions, the willingness and/or availability of program presenters for an in-person or virtual event; the technical capabilities of attendees, and if exhibitors are enthusiastic or reluctant to embrace a change in platform.

Develop Budget Planning Scenarios

Use contract and liability analysis from risk assessment as a starting point. Build out revenue and expense models at varying levels, including best and worst case scenarios for your organization. Incorporate survey data to help align budget scenarios with reality.

Determine Desired Outcomes of Your Virtual/Hybrid Event

As you think about outcomes, also consider how they may differ from the end goals of in-person meeting (prioritizing or weighting goals helps guide the decision).

Examples of outcomes include:

- Deliver top-quality, timely education/research to participants or industry/community that can be immediately applied
- Serve as a touchpoint with members or your meeting community
- Exposure for exhibitors (lead generation, brand visibility, providing thought leadership, content presentation/demos, customer connections, technology updates to your community)
- Networking (chat, attendee matchmaking, video capabilities, networking rooms)
- Build a wider live audience for future year
- Provide education to a larger global audience who can't attend
- Replacement or supplemental revenue generation for the association
- Develop skills and learn the ropes for 2021 and beyond: learn how to run virtual elements now; people are currently more forgiving for glitches

Building a Strategic Plan: Identifying Goals and Outcomes

Define Success

Set quantifiable goals around revenue, participation, and education (in addition to any other benchmark categories relevant to your meeting or organization).

Revenue Goals

- Registration and exhibit/sponsorship revenue
- Percent of revenue that is converted from the in-person event to a virtual event
- Add revenue through targeted registration types such as "developing country," "plenary-only," or lab rates. They are easier to control in a virtual environment than in an in-person meeting
- A percentage of speaker/presenter participation, which equals revenue (for some scientific meetings)
- Add/revise virtual sponsorships
- Add non-endemic sponsorships—get creative!
- Post-meeting revenue streams (e.g. sales/subscriptions for captured content)

Participation Goals

- Percent of "normal" attendance; percent increase in virtual audience
- Attendees: a specific number of first-time attendees, students, or international (or any other category)

> **TIP!** Develop incentives to keep exhibitors in a virtual event: lock in booth rates for following year, free advertising, member list usage, extra priority points, additional sponsorships for virtual platform components, additional sponsorships to complement a virtual meeting.

- How many speakers and/or presenters make a successful meeting for you? (if applicable)
- Quantification of engagement & participation - through chats/polls during sessions; Q&A from anyone; post-meeting usage within platform
- Exhibitors—percent of participating companies and company types
- A virtual exhibit hall allows an opportunity to diversify exhibitor base; include small/start-up companies and/or companies with emerging products and services as a result of the pandemic or other evolving needs
- Positive post-event evaluation results

Building a Strategic Plan: Identifying Goals and Outcomes

Education Goals

- Deliver more content than ever before without time constraints (and/or allowing participants to consume more content than possible in an in-person setting)

- Present different education formats than an in-person (5-minute talks, Q&A only with experts, interactive sessions); a virtual platform can be a low-risk setting to try just one or two new things

After moving through these assessments, it's likely that the way forward will become evident. In some cases, organizations decide there is only a Plan A and will move forward with that no matter what. However, in many cases, a Plan B and even a Plan C are needed, as so many conditions are evolving rapidly and depend on developing news and information. If multiple plans are needed, establish a "drop dead" decision date or deciding factor that will determine which plan to follow.

No one knows when this pandemic will be "over" and things will "go back to normal." It can be disheartening to think of major upheavals lasting into a second year, but facing those possibilities head-on now can be much less scary than only focusing on the next few months and simply hoping for the best after that. Try to consider impacts on future years as you look towards the future of your conference, whether hybrid or virtual, so that your organization is positioned as best as possible down the road!

QUESTION	ANSWER OPTIONS
Prior to the COVID-19 pandemic were you planning to attend the Annual Meeting in XX City Month, 2020?	Yes Yes, I've already registered No Maybe
Is your facility/organization currently experiencing travel restrictions?	Yes No I'm not sure
If yes to the question above , what is the duration of the ban?	Indefinite Ends prior to [conference date] Through 2020/End of year Other
If the CDC updates their recommendations and allows large gatherings to take place, will you attend the Annual Meeting?	Yes No I'm uncertain
Has your organization cut funds for conferences and travel for the remainder of 2020 (or fiscal year)?	Yes No Discussed but not final Uncertain N/A
If you plan to attend the Annual Meeting what can the association do to help you feel safer in the convention space?	Open ended
Would you attend a virtual Annual Meeting at a reduced registration fee if you were unable to attend in person, assuming that the amount and quality of content, continuing education, career resources, access to exhibitors, posters and networking was comparable to what you would expect from an in-person experience? This would include pre-recorded and live sessions, both of which would have live presenter Q&A.	Yes No
If you said "No" to attending the virtual Annual Meeting, what would be the reason(s) you wouldn't attend?	Multi-select: Price Time commitment/length of conference Childcare Time zone Decreased value over in-person event Other
Please provide any other thoughts, concerns or questions not covered above.	Open ended

You also might want to add:

- Demographic Question (time zone/geo location, career level, membership, how frequently they have attended an in-person meeting, etc)
- What COVID topics would you want to see on the agenda?
- What can the association do to help you during this time?
- Who pays for your registration and travel costs?

Sample Survey Questions

Measuring Successes

Elizabeth Davis, Conference Managers

Katie Kostiuk, Conference Managers

Maggie Pearson, Conference Managers

Ty Wilson, Sponsorship Boost

How do you define and measure success? Who should measure success? It is important to evaluate your meeting's success from both profitability and goal retention perspectives. Doing so will help you see how a virtual event can impact your bottom line in a positive way.

One challenge we face right now is understanding the complexities of creating a budget for a virtual event. Virtual events introduce a new set of revenue opportunities and expenses that differ from live events. It is important that when you talk about return on investment (ROI), return on engagement (ROE), and return on objectives (ROO), that you bring your stakeholders along for the journey to evaluate platforms and functionally. There are many factors to consider for the virtual conference experience to be a success.

What is Success?

Success can be defined as achieving your organizational goals. Successes are measured differently for individual stakeholders within your organization. Event success varies per stakeholder, but each needs to be considered when evaluating the virtual platform. How will the platform best meet the goals of each stakeholder within the organization?

Who Measures Success?

Individual stakeholders within an organization measure success. Most commonly your stakeholders hold the following roles within an organization; Event Owner (CEO/Executive Director), Procurement/Finance, Marketing, IT, Event Managers, Education Managers and Sales Departments. Each of these groups may have different goals to best meet their needs, which lead to different ways of measuring success.

How is Success Measured?

Some common ways we measure success are through return on investment (ROI), return on engagement (ROE), and return on objectives (ROO).

The simplest way to calculate ROI is event revenue divided by event expenses. This is the simplest calculation to find your ROI, it does not illustrate the profitability of the event. To show profitability to your organization, your

Measuring Successes

calculation should reflect the gross margin calculation; event revenue divided by cost of goods sold (COGS).

While COGS can look similar to your event expenses, COGS takes into account ancillary expenses that contribute to the overall sale of the event. For example, direct labor costs, storage costs for event materials, and paper costs to produce handouts would be reflected into this calculation. In the charts below we provide two calculations for gross margin, one for a live event and one for a virtual event.

It is also important to think through how you will determine your attendee, exhibitor, and sponsorship rates because they will affect your ROI. Does your virtual event allow the same opportunities to your members as the live event? How will you set your registration rates to accommodate the change as well as meet your revenue needs?

Live vs Virtual Costs

Determining your rates for a virtual conference is often dependent upon your overall organizational budget. Are you moving to a virtual conference platform due to COVID-19 or other external factors? If so, you will need to understand the original profitability of your live event and what your profitability target needs to be with minimal impact to the organizational budget and original operating cash flow. Some organizations plan their events to be a breakeven event while other events contribute 50 percent or more to the overall organization's profitability. Understanding your organization's position is the first step in structuring your fees.

Live Event Gross Margin Calculation

Breakeven	265	Cost/Attendee	$686.66
HOTEL CONTRACT DETAILS		**GROSS MARGIN**	
Room nights blocked	1800	projected attendance	projected revenue
attrition %	80%	581	$620,405.00
room nights picked up	1680	Fixed Costs	$191,811.60
staff+speakers+exhibitors	110	Variable Costs	
# of days of event	3	F&B	$180,153.00
F&B minimum	$85,000	F&B attrition	$0.00
F&B multiplier	40%	Rooms attrition	$0.00
room rate with tax	$167.72	Commission	
room multiplier	0%	Comps	($3,522.12)
attrition waiver level	0	Total Costs	$431,496.03
comps	40	Gross Margin	$188,908.97

Virtual Event Gross Margin Calculation

Breakeven	228	Cost/Attendee	$522.95
		GROSS MARGIN	
		projected attendance	projected revenue
		400	$366,000.00
		Fixed Costs	$226,130.80
		Variable Costs	
		F&B	$0.00
		F&B attrition	$0.00
		Rooms attrition	$0.00
		Commission	
		Comps	$0.00
		Total Costs	$226,130.80
		Gross Margin	$139,869.20

Measuring Successes

Cost per Attendee

As you will see in the samples provided, the cost per attendee for a virtual event is lower than what we see in the live event, this is probably not surprising to most. Keep in mind that virtual conferences present more fixed costs versus variable costs which contributes to the lower cost per attendee. Understanding the cost per attendee can assist you with structuring your attendee registration rates and exhibitor and sponsor fees. In each of the sample charts you see it also captures the breakeven number of attendees, this is useful for organizations that are not only planning on a breakeven event but also for organizations to understand the minimum number of registrations for the event and its impact on the overall profitability.

ROI

Creating attendee, exhibitor, and sponsorship fees for a virtual conference presents a new set of challenges because one of the biggest ROI's we hear in the event industry is the networking/connections and the return that attendees, exhibitors, and sponsors see as a residual effect of a live event. We are now challenged to identify what the value is and how we as event strategists can show our exhibitors and sponsors the value virtual conferences have through email, ads, and 1:1 video appointments. How do you do this during a time where we are all exhausted with video conferencing, telephone calls, and email? The simplest answer is by identifying a platform and creating an experience that incorporates

education, networking, and analytics that can be provided to exhibitors and sponsors.

Similar to live events, there are several expense areas that will factor into the budgeting process. Some examples of direct cross-over from a live event to a virtual conference include:

- Number of event days
- Number of attendees
- Number of sessions offered
- Speaker fees
- Staff time
- Copyediting
- Production fees
- Marketing fees

Virtual meetings generate an additional, different set of expenses:

- Number of sessions offered
- Number of pre-recorded (asynchronous) sessions vs. live-streamed
- Number of breakout rooms, if applicable?
- Platform price fluctuation between number of days/ number of sessions?
- Amenities/options that the "base model" platform offer? Can you achieve your goals with the base model, or do you need to upgrade the platform to accomplish your goals?

This chart will aid in the budgeting process by helping you evaluate the new expenses of a virtual conference. Your list may be different based on your individual goals.

Evaluating Functionality for ROI

Service	Criteria (up to XX people included)	Rate Per Event	Rate Per Day	Rate Per Attendee
Platform/System Requirements				
Conference service/license				
API integration with registration				
Single sign on				
Branding Requirements				
Custom branding for the event				
Ability to white label website with domain				
Attendee Experience				
Agenda building				
Create a profile				
Video chat with specific group of people				
Education/Content Requirements				
Live sessions				
On-demand/pre-recorded sessions				
Attendence monitoring				
Collaboration with presenter and audience				
Continuing Education Requirements				
API Integration with LMS				
Session evaluation post-session				
Polls/checkins during the session to ensure user is participating				
Exhibitor Requirements				
Virtual Exhibit Hall				
Qualified leads—soft and hard leads				
1:1 appointment scheduling				
Collect leads from attendees who have visited "booth"				
Live hours to meet with attendees				
Sponsorship Requirements				
Embedded videos prior to live and pre-recorded sessions (content given by sponsor)				
Branding/logo on specific sessions				
Networking Requirements				
Discussion board				
Live Q&A				

Measuring Successes

By using the virtual platform expense chart along with the gross margin calculation you can provide your stakeholders with a snapshot of the ROI and profitability for your virtual conference. While ROI is the most common measurement for success, ROO, and ROE also contribute to measuring success of the virtual meeting.

Return on Objective can be measured by:

- Educational Session Evaluations and Surveys
- Educational Session Comprehension
- Brand Awareness - Organization's brand and Sponsoring Companies

Return on Engagement can be measured by:

- Attendee Reach
- Leads Gathered
- Retention
- New Business
- Brand Awareness

Both ROO and ROE have tangible and intangible mechanisms to capture success.

Keep in mind your attendees, exhibitors and sponsors will have their own ways of evaluating return on investment of your meeting. They may recognize ROI in ways such as:

- Industry connections
- Educational content
- Advertising opportunities
- Sales of a specific product

Remember, each event is uniquely different; with different end goals that define the needs of the virtual platform. Success can be measured in multiple ways; revenue, profitability, leads gathered, number of attendees engaged, retention, and new business. Achievement should be measured against the organizational goals to determine the event's success.

Successful organizers will also factor into their goals how attendees and sponsors will measure the success of the event.

Using these tools to support your organization's evaluation process of a virtual meeting and identify how you measure return on investment, you can create an event that impacts your bottom line in a meaningful way.

Platform Research and Creating the RFP

Alison Bashian, Conference Managers

Hannah Brawley, Conference Managers

Melissa Charity, Conference Managers

Katie Owings, Sponsorship Boost

Meghan Schofield, Conference Managers

First the good news. There are a LOT of technology options for you to choose from when creating a virtual event or a virtual component for your hybrid event. Now the bad news. There are a LOT of technology options for you to choose from when creating a virtual event or a virtual component for your hybrid event. It can take a lot of time to sort through all of the technology options, understand the capabilities, and determine what will give you the best return on investment (ROI). Often it can feel like learning a new language.

This section will outline the first steps your organization should take when making this important decision, including determining your selection criteria, reviewing demos, sending out RFPs, and identifying the platform that optimizes the value proposition of your meeting.

Terminology

Before you begin, it will help to understand basic terminology for common virtual conference environments:

- **Hybrid Event** - a tradeshow, conference, seminar, workshop or other meeting that combines a "live" in-person event with a "virtual" online component
- **Fully Virtual** - a tradeshow, conference, seminar, workshop, or other meeting that is conducted solely online
- **Livestream** - a broadcast of a session streamed over the Internet in real time; can be made available on-demand after run date
- **On-Demand** - a session that is recorded and then made available online to be accessed at any time by the viewer
- **Simulated Live or "Simulive"** - pre-recorded sessions, broadcast at a specific date and time to appear live; presenter usually comes on after broadcast has concluded to conduct a live Q&A; typically made available on-demand after run date

Create a Wishlist

Even if you're not familiar with everything that is available or possible in the virtual conference world, it is important to come up with a wishlist of features and

Platform Research and Creating the RFP

criteria. Prioritize your list and determine any must-haves, with the knowledge that you will likely be adding to this list. Here are examples of common needs to consider:

- **Registration/Integration** - Do you need the provider to host registration? If the answer is no, do you want an API between your existing registration and/or membership databases? Do you want Single Sign On?

- **Session Formats** - Decide if your event will be Live, On-Demand, or Simulive.

- **Networking & Engagement** - How important is it for you to provide networking or engagement tools? Will you want to utilize common networking and gamification tools include polling, games, quizzes, live chats, video chats, Q&A, virtual happy hours, prize drawings.

- **Exhibitors** - Think about what your exhibitors want to showcase, how advanced the features need to be, and what they are willing to pay for. Some ideas are below:

  - **Virtual Floor Plan/Booth** with an enhanced exhibitor listng (logos, videos, brochures, social media, etc)

  - **Analytics for exhibitors** - number of visitors and contact infomation (virtual lead retrieval)

  - **Ability to set appointments and virtual meetings**

- **Sponsorships** - Think of creative ways you can incorporate sponsorship opportunities that will not only show visibility, but can also tie in with education such as:

  - **Gamification** (scavenger hunt, daily drawings)

  - **Sponsored Focus groups** - Have breakout rooms serve as focus groups moderated by sponsors.

  - **Retarget advertising** - Sponsor banner ads can be retargeted to attendees pre or post-event.

  - **Digital Advertising Options** (virtual tote bag, banner ads)

  - **Product Showcase Demo** (have sponsors showcase their products through a video or brochure)

  - **Poster Awards** (company can sponsor the award)

  - **Educational Session Sponsor** (logo shown throughout or have a intro opening before the session)

  - **Virtual Happy Hour** or Networking Event

- **Production Level** - Can providers replicate the feel of a general session with intro videos, music, or sponsor banners and is that important to you? How involved do you need the providers to be with preparing speakers and checking audio/lighting?

- **Continuing Education & Evaluations** - What requirements must attendees meet in order to claim a credit and how can those requirements be replicated in a virtual environment? What types of evaluations

Platform Research and Creating the RFP

will you need: overall conference, per session, etc. What post-event reports will you need from the provider? Are you limited on where you can put sponsor content due to possible accreditation regulations?

Research Providers

Where do you start to find a trusted partner to provide a reliable platform for one of the most important assets of your association? If you do an Internet search for "Virtual Conference Provider" you will undoubtedly be faced with a never-ending list of companies. Instead of Dr. Google, try to leverage existing technology and connect with vendors that you currently work with. They may be able to offer some solutions and advice. You can also check industry message boards for recommendations from fellow event planners.

> **TIP!** Watch technology platform video first, then conduct demo, then send out RFP.

Request Platform Demos

What comes first: the demo or the RFP? There's really no right answer here, but you may find that conducting a demo first will help you build out your RFP.

Before the demo, ask if the provider has a video that provides an overview of their platform. Provide a summary of your wishlist items to make sure the person hosting the demo knows which features to focus on.

> **TIP!** As more events go virtual, provider demo schedules are booked. The sooner you start this process, the better off you will be.

During the demo, come with your wishlist and ask LOTS of questions (there are definitely no stupid questions when it comes to demoing these platforms). Ask for the demo to be recorded and ask for examples of what other meetings used that worked well. You may get some great ideas.

Send out the RFP

Once you have a handle on what a platform is able to provide, send out the request for proposal. Some common details to include:

- Organizer and contact details
- Date, length, and title of conference
- Expected number of attendees
- Conference format requested (fully virtual, hybrid)

Platform Research and Creating the RFP

- Session formats requested (live vs. on-demand, and how many of each) NOTE: If you had concurrent breakouts during the live event, do you need any sessions to happen simultaneously in a fully virtual event?
- Expected number of exhibitors/ sponsors
- Exhibit/Sponsorship features desired
- Specific features seen during the provider demo that are of interest

Compare Providers

Create a side by side comparison—incorporating your wishlist items—of all of the different platforms you've researched. Understand that platforms will vary tremendously so be sure to detail the differences within your comparison. Compare the features, cost, learning curve, and customer service.

FEATURES

Does the platform provide enough features that work within your criteria? If there is something they do not provide can work with them on alternatives? Note: If one platform does not provide everything needed, you can consider using multiple platforms to cover your requirements.

COST

Compare the cost of platforms, but be cognizant that a more expensive platform may also have more features and therefore a higher ROI. Determine ways to offset your cost of the platform such as providing exhibitor and sponsorship opportunities. Understand that most platforms have different levels and add-ons you can purchase. The pricing is usually customized based on your needs versus one sticker price for the entire platform.

LEARNING CURVE

How intuitive is the platform for organizers, attendees, speakers, exhibitors/sponsors? What training is involved? How quick can the platform be up and running? Do users need to download software or is it web based?

CUSTOMER SERVICE

What customer service does the platform provide to your organizers and attendees? Are you on your own once they sell it to you or are they able to provide quick customer service throughout your virtual event?

Marketing Your Virtual Event

Beth Barnhart, Conference Managers

Linda Cohen, Sponsorship Boost

Emma Hoover, Conference Managers

Dana Jones, Sponsorship Boost

Nicole Tisdale, Conference Managers

As the meeting landscape pivots from in-person to virtual, so does the event marketing. Your traditional marketing plan must adapt quickly. We've outlined a marketing plan to promote virtual events so that attendees sign up, tune in, and stay engaged.

Identify Your Audience

The interest in virtual meetings has never been higher. However, it is important to know your demographic for past and current members, exhibitors, and sponsors. Also remember that a virtual or hybrid event will be accessible to a wider audience. Ask yourself, "What's motivating people to join your event?" Is it continuing education, networking, exhibits, something else? What is your desired outcome of this event? Think outside the box. This will help identify the potential wider audience.

Create a Marketing Timeline

Marketing timelines will be different for each individual event whether it is traditional, virtual, or a hybrid. The most important thing to consider is marketing at the right time. If you market too early, you will lose attention. If you market too late, people won't have the time available to attend.

Build Your Message

Identify the key features your event has to offer, particularly those that make it unique. Clearly communicate the value of your event to your attendees in your marketing. One thing to consider is how the communication needs to be tailored to various stakeholders - attendees, exhibitors, sponsors, and your board. Each stakeholder will want something different from your virtual meeting so it is important to communicate the value to each stakeholder specifically.

Marketing Your Virtual Event

Prepare Your Marketing Materials

Once you understand your audience and create your message, it's time to prepare your marketing materials. There is a strong emphasis on virtual marketing materials. Print brochures are not needed in the virtual world. Your logo should be a visual for the meeting. Make sure it tells a story. Your website needs to be engaging to grab the users attention and differentiate your virtual meeting from the others being offered. Finally, your social media strategy needs to include a clear hashtag referencing your event.

Announce Your Event

When the prep work is complete, it is time to announce your event. It is important to be strong across all marketing channels. Push the announcement on all social media platforms. A quarter of all traffic to registration pages is from social media. Also, send press releases to all relevant professional trade organizations. Ask your sponsors, partners, and speakers to spread the word.

Drive Conversation

After your event is announced, frequently market to your attendees by posting on social media platforms, eblasts, and/or blog posts. Tease your virtual content once it has been developed. Poll your attendees leading up to the event about how they are feeling, what they want to get out of the virtual event, and if they have any pre-event questions. This will help them know the event will be tailored to their needs.

Check the marketing's effectiveness by seeing how many people are reading emails, how many clicks sessions have, or how many people are registered. This will help understand which marketing tactic is most effective.

Actively Engage During Your Event

It is important to communicate during the event to keep your attendees engaged and informed. Live tweeting, digital signage, gamification, speaker announcements, and social media wall chats are all great ways to keep your attendees communicating and engaged during the event. Understanding your virtual platform will help you decide which methods are right for your virtual event.

Post Event Communication

Post event communication is just as important as the marketing before your event. Thank your attendees for attending. This is a great time to provide your attendees the event content or session recordings so they can revisit the information again and also include a quick survey. The data provided by the survey can help shape your future events, messaging, and marketing strategies to help provide content your attendees want.

Marketing Your Virtual Event Checklist

STEP 1: IDENTIFY YOUR AUDIENCE AND DESIRED OUTCOME

☐ Attendee/Sponsor/Exhibitor demographics

☐ Price accordingly

☐ What is the attendee, exhibitor, or sponsor motivation to join?

STEP 2: CREATE A MARKETING TIMELINE

☐ Consider how much time you have

☐ Choose the marketing platforms that are most frequented by your attendee base

☐ Schedule your marketing according to the best timeline for your event

STEP 3: BUILD YOUR MESSAGE

☐ Identify key features

☐ Promote your expertise

☐ Communicate virtual benefits

STEP 4: PREPARE YOUR MARKETING MATERIALS

☐ Create an exciting website and an eye-catching logo

☐ Construct a hashtag to be used on social media

☐ Consider Search Engine Optimization to ensure you are the top search result

STEP 5: ANNOUNCE YOUR EVENT

☐ Create and send press releases

☐ Have exhibitors, sponsors, and speakers self-promote to spread the word

☐ Utilize as many social media platforms as possible

STEP 6: DRIVE CONVERSATION

☐ Frequent marketing via social media platforms

☐ Poll for audience expectations beforehand

☐ Check your marketing data - are people viewing emails, how many clicks, etc.

STEP 7: DURING EVENT

☐ Live tweet using your created hashtags

☐ Keep audience engaged with trivia questions and/or prizes

☐ Enable a social media wall or chat feature

STEP 8: POST EVENT COMMUNICATION

☐ Thank the audience for joining

☐ Provide the event recording

☐ Conduct surveys to help analyze data for future marketing

CHAPTER 5

Best Practices

Maeve Carey, Conference Managers

Deanne Rockola Altman, Sponsorship Boost

Andrea Schermerhorn, Sponsorship Boost

Corey Siembieda, Conference Managers

There are three main areas you need to consider when creating your Virtual Event- Content, Exhibitors, and Networking. Think about the big picture and what is most important to your association and attendees.

Content – Engagement and Production are Key!

The production level of your sessions including introduction videos, scrolling ads, timer countdowns, music, scrolling notes about sponsors, or updates is important. Invest in production (higher quality videos, tech support, speakers) to help keep attendees engaged.

Shorten the duration of sessions because attention spans are shorter online than in person. Try a conversational format with multiple people talking to each other. A variety of speakers makes for a more engaging discussion.

Ensure that content is accessible for the visually challenged and hard of hearing. If you plan for a global audience, consider translation services for captioning.

To make sure your content is well done:

- Pre-record presentations so that you have them ready if the streaming video fails for any reason.
- Allocate time for presenter orientation to ensure it runs glitch-free
- Address time zone differences
- Troubleshoot technical glitches
- Assign a facilitator/moderator to engage the remote audience
- Capture real-time feedback
- Plan for strong customer support
- Treat attendees as collaborators

CHAPTER 5

Best Practices

Exhibitors and Sponsorships

The needs of exhibitors and sponsors are just as important as the needs of an attendee. Some ways to ensure their return on investment is positive are to

- Leverage sponsors as partners.
- Select software that allows for matchmaking, video calls, and discussion boards within the virtual exhibit hall.
- Show your exhibitors and sponsors how to use the virtual booth format and how to make the most of it.
- Showcase exhibitor services or products that can translate virtually.
- Create new sponsorships that fit your virtual event goals and technology platform abilities
- Allow exhibitors to provide speakers and content for sponsored educational sessions.
- Allow exhibitors/sponsors an option of digital communications.

TIP! Over-communicate to your presenters, including your sponsored presenters, what to expect, and how to present. Training presenters or microphone use, lighting, and camera usage will only help to ensure a more successful presentation.

Networking

The best part of in-person meetings is the networking and social element so make the same true of virtual or hybrid events!

- Get social media ambassadors in the community to promote the virtual event.
- Select software that allows for matchmaking, video calls, and discussion boards within sessions.
- Build breaks into the schedule (and get them sponsored). Attendees can chat with others while listening to a fun playlist and enjoying a cup of coffee!

The Best Ways to Engage and Network with Attendees

Krissy Canales, Conference Managers

Danielle Frisby, Sponsorship Boost

Lacey Kishter, Sponsorship Boost

Catherine Pumphrey, Conference Managers

Michelle Ruiz, Conference Managers

The top reason people attend conferences is networking and social engagement. The in-person interaction is invaluable and is critical to the success of the virtual event. So, how do you take all the fun and value of in-person interaction and pivot that vital segment into a virtual experience?

> Without any engagement, attendees are just watching a webinar! **TIP**

Pre-Conference Engagement & Networking

Create a welcome video that allows attendees to meet the staff in a more personal way. It also gives the attendees a preview of different aspects of the virtual conference. This will set the tone for the conference and give attendees an idea of what to expect while participating in a virtual conference.

Hold a pre-function coffee break that allows attendees to mingle before the sessions start in the morning. It also encourages networking between attendees about sessions they have been to and what they are looking forward to in the conference.

Create a music playlist to create the energy of sitting in a live session (ensure you are using copyright/royalty free music) or create a custom song with a musician who can create custom songs during the event.

Connect with attendees on all social media platforms. Create an event-specific hashtag to be used on various social media platforms. You can also create a digital backdrop for attendees to take screenshots and give them the same feeling of a step and repeat backdrop.

Conference Engagement and Networking

During the event, mix in coffee breaks in-between sessions to encourage attendees to continue networking. You can create sponsorship opportunities for raffled coffee shop cards or any type of virtual gift card.

The Best Ways to Engage and Network with Attendees

Graphic Recording

Graphic recordings are a great visual representation of a session. They can provide a recap of the sessions in aesthetically eye catching way as well as provide a new way of looking at information virtually.

Q&A with Speakers

This feature allows for normal question and answer periods during the presentations.

Health & Wellness

Add exercise opportunities such as: yoga sessions, walking challenges or chair pilates.

Social Media

Use the hashtag you established specifically for the virtual event. Post live videos on various social media platforms and again, as before the conference, utilize a digital association backdrop for attendees to take screenshots and hashtag the association.

Focus Groups

Form mini break-out sessions that attendees can move through based on the content they want to see. These can be sponsorship opportunities and the sponsor can provide the content or host the session.

Gamification

Games engage attendees during live sessions. Things that work include trivia and polling, exhibitor QR scavenger hunt/trivia, raffles and bingo for sessions/general sessions.

Engagement and Networking

More than even in a live event, it's up to the organizer to create networking opportunities and make the audience feel connected to the event. Host virtual happy hours and theme parties—attendees could send fun drink/food recipes prior or dress up to feel like they are there! Work with platforms that pair attendees for social networking meet-ups.

Networking allows for numerous sponsorship opportunities. Get creative and design opportunities around:

- Coffee breaks
- Conference playlists
- Health & Wellness - yoga sessions, walking challenges
- Backdrops
- DJ for happy hours/networking events
- Backgrounds as company logo in chat rooms
- Recipes sent to attendees
- Drink creations to send attendees
- E-gift cards to food delivery apps
- Raffles
- Welcome reception happy hour
- Closing party happy hour

Virtual Sponsorship Ideas

Here are a few sponsorship ideas to get you started:

Online Education

Virtual Town Hall

Invite industry experts to participate in a virtual town hall discussing how COVID-19 might affect your industry. An association leader can be the moderator with both invited experts as well as content experts from sponsors. Questions can be asked from members through your virtual meeting technology (Zoom, GoToMeeting, etc.), email and social media.

- Give sponsors content exposure by inviting their chosen speaker to participate.
- Give sponsors brand awareness by showcasing their logo in email communications and online during the town hall.

Meet the Experts Panel

Host a panel of industry experts to participate in a webinar discussing any industry information. An association leader can be the moderator with both invited experts as well as content experts from sponsors.   Unlike the virtual town hall, no questions can be asked. However, this content can be archived for reference.

- Give sponsors content exposure by inviting their chosen speaker to participate.

- Give sponsors brand awareness by showcasing their logo in email communications and online during the panel.

Educational Session Webinars

Offer educational session/webinars to your members. Demonstrate your organization's expertise through an online webinar with expert speakers and Q&A. Companies that are aligned with these content topics could be ideal sponsors. They could help provide speakers and content that could help your members.

- Give sponsors content exposure by inviting their chosen speaker to participate.
- Give sponsors brand awareness by showcasing their logo in email communications and online during the webinar.

"Brown Bag Lunch" Educational Sessions

You may have had some recent educational sessions that would be quite valuable to attendees. Look through your archives – discover what education can be repackaged as a webinar. Invite your members for a virtual "brown bag lunch educational session".

- Give sponsors brand awareness by showcasing their logo in email communications and online during the brown bag lunch educational session.

Virtual Sponsorship Ideas

Virtual Posters Gallery & Poster Awards Online Contest

Did your current postponed or cancelled meeting have posters? This opportunity is an excellent way in which to showcase your poster authors' valuable work while providing virtual education to your members. You don't need to wait for a face-to-face meeting to present these posters! There are many event technologies that offer online poster galleries.

- Give sponsors brand awareness by showcasing their logo in email communications and online at the virtual posters' gallery.

    Poster Awards Online Contest
    Launch an online poster gallery for your members. Have them review and vote on the "People's Choice Award," Or create some fun, new awards for today's environment. Maybe "Best Poster to Read During Remote Work"?

    - Let sponsors choose a poster award that attendees can vote upon.

Virtual Tradeshow

Company Product/Service Showcase

No exhibit hall? Your exhibitors can still showcase their product/services to your attendees. You can create a Company Showcase on the conference website. Have exhibitors post their product photos, descriptions, flyers and videos. Send out eblasts inviting members to review this showcase. Make it interesting by adding games and prizes!

- Let exhibitors post photos, descriptions, flyers, and videos.

Focus Groups

Create focus groups in breakout rooms. Sponsors can pre-select attendees and ask questions through polling and conduct live virtual focus groups.

- Sponsors create focus group attendee demographics.
- Association invites attendees to join virtual focus group.
- Sponsor receive instant marketing feedback.

Gamification

Add a sponsored scavenger hunt to your conference website where members can search for icons/graphics, or depending upon the platform - QR codes. Attendees find the graphics oranswer the sponsor trivia questions to win prizes. Or create new trivia game through online forms.

- Sponsors add trivia questions, specific to the company.
- Give sponsors brand awareness by showcasing their logo in email communications and online.

Virtual Sponsorship Ideas

Digital Communications/Advertisements

Eblast

Your organization may not have a current sponsored eblast policy. With face-to-face meetings temporarily cancelled, you may wish to revisit this policy. Sponsors want to reach your members and eblasts can be the easiest and fastest manner for member access.

Please note that you can limit sponsored eblasts to certain dates and times. You can also dictate the length and type of messaging and graphics. All eblasts will have to be approved by your organization.

- Sponsors create eblast (text and graphic) to be sent out

eNewsletters

Most associations have digital newsletters. Add a section for sponsored content. Review your advertising rates and plans. Possibly add additional banner locations or additional price options.

- Sponsors create content to add to your enewsletter.
- Sponsors create banner advertisement for your enewsletters.

Retargeted Advertising

Maybe you've used retargeted advertising for your attendee marketing. There are many technology portals that can help your retargeted advertising. Did you also realize that this technology can also be used for monetization for sponsors? Companies can purchase online retargeted advertising that will reach your attendees.

- Sponsors create advertising banners that retarget attendees online after the event.
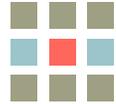
CONFERENCE MANAGERS

Linda Baker, President
703-964-1240
lbaker@conferencemanagers.com
www.conferencemanagers.com

sponsorship BOOST

Jennifer Kerhin, MBA, CEM, President
301-200-4616
jkerhin@sponsorshipboost.com
www.sponsorshipboost.com