

# Virtual Event Guide

How to roadmap your online event



*Made for minds.*



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How to roadmap your online event

Supported by the



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## Imprint

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# Introduction



Given the global COVID-19 pandemic, online events have become more popular than ever and are likely here to stay. Dozens of digital platforms are now available, ranging from free "do-it-yourself" event platforms to apps and to full-service corporate conference services. This has created novel opportunities for organizations and institutions to connect with new audiences, maintain ties with existing communities and foster new kinds of collaboration via the internet. But going "virtual" also comes with new pitfalls. Many existing difficulties in organizing events still remain, though now in different forms.

Access to digital events can impose hurdles due to technology, infrastructure and internet access. With so much of our lives now online, many people suffer from digital fatigue, while others still struggle with poor connectivity and difficulty accessing internet-based events. As a result, it is crucial to book speakers who will draw the right crowd and help you stand out among the countless online events, and to carefully design your event to avoid potential technical and organizational problems. And while the pandemic has created a proliferation of online tools and a wealth of resources for those trying to hold digital events, deciding on which ones to use can be complicated.

The aim of this guidebook is to walk you through – step by step – how to best organize digital events from the concept phase to planning to going live. It includes processes to help you learn from your experiences and improve your future events.

This manual will not only assist you in organizing online events that work towards your goals, but in creating digital experiences that attract the right audience and help you connect with them. Connections like these can develop even under difficult conditions like if your audience only has limited internet access, for example, or can only participate via a mobile phone.

The guidebook offers a roadmap for success and is based on the practical experience that DW Akademie and its partner organizations have gained through staging online events during the pandemic. It is the sum of our insights gathered during this unusual period in world history.

We hope this practical guide – and the case studies included – will provide you and your organization with the strategy and information needed for creating meaningful interaction with your audience through successful online events.

## How to use this guidebook

This guide will help you to create tailor-made digital events. Our goal is to offer you a practical manual that supports you in implementing digital events – from your very first foray online to your twentieth event with thousands of participants. It is a comprehensive guide that you can read "cover-to-cover" or simply skip through to find tips when you need extra support.

For better orientation, we have used a series of icons throughout the text to highlight specific features.



**CHECKLIST.** In each phase, a checklist highlights key activities for you to complete to ensure the success of your online event. Some items on the checklists refer to decisions you made earlier on. They are also part of your roadmap. Use them like a pilot uses a checklist for take-offs and landing; to make sure you don't miss anything important!



**CASE STUDY.** This is a brief example of a previous event and helps illustrate available event options. Case studies provide real-life examples of how to apply the steps laid out in this guidebook.



**INCLUSIVITY.** There are various methods for making your event more inclusive, ranging from increasing the diversity of your audience to ensuring that the visually impaired are able to take part.



**TIP.** Here you will find ideas to help you develop your event. This can be advice on the event process or things you could consider when planning. Tips have been tested in practice. You can use them as suggestions.

These icons will re-appear throughout the text, since ideas and examples can either refer back to decisions made earlier or are the next step in the process.

# ROADMAP SHOWING THE FIVE PHASES

## Follow the roadmap

This guidebook breaks the digital event planning process into five phases. Each phase has its own icon and color. Each phase also poses several questions to answer and tasks to complete before moving on to the next phase.

This roadmap lets you move around. If you have already perfectly planned your event, skip ahead to the communication phase. If you are a communications genius, go back to the planning phase to see if you can tweak your event to attract even more people. If you've already organized a few events, check out the evaluation phase to see how you can keep improving.

1

### CONCEPT AND DESIGN

- Overall strategy and objectives
- Reach and target audience
- Content and program
- Type of event
- Platforms and formats
- Social interaction
- Event branding
- Building your team

3

### COMMUNICATION

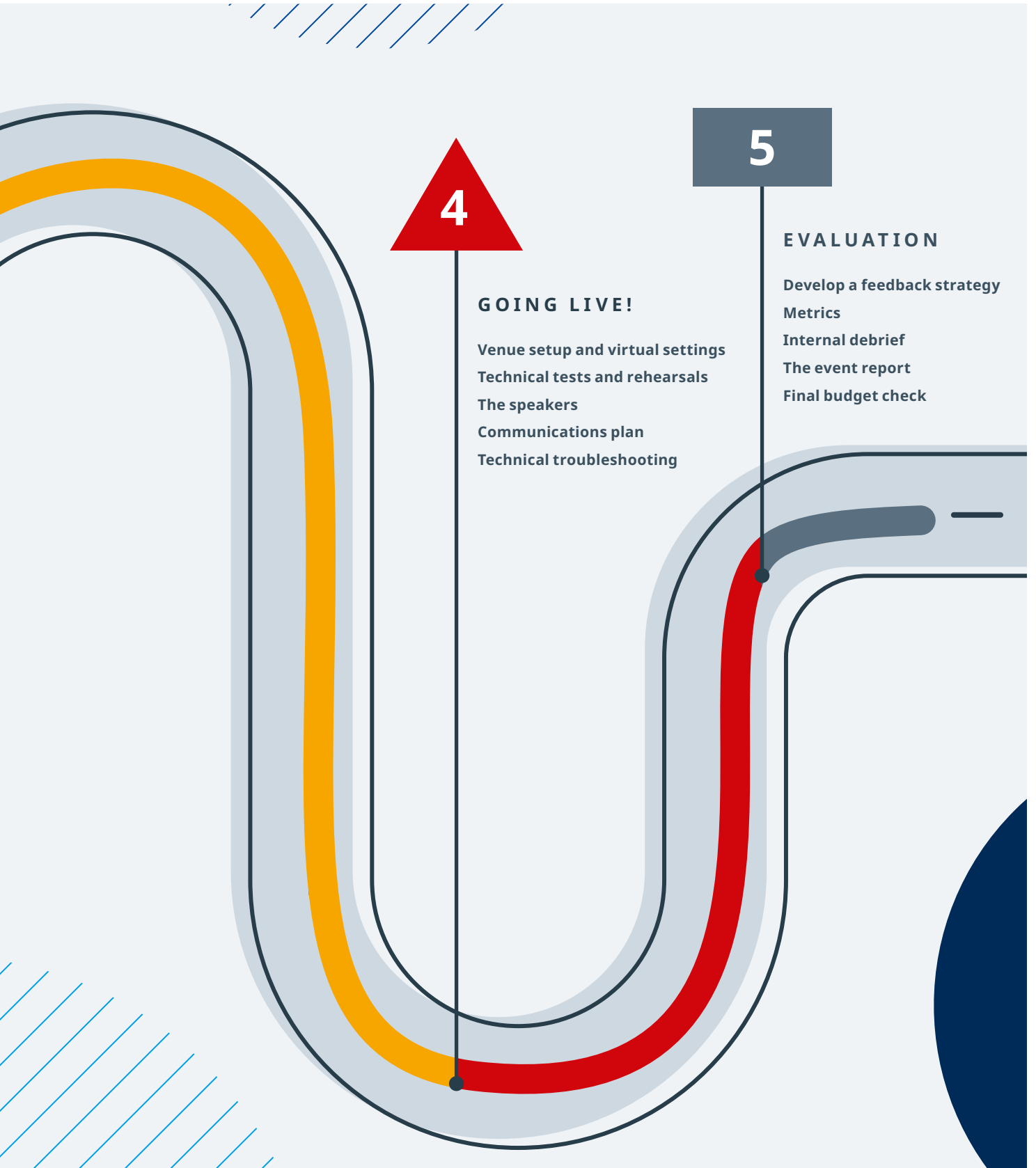
- Finding your audience
- Targeting your audience
- Publicizing your event
- The Event Director

2

### PLANNING

- Date, time and language
- Location
- Content design
- Technical set-up
- Digital security
- The script - your basis for implementation
- Key performance indicators
- Budget plan







1

## CONCEPT AND DESIGN

Overall strategy and objectives

Reach and target audience

Content and program


Type of event

Platforms and formats

Social interaction

Event branding

Building your team



Hosting an online event is more than arranging talking heads on a digital platform. From the event's title to the description of your event to the graphics to the moderation, you will need an overall concept that makes your event a unique experience for participants and speakers.

The first phase of any digital event is the **CONCEPT AND DESIGN** phase. What is your event's overall framework, setting, feel and motto? What story do you want to tell? How can participants interact and how can they benefit from taking part? Which platforms, technical tools and people power do you need to make your vision a reality?

The concept and design phase is one of the most intense parts of the process. All subsequent phases are based on implementing the decisions you make during this initial phase. The way you decide to frame an event will influence everything that comes afterwards. It is critical to work through these steps carefully and to include all key organizers in the design process right from the start.

Online events upend a lot of assumptions you would normally have about live events. Physical distance is no longer a problem and means that you can now bring together collaborators and participants from all over the world. Decorative features that would have otherwise been expensive to include in a rented event space can now be generated digitally and often at little to no cost. Of course, going virtual does mean that there will be new technical challenges such as limitations based on infrastructure and internet speeds. But if you think outside the box now, you'll find a wealth of new possibilities.

Here are the main concept and design questions you need to address:

- How do I figure out which concept is right for my event?
- How do I make my event unique and attractive to my target audience?
- How do I foster social interaction?
- How do I find the right speakers/presenters and get them involved?
- How digitally literate is my target audience?
- What kind of digital access does my audience have?
- How will my audience benefit from the event?
- How will I tie various sub-events into a coherent whole if my event has more than one session?
- What function should the event have within the framework of my own organizational strategy?
- How do I measure success?

Once you have answered these questions – in whole or in part – issues concerning your budget will become clearer. Deciding on the design of your event early on will give you the time to adapt to available funding, raise additional funds, find event sponsors if needed to accommodate anticipated costs or search for additional staff, experts and perhaps volunteers.

## Overall strategy and objectives

You need a strategy for your event that will give you orientation in planning the details. Your event's content is the basis for everything, including audience interest, dialogue and impact. Keep in mind the functions that your event will serve for a specific project or your organization as a whole. Determine your communication objectives. And just as important, determine the concrete benefits for participants.

## Step 1 – Reach and target audience

Who are you trying to reach with this event? Digital events can have a much wider reach than in-person events. This means you need to decide which part of the public (or target group) you want to engage. An event can have various target groups, and these can be reached through a program that has diverse elements. Make it clear in the concept and design phase which target groups you want to reach. And don't forget the role and expectations of donors and sponsors.

Going virtual means that you can think globally or locally or somewhere in between (don't not forget that time zones exist and that not everyone speaks English or wants to!). Remember that if you are trying to engage a global group of specialists or those who come from the same region, the event's design will be different.

Perhaps you only want to reach a select group of people in order for them to intensively share ideas, work together on a project or prepare a larger event in the future. Your design will have to reflect this.

At other times, you might want to reach the widest audience possible. If so, emphasize documenting or taping the event so that people can watch the presentations "on-demand" if they are in time zones where "live" participation is not practical. You can also add events that offer specific group or topic discussions and are held at different times than the main event.

## Step 2 – Content and program

Crucial aspects to an event's design include determining the main message you want to convey and the content you want participants to take away from the event. Ask yourself why should person X take part in the event and spend their time in front of their screen. If the reasons are not clear, getting people to join will be almost impossible. The main message and the key takeaways should be clear before you move on to the planning phase.

Once the message and benefit for the participants are set (CONTENT), you need to look at how to incorporate these aspects into the event (DESIGN). Do you want to inform people (watch/listen), have them exchange ideas (explore/interact) or encourage them to build something new (create)?



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Imagine your event from the perspective of different types of participants: someone who is new to the topic, someone who is not very good with technology, someone who has been to hundreds of other online events, and perhaps someone who is already an expert in this field. Include these perspectives in your brainstorming sessions and think about possible conflicts in trying to appeal to different target groups.

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## Step 3 – Type of event

Now it's time to decide on the event's format and duration. Digital events have a variety of formats, ranging from high-budget hybrid events put on by large corporations that connect employees from across the world, to extremely low-budget events that use free software to connect a handful of experts using their personal cellphones. Your event's format will depend on the goals and the resources you have. Here are questions you should answer before deciding on the event's format:

- Is this to be a one-day or multi-day event? How long will the event last?
- Is it important that participants can ask questions, exchange views and interact with one another?
- Is your event free of charge or is there a fee?
- Is there a limit to the number of participants?

You can also combine formats to get the best of all worlds, for example, holding one large event broadcast to all participants combined with several community sessions held before and after the main event. Make sure you have indicators regarding what your audience would prefer, how many will be able to attend and how they can best take part.

## Step 4 – Platforms and formats

You now have a general idea of the different types of events. The list below shows digital event platforms, formats and secondary audience participation options to help get you started.

This is not an exhaustive list! Platforms continue to adapt to current situations and so invariably develop new programs and options available to users. New formats also constantly crop up as we all learn what works and what doesn't in online spaces. See the following list as a starting point to make your event your own.

## Step 5 – Social interaction

You may have an engaging program and an appropriate format, but one reason people tend to believe that virtual meetings are destined to fall short is the lack of unstructured social interactions and networking. These are two of the main reasons why people travel to physical conferences. However, many creative ideas do exist for how organizers can develop opportunities for unstructured and even unexpected interaction.

Depending on the topic of your event and your goals, you need to include opportunities for interaction. One of your team members should supervise each format in order to prevent abuse. Here are some ideas:

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### Meeting peers and networking



**Wish list:** Invite participants to make a list of 4-6 people that they would like to "run into" at the conference, then send emails to these people to schedule short video chats at some point during the conference.

**Sign-up sheets:** Provide a way for participants to advertise sign-ups for potential one-on-one sessions (e.g., link to a Google doc) with a list of open meeting slots and invite participants to fill their name in the slot they would like.

**Meetups:** The idea is to match like-minded participants who have never met. One option is a virtual "coffee break" where participants can briefly exchange ideas and small talk just like at a non-virtual conference.

**Speaker rooms:** Create special break-out rooms for attendees to continue posing questions to a speaker after the talk has ended. Consider ways to highlight speakers to attendees (similar to speaker badges at physical conferences).

**Speakers lounge:** Consider spaces where speakers can meet, such as a special room or a video session for them to introduce themselves.

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**Creative spaces**

**Chat roulette:** Replace coffee breaks with sessions you randomly create, optimally for 2-4 people. If someone decides they have had enough of one conversation, they can go back to the main room and choose a different group to join.

**Virtual lunch tables:** Conversely, organize sessions where a senior member of your community or speaker is placed at a "table" and then invite others to sign up to join them. Or consider a lunch model where participants are randomly assigned to tables.

**Chill-out corners:** These are virtual spaces where people can join and chit chat during breaks, with coffee in their (physical) hand or not.

**Virtual poster sessions:** Create virtual spaces where participants can wander around and get together in small groups to discuss the posters on display.

**Scavenger hunt:** Create a challenge with questions that encourage people to dig into papers or presentations from the event. People can participate individually or in teams. Awards/acknowledgements can be offered for the winners.

**Virtual rooms:** Virtual conferences can be demanding, so offer spaces that feature things unrelated to the conference like an online yoga session or a room where people can listen to relaxing music.

**What type of event best suits your goals? Here is an overview:**

TYPE OF EVENT	FOCUS	SIZE*	INTERACTIVITY
<p><b>Broadcast</b></p> <p>One speaker and a large audience. The focus is on speaker's delivery to the audience, i.e. one stream for everyone with minimal interaction.</p>	Speaker delivery	Large	Minimal
<p><b>Expert meeting</b></p> <p>Multiple panelists exchange ideas with each other. The emphasis is on interaction between the panelists with possible interaction with the audience during or at the end of the discussion. Group size is moderate but can be increased with less interaction.</p>	Exchange among panelists	Medium to large	Moderate to low
<p><b>Community event</b></p> <p>An open concept for any event that focuses on interaction. Multiple speakers with chat functions and high interaction limit the number of overall participants.</p>	Participant engagement	Small to medium	High
<p><b>Hybrid</b></p> <p>A mixture of online and offline activities requires special planning and considers the needs of the different groups of participants.</p>	Combination of on and offline activities	Various	Various

\*The event's size is relative to the size of the organizing team. A large event for a small organization may be considered a small event for an international organization. Keep in mind the size of your planning team and your budget when deciding whether this will be a "small", "medium" or "large" event.

Table 1

## Step 6 – Event branding

Online events, no matter their size or format, will ideally have something that gives it a cohesive feel. One way to achieve this is to create a branding and graphic design concept for your event. This often involves several different factors depending on the kind of story you are trying to tell.

**Name or title:** Look for a compelling name for your event that tells potential participants about its key content and goals. Make sure that your event name can easily be found in an online search engine. It's also helpful to make a memorable hashtag out of it. Make sure it distinguishes your event from others on the same subject.

**The look:** Each event needs its own aesthetic. This can include a logo, typography, background images for speakers or color scheme that you use throughout, or a general visual style. This can include chyrons/lower thirds and captions that incorporate the logo and the event title.

**Sound concept:** The selection (or production) of a sound concept could make your event more attractive. A unique sound will form an acoustic bracket for the event and make it easy to recognize.

**Social media branding:** A catchy hashtag for the whole event and/or individual sessions are a good way to tie together comments/posts about your event on social media. This should be part of a larger social media strategy (See Phase 3: Communication). Collect striking and related images that you can use on a public platform. Make sure you have the rights to use these images before you broadcast them. Well-known speakers are essential for online events and can be incorporated in the branding.

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Online events open up possibilities for greater inclusivity. People who would have otherwise been excluded because of disabilities, a lack of resources, the inability to travel or time constraints can now take part.



To make the event more accessible for those with disabilities, consider live captioning or sign language interpreters for the hard of hearing. For events with a multilingual audience, consider translators for live events or subtitles for the post-production of event videos.

Try to choose a platform that has low-data options for those who may only have access via cell phones, have difficulties affording data packages or would need to spend time in an internet café to participate.

For those who cannot attend the event at the planned time, or to reach a larger audience, post recordings of the event online. You can also provide summaries of a session's key points or make the chat sessions available afterwards.

All these different levels of interaction will help accommodate those in your audience who can only listen to the event or only watch it later while not diminishing the experience for those who are taking part.

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## Step 7 – Building your team

As with any kind of in-person event, a digital event is also very hard to organize and run if you don't have a good team in place. In the early phases, you'll need people who have a variety of skills. During the event itself, there will be many other roles to fill.

First, identify the types of people who need to be part your team. Think about the expertise your colleagues have and the roles they could best fill. Is there someone you work with who is good at planning, is a tech whizz or a social media guru? Try to fill as many of these roles with the people you have at hand.

If you cannot find all the people you need within your organization, first look for assistance in your local area. Perhaps there are experienced people in your community you can engage with. Also can think further afield. Perhaps if you have sister organizations that could provide people for tech support or even host a panel. Volunteers are a common alternative. If these options can't fill all the roles you need, you can always hire outside experts.

For larger events, you will need a content team as well as a technical team that will be working closely together, both in preparation and during the event. You will also need people responsible for tasks such as editing, audience engagement, social media management and participant support. For smaller events, each person is usually responsible for several roles.

Regardless of where you find your team members, you need to clarify some aspects before starting. Always agree on the distribution of responsibilities among your team and define the team members' responsibilities and roles, such as who is in charge.



### SOCIAL CHANGE CAMPAIGN EVENT BY 7AMLEH AND DW AKADEMIE

DW Akademie, together with the Palestinian partner organization 7amleh, put on a two-day Media and Information Literacy (MIL) workshop on how to develop and run a social change campaign. The event focused on group work which took place in break-out rooms. Groups had to work together to decide on the social change they wanted to create, then make a mock-up of a poster they would use to communicate and convince the public that they need to change their behavior.

**Number of participants:**

85 people from DW Akademie and its partner organizations worldwide

**Time:**

Two half-days in November 2020

**Held by:**

7amleh – The Arab Center for Social Media Advancement

**Platforms:**

Zoom (break-out rooms), emails, questionnaires

#socialchange #groupwork #MIL

**Challenge:**

How to enable information intake and facilitate active group work online among participants who do not know each other.

**How we did it:**

Before the event, participants could name the topics and social challenges which they wanted to work on. Based on this information, groups were formed and communicated beforehand. During the event, the facilitator guided the groups through the process of building a social change campaign that focused on the issue they had chosen.

**Outcome/result:**

The event kickstarted participants' skills in creating social change campaigns in the MIL sphere and gave them confidence to try it out with their own organizations.

**Key learnings:**

New knowledge is best shared when participants can immediately put it into practice. Guided "mindful minutes" throughout an event give participants a moment to reflect and perhaps be more focused during the workshop.



## Formats/platforms you can use to build your event individually or in combination:

FORMAT	DESCRIPTION	ADVANTAGES	POSSIBLE DISADVANTAGES	NOTES
<p><b>Live tweeting</b></p> <p>A twitter account, or series of accounts can be used to live-broadcast an event through short 280-character messages. This very low-cost option can have an almost unlimited audience and allows for participation. It is also entirely public and offers no security against disruptions. Don't forget a catchy hashtag!</p>	Using Twitter accounts to broadcast and engage with audience	Very low-cost, high levels of interactivity and accessibility	Not secure against disruption because it takes place on a public platform	
<p><b>Social livestream</b></p> <p>This allows live video streaming of speakers on platforms such as Facebook, Instagram, Twitter, Twitch, Youtube, Discord, etc. These platforms make audio-visual content available to everyone with access to the platform. Audience participation is a common feature, but security can be an issue. People who cannot join the live portion of your event but are interested in your message can access the video on demand.</p>	Using a platform such as Facebook or YouTube to broadcast your event to the public	Very low-cost, high levels of accessibility	Interaction can be limited Event not secure against disruptions	
<p><b>Messenger</b></p> <p>Applications like WhatsApp, Signal or Slack enable you to create a private texting channel and subscriber list. As with live tweeting, there are mainly texts and images. However, there is no limit to the number of characters and almost no limit to the number of people who can participate.</p>	Using chat groups on WhatsApp, Signal or other messenger apps	Very low-cost, high levels of accessibility and good for feedback	Less control and difficult to oversee and moderate Possible privacy concerns	
<p><b>Webinar/online seminar</b></p> <p>A speaker can address a wide audience that registers to attend.</p>	Speaker and topic-oriented event with registrants	Low-cost with high accessibility Registration reduces chances of disruption	Interactivity is limited to typed questions	



FORMAT	DESCRIPTION	ADVANTAGES	POSSIBLE DISADVANTAGES	NOTES
<p><b>Online gatherings</b></p> <p>Free programs like Wonder.me or commercial companies offering customized conference and exhibition programs allow you to simulate in-person gatherings through small groups in virtual spaces or rooms. This can be a useful addition to larger panel discussions to generate more audience participation without overwhelming the main speakers.</p>	<p>Simulation of in-person gatherings through small groups in virtual spaces</p>	<p>Free exchange without having to travel</p>	<p>Not always barrier-free</p> <p>Lack of wider social interaction</p>	
<p><b>Online collaboration</b></p> <p>Programs like Sketch.io, miro or Twiddla enable an online collaborative session where participants can engage and interact with a document or whiteboard. As with break-out rooms, this is a great way to generate audience interaction and more intense discussions.</p>	<p>Simulation of workshops where people work together on projects or ideas.</p> <p>Good add-on to other formats</p>	<p>Good way to collaborate</p> <p>Many available apps</p>	<p>Not always barrier-free</p> <p>Lack of wider social interaction</p>	
<p><b>Online seminar</b></p> <p>Programs like Zoom, Jitsi, Vimeo, Webex and Shindig let you create a closed online seminar with a limited number of speakers and manage the access of participants and audience. This is ideal for smaller or expert-oriented digital events where security is a priority, or for multi-session events across several (non-consecutive) days.</p>	<p>Closed virtual seminar or lecture with limited audience</p>	<p>Good way to share and transfer knowledge, including on demand</p>	<p>Direct contact with speaker(s) is limited</p>	

FORMAT	DESCRIPTION	ADVANTAGES	POSSIBLE DISADVANTAGES	NOTES
<p><b>Fireside chat</b></p> <p>A semi-structured interview between two people (moderator and a guest) with questions from the audience. This format works well on webinar platforms or social livestreams. The idea is to shine a spotlight on one person and engage deeply with their expertise.</p>	<p>Semi-structured interview between a moderator and a guest with questions from the audience</p>	<p>Option to include experts otherwise were unable to contribute (due to time or distance)</p>	<p>Separation between audience and experts</p>	
<p><b>Deep dives</b></p> <p>These are often small events with little to no live audience. The idea is to connect experts, practitioners and interested groups with each other to intensively discuss a single topic or issue in order to brainstorm recommendations or future actions. Deep dives are then often summarized in a report so that the "missing audience" can engage with what was discussed after the fact and in their own time.</p>	<p>Small events with little or no live audience used to go more deeply into a topic</p>	<p>Connects experts, practitioners and interested groups to intensively discuss a single topic or issue</p>	<p>Difficult to generate trust for a deeper discussion</p>	
<p><b>Digital Barcamp and Freestyle</b></p> <p>These are participatory conferences where participants can shape their own program. It offers ample space for exchange and networking.</p>	<p>Meeting with no agenda or preparation</p>	<p>Creative form with little effort</p>	<p>Risk of misuse, confusion or lack of interest</p>	
<p><b>Exhibition</b></p> <p>An exhibition can visually enrich your event and offer participants a relaxed change of pace. It can also visualize the topic.</p>	<p>Virtual exhibition often with showrooms to simulate offline exhibitions or trade fairs</p>	<p>Offers real or virtual products</p>	<p>Difficult for physical goods</p>	

Table 2

FORMAT	DESCRIPTION	ADVANTAGES	POSSIBLE DISADVANTAGES	NOTES
<p><b>Hybrid event</b> A combination of online and offline events where people can choose how to take part. It enables you to expand your traditional offline event to new target groups unable to or prefers not to be physically present. However, its complexity brings new challenges for organizers.</p>	<p>A combination of online and offline events. People can choose how they want to take part</p>	<p>Opportunity to include a larger target group and participants unable to travel</p>	<p>Online attendees may feel that they are not really included</p>	



## The big questions (answer these questions first, together with your team):

Why exactly are we holding this event and what is its aim? What is the event's topic?

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What function should it have for our organization?

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How can we make this event unique and attractive to our target audience?

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Are there any comparable events from other providers? How can we stand out?

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What will our target group expect? What should they gain from the event?

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What type of digital access does our audience have?

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If our event has more than a single session, how can we tie the various sub-events together into a coherent whole?

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## Event content and format:

Decide on the event audience and reach

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Decide on the main message you want to convey

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Find an overarching theme and motto

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Develop a concept that reflects your vision

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Decide on what you want participants to take away from the experience

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Decide on the duration of your event (long, short, mixed, non-consecutive)

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Decide on the event type (broadcast, expert meeting, community-focused, hybrid)

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## Event branding and inclusivity:

Pick a compelling name for the event

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Decide on a look/visual story for the event

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Think about a social media presence in advance of the event

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Think about the right platform for your participants and audience

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Think about live captioning, sign language interpreters, translations

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Think about recording the event and whether you want to post it online afterwards

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## Building your team:

Identify the skills you and your team already have

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Consider recruiting volunteers and hiring outside support

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Agree on the distribution of responsibilities among the team

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# 2

## **PLANNING**

**Date, time and language**

**Location**

**Content design**

**Technical set-up**

**Digital security**

**The script - your basis for implementation**

**Key performance indicators**

**Budget plan**





Once you have finished brainstorming and have a clear concept for your event, you can start with the planning phase. This section walks you through steps needed to work out how to transform your content and design into an actual event.

As part of the planning phase, you should take time to create a work schedule and a project plan to ensure that key tasks are completed on time and in sequence. Create a system for team communication (can also be adopted for the event itself!) to ensure that tasks are being completed and problems are being addressed. Make sure you have a record of the process so that you and your team can review what worked and what didn't once the event is over.



### How to plan using a mind map

Start with a mind map and a list of questions or activities that will be part of your virtual event. It should cover every aspect of your event, whether it's related to the attendees or yourself. The mind map should include information and answers to questions relating to the main steps in each chapter of this guide.

## Step 1 – Date, time and language

First, decide on the exact date, time and duration of the event. When deciding on a date and time, think about how to maximize participation based on the accessibility of digital events.

Check if there are events or holidays in various countries and locations that could conflict with your event. But also check if there are any events, holidays or anniversaries that could bring attention to your issue, such as a day recognized by the UN (i.e., May 3rd, World Press Freedom Day) or the 10th anniversary of your organization. Also make sure you pick a time that will be accessible across multiple time zones, particularly those where your target participants live.



### Language & translation

The increased geographical scope of digital events can make language a complicated factor when planning. Consider whether you want to hold your event in the language that most of your target participants can understand. Check if you will need to provide simultaneous translation in multiple languages. If the event is only to be held in one or two languages, consider offering event summaries/reports in additional languages on your website.

## Step 2 – Location

When making a video stream for a virtual event, you can do so from your own desk, a professional studio or various other options. Your choice of location is crucial for the event's overall concept and determines the planning required to produce a technically flawless stream.

If you will be hosting the digital event from your home or office, make sure there are no problems with background noise. Consider any construction nearby, loud neighbors or family members and traffic. Look for a spot where you can control these factors, or whether you need to move to a studio or alternative location to better control them.

You may consider creating a virtual studio, an environment that will be used by all the speakers and moderators. This requires a lot of preparation, a green screen and technical expertise. Virtual backgrounds must be pre-produced. You will also need a platform that allows you to broadcast this option. If you cannot make the locations match in terms of how they look, consider coordinating the clothing of the moderators or event speakers to create a more cohesive aesthetic. Mail a poster to the speakers to hang behind them or a pin they can wear.

If you decide to use a real studio, you will need to make decisions regarding physical decorations, banners, stands and lights, sound insulation and the required technical setup (See PLANNING – Step 4).

## Step 3 – Content design

Compared to live events, content design for digital events requires some additional steps and planning, but the general idea is the same.

**Editorial concept:** The first step is an editorial concept that outlines how your message will be conveyed and the types of content that will be required for this. It's best to create an editorial plan that gives a thematic overview of all the speakers (and their contributions), video/audio clips, moderation texts and other content-related elements, and the names of those responsible for creating or acquiring them. Consider whether it would make sense to hire additional authors or editors, or to recruit volunteers with experience in this area who can assist.

One way to layout your editorial concept is to write a script (See PLANNING: Step 6). The script can be used to show what will happen when, how much time each component will need and whether the content matches the event's overall concept and design.

**Speakers:** The main conveyors of content to your audience are the speakers. That's why it's important to carefully plan the contributions of each speaker in advance, to make content specifications if necessary, and to request a brief summary of their contribution. If you are having an open call for speakers, define the selection process in advance and also have the applicants submit a brief outline of their proposed talk ("Call for Papers process" or CfP). Create a speakers list with their short bios and photos so that the organizers and moderators become familiar with them.

Plan for cancelations! If one or more speakers has to cancel, have possible backups who can step in on short notice. This also ensures that losing a speaker does not take away from the overall content the audience expected.

**Moderation:** Moderation is another key aspect of content design. Moderators must be familiar with the topic on hand and be briefed on the event's goals and how they can best facilitate the discussions. Their texts and key points should be written well ahead of the event, and they must also have access to detailed information about the topic and speakers.

Include all the moderation details in your editorial script, including:

- Will the moderator introduce the speakers, or will you have someone else do that?
- How will moderators keep the event running smoothly and on time?
- Will moderators introduce and close the session?

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Online sessions often end abruptly, leaving the audience hanging. Think about how you would like the moderator to close the event either with a goodbye, a mention about further sessions, a thank you to the audience or an option for giving feedback?

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## Step 4 – Technical set-up

To put your ideas into action, you need to consider two major aspects: the participant side ("front end") and the technical implementation ("back end"). Fortunately, there are plenty of options for both. Make sure you draw up a detailed plan for each and include a list of the equipment needed and the expertise needed to use them.

### The front end

First, determine how an interested participant will access your event and what they will see when they get there. It is important to think through all the steps in this process.

**Registration:** This can be done through social media platforms like Facebook, through a separate website, or a dedicated email address.

**Landing page:** This should be the main online site where participants can get information about the event, registration options, the event program and information about the speakers.

**Streaming:** This is the digital location through which the program is distributed. This can be organized on the landing page where a player is integrated or another platform such as YouTube.

**Interaction:** This is the digital space where participants can act and take part. Interaction at digital events can take many forms. Synchronous or simultaneous interaction allows participants to directly interact on the same platform where the event is taking place. Asynchronous interaction has a time delay or takes place on another platform, for example via a chat function, messenger system or a comment section.

It is important to include interaction in the planning and promotion of the event. This is a technical as well as a design challenge. If you want to offer the audience a chance to participate via video themselves, you will need to choose a platform that has this capacity. It is also important to consider how these interactions will be moderated or supervised and how to offer support if problems arise.



If you do not offer a channel for interaction, people will still exchange ideas and opinions on other channels such as social media. There can be negative effects if organizers are not monitoring these exchanges, for example if there is no reaction to (improper) criticism. In worst-case scenarios, this can lead to public scandals. Monitoring social media are a way to see what is being said about your event within a larger public sphere.

**Documentation:** This is the digital space where the content is documented and can be accessed on demand. This is where your own homepage or platforms from other providers, such as YouTube, come into play. If content is to be recorded and later made available to the public, participants should be informed of this, and those who contribute content should sign a declaration of consent.

**Digital architecture:** This depends very much on your budget and level of technical expertise. Organizers can try to map all functions on one platform, for example via their own website, on a social media platform or with the help of event service providers such as Eventbrite or Hopin.

Digital events can also be organized through completely mobile platforms such as Whova, Socio or other providers. Commissioning service providers to deliver a custom event can be very expensive depending on the services requested and the number of participants.

Another alternative is a modular structure that uses multiple tools or platforms for their respective functions. An existing website can be used as a landing page, social media platforms or messenger apps for communicating and interacting, and YouTube as a platform for streaming. A modular structure is often cheaper but requires careful planning of how the modules will interact and the function each will have in the overall concept.

**Other front end design considerations:** Organize and pre-produce visual and technical elements and make them available to be used during the event (i.e., trailers, teasers, clips, logos, inserts). For a multi-date event, summaries or previews for the next day can be a useful resource and are put together by the production team.

### The back end

The back end focuses primarily on how to create the best technical sound quality and image signals with the equipment and tech expertise available to you. This ranges from using cell phone cameras to producing in a studio that has multiple cameras and professional lighting and sound technology.

**Image quality:** Determine whether the cameras being used can produce a high-quality image and that the space can be properly lit.

**Sound quality:** Bad sound is even worse than a sub-optimal picture. Quality microphones should be used even for smaller events. If several sound sources are planned, an audio mixer or audio interface will be required, as well as skilled people to operate them.

**Internet bandwidth:** Make sure your internet connection is capable of streaming a live event. Check if you can book additional bandwidth with your provider for the duration of the event.

**Memory space:** If individual speakers cannot appear live and will be presenting via a pre-recorded video, make sure you have systems that have sufficient memory capacity for this. High quality videos take up a lot of space.

**Network transmission:** Clarify how the stream will be played if a full-service streaming platform such as Zoom or another streaming app are not used. The basic equipment for the production of your own stream includes a computer, streaming software (e.g. OBS Open Broadcaster Software or XSplit), audio interfacing and mixing, microphones, camera, and lighting. You need to know how these all work together and practice using them in advance.

Know your technical limits! If it's essential to know technical settings like bit rates, image resolution and bandwidth, make sure you feel comfortable working with these details so that you don't accidentally get in too deep. Or ask for help from a professional!



### Participants and technology

Participants need to know in advance which internet capacity or speed is required to successfully take part in the event. Keep in mind that not all regions have the same internet speeds, and some participants may not have access to cheap data. If some participants are likely to have a poor internet connection, consider holding an event that does not require video, or can be done with pre-recorded video and asynchronous interactive elements.

The type and amount of technical equipment that people need to participate in your event can affect who will be able to join. Not everyone may have access to the latest technology. Determine the bare minimum needed for someone to take part in your event. If people need certain equipment such as microphones or webcams, make sure this is clearly communicated early on.

## Step 5 – Digital security

Security for digital events requires pre-planning and ongoing vigilance from the organizers. Many of your participants may not be trained or aware of the risks involved when using this technology. Always consider threats to privacy, impacts on vulnerable communities and laws such as the European Union's General Data Protection Regulation (GDPR).

Here are tips to prevent your event from being compromised, misused or attacked from outside:

- Familiarize yourself with the security features of the platform(s) you are using.
- Do a threat model. Ask yourself who could be interested in attacking your event or its participants.
- Ask participants to register in advance for your event instead of making it open to the public with a public link.
- Be careful giving out passwords for tools and platforms that you are using. Use two-factor authentication if possible.
- Protect all servers and computers you use with anti-virus software.
- Protect your own network with a firewall.
- Use the security features built into the platform.
- Take care of privacy and data protection. Make sure that no one from outside has access to the personal data of the participants or speakers. If you need to store the data, limit access to it even within your own team and encrypt the file or database. This is crucial because depending on the topic and/or country, people could be in danger of being attacked, surveilled or arrested.
- Do not share personal data from anybody who is involved in your event without their explicit consent.
- Make sure you have a plan for any disruptions to your event by trolls or uninvited guests. Know and practice the blocking features of your platforms so you can quickly remove disruptors.
- Monitor your audience and remove unwanted guests and content.
- Do not show the video or streaming URL to the public, otherwise everyone can see/use your stream.

## Step 6 – The script – your basis for implementation

One of our best pieces of advice is to write a script for your event. Based on your initial ideas and the technical design you've created, plan the event down to the minute and create a script that is handed out to everyone in your team. Think about this process like a director would think about filming a movie.

It can be helpful to have a director (perhaps you?) who is responsible for bringing the script to life during the event. Perhaps think about writing separate scripts for the various support roles: an overall script of the entire event, one specifically for the technical crew (including the technical moderator), one for the moderation team and one for the speakers.

### Moderator(s)

As with in-person events, you will need a moderator to run your digital show. Ideally, you will have one person doing the content/speaker moderation and other moderators covering the technical details (i.e. opening the event to participants, monitoring the chat function, explaining the technical set-up to the audience and dealing with any trolls or disruptions).

It's essential to make sure that the moderator(s) is equipped with sufficient technical expertise to run the event. And remember: People get sick! Stuff happens! Have a substitute ready for this central role. You don't want to have to cancel your event and lose all your hard work if unforeseen circumstances occur. Make sure the moderator is familiar with the code of conduct, privacy policy and rules for participation well in advance.

### The first 10 seconds

Unlike in-person events, your participants can leave with the click of a button. If you don't catch people's attention from the start, you run the risk of losing your audience. Since it can take a while for everyone to arrive at a virtual event – especially if people have technical difficulties joining – this problem is only exacerbated.

Plan in advance how to keep people's attention and engage them right from the beginning, even if the event gets off to a slow start. Prepare material for the moderators ahead of time in case of technical delays. Prepare music to play while waiting for the event to begin. This way the audience knows everything is working and the event will soon begin. The same goes for scheduled breaks! No one likes worrying that their feed has frozen.

### Audience participation

Virtual events often bring together people who know nothing about each other. Depending on how big your event is, icebreaker games can help to bring the feel of a real-life networking event and can get participants talking.

**Icebreakers** can range from short games to taking some calming breaths together or asking people to show off their hidden talents. Try to avoid anything that could cause social awkwardness or embarrassment: people may become less socially engaged in your event or simply leave.

If you are running a workshop, you may consider including a small group component to the event. Small group work can be done via digital break-out rooms or can utilize online working spaces for collaboration, like Google Jamboard, MURAL or Miro. Tell participants in advance when you will be accepting questions and be strict about the allocated question time and format. It can be helpful to prepare questions in advance to avoid awkward silences if no one has a question.



### Ensuring equal opportunity

Sometimes in virtual events, the same people always speak while others may be shy or not confident enough to speak up. It is important to ensure that everyone in the event feels heard and has a chance to participate. If there is group work in break-out rooms, consider having a moderator for each group to keep the participants focused and ensure that everyone gets a turn to speak.

## Step 7 – Key performance indicators

When planning your event, it is useful to determine your key performance indicators in advance. These are the specific goals and metrics you are aiming for so that you can judge the success of the event after it has been held. In the evaluation section of this guide, we lay out how you can use these indicators to improve any future events you might be planning.

The indicators can include:

- the number of participants
- social media and press coverage of the event before, during and afterwards
- concrete contributions to the discussion on the subject the event aimed to cover
- specific outcomes from the discussion (networking, a white paper, awareness)
- prominent speakers you want to get on board.

## Step 8 – Budget plan

The budget is a major factor in your planning. Make a list of all possible costs and revenue. Be as accurate as possible. Try to be clear about expected costs so that you can locate sponsors and/or partners. It is important to know the budget you'll need from the start so that you can price the tickets accordingly.

Here is a draft of a simple budget plan:

## Budget plan

CATEGORY	WHO/WHAT	PLANNED COSTS	COSTS INCURRED
<b>Program</b>	Speaker		
	Moderator		
	Panelists		
	Travel		
<b>Staff</b>	Program director		
	Event team		
	Communication team		
	Technical planner		
	Helping hands		
<b>Technical costs</b>	Platform		
	Streaming		
	Equipment (cameras, etc.)		
	Participant supervision		
<b>Branding</b>	Graphic design		
	Graphic production		
	Incentives		
<b>Venue</b>	Location		
	Decoration		
	Catering		
<b>Communication</b>	Event marketing		
	Press conference		
<hr/>			
<b>Total cost</b>			

CATEGORY	WHO/WHAT	PLANNED COSTS	COSTS INCURRED
Revenues		Planned Revenue	Revenue result
	Main sponsor		
	Sponsor		
	Partner/s		
	Tickets sold		
	Advertising, etc.		
<b>Balance/result</b>			

### BRAVE NEW MEDIA FORUM (BNMF)

At the fourth Brave New Media Forum, held online for the first time, media professionals and YouTube stars, together with children and youth, discussed the impact of the current pandemic. Broadcasted from Serbia and with a focus on the Western Balkan region, international speakers and participants looked at hate speech and freedom of expression as well as other topics.

**Number of participants:**  
More than 700 participants (350-700 per session)

**Time:**  
November 26 - 28, 2020 (10:00-17:00)

**Program:**  
61 speakers, 7 workshops, 13 deep-dive sessions (approx. 200 participants each)

**Platforms:**  
Landing page and Facebook Live to broadcast sessions, chat groups on WhatsApp, Viber and Telegram, and communication on Instagram

**Link to sessions:** <http://bnmf.online/>

**#crisis #youth #thinkbig**

**Challenge:**  
To enable an exchange on current, sensitive topics around the pandemic and to keep the young audience engaged during three full days of sessions.

**How we did it:**  
A production and moderation team in Serbia set up a visually attractive setting. A team of 30 young volunteers constantly communicated on Instagram and moderated five participant chat groups conducted in English and Serbian. Questions from the chats were forwarded to the moderators, enabling a discussion with the speakers in real time.

**Outcome/result:**  
The forum was able to cover various topics, ranging from current trends to media business models to existential fear. The format created an exciting atmosphere among the participants and added momentum to the covered topics.

**Key learnings:**

- It is crucial to plan buffers in terms of staff, timing and resources, and to do rehearsals.
- Communicators and community management enhance attendance and engagement.
- Thorough content preparation by moderators and condensed sessions increase participants' interest and can enhance the exchange between panelists and participants after the sessions.





## Content design:

Pick a date and time that work for your event and make the event easy to advertise

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Pick the language of the event

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Decide whether you want to host your event from your office/home or in a studio

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Choose speakers and back-up speakers. Get their photos and bios

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Decide on what the moderators will be responsible for and prep those tasks

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Write a script for the event (see detailed script checklist)

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**Technical design:**

Decide how much you want to do yourself or pay an outside company to do

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Decide how you want participants to register for your event

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Decide on the landing page and the streaming platform

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Decide how you want participants to interact with your event before, during and after

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Choose the platform you want for that interaction

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Identify all equipment needed to participate and make sure you have all the technical equipment needed for streaming the event (audio, video, light, mixers, etc.)

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Draw a plan of your technical structure so that everybody will understand what you are referring to

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Check if your own bandwidth and those of your speakers are sufficient

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## Inclusivity:

Make sure your event is as accessible as possible in terms of language(s)

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Decide if you will provide written summaries

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Make a plan of how to deal with audience participation  
(plan both for people who talk too much and people who are too shy to speak up)

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Make sure the technical choices are as accessible as possible

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Make sure your design choices are as accessible as possible

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**Script/moderation:**

Choose your cast: Who is the director? Who will act as the technical director? Who are the speakers?

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Decide if you need "sub-scripts" for the technical crew, the moderation team and the speakers

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Choose your moderator and any back-up moderators (including editorial or technical moderators)

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Prep the moderators in advance so that they know the code of conduct, privacy policy and rules for participation

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Decide how you will keep the audience's attention. Prep a Plan B for technical delays

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Prepare any music, icebreakers and questions you'll need to cover "dead air"

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Write out a minute-by-minute plan for the event

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Decide how long each speaker should speak and how long the question period should last

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3



## COMMUNICATION

Finding your audience

Targeting your audience

Publicizing your event

The Event Director



Communication is key to raising your audience's interest in the topic before, during and after your event. With the explosion of online events, having a detailed communications plan for your event is vital. "Zoom fatigue" is real and you need to make the case that your event is worth signing up for. Communicating on the right platforms will also help you attract the right people to your event and help you reach your goals. The communication methods you choose will largely depend on whose attention you want to attract.

### Step 1 – Finding your audience

In the design phase, you defined your target audience. The question now is how to find and communicate with them. The first step is to choose the media best suited for reaching your audience and to determine how they would want to receive information about your cause and event.

One approach is to designate your organization's homepage or social media presence as the communications hubs for your event. Think about the work you did during the design phase and develop an event landing page that has all the important information for participants. See if your newsletter or social media accounts have direct or indirect access (i.e. through related organizations and colleagues) that you can use to communicate information about the event. Also think about offline communication tools, such as flyers or local newspapers, that might be suitable for getting the word out.

### Step 2 – Targeting your audience

When you have decided how to reach your audience, it's time to target them directly through announcements and outreach work. The details of your event should be communicated clearly and simply to avoid misunderstandings, such as attracting people who are not eligible to sign up. Information on eligibility can include an age range, specific countries or people from certain professions or types of organizations. Or the event can simply be "open to the public."

If the number of people who can attend the event is limited, make sure this information is communicated clearly so that those who cannot take part are not upset. However, do not send out the link too far in advance in case circumstances change. If there are fees to attend, mention this clearly. If the event is free, say so.

Think about creating content ahead of the event such as teaser videos, posters, a blog or podcast. This can help give your audience an idea about what the event will focus on and what you hope to achieve. They also make great marketing material!



### Step 3 – Publicizing your event

#### Utilizing social media

Social media is one of the most accessible and cost-effective ways to communicate your event, and there are several proven strategies that can make it work for you. Start by creating a hashtag that can be used across social media platforms. Next, find an easy-to-use URL for your event, such as: [yoursummit.com](http://yoursummit.com).

Facebook allows you to create an event page with all your event details, share links to the event in relevant Facebook groups and cross-promote the event with partner organizations.

Twitter can help you build up some "chatter" in the leadup to your event and get people talking about it. You can also tease the event with posts and quotes from the speakers and share the link to your livestream of the event, if there is one. If your organization has Instagram, you can use it in a similar way to build anticipation ahead of the event.

Think about timing. Some posts tend to do better on Monday mornings when people arrive at work and aren't yet ready to face the day. Keep an eye out for what gets the most engagement. Posting regularly on social media gets the most "uptake" from the algorithms, allowing more people to see your posts than if you only post randomly. And of course, don't wait until the last minute!

If your event is for a small network of organizations with participants the organizers have already identified, or some participants are in a region with poor internet service, a messaging service like WhatsApp can also be used to communicate the event.

You can increase the reach of your info campaign with paid ads on social media. This can include teaser videos on social media and/or on YouTube. Think about search engine optimization (SEO) and use key terms that connect you to organized online communities. Look around for podcasts that match your goals. You could offer to do an interview on the event topic in general and plug the event during the talk.



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Don't be shy about asking for re-tweets, shares and likes! This allows you to use your communication strategy to build a community around your event!

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### Using the media

Depending on where you live and who you want to reach, more traditional media outlets (print and online newspapers, radio, TV) can be useful tools for building your audience. First, identify any media organizations that produce content that fits your event topic and contact them via their respective channels. Explain why you think your event would be a good fit for their news coverage.

For radio – just like with podcasts – you could offer to do an interview about the event's topic in general and plug the event during the talk. Before contacting outlets, write a short and snappy press release that can then be adapted to suit different kinds of media. You can later tailor the press release for specific media organizations depending on what their focus is.

### Using your networks

If your event is for a specific industry, your networks will provide you with a pool of people who can help spread the word about your event. Such contacts are some of the best possible ambassadors for your event! If people find out about an event from a person they know and trust, they are more likely to sign up.

Ask your team to write a list of all those they know who might be willing to share the event with the people you are hoping to attract. This list can include former employers, university professors, colleagues and like-minded organizations. It is best to send people you know personalized emails with the press release attached. Use organizational mailing lists if you have access to them.

Finally, keep an eye out for social media influencers whom you might want to contact. These may be well-known people who would stand up for your cause and help share information and drum up interest.

## Step 4 – The Event Director

Communications activities can be hard to keep track of if there are lots of different elements. To make sure you always have an overview, it helps to make a communications plan that includes every communications activity – right down to the very last tweet. Make sure your communications plan fits your event. If you put out your messages about all your activities on the same day, it will have a different effect on your audience than if you spread out your messaging.

## Template for a simple editorial plan

CATEGORY	WHO/WHAT	PLANNED COSTS	COSTS INCURRED				
			Platform	Content summary	Person responsible	Due date	Draft ready Y/N
Facebook	Announcement with photo	Lisa	10/11/22	Y	Tina	Y facebook .com/xyz	FB ads
Facebook	Guest post by one expert	Maria	12/11/22	Y	Tina	N	FB ads
Twitter	Tweet with link for application	Paul	15/11/22	Y	--	N	Promoted tweet

### GLOBAL MEDIA FORUM (GMF)

The GMF is an annual international DW conference that addresses the role of media in politics and civil society. Originally planned to be held in 2020 at the World Conference Center in Bonn, Germany, the GMF became a virtual event for the very first time due to the global pandemic. Titled "Pluralism. Populism. Journalism.", the conference focused on freedom of expression and diversity of content, and on quality journalism standards and populism.

#### Number of participants:

More than 2,000 participants from 120 countries

#### Time:

June - December 2020

#### Sessions:

10 sessions in total

#### Platforms:

Website, Facebook, Twitter, YouTube

**Link to sessions:** <https://p.dw.com/p/3ectZ>

**#journalism #crisis #dw\_gmf**

#### Challenge:

To transform the established, high-profile conference whose success is in part based on networking and personal encounters between diverse participants into a digital event while maintaining its community and brand.

#### How we did it:

The team developed various content for social media, and extended activities over a six-month period. Digital sessions and panel discussions were the highlights of the communication chain.

#### Outcome/result:

The GMF maintained and expanded its existing community (growth on all social media channels), supported international media professionals and featured important discussion and media content.

#### Key learnings:

- Short sessions and high-quality broadcast standards (picture direction, media elements, lower thirds, etc.) help sustain the interest of participants.
- Although mandatory registration creates more work for participants and organizers, it increases participants' commitment and allows better predictability.





## Capturing your audience:

Decide on the event audience and reach

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Gather all that you already have available to communicate your event (homepage, newsletter, social media presence)

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Think about people outside your organization who could help advertise your event

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Think about possible offline communication tools, such as flyers or local newspapers and your own networks of contacts

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Prepare any advance content (teaser videos, posters, blog posts)

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Find the least amount of information your audience needs to know about the event (date & time, eligibility, cost for participation, number of participants)? Make sure those details are in every communiqué you send out into the world

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## Getting your event out there:

Create a hashtag that can be used across social media platforms

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Set up any Facebook events, WhatsApp groups, and Instagram or Twitter accounts and share across relevant groups and accounts

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Decide if you want to use paid ads on social media

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Put your promotion material and any advanced information on your homepage or relevant accounts

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Think about search engine optimization (SEO) with key terms

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Ask for re-tweets and shares!

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Write a short and snappy press release that can then be adapted to suit different kinds of media

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Send out your press release to relevant organizations, individuals and influencers

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## Editorial planning:

Keep track of everything: set up a spreadsheet to document every communications activity

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Write down what you are communicating, where, when and to whom

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Double-check that each activity/channel targets a different section of your audience

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Post and communicate regularly

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Delegate communications activities to members of your team

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Don't wait until the last minute! Communicate early and often

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Don't forget to follow up with people you send your press release to

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# 4

## GOING LIVE!

Venue setup and virtual settings

Technical tests and rehearsals

The speakers

Communications plan

Technical troubleshooting

You've designed your event, completed your planning and developed a communication plan – now it's time to go live! This section gives you an overview of how to run an online event, including steps to take beforehand and advice on how to best run the event as it's happening.

## Step 1 – Venue setup and virtual settings

When preparing the venue on your online platform, each platform will have its own options that you need to customize. You will have to designate a co-host in case the main host has technical problems. As mentioned in the planning phase, you will need to designate a technical moderator to handle technical settings such as muting and unmuting people, recording the event and managing speakers.

You can avoid "dead air" where nothing is happening on screen by adding music, chyrons or pre-prepared video clips so that your audience knows their set-up is working. Make sure you prepare these elements well ahead of the event, and include them in your script for the event.

## Step 2 – Technical tests and rehearsals

There are two kinds of technical tests you need to consider: the general test well in advance of the event and the "as-live" test shortly beforehand. These tests will ensure that things run as smoothly as possible on the day of the event. Since things can go wrong no matter how well prepared you are, we have included a troubleshooting section below.

### General test

This test is meant to see whether the systems you intend to use can handle all that you are planning to do with them. This can be done with colleagues standing in as audience members and panelists. Try to make this test as close as the actual event conditions as possible. Run through a sample session complete with moderator, speaker and audience interaction.

This test helps determine if the internet connection you are planning to use has sufficient bandwidth. Hopefully, the software/platform functions properly but if there are any conflicts with your operating system or web browser, you can address them now.

Consider that your panelists may have similar problems. You might need to test their connections well in advance to see if there are any built-in issues that can't be fixed on the day of the event.

If you are having problems in any of these areas, you may need to make serious changes to your program design or event planning. One option you might have to consider is changing platforms to one that uses less bandwidth and is less technically demanding. You can also purchase a more stable internet connection or new hardware that functions better for hosting an event.

You also need to think about your speakers and audience. Consider purchasing data or time in an internet café for your panelists to make sure their connections are strong enough. Organize access to facilities with better internet connections and computer hardware for panelists and/or audience members, or encourage your audience to join small groups at locations with appropriate internet connections and hardware.



### Technical test

This test is done shortly before the actual event starts (usually 30 minutes before start-time) to make sure everyone's systems are working properly before you go live. New issues sometimes arise when speakers are interfaced with each other for the first time. The test also gives you a chance to make sure all the presenters have their settings optimized for a live or recorded event. The test tends to take just a few minutes, so everyone still has a chance to grab a cup of coffee or check their hair before the event really starts.

Here are some things to watch out for:

- Set the session to private/practice mode so the general audience cannot see you
- Make sure the audience is in a waiting room until the event begins. This way they know the link works but will not be able to see your final test
- Check access to microphones and cameras as well as the permissions to allow for screen sharing
- Get presenters who will screen share to turn off other notifications on their computers to avoid interruptions
- If any of the panelists are using a PowerPoint presentation or showing a video, ask them to practice making it visible to the audience
- Confirm the agenda for the session so that each panelist knows the plan and can ask any last-minute questions

## Step 3 – The speakers

Even if people are seasoned veterans of digital events – and many aren't – your event will have its own particularities that need to be explained. Don't assume that everyone automatically understands the platform or the format you have planned!

### Ahead of the event

For the speakers, prepare a guide to the platform and event format you will be using. It is also important to explain to speakers the logic behind your event design choices so that they understand how elements of the format relate to the goals of the event itself. Formulate an agenda for the event so that your speakers know what to prepare. Not everyone is comfortable speaking "off the cuff."

### Final briefing

Immediately before the event, conduct a final briefing with the speakers and your team (this can be done by email, videoconference, Slack or another messenger service). Make sure they understand the mechanics of the platform and the way the event will be conducted. You can also introduce your speakers to each other to give them a sense of community. This is also a great networking opportunity!

### Alternative communications

If something goes wrong, arrange for alternative forms of communication between the organizers, the individual speakers and the audience such as email or cell phone numbers. Make sure that both the host and technical moderator have a contact list with phone numbers and email addresses of the speakers in case the internet signal is lost. If there are temporary problems, you can either wait and/or proceed with other speakers/panelists, but if there's a serious problem, you will probably have to reschedule/cancel the session.

If problems occur, it is good to have a pre-scripted email that can be quickly sent out to the audience members. Time is of the essence! If you email people quickly to tell them there has been a slight delay, they are more likely to be patient and stay with the event.

## Step 4 – Communications plan

Another position to consider is that of the event director. Maintaining schedules and coordinating multiple speakers online is a priority. This is especially helpful for events that have more than one session or back-to-back sessions.

The event director:

- works to keep the event running on time
- ensures that upcoming speakers and panels are prepared
- complements the host/moderator who is handling events live and the technical moderator who is dealing with the mechanics of the online event

### Going Live!

This is the best part! Going live is when you and your team's hard work pays off. As previously mentioned, make sure that you have two hosts (or a host and co-host) in case one has technical difficulties. All participants should be muted by the hosts, and only the technical moderator and host should have the right to change presentation controls.

Start the event by taking a moment to explain to the audience the basic functions of the platform, such as how to raise hands or use the chat/Q&A options as well as the event's general format. Explain how they will be able to take part and when.

If you have a code of conduct for the event, this is a good time to remind the audience of its contents. Finally, introduce the speakers and try to keep to the planned time of each presentation and session. Adjustments to the schedule are difficult or impossible to communicate at the last minute, so keeping to the schedule is especially important.

### Moderation

Before moving on to audience interaction or a Q&A, the moderator can offer a few thoughts or get the speakers to engage with one another to help begin the conversation. Have a plan B for the Q&A if the audience is shy or needs time to pose questions. For example, if participants have to type their questions, it can take a few minutes for them to compose their thoughts, especially in a multilingual situation.

### Secondary audience participation

If you have decided to also set up alternative participation formats through messenger groups, break-out rooms or other virtual meet-ups, it is helpful to follow the same steps as for the main event. Make sure you have a moderator, a tech check and have prepared ice-breaker questions and a quick introduction to the code of conduct for participating.

Explain to the audience how this secondary space fits in with your larger event and what you hope to achieve there. This way the audience knows how best to use the space. Assign one or more of your team members to monitor this space and any other chat functions offered. This enables event moderators to continue hosting the event when individual participants are having problems such as technical ones.

### Gauging audience reactions

Getting a sense of the audience's mood during virtual events can be difficult but there are digital tools and strategies that can help. You can actively involve and engage with the participants. You can also employ a digital tool for immediate feedback about the event as a whole or about specific parts (e.g. Mentimeter or sli.do). Some platforms (i.e. Zoom) already have voting and polling systems integrated into their event platforms.



A simple way to get a sense of the mood of the event is to ask participants via the chat function to send an emoji in the comment section or via a messenger app.

### Dealing with trolls and disruptors

Disruptive behavior is possible at any event but digital events are particularly vulnerable to disruption. If your event had been publicized on the internet, those who oppose your initiative could decide to purposefully sabotage the presentations or behave inappropriately during the Q&As.

Mandatory prior registration and password protection will help guard your event from trolls and casual hackers. For a large event, consider creating, in advance, a code of conduct outlining unacceptable disruptive behavior. Make sure that only the host/technical moderator and presenters can control screen sharing and other functions that allow you to modify the image. The technical moderator should know how to mute the audience and specific participants and, if necessary, how to eject the latter from the event entirely.

**Inclusivity alert:** Events about controversial topics often require stronger checks against trolls. Consider assigning a second technical moderator just to manage possible disruptions and trolls.

## Step 5 – Technical troubleshooting

Even with the best laid out plans, your event can experience technical difficulties.

Here is a list of some common technical problems along with possible solutions:

**Problem:** Host disconnects from the event

**Solution:** Make sure you have already assigned a co-host and additional organizers who can step into the role of moderator or technical moderator as you try to reconnect.

**Problem:** Speaker disconnects from the event

**Solution:** Use second modes of communication to determine the problem. While the technical moderator attempts to solve the problem, the moderator should inform the audience of what is going on and tell them about next steps (a short break, moving on to the next speaker or starting the Q&A early).

**Problem:** Weak signal from a presenter

**Solution:** See if the speaker can quickly move to a more reliable internet connection by switching from WiFi to an ethernet connection, for example. In some cases, the incoming data from so many video streams can slow down the outgoing data from a speaker. You can try turning off as many videos as possible to boost their signal.



## DISPLACEMENT AND DIALOGUE CONFERENCE

In 2020, DW Akademie's second conference on communication, engagement and accountability in crises was held for the first time online. The virtual event, "Displacement and Dialogue" brought together refugees, communication professionals and humanitarian experts to discuss issues regarding access to information and dialogue in displacement settings.

**Number of participants:** More than 400 participants

**Time:** October 5 - 16, 2020

**Sessions:** 10

**Speakers:** More than 50 speakers

### Platform:

All sessions were broadcast using the conference software **Whova**. Participants and moderators also communicated and exchanged resources in chat forums on **Whova**.

**Link to sessions:** <https://tinyurl.com/38ut3ux6>

**#aroundtheworld #tvconference #onair**

### Challenge:

To enable participants from multiple time zones to join and to keep them engaged despite widespread "zoom fatigue" after months of online meetings.

### How we did it:

Instead of holding a two-day digital event packed with sessions, we held a daily one-hour virtual session, held weekdays over a two-week period. Every session had the same time slot: 15:00-16:00 CET. This enabled participants from all time zones to join and did not strain limited attention spans. The hybrid TV-style format with the #aroundtheworld theme set the conference apart from conventional online formats.

### Outcome/result:

The conference enabled an exchange on communication in crises and reached a greater and more inclusive audience (no travel was required). Although the sessions were mainly an information-input format, participants did exchange knowledge, resources and contacts in the chat box.

### Key learnings:

- Stretching the program over a two-week period allowed participants in all time zones to attend. However, this offset some of the energy that on-site conferences have. As a result, participants picked specific sessions to join rather than sticking to the entire program.
- Determine which sessions can be pre-produced. This reduces stress and minimizes mistakes. However, it also can also take away spontaneity.
- The choice of the platform is crucial as it influences the overall usability and atmosphere for the participants as well as technical options.







## Pre-event checklist: Roles

Arrange a host for the event

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Arrange for a co-host

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Arrange for a technical moderator

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Prepare any secondary audience participation and necessary moderators

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## Pre-event checklist: Presenter preparation

Prepare a platform/event guide for speakers

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Send guide to speakers/presenters

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Make speakers aware of event design and aims

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Collect secondary contact information from speakers

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Prepare secondary contact sheet for hosts/moderators

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Have host prepare questions for presenters in case public engagement is initially low

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### Pre-event checklist: General technical test

Check host/co-host's bandwidth

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Check host/co-host's platform functionality

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Check panelist/audience's internet access

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Make alternative arrangements to deal with deficits from the general technical test

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## Event day checklist: Technical test/final briefing

Set the session to private/practice mode

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Get all presenters to check microphone and camera functionality

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Get presenters to turn off other notifications

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Confirm everyone understands platform mechanics

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Confirm everyone understands format and order of events

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Introduce your speakers to each other

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## Event day checklist: Launch/moderation checklist

Check there is a co-host

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Mute all participants

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Open the event to the public

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Welcome attendees and explain the platform and format

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Explain how the audience will be able to participate

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Remind everyone of the code of conduct

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Introduce the speakers

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Enforce time limits

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Open public engagement

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# 5

## EVALUATION

Develop a feedback strategy

Metrics

Internal debrief

The event report

Final budget check

Evaluating a major event after it has finished is always a valuable exercise. But in this new era of digital events, it is an ever more crucial tool to help you find out how to improve your outreach and impact in the future.

By talking to your presenters, surveying your audience and using online metrics, you can find out what worked and what did not. You can also determine if your online event design was sound, if it only needed some tweaking around the edges or if you need to overhaul the way you think about digital events. It is vital that you do not lose this information and that you come up with a system to learn from it and integrate these insights into your best practices going forward.

Since so many people are new to running events online, consider this to be a collective learning process as both event organizers and participants continue to figure out what they need and what works best.

## Step 1 – Develop a feedback strategy

Ahead of the event, prepare a strategy for how you will gather information after the event. This will be tailored to the type of digital event you are staging and the aims you have set. If community participation is key, you will want to focus on audience feedback. If maximizing the size of the public is your main goal, you will want to focus on online metrics. If your main goal is to run the most efficient event possible so that it can be easily and effectively repeated on a regular basis, feedback from your team is especially important. Here are options to consider:

### Speaker feedback

Talk to speakers afterwards about how they found the experience of presenting in an online event. You will have more access to them than audience members, so the information you can learn from them is an important basis for the rest of your analysis. Ask them if they felt they were properly prepared for the event's format and if any technical problems arose unexpectedly. If so, did they have the resources and preparation to cope?

Ask them if they have any immediate criticisms about the platform. Was the system of online moderation/direction clear and easy to follow? Did they find audience engagement to be effective? Do they have suggestions for how things could be improved in general? Finally, do they have any experiences – both good and bad – from other events they have participated in that would be useful for you to consider?

### Audience feedback

Engage with your audience after the event and actively seek out their feedback about their experiences. This can be done with an online survey that is emailed out afterwards or you can poll select participants to gauge their reactions. Some platforms have a polling function and you can ask for this feedback at the close of the event.

Ask the audience if they were able to fully hear and see the panelists and if the presentations were clear and easy to understand. Did they need more information to understand how the event would work or did they feel well informed and ready to interact when appropriate? Did they find the online moderation/direction clear? Did they have enough time to engage with presenters or panelists when given the chance? Finally, did the digital platform work as advertised and are there any features they found lacking or particularly good?

If you used secondary audience participation (break-out rooms, Slack or messenger groups), ask if they found these spaces useful and added to the overall event. If you used audience feedback tools, ask them what they liked and what they disliked. Ask them what could be improved for the next event.

### Team feedback

Talking with your team can be valuable for several reasons. With their feedback, you can improve future events, brainstorm new ideas, check if your current planning and designing systems worked and consider if every team member was able to use their skills and strengths to the best of their abilities. Ask your team if they felt properly prepared for their role during the event.

If there were any technical problems that arose unexpectedly, ask the team if they had the resources and preparation to cope. Do they have any immediate criticisms about the platform? Did they, especially the technical and editorial moderators, get any direct feedback from the audience?

Ask them if they have any suggestions about how things could be improved in general. Check if they have experiences – both good and bad – from other events they have participated in that would be useful to consider.

## Step 2 – Metrics

Digital platforms allow you to gather a variety of metrics, many of which may be helpful in adapting your online events. One especially important metric is the number of actual attendees. The ratio of registrations to attendees can inform you about what to expect for the future. If numbers are particularly low, it may also indicate that you need to send out more reminders or make the event sound more appealing, especially closer to the date.

Check the length of time attendees spent in each session. This can tell you which parts of your event kept the attention of your audience. Lots of people logging off can tell you where people lost interest.

Compare the number of attendees at the main event to number at secondary sites. This will tell you how interested people were in the secondary sites and whether these should be used more or less (or differently!) in the future.

Ask the attendees how they heard about the event and evaluate which avenues brought in the most people. This information can help you decide on a communication strategy for the future and help you maximize your outreach.

You can also manually track metrics by noting the length of the presentations and panels to see if you were actually keeping to the planned schedule.

## Step 3 – Internal debrief

Once the event has finished and you have had sufficient feedback from panelists, audience members and your team, make sure you compile all this information in the form of an event report. The report should include the feedback you received and consider how effective all elements of the event were by comparing your goals to the outcomes.

Be sure to consider the strengths and weaknesses of the digital platform, format and event design. Mark down any characteristics about the audience (big, small, engaged, passive, etc.) and if those matched your planning and designing goals. Did the length and size of the event fit the goals of your organization and would you make similar decisions for the next event? If you set key performance indicators, did you meet them? If not, why?

## Step 4 – The event report

You can use the event report as part of your obligations towards sponsors, event supporters and your organization, and archive it for future use in an internal repository. You can also publish a public report of the event as a guide for other organizations. If you do, include a description of the event, the reactions of the audience, the goals achieved as well as a summary of lessons learned and further plans.

## Step 5 – Final budget check

With the help of your budget plan and your team, compare the original budget plan to the final outlays. It should be easy to see whether the original budget covered all expenses. Also explore whether the money was well-spent.

Could there have been more money available for communication or audience engagement? Perhaps getting an additional sponsor or two would have made it possible to reach a wider audience. Perhaps spending more on an event hosting platform would have led to greater engagement and interaction between participants. Use these considerations when creating a budget for your next event.







CHECKLIST: EVALUATION

**Pre-event:**

Prepare a feedback strategy

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Prepare panelist feedback questions and forms

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Prepare audience feedback questions and forms

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Prepare an informal list of feedback topics for team discussion

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Prepare metrics analysis available from your chosen platform

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## Post-event:

Conduct a panelist feedback review

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Conduct audience feedback review

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Conduct a team feedback review

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Gather metrics data

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Collate feedback and metrics data according to feedback strategy

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Prepare an internal debrief document

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Prepare an event report

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Generate strategies for how to implement lessons learned

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Prepare a public report for sponsors, supporters and members

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Evaluate your original budget and compare it to the final version

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