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VIRTUAL MEETINGS



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Virtual Meeting - First Steps

White Paper

Why a Virtual Event?

Virtual events are held for the same reasons as in-person events: to deliver your association's message to drive leads and revenue, drive adoption, and build loyalty lifetime value. When deciding whether to make your event virtual, consider what you hope to gain from the event and how well those goals can be reached virtually versus in-person.

- ❖ **Accessibility:** While the event is still being held in-person, virtual options allow you to accommodate attendees who are unable to attend in person.
- ❖ **Budget:** Your organization needs to cut costs and making smaller events and webinars virtual can help move money to the biggest event of the year that brings in the largest number of leads. It also helps to have a virtual or hybrid option when attendee budgets to travel are a concern.
- ❖ **There's no other option:** Whether due to the extreme weather, travel bans, or an act of God, you're forced to make your in-person event virtual or cancel it altogether.¹

CONSIDERATIONS

Client Team and Staff

Recruit Your Team: Just because you're going virtual, it doesn't mean you can put the weight of the entire event on your shoulders. And especially because this is somewhat unexplored waters to many event planners, you'll want someone who understands the process of virtual event planning by your side. Choose your Virtual Event Production company wisely, and make sure everyone involved shares your vision.²

- ❖ **Makes Roles Clear:** Make sure everyone is crystal clear on who oversees what, expectations, and deadlines.³
- ❖ **Set Boundaries and Expectations:** Set boundaries and expectations with your team, vendors, and clients. Let everyone know working hours and what is expected in terms of response time, roles, and anything else that would benefit from being clarified. Again, just because you're going virtual, this isn't an excuse for anyone to slack-off. On the contrary, if this is your first rodeo, you'll want to make these boundaries and expectations even clearer.⁴

1 CVENT. *The Ultimate Guide to Virtual Events*.pg. 4.
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Budget

In order to successfully plan your virtual event, you need to know your numbers. Without a clear event budget, you risk spending a lot more than necessary, or cutting corners you didn't need to cut. A budget will help you clearly understand where to allocate money. It can help you decide where to splurge and where you may need to cut back when creating your virtual event. ⁵

❖ **Budget Considerations:**

- Must Have – This feature is critical to your business.
- Nice to have – This feature would be advantageous but not critical.
- Future need – This feature should be considered for future goals as an organization

❖ **List Income:** List out all the ways you plan on having money come in. Be as realistic as possible, you'd rather fall over budget than under.⁶

- Consider Potential Revenue Options:
 - Vendor Fees
 - Registration Fees
 - Sponsorships
 - Auctions
 - Merchandise Sales

❖ **List Expenses:** List out all the possible expenses you might come across. Create a cushion for yourself because things tend to cost twice as much as expected. When in doubt, overestimate expense.⁷

- Request Pricing Itemized Pricing for the following:
 - Technology/Equipment
 - Production
 - Creative Needs/Web Developer
 - Resources/Engineers/Producers
 - Registration/Communication/Reporting
 - Portal/URLs/Archives
 - Editing/Add-On Meetings

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Virtual Formats

Webinars: Webinars typically last somewhere from 45 minutes to eighty minutes in length. Holding webinars virtually allows attendees from around the world to join in and listen as one or more speakers present the content. Companies can charge attendees to join webinars using online payment services or can be offered for free. Webinars typically use video conferencing tools that allow Q&A, the ability to present live or a pre-recorded video, and be offered as on-demand after the fact. Due to their one-off educational nature, webinars have thrived with 100% virtual attendance. These can also include internal and external trainings.

Virtual Conferences: Much like in-person conferences, virtual conferences are built around a live, complex agenda that includes keynotes, sessions, breakouts, and more. Virtual conferences include multi-session content and can involve community engagement tools. While not as effective in terms of lead capture and networking as an in-person event, virtual conferences allow attendees to view keynotes in real-time, build their own agenda from relevant, on-demand content, and interact with other attendees.⁸

External Hybrid Events: These events are held for those outside of your organization. They can be user conferences or industry conferences. These events require higher levels of video production so that virtual attendees are provided a similar quality to in-person attendees. These events allow attendees who are unable to travel to the event to participate and learn. It is challenging to provide the same value at external hybrid events, as in-person attendees can network more freely and engage easily with content than those attending virtually.⁹

Technology Platforms

Identifying and reviewing Platform Options by Solution type. From the main menu, click the technology tab for an example list of options and many of the solutions can go across several categories.¹⁰

- ❖ The technology platform chosen should match up with the event outcomes and objectives you have set.

Leverage your existing technology – most AMR clients have access to MemberClicks and Zoom as options for registration and hosting your webinar or virtual event (Zoom & MemberClicks guide). They also have access to Basecamp as a project management tool for strategy collaboration, team check points, and focuses specifically on the current virtual meeting.

8 CVENT. *The Ultimate Guide to Virtual Events*. Pg. 3.

9 CVENT. *The Ultimate Guide to Virtual Events*. Pg. 3.

10 Digital Experience Institute. *DES Technology Module – Virtual Solutions Grid (Range of Platform Options)*. PCMA. 2018.

Sponsor Involvement

You will want to consider if the sponsors being selected fit the purpose of the event or, once you make a potential sponsorship list, reach out to the sponsors that fit areas of your content first.

- ❖ **Sponsor announcements:** Allow industry partners to sponsor sessions and provide a one-minute sponsor announcement at the beginning of each session. This can include a visual image or quick demo of their product for the benefit of online viewers.¹¹
- ❖ **Brand the Live Session Window:** Use a custom-branded viewer for virtual sessions that has the capability to incorporate custom logos, coloring, and CSS to highlight your brand better or display a sponsor section.¹²
- ❖ **Add a Sponsored Tab:** Incorporate a custom tab in your session viewer that has text, videos, or downloadable content about a sponsor or exhibitor.¹³
- ❖ **Spotlight Interviews or Vendor Demos:** Pre-recorded spotlight interviews or vendor demos with your sponsors and exhibitors can be and played during breaks in sessions.¹⁴
- ❖ **Networking or Breakout Sessions:** Allow industry partners to moderate or sponsor breakout sessions on a certain topic. Sponsoring a virtual networking hour offers great exposure for companies as well.
- ❖ **Recorded Commercials:** Capitalize on the time attendees may spend waiting to join a session with pre-recorded commercials or rotating slides from sponsors and exhibitors to display.¹⁵

11 Communitybrands. *How to Plan and Execute a Virtual Conference*. EventTech Group.

12 Communitybrands. *How to Plan and Execute a Virtual Conference*. EventTech Group.

13 Communitybrands. *How to Plan and Execute a Virtual Conference*. EventTech Group.

14 Communitybrands. *How to Plan and Execute a Virtual Conference*. EventTech Group.

15 Communitybrands. *How to Plan and Execute a Virtual Conference*. EventTech Group.

PIVOT FROM LIVE TO VIRTUAL

Should you pivot?

- ❖ Can your agenda be translated to a virtual setting, or is an in-person event required?
- ❖ How will you track attendance?
- ❖ Does your organization have a virtual meeting solution?
- ❖ Does your organization have staff members that can support and manage the technical aspects of a virtual event?
- ❖ Can you handle the bandwidth?
- ❖ Do your attendees have all the materials they need to attend virtually?¹⁶

How do you pivot?

- ❖ Update the event website and email attendees to communicate that the event is going virtual and the reason for the change.
- ❖ Provide attendees with a guide on how to attend the event virtually.
- ❖ In the agenda, add links to the session recording or live broadcast.¹⁷

CONCLUSION

Start with the desired outcomes for the event and then use those objectives as well as your available budget to inform each major decision. There are a lot of technology options but for those of you looking for zero to low cost options, most AMR clients can utilize MemberClicks and Zoom. Virtual meetings can range from small webinars to full blown conferences, the format should match up with the content but don't be afraid to try different formats.

Give yourself the freedom to make mistakes and try new things. This will be a new endeavor for most people, staff, volunteers, and attendees. Use this as an opportunity to branch out a bit and establish something that can be carried forward long term.

Once the initial decisions of "why" and "how" have been made, AMR has many resources to draw upon to execute a successful Virtual Meeting.

16 CVENT. *The Ultimate Guide to Virtual Events*. Pg. 11.

17 CVENT. *The Ultimate Guide to Virtual Events*. Pg. 11.