VIRTUAL EVENT PLANNING CHECKLIST

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Your Virtual Event Planning Checklist!

Virtual and hybrid events are set to be the next big thing. Ponder this - in a world where technology develops and improves at an impressive speed, it's our job as events profs to keep up with the motions. So why not be the one who takes the first step into more engaging, sustainable events that can connect thousands of people from around the world at lower costs and increased flexibility?

The tools we have readily available right now represent an ocean of untapped opportunities. From being able to reduce our carbon footprint to making education and networking available to more people, virtual events are full of potential.

Making the jump from in-person events to virtual might seem like more than you can chew. But just like in any other thing in life, it's about the allies you choose to have on your side. And as a highly experienced and tech-savvy company, Endless can help you make this transition in a seamless way.

Every day we witness change happening right before our eyes. And we believe that by being at the forefront of change and positioning ourselves as game-changers, we can contribute to making not only the events industry, but also the world, a better, and more connected place. Events are all about bringing people together. But who's to say that you can't have the same results, or better, by adopting the technology that is shaping our everyday lives? You can start today - and to help you out, we put together this virtual event planning checklist! Keep reading to get a little sniff of what we've been up to. And when you're ready to make the jump, click here to get access to the full checklist - let's make this happen!

Thank you for reading, and happy planning!

Will Curran,
Chief Event Einstein

Before The Event

✅ Establish Virtual Event Goals & Objectives

☐ **Start With Why:** In virtual event planning, the "why" will be more important than ever. Ask yourself - why are you doing this event? What is the purpose? What are your attendees and your brand going to take from this? Before you do anything else, you need to have a clear idea of what you want your event-goers to experience.

☐ **Event Goals:** What do you want to accomplish by planning your virtual event? Increase brand loyalty? Introduce your audience to a new and exciting way of doing events? Augment sales? Outline your event goals and share them with your entire staff. This will be the mental roadmap associated with the event, and you should reflect on them often.

☐ **Determine Your Target Audience:** It's paramount to determine who you want to attend your virtual event right away. Your target audience is a stepping stone for many aspects of planning and execution. Why are they tuning in? Where are they coming from? What do they want to experience? The better you can identify the personas, the more you can cater your virtual event to them.

✅ Develop A Virtual Event Concept

Developing the concept of your event is extra important when planning a virtual experience. This will help you make the right decisions, especially in a field that is relatively new to event planners. Here are the essential steps:

☐ **Ideation:** The planning stage is where anything is possible. Walk yourself through your virtual event and write down everything you picture. And remember that with virtual events, there are fewer restrictions than in an in-person event; something you can definitely play to your advantage.

☐ **Market Research:** Learn from others to avoid their mistakes and replicate their successes. You are not the first, and certainly won't be the last event prof to dive into virtual event planning. Look at the ones that came before you, what they did, and how it can inspire your own event.

☐ **Create A Theme:** Who's to say that virtual events can't stand out? On the contrary! Now that we're sure to see more and more of them popping up, you have to take fresh new approaches to stand out. Play with the elements of sound and vision in particular, since these will be the ones your audience will be engaging more with. Where do you want to take them? How do you want them to feel?

☐ **Make A Vision Board:** A vision board is a great way to give a visual representation to your event concept for everyone to see. This will come in handy when handing off tasks to partners and vendors, whether it's a graphic designer in charge of social media or your Virtual Event Production company when setting everything up.

✅ Follow A Plan

☐ **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.

☐ **Create A Timeline:** Having a timeline is an integral part of the event planning process. It will be your guide and a presence that doesn't let you lose focus and miss important deadlines. Make sure this timeline is available to everyone involved in the virtual event planning process.

☐ **Makes Roles Clear:** Make sure everyone is crystal clear on who is in charge of what, expectations, and deadlines.

☐ **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.

✅ Create The Virtual Event 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.

☐ **List Income:** List out all the ways you plan on having money come in. This can range from vendor fees, online ticket sales, sponsorships, live auctions, or live merchandise sales. Be as realistic as possible, you'd rather fall over budget than under.

☐ **List Expenses:** List out all the possible expenses you might come across. When it comes to a virtual event, think of everything you need from a technology perspective, entertainment costs, all the way down to speakers. Create a cushion for yourself because things tend to cost twice as much as expected. When in doubt, overestimate expense.

☐ **Create An Emergency Fund:** Budget for Murphy's law "what can go wrong, will go wrong". It is almost a guarantee that there will be last-minute, unexpected costs. So be proactive and give yourself a budget for this moment.

☐ **Include Estimated vs Actual Expenses:** You should always have two budgets when planning a virtual event, an estimated breakdown of income vs. expense, and the actual running total of what you have made vs. what you are spending. Do this even if you have a standard allocated budget by separating the money into categories of expenditure. Get as detailed as possible. The more you narrow down your cost, the better you can budget and plan during the process.

☐ **Keep It Updated:** With virtual event planning, things are bound to change in the process. These changes affect the budget, so make sure to update your budget as changes are made for an accurate picture.

✅ Virtual Event Logistics

☐ **Determine The Date And Time:** Pick the date and time of the event. Then pick the backup date. Stay away from having your event at the same time as other large or conflicting events happening in the world. Make sure that all key players on your team are available these days and mark it on their calendars.

☐ **Consider What Else Is Going On:** Since you're planning a virtual event, you now need to be mindful that you're also competing against big events happening online. Are the Grammys airing? Is there a concert live stream that you know your target audience will flock to? This is important to consider so you can ensure your virtual audience won't choose another event over yours.

✅ Consider The Format Of Your Virtual Event

Virtual event planning will obviously deviate from in-person event planning. Perhaps one of the biggest mindset shifts you have to make is considering the format you want for your virtual event. Do you just want a speaker talking to the audience? Do you want the audience to engage? Do you want attendees to be able to go from a virtual room to another? These are all things to consider.

☐ **Webinar:** You can opt for a webinar format where attendees simply tune in to listen to the speaker. Make sure you talk to your Virtual Event Production company to learn the best strategies to make this more entertaining and engaging!

☐ **Live Stream:** How are you going to live stream the event? Are you broadcasting from a studio? Will each speaker come on live from home?

☐ **Web Chat:** How will the attendees communicate to each other and the presenters?

☐ **Panels and Forums:** What do you want panels to look like? How will attendees interact with panelists?

✅ Determine Your AV And Production Needs

At the end of the day, you still want to put on a show your attendees will remember for years to come. Virtual events have their own set of AV and production needs that have to be met. This is a good time to go after the best Virtual Event Production company that is already familiar with the game and can walk you through the details.

☐ **Connect Your Production Company With The Talent:** Make sure your production company is up to speed with your speakers and talent. This way they can not only coach them on how to be a part of a virtual event and engage with the audience, but will also tell them about the equipment requirements, sound, and lighting - all paramount parts of putting together a successful virtual event.

☐ **Learn The Lingo:** Familiarize yourself with technical terms. AV and production terms can seem like another language if you aren't familiar, which only leads to confusion. Remember knowledge is power when talking to your production company!

☐ **Quote Walkthrough:** Ask your production company to walk you through the quote line by line. Everything on your quote should be easily explained to you. Don't be afraid to ask questions! If they won't explain, consider it a red flag and walk away!

☐ **Connect To Your Event Manager:** Ask to be connected to the person who will be working the virtual event. Having a person other than the techs monitoring the lights and the sound that works for your production company is important. This person will be able to be reached at a moment's notice when you need them ready to assist.

☐ **Always Ask For Updated Quotes:** If anything on your quote changes during the planning process, ask for an updated quote immediately. Lots of small changes can lead to a big sticker shock if you don't!

✅ Be Mindful Of Your Technology

In virtual event planning more than ever, technology takes the driver's seat. This is where you might want to consider spending a big chunk of your planning or make sure you have the right company by your side.

☐ **Integrations:** Don't just go for an all-in-one platform that promises to give you everything you need for your virtual event. What you want is to investigate the best options for each part of it, and find the right tool to replace. In the end, you want them to integrate seamlessly with each other and deliver the best holistic experience.

☐ **Consider Your Attendees:** Your attendees will be on the other side of your virtual event and you want them to navigate it without having to worry. Make sure the technology you choose is user-friendly!

☐ **Security Protocols:** Cybersecurity is just as important for a virtual event as security-guards are important for an in-person event. Be mindful of being up to date with all the security protocols of the companies that are behind the tools and technology you are using for your event.

☐ **Important Features:** As we mentioned before, the tools you choose are paramount for the success of your virtual event. With this in mind, you will want to look for features that will enrich the attendee experience both during and after the event. Can the sessions be recorded and turned into evergreen content? How does attendee engagement come into play and what do they offer to ensure it happens in the best way possible?

☐ **Event App:** Create accessibility to content, notifications, feedback, and more with your event app. A great app will also allow you to track your ROI and monetize sponsors. What you would like your event app to do? Are you wanting it mainly for push notifications? Are you looking for crowdsourcing? Do you want the ability to network? Live polling? These are all points to consider. If you need a fully customized event app, talk to your developer on a timeline. Custom apps are much more time-intensive to create. Finally, on the same note as security protocols, be sure that your attendees' data is safe and encrypted.

☐ **Chatbots:** If chatbots are an amazing tool for in-person events, then they are almost essential in virtual events. They are a conversational tool providing a variation on a chat-driven process. Their primary function is to give consistent responses to questions via programming. And when you're dealing with a remote audience, this will come very much in handy to help out with any questions or issues!

☑ Be Proactive About The Content

☐ **Check For Credentials:** When hiring content creators, ask them what experience they have in virtual events. Do they have a studio where they produce their content? How are the conditions? Are they able to deal with unexpected issues that might come attached to a virtual event?

☐ **Review:** Ask to review entire portfolios from past virtual events if possible. This way you can see what you will get, not just the highlight reel.

☐ **Connect Them To The Production Company:** Connect the content creatures to production to assist with any needs.

☑ Find Speakers

☐ **Align With Event Purpose:** Your speakers should align with the purpose and values of your event. When selecting your speakers always keep in mind your target audience to ensure the attendees stay engaged.

☐ **Add Value:** Speakers should genuinely be interested in your event and have something valuable to offer your attendees. The added value will show through when you have an engaging speaker that takes time to build a connection to your event and the virtual audience.

☐ **Check What Others Are Doing:** Be sure to research what speakers have recently been at related virtual events. You do not want to have the same speaker that your attendees just saw at another event - this will reduce excitement and maybe even be a deciding factor in whether or not to attend.

☐ **Experience:** Just like with your content creators, you want to make sure your speakers know what they're getting into. Ask them for past examples of virtual events they've done. If it's clear that a speaker can't engage with a virtual audience, then you might want to skip on that one and look for someone better.

✅ Find Entertainment

Having entertainment in virtual events is still possible! YouTube is ripe with DJs, bands, and artists live-streaming for the entire world to see and enjoy together, even if they're apart. So if you want to hire a band, and actor, or any other kind of entertainment for your virtual event, go ahead. Just because the audience isn't physically there, doesn't mean they won't enjoy it. On the contrary - they might even feel more comfortable to enjoy and let loose!

☐ **Find The Right Entertainment:** Keep the audience in mind when you sort through your options and decide whether or not a particular entertainer will resonate with your audience.

☐ **Request Talent Fee:** Talent fee is just that, the cost of the talent performing as agreed upon. This can also be called an artist fee or an entertainer fee. A great thing about virtual events and remote performance is that you can just wave the transportation and stay fees, among others associated with in-person performances.

✅ Find Sponsors

☐ **Sell Your Virtual Event:** Determine what your virtual event can offer sponsors, provide as much data as possible to help your case. Including the fact that it's an exciting new format!

☐ **Research Sponsors:** Research what sponsors fit into the purpose of your event and would be a good fit to work with.

☐ **Make A List:** Compile a list of sponsors to reach out to.

☐ **Create Sponsorship Packages:** Create sponsorship packages and start reaching out!

✅ Marketing

☐ **Create A Marketing Plan:** Create a marketing plan that targets your ideal attendees. Make marketing and promotion plans, create a launch plan - how will people know about your event?

☐ **Make An Event Name:** Your event name is your best friend when it comes to marketing. It should intrigue people to dig deeper into the who, what, where, when and why.

☐ **Make An Online Presence:** Create and launch the website and social sites. The entirety of your event will be taking place online, so make sure you use this to your advantage.

2 Months Out

✅ Promote Your Virtual Event

Now that your event is getting close it's time to really build the excitement! Ask your speakers and influencers to post on their social channels about your event. Let them promote your event and themselves by sharing what interesting topics they will be discussing. Also, send out all press releases to media outlets to spread awareness of your event.

1 Month Out
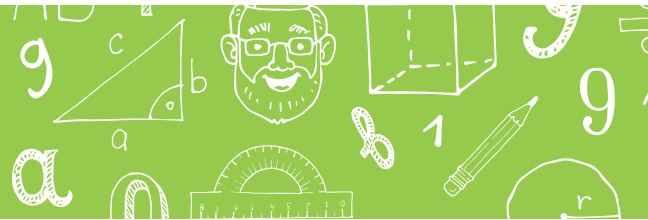
☐ **Confirm Times:** Contact vendors and entertainment to confirm starting times and see if there are any last-minute questions, concerns, or needs. It is very important to get this confirmation so expectations are clear

☐ **Request Payments:** Make sure all pre-event bills are paid. Take a look at your budget again to make sure you are in good standing on the day of the event. Do you have to be cautious with expenses? Maybe you need to push ticket sales through marketing the last 4 weeks leading to the event.

☐ **Virtual Command Center:** Give your team a virtual space of their own. This should be where they can talk to each other freely during the event to deal with any problems, or just relax and team-build.

☐ **Digitally Distribute Information:** It's time to distribute all the information you can to your team. Does everyone have the event timeline with everyone's contact, social media guidelines, and any necessary information they may need? Make it crystal clear!

☐ **Dress Code:** Just because you're going virtual, it doesn't mean you can show up in your pajamas! Well, unless that's the theme, of course. Either way, let the team members who'll be a direct part of the event know that they still have to look the part and dress professionally. We said it once, and we'll say it again - just because it's virtual, you shouldn't slack off!

☐ **Virtual Communication System:** Designate a way to communicate virtually. Whether it's a private chat room or a specific tool for your team, they need to be in constant contact with each other. Particularly during a remote event!

1 - 2 Weeks Out

☐ **Go Over Final Details:** Have everyone on the planning team meet to discuss the final details of the event. Go through everything with a fine-tooth comb, communication is key!

☐ **Address Expectations:** Go over expectations for all event staff about their duties and the virtual event timeline.

☐ **Review Event Cybersecurity Plan**

The Day Before

☐ Make sure everything is set-up and TESTED.

☐ Confirm all starting times for staff and vendors.

☐ Create a final to-do list to ensure all tasks are completed.

During The Event

☐ **Have Fun:** Your day has come! Remember to step back and look at all you've accomplished and feel proud.

☐ **Have A Comfortable Space Around You:** Yes, it's remote, but you won't want the event to take place while you have a pile of socks on your desk or space! Make sure the atmosphere is pleasant and comfortable for you.

☐ **Who's Who:** You should set up a profile that will replace the typical badges of in-person events, so everyone knows who is who and who is responsible for what.

☐ **Know Your Team:** Meet everyone on your team. This makes them feel human and if something goes wrong, you don't come off as pushy or mean because you can use their name.

During The Event

☐ **Check-In:** Constantly check-in with your partnerships. This will help you be proactive if they are unhappy. Also, use your event apps to crowdsource and check your event's hashtag for immediate attendee feedback. This allows you to make program changes at the moment should you need to.

☐ **Social Media Manager:** Have one person in charge of social media for the virtual event. Make sure your hashtag is prominently displayed so everyone consistently uses it and have one person whose sole job is to tweet and monitor social media.

☐ **Collect Feedback From Attendees:** The easiest way to do this is through your event app, but you can also administer online surveys. Give them some sort of incentive to fill them out!

☐ **Next Year's Date:** If you have the date for next year's event, announce it. This is your chance to hype up next year's event and convert current attendees into future attendees.

After The Event

✓ For The Staff/Team

Have a post-event meeting - sooner the better!

☐ Debrief with your entire staff.

☐ Share all the data.

☐ Get all of the problems and successes out in the open to discuss.

☐ Review your event goals - did you achieve them and if not document why.

☐ Keep notes of this meeting for FUTURE planning.

Go over the budget.

☐ Review budget versus actual expenditures.

☐ Calculate your ROI.

After The Event

Tie up all loose ends.

- ☐ Be sure to send sponsors the data from your event.
- ☐ Store away the feedback and data you have collected.
- ☐ At this time decide what worked and what needs changing for your next event.
- ☐ Settle any remaining bills for the event.

Send thank-you notes to:

- ☐ Sponsors
- ☐ Speakers/Presenters
- ☐ Donors
- ☐ Media
- ☐ Partners

✓ For The Attendees

- ☐ If you haven't asked for feedback now is the time.
- ☐ Update attendees on dates and information as soon as possible for next year's event to keep them connected and engaged via great content.