



Introduction

SPE Technical Sections now face exciting opportunities and new challenges as more events become virtual (online) or hybrid (in-person and online). While virtual events provide an excellent new way of bringing education to SPE's members, these events require a higher degree of coordination, planning, and communications both internally and externally.

In this document, we have prepared a document which you can use as a guide to help your Technical Section or be successful at virtual or hybrid (in-person and virtual) events! We will cover roles and responsibilities of members, different virtual events platforms, how you can work with sponsors, marketing tips, preparation checklists, ways to create engagement, and what to do after your event.

We would also like to remind you of the [SPE Events Code of Conduct](#). This code of conduct has been updated for virtual events and outlines how you should work with and handle individuals who are being unprofessional during your events. We hope that you never have to enforce it, but you should include a link to the Code of Conduct on the registration page for your virtual events.

If you would like to provide feedback on this document or have any questions, please reach out to your Technical Activities Specialist or Technicalsections@spe.org.

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Roles and Responsibilities

Team Lead

- Overall owner, director of event
- Event calendar coordination – ensure events are properly spaced (recommend two max per month) and have ample time for promotion.
- Communicate with your SPE Technical Director about any virtual or hybrid events that may have broader appeal to an audience outside within your technical discipline.
- For joint Technical Section events: Coordinate resources to ensure each Technical Section is promoting the event to their members.

Moderator

- Assists with smoothly transitioning from speaker to speaker and keeping speakers' times on track.
- The moderator may provide an introduction, including introducing the speakers, as well as closing remarks.
- At the end of the session, the moderator may ask audience questions from the chat to the individual speakers.

Technology Lead and/or Staff

- Manages virtual event platform (recommend multiple people for simultaneous activities).
- Ensures content is correctly captured and meets quality standards—either live (via webcasting software) or prerecorded.
- Email support for attendees (Separate from moderator managing polling, Q&A, etc.)

Social Media Lead and/or Staff

- Chat moderator – someone well-versed in social media and engagement
- Handles messaging and incoming questions and interactions.
- Resources manager – compile resources from the Speaker Logistics Lead and/or sponsors for social promotion (may also support Technology Lead/Staff).
- Set up LinkedIn and/or Facebook event pages and promote event on social media accounts.

Speaker Logistics Lead

- Designated handler to work with speakers, interviewers, moderators, etc.
- Ensure all speakers have signed content release form, including informing speakers of where and for how long their content will be made available.
- Manage and prep speakers, collect bios, headshots, etc.; Pre-event rehearse with them. During presentation, designated as “listener” for any issues that may arise; communicate issues to tech support

Designing Your Virtual or Hybrid Event

Before deciding what virtual event platform to use, it is important to first consider what your goals are for the event. Is it education, knowledge sharing/networking, revenue generation, or all the above?

After goals are determined, here are a few other important areas to address:

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Pre-Event Design

- **Avoid topic and event date overlap with other Technical Sections** since virtual events can draw a wider audience. For virtual events that may have audience interest outside of your Technical Section, you should consult with your SPE Technical Director prior to finalizing the event details. All virtual and in-person events must continue to follow existing [SPE event guidelines](#).
- **Technical Sections should avoid scheduling all-day virtual events**; consider breaking content across multiple days and/or provide ample breaks between meeting items or sessions. The speakers' and audience's time zones should also be considered when scheduling the live times for an event.
- Be methodical in selecting the right day(s) and start time for your event, taking into consideration different time zones participating live, as well as ensuring your event does not conflict with other upcoming events/activities.
- "Zoom fatigue" is a new but real problem, so design your event with this in-mind. In-person events can be all-day, but virtual should not be any longer than a half-day. Consider breaking up virtual content into shorter versions of its in-person counterpart or make the virtual content available for a longer duration on-demand.
- If you are expecting people outside your Technical Section or to access the live, virtual content, be sensitive to different time zones, ensuring all attendees and speakers can participate live.
- What language(s) will be spoken at the event? Ensure your speakers are aware and prepared if you will have a multi-language audience.
- For hybrid events, Technical Sections should be thoughtful in their approach of what to record and stream online. Consider the key meeting items or presentations that would be of most interest to a virtual audience. Technical Sections should also **ensure all technical equipment (e.g. microphones, cameras) and internet are properly tested ahead of the event**.
- When inviting speakers, the Technical Sections should ensure speakers understand the event format, including who is the intended audience, if their content will be available on-demand, and if so, for how long, what language(s) will be spoken, and where the online content will be published.
- The SPE Board's **Technical Content Committee should be aware of Technical Section-run joint events**. The Technical Sections should communicate with their Technical Director ahead of planning a joint event. Your Technical Director, in-turn, will share with the other Technical Directors to ensure the topic nor the audience conflict with other Technical events happening around the world.
- Technical Sections should decide which one of them will lead the management of the joint virtual event. The Technical Section will be responsible for sharing event details and marketing materials with the other parties for distribution to their members. Technical Sections should not [share lists nor email members](#) outside of their jurisdiction.

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During the Event and After:

- Technical Sections **should continue to enforce that attendees do not take unauthorized photography, screen shots, or audio/video recording of presentations and slides during live or on-demand virtual events.** The [SPE Code of Conduct](#) can be included in event communications to outline audience expectations.
- After the event, Technical Sections **should share the results in their annual report**—engagement data such as how many people registered vs. attended and attendee demographics such as city/country, age, member status, and Technical Section.
- Attendee data can be captured if a registration process is required for the virtual event, but after the event is over and analytics are captured, the personally identifiable data should not be stored for future use. **Attendee data should be destroyed** in accordance with all international data protection laws (e.g. GDPR) and the [SPE Privacy Policy](#).

Virtual Event Platforms

When deciding which event platform to use for your virtual or hybrid events, there are a few factors to keep in mind.

- Here are important team questions to ask in order to know exactly what you need out of the platform.
 - Do you want to feature live or pre-recorded videos, or a combination of both?
 - If pre-recorded videos, do you still want to have live Q&A after the presentations?
 - If a hybrid event, which elements will be in-person and virtual versus one or the other?
 - Do you want to poll your audience?
 - Will your event have sponsors and/or exhibitors?
 - Do you need breakout room capabilities with branding opportunities for sponsors?
 - Do you want networking capabilities (e.g. direct messages, matchmaking)?
 - Does your event need translation capabilities and/or closed captioning?
 - Will you charge attendees for this event?
 - How many attendees do you expect?

Once you have determined what you need and choose the right platform for you, you should test the platform's capabilities well in advance. Testing will help relieve stress and ensure your event is organized, polished, and enjoyable for all. Now that most SPE members have had experience with virtual events, they have higher expectations for the video quality and networking features at the virtual event.

Not sure of which platform to use? Below are some of the most popular with brief guides for a few. For more detailed information and to stay up to date with current features, visit the help sites for each platform.

- [Zoom User Guide](#)
- [Teams User Guide](#)
- Facebook Live
- YouTube
- [GoToMeeting Guide](#)

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Need a more robust platform? If you have concurrent sessions for live or on-demand presentations, or need more advanced features like networking, matchmaking, and games, here are two platforms that SPE International has worked with for virtual and hybrid events:

- [Swapcard](#)
- [Pheedloop](#)

Working with Sponsors

Going virtual does not have to mean you have to lose your sponsorships. Consider offering sponsors a short speaking opportunity, on-screen branding or 30-sec commercials, or even their own networking breakout session.

Leading up to the Event

- **Banner Ads:** whether in email communications (newsletters) or on your website, banner ads are a great way to feature your sponsors.
- **Website Ads:** your Technical Section/event website is a perfect opportunity to highlight some of your most valuable sponsors.
- **Email Marketing Inclusion:** including ads, mentions or links to content from your sponsors in your email marketing efforts, can connect your audiences with your most valued companies.
- **Promotional videos** about the event can include sponsor recognition.

On the Platform Before the Event

- **Login Screens sponsorship:** a login page for your virtual experience is a page that every attendee will see; it is valuable real estate.
- **Exhibitor Office Hours:** these defined time occasions can act much like dedicated show floor hours where attendees "drop in" to an exhibitor's office (via Zoom, WebEx or other video conferencing software) to meet with company representatives.
- **Online Agenda Sponsors:** content (programming) is always a top driver for online attendance. Take the opportunity to feature your sponsors and exhibitors with a logo or ad for increased visibility.

On the Platform During the Event

- **Sponsor Presentation Slides/Transitions:** showcase exhibitors or sponsor logos between sessions, speakers or slides. Include contact information for the company (e.g. web address).
- **Break Sponsors:** at various points throughout the event, incorporate full-screen advertisements or commercial videos highlighting your exhibitors or sponsor's products or services.
- **Virtual Roundtables on hot topics:** allow exhibitors or sponsors to have one of their experts host a pre-planned topic chat for 15-30 mins.
- **Behind the Scenes with Speakers:** sponsor hosts a backstage chat with the keynote speaker.
- **Branded Breakout Session Rooms:** these sponsors can have their logo featured in session slides or play a pre-session video.

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For the Attendees

- Virtual Games: attendees participate in a group game, like trivia, puzzles or a virtual scavenger hunt.
- Virtual Swag/Goodie Bags: let sponsors provide exclusive promotions, discounts, gift cards, or free trial offers. Then assemble all sponsor offers into a "bundle" and send it out in an email or post on a protected web page.
- Please note: Technical Sections should be careful of awarding monetary prizes or other gifts, especially when the event spans more than one region or country. Providing gifts may require you do to things like register as a lottery or comply with other local laws that preclude giveaways or prizes.

Marketing Tips for Virtual Events

Amid all this planning, it is easy to overlook how you might need to adjust your marketing to convert an in-person event to virtual or hybrid.

Here are some tips from SPE's Marketing staff:

- The appropriate [SPE Technical Section logo\(s\)](#) should be used on all virtual events, including joint events, to ensure it is clear who is organizing the event. *SPE Technical Section logos are available upon request for Technical events.*
- Create a landing page on your website for promoting the event. The page can also include instructions or FAQs on how to use the webcast/virtual event platform.
- Produce a "sneak peek" of the content planned for the virtual event. For example, could you have a speaker record a short video with highlights of their talk? You can then promote it via your website, social media channels, and emails.
- Adjust your marketing timeline for promoting the virtual event. Since virtual events do not require as much advanced planning on the participant's part, they will be more likely to make last-minute plans.
- Send one initial announcement email, but also leverage existing email communications to cross-promote the virtual event. Email frequency can increase to weekly as the date approaches but ensure each email has a theme—for example, highlight the topic(s) being covered or the speaker(s) confirmed.
- Plan emails and social media posts on the day before and day of the event—reminding people that it is not too late to participate and reminding participants to log in.
- Even if your virtual event is free, create an RSVP system to ensure you can communicate with participants pre- and post-event on how to access the content.
- To reduce participants dropping out during your virtual event, include icebreaker activities like a poll to engage participants in-between presentations.
- Don't forget about post-event marketing! Record your webcasts so that people who were not able to participate can still watch the content at their leisure. Consider posting links to the recordings on your website to drive traffic and engagement, as well as use this content to promote other future virtual events.

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- Take advantage of data. Virtual events provide rich data that is difficult to obtain at in-person events. Evaluate poll responses, questions, viewership numbers, and more to learn valuable lessons on how to improve your next virtual event.

Planning and Preparation

- Ensure you will have access to two computers and/or a mobile device, so you have a back-up option if one goes down during a live presentation.
- The other computer (or a separate monitor) can also be used by the moderator to see the Q&A, polls and chat panes and dashboard.

Have a Back-up Plan

- Ensure the host/moderator is prepared to move to another speaker or discussion if a speaker is dropped or has poor audio.
- Prepare a short video or slides to present on the screen while you adjust/troubleshoot if technical difficulties arise.
- Create a WhatsApp group or Teams chat with all the speakers, panelists, moderators, and back-end help for easy communication.

Create a Virtual Background

Having a virtual background for all speakers and panelists is a great way to create cohesion and put forward a professional image.

If you want to create your own background, here is how you can do it using Microsoft Word:

1. Find a background image that works best for your event. To work best it should be a solid color, or a simple pattern; and insert the picture into a Word document.
2. Contact Technicalsections@spe.org for Technical Section logos, and save somewhere easy to find, like your desktop.
 - Note: Only use your official SPE Technical Section logo. **Do not use the SPE International logo.**
3. Insert your logo by clicking the **Insert** tab on the top Word menu >> **Pictures** >> select your logo file.
4. Once inserted, *right* click on your logo >> **Wrap Text** >> **Tight**.
5. Then, *right* click on your logo again >> **Bring to Front** >> **Bring to Front**.
6. Resize your logo and place onto the background.
7. Hold down the **Ctrl** button on your keyboard and *left* click the logo and then *left click* the blue background image. Once both images are selected, *right* click and select **Group** >> **Group**.
8. Once grouped, *right* click anywhere on the image >> **Save as Picture**. Commonly accepted file formats are JPG/JPEG, 24-bit PNG, or GIF.

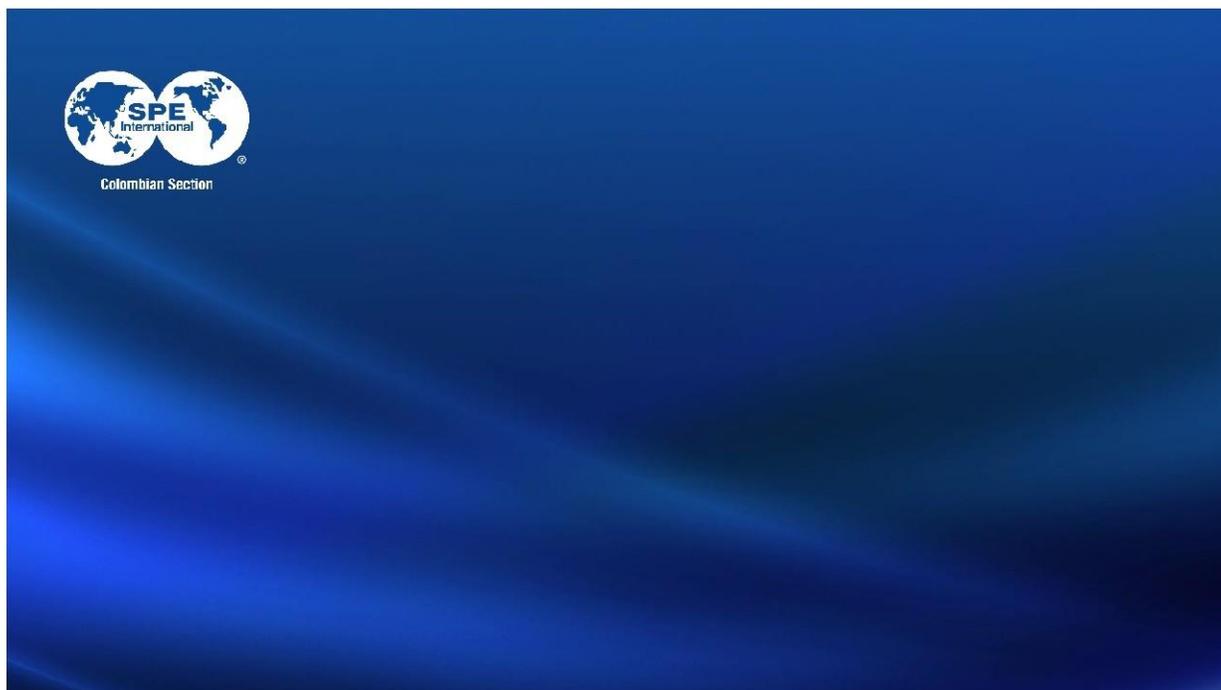


Section Officers Resource Centre

Use this background image. An example of a completed background is below.



Example:



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Plan a Full Rehearsal

- Different day, but same time of day
- Include all speakers, moderators, and behind-the-scenes persons
- Run through the entire agenda
- Internet access
 - Hardwire (ethernet) connection is recommend versus Wi-Fi for all speakers
- Test bandwidth
 - Join meeting on your laptop
 - Join audio from your phone
- Record and review the Rehearsal
- Use facial expressions and hand gestures as appropriate
- Make sure audio is clear and limit background noise for all speakers
- Ensure that background workplace appropriate
- Ensure all speakers have appropriate lighting
- Ensure all speakers have cameras placed where they can read the script and make eye contact with the attendees
- Join rehearsal as Attending on a Laptop, Tablet, & Phone. Do your visuals work for all formats?
- During the Dress rehearsal, open a Word document and type out questions for the audience, write up posts for use in the chat (example: if a speaker mentions a website, provide the website link; if a speakers says, “email if you have questions” have the speaker’s contact information written down)

Some good reminders to share with speakers

- Use a professional, neutral background; remove clutter
- Raise up your computer. This is a more flattering angle for most!
- Use good lighting
- Use a direct ethernet cable, if possible
- Dress professionally
- Test audio in advance. People will forgive bad video but will leave if they can't hear.
- Look at the camera--not the videos of others. It can help to place a sticker or picture near the camera to help focus on the camera.
- Get close to the camera
- Stand up, if possible, as this creates higher energy
- Be animated, don't just sit there

Event Day

Day-of Email to Attendees:

The first step to driving engagement (and get people to participate) needs to happen long before the meeting starts. If you want participants to be engaged during your meeting, help them show up ready to engage.

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Potential Subject Lines:

- Few hours to go! SPE Lagos Annual General Meeting & Awards Ceremony
- *TODAY* Virtual Awards Ceremony 2020 | SPE Southwestern North America Region

By sending this key information ahead of time (ideally, at least a few days before the scheduled meeting and day of the event), people are coming into the meeting knowing why they're there and being prepared for it. If you want to deliver an even stronger boost to your meeting engagement, get your participants involved in building out the meeting agenda.

Prepare your attendees on how they join, including if they will use their camera and/or will be muted.

Speaker, Panelist, and Moderator Management

The day of the event, you should establish an after-event meeting with all those who help you put on the event. This should include you Speakers, Panelists, Moderators, etc.

When your event ends, often it will also end for all these individuals. With an after-event meeting you will be able to connect with all parties immediately after and can properly thank them for their participation and talk about how the event went.

1 hour to go

- Open the webinar in “practice mode” to communicate and practice with your speakers without attendees arriving early/ do not start the webinar immediately
- Welcome your speakers and have them warm up
- Ensure all speakers are in a workplace appropriate environment, are wearing business attire, and have suitable lighting
- Give everyone an update including the expected number of attendees
- Perform a final sound check
- Confirm everyone is using the correct equipment and remind them not to use speakerphones or open mics
- Disable email alerts and any other pop-up notifications or sounds
- Silence mobile phones and other devices
- Ensure all devices are plugged in and charging, including ethernet connection / LAN cables for internet access
- Ensure speakers have a glass of water available
- Give presenter controls to those who need to advance the slides or show their screens
- Re-confirm the format of the webinar (intro, presentation, poll question, Q&A, wrap up, etc.) and who is responsible for what
- Send out a reminder to join

15 minutes to go

- Require that all speakers and moderators put their speakers on mute
- Send out a private chat message to remind speakers to communicate via the chat box
- Show your screen (or ask the presenter to share theirs if they are hosting the pre-presentation on their device)
- Allow attendees to join and view your pre-webinar slide/video with music.

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- Enter a welcome message to the audience in the chat box, along the lines of “Thanks for joining! We’ll begin in shortly”
- Add upbeat music that gets the crowd going prior to the event. If there are breaks, play music. It sets the tone for the event.

1 minute to go and event kick-off

- Make sure all speakers are muted except the person speaking
- Turn on webcams
- Start recording and remind everyone it is being recorded
- Remind everyone of the virtual event code of conduct
- Start the event and bring attendees off hold
- Explore and share with attendees the features you plan to use. Don’t assume everyone will understand your platform.
- Share how they can access the slides and recording after the event.

End of Event

- Thank speakers and attendees.
- Remind everyone where they will be able to access the slides and recording.
- End event with closing slide/video and allow music to play with attendees finish conversations in the chat feature.

During the Event

Virtual meetings can be engaging, energizing, and fun. Here are some tips on how to minimize “Zoom Fatigue”, quash multi-tasking, build participation, and engage participants. These tips can be used for your board meetings and/or your member events.

Engagement

Icebreaker

Start off with an icebreaker. Take a few minutes to ask a simple question for everyone to answer (in a poll or chat) to feel a part of the meeting.

Icebreaker Ideas Using the Chat or a Polling Feature:

- Ask Participates:
 - What’s your favorite movie or book?
 - What makes you laugh?
 - Where they are from?
- Show us your favorite coffee mug, or special object you have on your desk that you can tell us about. This can also be used to introduce the panel.

Polls can also be used throughout the event for participants to respond or reflect on the programming. For example, asking how much they agree or disagree with a point made during a presentation.

Use lots of visuals

Using more visuals than you would in an in-person meeting keeps people engaged. Visuals give the participants something to look at besides the speaker – which can sometimes be boring if the speaker is the only thing to watch.

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Screen sharing

Take turns presenting to the group with screen sharing to maintain engagement.

Chat and Q&A features

Allow participants to ask questions or make comments throughout the meeting.

Plan a few questions pre-typed to post in the chat to help get the conversations started. You can also use the chat to share hyperlinks to content communicated during the meeting or presentations. If you know the hyperlinks beforehand, use a system like bit.ly to create short hyperlinks where you can track the engagement.

Virtual Roundtables

Between presentations or after a panel have a virtual roundtable that allows attendees to network (this is a great use of Zoom breakout rooms) and invite your members to discuss what they have learned.

Ask for their input in small meetings

Ask participants directly for input. This practice helps everyone feel engaged in the discussion and avoids any one person dominating the meeting, which is especially important if the goal of the meeting is to brainstorm ideas.

During the meeting, take stock of everyone's participation levels and if you notice a few participants dominating the conversation, make sure to interject to give other people an opportunity to engage.

Promote a "Video-First" Approach

Voice-only conference calls limits the level of collaboration and participant dynamic and thus limits engagement. With video, attendees will engage more as they interpret the facial expressions and social cues. Video also allows participants to see each other's reactions to ideas and helps avoid miscommunication.

After the Event

Speakers

You should invite all your speakers, panelists, and moderators to join you in a new and separate meeting. This will give you a chance to thank them in a private meeting, discuss any talking points that may have come up during the meeting, and talk about any challenges.

Attendees

Within two days of the meeting you should email all attendees with information about how they can access the recording (if recorded), provide them with any resources or links that were discussed in the session, and to thank them for attending.

This is also a great opportunity to survey the attendees and ask for their feedback on how to make your events better in the future.