



Contents

Introduction	2
Roles and Responsibilities	3
Designing Your Virtual or Hybrid Event	3
Virtual Event Platforms	5
Working with Sponsors	5
Leading up to the Event	6
On the Platform Before the Event	6
On the Platform During the Event.....	6
For the Attendees	6
Marketing Tips for Virtual Events.....	6
Planning and Preparation	7
Have a Back-up Plan	8
Create a Virtual Background	8
Plan a Full Rehearsal	8
Some good reminders to share with speakers	9
Event Day.....	9
Day-of Email to Attendees:	9
Speaker, Panelist, and Moderator Management.....	10
1 Hour Prior to Event	10
15 Minutes Prior to Event	10
1 Minute Prior to Event and Event Start.....	10
End of Event	11
Increase Engagement.....	11
During the Event	11
After the Event.....	12
How to Create an Awards Celebration	12
Award Recipients	12
Marketing.....	12
Engage the Audience	13
Continue the Celebration.....	13
Helpful Links	13

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 section 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 contact your Technical Activities Manager or email technicalsections@spe.org.





Roles and Responsibilities

Team Lead

- Overall owner, director of event
- SPEI event calendar coordination – ensure events are properly spaced, confirming there is no overlap with other events (see Pre-Event Design below). You should provide ample time for promotion.
- For joint events: Coordinate resources to ensure each 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 of the above?

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



Pre-Event Design

- Using the two links below, ensure your event does not overlap with other events on the same topic during the same time. Enter your event information in the Section Virtual Events Spreadsheet so other sections can check for overlap as well.
[SPEI Events Calendar](#)
[Section Virtual Events Spreadsheet](#)
If your event overlaps, shift the timing or adjust the topic a bit. All virtual and in-person events must continue to follow existing [SPE event guidelines](#).
- 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.
- "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.
- Be methodical in selecting the right day(s) and start time for your event, taking into consideration different time zones for your attendees and speakers participating live, as well as ensuring your event does not conflict with other upcoming events by consulting the SPE International event calendar ([add hyperlink](#)) and the event listing ([add hyperlink once created](#)).
- 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, be thoughtful in your 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. **Ensure all technical equipment (e.g. microphones, cameras) and internet are properly tested ahead of the event.**
- When inviting speakers, ensure they understand the event format, including who is the intended audience, if their content will be available on-demand and where, and if so, for how long.
- For joint events, each section is responsible for promoting the event to their members. You should not [share lists nor email members](#) outside of their jurisdiction.

During the Event and After:

- Communicate to **attendees that they should not take photographs, screen shots, or audio/video recordings 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, **share the results in your annual report**—engagement data such as how many people registered vs. attended and attendee demographics such as city/country, age, member status, and section.
- Personal identification data may be collected if a registration process is required for the virtual event. After the event is over and analytics are captured, all personal identification data **must be destroyed** in accordance with 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?
 - Do you need 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 chosen the right platform, you should test the platform's capabilities in advance. Advanced testing will 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 for virtual events.
- 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](#)
- 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 event webpage is a perfect opportunity to highlight some of your most valuable sponsors.
- **Email Marketing:** including ads, mentions or links to content from your sponsors in your email marketing efforts.
- **Promotional videos:** include sponsor recognition when promoting the event.

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 times 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 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.

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 them out in an email or post on a protected web page.
- **Please note:** 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 prohibit 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:



Technical Section Officers Resource Centre

- The appropriate SPE section logo(s) should be used on all virtual events, including joint events, to ensure it is clear who is organizing the event. You can request technical section logos at technicalsections@spe.org.
- 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, have a speaker record a short video with highlights of their talk and 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 to attend.
- 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 in one email and the confirmed speaker(s) in the next.
- Plan emails and social media posts on the day before and day of the event—reminding people that it is not too late to log in and participate.
- Even if your virtual event is free, create an RSVP system to ensure you can communicate with participants pre- and post-event.
- 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.
- 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.

- Make sure the laptop and network you are using matches the recommendations of the virtual platform that you are using. You may need to close applications like Outlook or Teams to ensure they do not interfere with your presentation.
- Where possible, have any media files loaded to Vimeo or the virtual platform instead of streaming the media from your laptop.
- Internet access - Hardwire (ethernet) connection is recommend versus Wi-Fi for all speakers
- Select and save upbeat music to be played at the beginning of the event and during breaks. (Ensure you have the proper music licensing if needed.)



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.
- Consider having a person who can cover for any critical roles if there is a problem. Ideally, the backup person would be in a different physical location in case of a power or network outage.

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. Be sure the image is not copyrighted and is available to use for free.
2. Use your official logos, and save somewhere easy to find, like your desktop. Do not use the SPE International logo. You can request technical section logos at technicalsections@spe.org. **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.

Plan a Full Rehearsal

- Different day, but same time of day
- Include all speakers, moderators, and behind-the-scenes people
- Run through the entire agenda
 - Test your participation in the event. Whatever your role will be in the event, conduct a test of that role using the same laptop and network that you plan to use during the event.
 - If multiple people are participating in the event from the same location, have all the participants test at the same time from that location to identify potential network congestion.
- Test bandwidth
 - Join meeting on your laptop
 - Join audio from your phone
- Record and review the Rehearsal
- Test facial expressions and hand gestures are effective and not distracting



- Make sure audio is clear and background noise is limited for all speakers
- Ensure that background workplace is 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 an Attendee using 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 speaker 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 your camera above eye level. This is a more flattering angle for most!
- Use good lighting
- Use hard-wired internet instead of wireless, 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
 - Do not to use speakerphones or open mics. Headsets are best.
 - Disable email alerts and any other pop-up notifications or sounds
 - Silence mobile phones and other devices
 - Mute when they are not speaking.

Event Day

Day-of Email to Attendees:

The first step to driving engagement (and participation) 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. Send messages in advance.

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 day of the event), people are coming into the event 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 to join, including how they will use their camera and/or if they 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 your Speakers, Panelists, Moderators, etc.

With an after-event meeting you will be able to connect with all parties immediately after and can properly thank them for their participation, talk about how the event went, and make improvements for future events.

1 Hour Prior to Event

- If possible, open the event in “practice mode” to communicate and practice with your speakers without attendees arriving early.
- 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 event (intro, presentation, poll question, Q&A, wrap up, etc.) and who is responsible for what
- Send out a reminder to join to all attendees, speakers, and moderators.

15 Minutes Prior to Event

- 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-event slide/video with music.
- 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 Prior and Event Start

- 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 (if applicable)
- 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.

Increase Engagement

Virtual events 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 events and/or your member events.

During the Event

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:

- What made you want to attend this event?
- What do you hope to learn?
- What about your job keeps you up at night?

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.

Visuals

Using more visuals than you would in an in-person meeting keeps people engaged.

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 input

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 post-event 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 event, and talk about any challenges they experienced.

Attendees

Within two days of the event 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.

How to Create an Awards Celebration

Together, we have been pushed into an even more virtual world. By now, we realize almost all programming must be taken online, including your annual awards ceremony. [Recognizing members](#) remains an important element of engagement, so don’t skip your awards events — instead, go virtual.

While awards ceremonies might preferably take place in person, there are many benefits to moving online:

- No conference space needed!
- No catering needed!
- No travel needed! Almost everyone can attend.
- No printing or shipping needed!
- Easy recording—no need to hire a videographer!

Make sure your agenda includes timing, which will help you stay on schedule and on track. It can be helpful to have another officer or volunteer keep track of the agenda and provide queues if parts of the ceremony start running over.

Award Recipients

Let your recipients know what to expect and if there are any actions needed from them. (ex: provide a headshot or bio) Rehearse in advance! Most of all, make sure they feel special and recognized.

Marketing

Send invitations and reminders through email and social media and post to your website, as you normally would. Be sure to include detailed RSVP and login instructions—including the meeting ID or



password. It is also helpful to include instructions of how to download the software or app in advance.

One of the benefits of going virtual is that you can allow for last minute registrations. You can continue to invite people and send reminders the day of—or even an hour before—the event.

Engage the Audience

Here are a few ways to make your event exciting, interactive, and engaging:

- Invite a Prestigious keynote speaker
- Keep speeches short and to-the-point
 - If reading bios, keep them short as well
- Be candid and add humor, as appropriate
- Secure Multiple hosts to create more interaction and visual interest
- Encourage attendees to use the chat feature to congratulate and celebrate the awardees
- Plan small networking breakout sessions before for after the awards presentation
 - This gives everyone a chance to speak when they might not be able to in one large group.
- Encourage your attendees to dress up at home and enjoy a fancy dinner, as they would in person.
- Encourage live commenting/chat/polling
 - Ask the attendees to participate in some way every few minutes
 - What are you enjoying eating or drinking?
 - Where did you meet the award recipient?
 - How many years have you known the award recipient?
 - Bonus: Share a copy of the recording with the award recipients, so they have a chance to read the comments from their friends and colleagues.

Continue the Celebration

After the live ceremony, share the video on social media after the event! You can trim the recording to feature award winners on your social accounts, so they are given the extra exposure in front of their colleagues and friends.

Plus, you now have great marketing footage to promote next year's event!

Helpful Links

- [Planning a Hybrid Event? 4 Hybrid Event Format Ideas](#)
- [The Insider's Guide to Better Webinars](#)
- [Moderating a chat room](#)
- [The Ultimate Virtual Event Planning Checklist](#)
- [Defining Roles during Digital Events](#)
- [Virtual Event Staff Roles Defined & Staffing Tips](#)
- [New Roles Are Emerging for Virtual Events](#)
- [What Is Virtual Event AV Production?](#)
- [Zoom Online Event Consulting](#)