

DEPARTMENT VIRTUAL EVENT PLANNING TOOL KIT

PURPOSE

To provide guidance and resources to departments planning a virtual event that are not supported by CAS-Events and CAS-Marketing. Virtual events include many of the same elements as in-person events. However, virtual events focus on technology, content, and ease of use for the end user.

DETERMINING WHICH VIRTUAL PLATFORM TO USE WHEN PLANNING YOUR EVENT

USF supports the Microsoft Teams platform, Teams Live Events or Teams Meeting. Before deciding which platform works best for your event, please consider the following questions.

1. How much interaction do you desire with the audience?
2. Do you prefer a formal or informal setting for your event?

Listed below are the main differences between the Teams Live Event and Teams Meeting platforms. This information along with your content will help you finalize the design of your program.

TEAMS LIVE EVENT

- This platform enables video and meeting content delivery to a large online audience of up to 10,000+ attendees. Attendee Connection is encouraged through engaging content and meaningful questions and answer sessions using the chat feature.
- It allows one to many communications, where the host or moderator leads interactions with controlled audience participation.
- Benefits to using this platform include:
 - ✓ Live events are easily scheduled. Attendees are invited by sharing a custom access link.
 - ✓ Presenters can share their presentations and engage in meaningful Q&A sessions.
 - ✓ The Teams App allows attendees to watch the Live Event from a web browser, computer/tablet or phone.
 - ✓ Live Events are automatically recorded and can be shared post event for guests who were not able to attend.
 - ✓ The following options are selected when creating the event and can be adjusted based on the specific needs of your event. 1) Recording available to producers and presenters, 2) Recording available to attendees, 3) Captions, 4) Attendee engagement report and 5) Q&A. 6) Closed Captioning Feature IMPORTANT: You need to check the Q&A Box if you want audience participation via the Q&A box. You may deselect any of the above items unnecessary for your specific event. Post event, the Attendee Engagement Report and Q&A Report are available for download (lists all the questions asked during the event).
 - ✓ Screen limitation, 1 person or 1 person plus presentation visible at a time, updates coming soon from Microsoft, until then may need to consider use of Production Company.

TEAMS MEETING

- This format is best used for intimate groups with formal or informal interactions, and delivery to an audience up to 250 people. It encourages collaboration through audio, video, and screen sharing.
- It allows one-to-one or one-to-limited participant communications. A designated host or facilitator is still recommended for leading interactions and audience participation.
- Benefits to using this platform include:
 - ✓ Attendees may share their computer screen, create a whiteboard, and actively participate during the meeting by turning on the cameras and microphones.
 - ✓ The Teams App allows viewing from a web browser, computer/tablet or phone.
 - ✓ Teams Meetings can be recorded. **IMPORTANT:** At the beginning of the meeting, request permission to record from your attendees then select the “start recording” option.
 - ✓ Meeting organizers may schedule a Teams Meeting inviting attendees within USF and outside of USF.
 - ✓ **IMPORTANT:** Microsoft consistently updates and offers new features to the platform, please visit the link below for updated information:
https://support.microsoft.com/en-us/office/what-s-new-in-microsoft-teams-7f092a6d-c896-424c-b362-a472d5f105de#PickTab=Desktop_and_web

HELPFUL LINKS FROM MICROSOFT TO FURTHER YOUR UNDERSTANDING OF TEAMS LIVE EVENT

- Plan and Schedule a Teams Live Event: <https://support.microsoft.com/en-us/office/plan-and-schedule-a-live-event-f92363a0-6d98-46d2-bdd9-f2248075e502>
- Getting Started & Event Roles: https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a?ui=en-us&rs=en-us&ad=us#bkmk_roles
- Producer Capabilities: <https://support.microsoft.com/en-us/office/produce-a-live-event-using-teams-591bd694-121d-405c-b26d-730315e45a22>
- Presenter Capabilities: <https://support.microsoft.com/en-us/office/present-in-a-live-event-in-teams-d58fc9db-ff5b-4633-afb3-b4b2ddef6c0a>
- Join A Teams Meetings Training Video, plus additional training videos you may click through: <https://support.microsoft.com/en-us/office/join-a-teams-meeting-078e9868-f1aa-4414-8bb9-ee88e9236ee4?ui=en-us&rs=en-us&ad=us>
- Overview of Teams Live Events: <https://docs.microsoft.com/en-us/microsoftteams/teams-live-events/what-are-teams-live-events>
- Teams live event organizer checklist: <https://support.microsoft.com/en-us/office/teams-live-event-organizer-checklist-44a80886-0fd9-42e5-8e7c-836c798096f8#:~:text=%20Teams%20live%20event%20organizer%20checklist%20%201,to%20all%20your%20attendees%20as%20you...%20More%20>
- Best Practices for Producing a Teams Live Event: <https://support.microsoft.com/en-us/office/best-practices-for-producing-a-teams-live-event-e500370e-4dd1-4187-8b48-af10ef02cf42>



BEST PRACTICES TO ENHANCE THE EXPERIENCE FOR VIRTUAL EVENTS

- ✓ Keep sessions short and engaging. We recommend 20 to 30 minute presentations with a 20 to 30 minute Q&A for audience participation.
- ✓ Schedule breaks for events exceeding one hour. You can add 5, 10, or 15 minute breaks based on the length of your program.
- ✓ Incorporate surprise elements into your event to keep your audience's attention and fully engaged to prevent outside distractions. Be creative and have fun!
- ✓ Select an Event Emcee or Moderator to host your event, choose someone with a dynamic personality and excellent communication skills. May need to add a script for your Emcee, Moderator or Speaker (ie. opening and closing remarks, etc.).
- ✓ Provide clear and simple instructions for your attendees and presenters.
- ✓ Create an event Show Flow to share with your producers and presenters so everyone has a clear expectation of when and what will occur on the day of the event.
- ✓ Schedule a pre-event "test run" to talk thru the event Show Flow with your team on the platform you are using to produce the event, this can take 20 to 30 minutes.

CONTENT DRIVEN EVENTS

It may be more challenging to engage with your audience in a virtual event than an in-person one. Therefore, developing a content driven event is crucial where there are multiple distractions pulling the attention away from your attendees.

- ✓ Decide on the most important and beneficial information for your audience to hear or learn about, challenge them to think differently or ruminate on the subject matter.
- ✓ Create visually appealing slides to stimulate and keep your attendees' interest.
- ✓ Utilize a Moderator to emcee the entire event and lead the Q&A session.
- ✓ Allow enough time for audience Q&A and think of ways to address unanswered questions post event to keep the conversation going.
- ✓ Choose Speakers who are comfortable speaking to a virtual audience and share our Speaker Tips (see Additional Resources) to enrich the virtual experience.

END USER EXPERIENCE

To fully engage with the audience, it is important to make the process as easy as possible for the end user, the attendee. Here are some helpful tips to make the process easy:

- ✓ Develop an easy Registration process, if needed, for guests to register for the event like Qualtrics.
- ✓ Create or enhance an existing webpage (AKA Landing page) to share current event information.
- ✓ Make joining on the day of the event easy with a simple click of a button on your webpage or within the event invitation.
- ✓ Encourage the use of emoji's like the raise hand feature, thumbs up, laughter and heart when appropriate as well as the Chat Box to converse with attendees.
- ✓ Use the Q&A feature in a Teams Live Event or the chat in a Teams Meeting as another way to communicate with the attendees during the event by making announcements or sharing contact or upcoming event information.
- ✓ Communicate all event details to your attendees, overcommunicate when necessary.



- ✓ Include Attendee Tips on the event website that share helpful tips and steps on how use the Microsoft Teams Live Event or Teams Meeting platform (see Additional Resources).

BACKUP PLANS

Creating backup plans are important for the success of your event especially a virtual event because many variables are outside of your control. Being prepared for worst case scenarios can make a difference when, technical difficulties arise because you will need Plan B, C, D and E ready to go!

- ✓ Implement backup Speakers, Moderators, or anyone else involved in the event.
- ✓ Share the phone number with event access code with your Presenters and Attendees so they can continue to participate in the event if their internet stops working or they cannot join the link. (IMPORTANT: For a Live event, the presenter link and attendee link are different so be sure to share the correct link to the appropriate group)
- ✓ Collect a photo of each of your presenters in case they must phone into the event, you can share their photo on the screen while they speak.
- ✓ Gather contact information for the event producers and presenters to communicate offline if anyone experiences issues.
- ✓ Create backup event links for Teams Live events. (Please contact cas-events@usf.edu for further details and explanation on creating event backup links for Teams Live Events.)

****Think **K.I.S.S.** when planning your virtual event, **Keep It Simple, Simple******

GENERAL VIRTUAL EVENT TIMELINE

Virtual events consist of Pre-Event, During and Post Event planning. Use or customize the timeline below based on your actual event and event needs.

PRE-EVENT

6 PLUS MONTHS OUT

- Determine date, time and Microsoft platform for the event (**Be considerate of time zones when scheduling your speaker*)
- Establish clear goals and objectives and target audience for the event
- Develop a Virtual Event Concept:
 - Define and discuss team roles with all involved
 - Define specific deadline dates for timeline
 - Determine VIPs and/or honorees who will be invited to attend
 - Determine what Creative elements (auction, raffles, etc.) may be needed or visual cues needed online during the event
 - Establish how to promote the event using social media tools or influence
 - Decide if you want to provide SWAG items or giveaways
- Assemble your team, define everyone's roles (producer, presenter, participants, or attendees) and confirm their participation in the event. Be sure to set clear boundaries on who does what, how and when. NOTE: See Microsoft Links for defining the roles and capabilities of the Producer and Presenter.



- Budget – Create an event budget
- Determine your equipment needs to produce the event. NEEDS: reliable internet (hardwired preferred, with a speed of 10Mbps Upward and 10Mbps Downward, verify internet speed at speedtest.net), a computer with an internal or external webcam and microphone (headphones or headset). Producers on Live Events need a second monitor to deliver event presentation needs. Teams Meetings organizers or presenters also benefit from using two screens.
- Website (AKA Landing page) – Do you want to incorporate a webpage to house the event information? RECOMMENDATION: Shorten the Teams URL link for easier access to the event link. (Check with the CAS-CCE technology team on how to get a URL link shortened)
 - Create or update current department webpage and shortened URL
 - Determine Content needed to include on the webpage
 - Use the site to communicate with your attendees, ie. details of the event, ways to RSVP and tips to using the livestreaming platforms to ensure a friendly virtual experience for your attendees and presenters.
- Speaker
 - Share information with your speaker about the platform you are using and perform a technical audit of the equipment they will use during the event.
 - Identify your event speakers, collect contact information, and plan the agenda
 - Obtain and sign contract, request a Bio and photo of speaker for use in marketing materials, request approval to share recording of the event, if needed.
 - Determine presentation materials needed for the event (power point, etc.)

THREE TO FOUR MONTHS OUT

- Schedule Live Event or Teams Meeting
 - See links on how to schedule the event
 - IMPORTANT: Be sure to test all event links before sharing with attendees
- Add links to your webpage. NOTE: Create a shortened URL for the event link
- Discuss Attendee experience and ways to engage with your audience virtually
 - Enhancements include breaks or Live interactive experiences
 - Visual cues such as slides to highlight what is coming up or help introduce a speaker that includes their photo along with a mini bio.
- Develop your marketing plan and decide on promotional materials or visuals needed for on screen (logo, event description, hashtag, etc.) **MARKETING TEMPLATE RESOURCES:**
<https://usf.box.com/s/hx8u40kbnjinbwqlg7xmmallhrhaylfv>

TWO MONTHS OUT

- Agenda – to be finalized along with Speaker contracts, if not completed
- Define technical tools needed, set up space and support needs (Do you have all the equipment needed to virtually share the event? Where will presenters be sharing their information, from home or campus? What is the speaker’s background while on screen? Do you need to designate someone for technical support on the day of the event?)

- Registration, if needed
 - Set up and enable online registration, may use Qualtrics
 - Include link on webpage
 - Test links for easy attendee experience
- Begin promoting your event based on your marketing plan and schedule

ONE MONTH OUT

- Schedule Test Runs for Presenters (Test Runs should be held 1 to 2 weeks from event)
- Create and prepare backup plans for all speakers/presenters
- Create event Show Flow based on the agenda
- Communicate with your attendees all details about the event, how to RSVP and tips to using the livestreaming platforms to ensure a virtually friendly experience for everyone. SHARE: Attendee Tips or Speaker Tips. These can be visible on your webpage. Overcommunicate the details to make things as simple as possible for the end-user.

ONE TO TWO WEEKS OUT

- Rehearse event with the team: review expectations, responsibilities, and the event timeline with all involved, be sure to have copies of all presentations to test on the screen
- Email show flow to host, moderators, presenters (and back up participants) plus Speaker Tips, confirm event details including date, time, any event changes, arrival times, attire (if needed), etc. RECOMMENDATION: Send Show Flow one week out.
- Host Test Run: share how to communicate with presenters during the Live event, include back up plan instructions (phone number to call in)
- Collect talking points from each presenter for ease of transitions during live event, if available
- Final test of links for attendees, keynotes, or panelists at test event
- Verify number of registrations prior to event (NOTE: you can keep your registration open so attendees may continue to join on the day of the event)
- Review Budget and final payments expected post event
- Confirm back up plans and test all event links

1 TO 2 DAYS BEFORE THE EVENT

- Review and confirm all contact names with cell numbers and start times for staff and/or any vendors, address any last-minute changes
- Resend Show Flow or communicate last-minute changes to all involved

DURING

DAY OF EVENT

- Gather producers and presenters 20 to 30 minutes before event starts, check equipment and microphones with each presenter, check speedtest for web connection (speedtest.net), MUTE all mics at least 5 to 10 minutes before event goes Live

- Microsoft Live Events ONLY: Use Chat Box function to communicate between Producers and Presenters, send messages to remind them when they will go Live and UNMUTE their microphones before speaking
- Moderator handles the flow of the event (introducing speakers, Q&A, etc.) as well as keep the event moving along or needing to switch speakers if technical issues arise (examples: poor internet or camera malfunction).
- Produce event – trouble shoot as needed
- Implement Backup plans if anything goes offline

POST EVENT

- We encourage follow up communications with your attendees within 1 to 2 days post event. A thank you email where you include a recording of the Live event for those attendees who were not able to attend or those who may want to rewatch the event (*if permitted to share recording*).
- Send out a thank you note to your speaker along with a small gift for participation.
- Produce event reports and share stats with team, store collected data, if requested

ADDITIONAL RESOURCES

- Attendee Tips
- Speaker Tips for Teams Live Event or Teams Meetings
- Show Flow sample

These resources can be found in the Box file listed below. You are welcome to copy and customize these templates for your own use on your events.

<https://usf.box.com/s/z35qdu3ln14h7a1g95lmjrhlc22l8hj6>

THANK YOU

We hope these guidelines are useful when planning your own virtual event. If you have additional questions, please contact CAS-events@usf.edu. At times when we are not available, we are still happy to support our departments in creating meaningful and interactive virtual events.