

User's Guide

Hosting Successful Events

Apple products do them. Small businesses host them. Individual coaches put them on.

What are we talking about? Hosting successful events, whether virtually or in-person. In a world that thrives on connections and shared experiences, events hold a special place in our lives. Whether it's a captivating conference, a virtual get-together, or a thought-provoking seminar, events bring people together, foster collaboration, and create unforgettable memories. The impact of events is undeniable.

Over the past decade, the world has seen a significant shift towards virtual platforms. In 2021 alone, the global virtual events market was estimated to be worth \$78 billion, and it is projected to reach a staggering \$774 billion by 2030. This exponential growth isn't surprising. Online events, when done right, can reach a wider audience and offer unparalleled convenience.

Just like an in-person event, the virtual environment also comes with its unique challenges. Organizing an event isn't just about switching on your webcam and talking into the void. It requires thoughtful planning, seamless integration of technology, and an in-depth understanding of your virtual audience's needs.

This guide is aimed at equipping you with the necessary tools and knowledge to successfully plan, host, and execute events, no matter the scale or purpose. By the end of this guide, you will have a solid foundation to deliver events, either online or in person, that not only meet but exceed your audience's expectations, fostering deeper connections and delivering impactful content.

Let's get started.

Defining the Purpose of Your Event

The first step in planning any successful online event is defining its purpose. Without a clear understanding of why you're hosting the event and what you hope to achieve, it's easy to lose sight of what's important, leading to an event that fails to meet your objectives or resonate with your audience.

A clearly defined purpose will be your compass, guiding every decision you make, from the event format and content to the marketing strategy and follow-up activities. Whether you're aiming to launch a product, share knowledge, raise funds, or network, keep this goal in mind during your planning process.

Start by asking, "What do I want to achieve by hosting this event?" Your goals should be Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). For instance, rather than having a vague goal like "increase brand awareness", a SMART goal would

be "Attract 500 attendees to our event from our target industry and increase newsletter subscriptions by 20% within a week after the event."

After identifying your goals, it's essential to understand your virtual audience.

- Who are they?
- What are their interests, needs, and online behaviors?
- What time zones do they reside in?

Knowing your audience aids in tailoring your event's content and format to their preferences, making the event more engaging and beneficial for them. For instance, if you're targeting working professionals, consider hosting your event at a time that won't clash with typical office hours.

Knowing who your audience is helps you develop your marketing strategy. This helps you reach your potential attendees more effectively. With the vast array of online tools and analytics available, gathering this information is more accessible than ever.

So how can you find who your audience is?

Consider conducting surveys or polls before the event to gather insights about your audience. Their responses can help you tailor your event to meet their needs and preferences, ensuring it's an engaging and valuable experience.

Social media engagement and data from past events can also provide invaluable insights into what your audience values most in an online event.

By defining the purpose of your event and understanding your audience you'll set a strong foundation through the planning. It gives direction to your event, aligns your team towards common objectives, and ensures your event resonates with your attendees, setting you on the path to online event success.

Planning Your Event

Now that you know who your audience is and the purpose of your event, you can start with the planning. Planning is the backbone of any successful event, particularly in the online space where technical considerations, audience engagement, and data security become even more significant.

Develop a Comprehensive Strategy

A well-thought-out strategy is key to a successful online event. Start by breaking down your event into manageable tasks. Assign roles and responsibilities to your team members.

Key elements to consider in your strategy include:

- **Event Format.** Decide whether your event will be live, pre-recorded, or a mix of both. Each format has its pros and cons and will depend on your event's purpose and audience.
- **Content Planning.** Define your event's content, including presentations, interactive sessions, Q&As, etc. Think about how to make the content engaging and interactive for your online audience.
- **Audience Engagement.** Plan how you'll engage your audience. This could include polls, quizzes, breakout sessions, or live chat features.

Allocate a Budget for Digital Resources

An online event typically requires less budget than a physical event, but you'll still need to consider costs related to:

- **Platform.** There might be a fee for using certain online event platforms, especially for larger events.
- **Technical Equipment.** Depending on your event's nature, you may need to invest in high-quality audio and video equipment.
- **Marketing.** Allocate a budget for digital marketing, including social media ads, email marketing, and other promotional activities.
- **Staffing.** You may need to hire additional staff for event management, tech support, and content creation.

Establish a Timeline

An event timeline is the visual representation of what needs to happen and when. It helps you track progress and ensures that all tasks are completed on time and, hopefully, in the right order.

It's a good idea to use project management tools like Trello or Asana to create your timeline. Break down the planning process into key stages: pre-event, during the event, and post-event. Each stage should have specific tasks, deadlines, and assigned team members. Include everything from the initial planning stages to the post-event follow-up.

You don't have to be an expert organizer to host an event. But you do have to plan. Planning an online event requires a strategic approach, a defined budget, and a well-established timeline. With these steps, you can ensure your event runs smoothly, effectively meets your objectives, and offers a memorable experience to your attendees.

Next, we'll look at what goes into designing your event.

Designing Your Event

The next stage of planning your event is about the visual and interactive side. Designing an event involves making important decisions about the theme, platform, and the virtual environment. Each of these factors plays a significant role in how your attendees experience the event.

Select a Compelling Theme

The theme of your event is the main idea that ties everything together. It sets the content of your event, the visual aesthetics, and can even influence the choice of speakers or activities. When selecting a theme, consider your event's purpose and your audience's interests. The theme should resonate with them and align with your event's objectives.

For inspiration, look at successful events within your industry, or consider current trends or issues relevant to your audience. Your theme could be as simple as aligning with your company's brand colors and logo or as specific as 'Retro Revival,' 'Future of Tech,' 'Sustainability Summit,' or 'Holiday Extravaganza,' depending on the nature of your event. The key is to ensure your theme resonates with your audience and enhances the event's core message. Remember, a well-chosen theme can make your event stand out in the sea of standard Zoom meetings.

Choose a Suitable Platform

Next up is selecting your online platform, the venue for your virtual event. The right platform is crucial in delivering your event seamlessly and providing a positive user experience.

There's a plethora of options out there - from Zoom to Google Teams, Hopin, Webex, and beyond. Each platform comes with its own set of features and user interfaces. Your choice should align with your event's format, size, interactivity level, and, of course, your budget.

When choosing a platform, consider the following:

1. *User Experience* - The platform should be easy to use and navigate for both you and your attendees.
2. *Interactive Features* - Features like live chats, polls, and breakout rooms can enhance attendee engagement.
3. *Technical Requirements* - Ensure the platform can handle your estimated number of attendees and has good video and audio quality.
4. *Customer Support* - Ideally, choose a platform with reliable customer support to help you resolve any technical issues quickly.

Planning the Virtual Environment and Engagement Tools

The virtual environment you create should facilitate interaction and engagement, making the event more valuable and memorable for your attendees.

1. *Visual Design*: Use your event's theme to guide the visual design of your online event space. This includes the branding, color schemes, graphics, and slide designs.
2. *Networking Opportunities*: Include features like virtual networking rooms, attendee chat, Q&A sessions, or breakout rooms to facilitate networking and interaction.
3. *Interactive Tools*: Tools like polls, quizzes, or interactive whiteboards can make your event more engaging and interactive.

Remember, the more engaging and interactive your event, the more memorable it will be for your attendees. This increases the chances of them attending future events and recommending your event to others. As you design your event, always keep your audience's needs and preferences in mind to ensure a positive and valuable experience for all.

Next comes the technical side of planning.

Technical and Operational Logistics

The scene is set, the budget is on track and the theme is chosen. Now comes the technical side. Managing the technical and operational logistics of your event is critical to its success. This includes choosing the right technology stack, managing audiovisual needs, and ensuring data security.

Choose the Right Technology Stack

The technology stack refers to the combination of software and hardware used to deliver your online event. This could include the event platform, registration software, email marketing tools, and more.

1. *Compatibility*: Ensure all components of your technology stack integrate well together. This will make managing your event much easier and provide a smoother experience for attendees.
2. *Scalability*: Choose technology that can handle your event size and can scale up if needed.
3. *Reliability*: Test your tech stack thoroughly before the event to ensure everything works as expected.

Outline Your Audiovisual Needs

Quality audio and video are crucial for an engaging online event.

1. Invest in good quality microphones, cameras, and lighting.
2. Consider hiring a professional to handle the AV production to ensure a high-quality event.
3. Conduct several dry runs to ensure all speakers are comfortable with the technology and that their audio and video are clear.
4. Plan how you will incorporate live chats, Q&A sessions, polling, and any other interactive elements into your event.

Safeguard Attendee Data

Data security is a serious consideration for events. Your attendees need to be able to log into your event easily, but unauthorized access must be prevented.

Ensure you understand how to generate and distribute access codes or links for your event. Consider if a waiting room feature is necessary to control attendee access.

Data security is equally crucial. With cyber threats on the rise, it's essential to ensure your chosen platform complies with data protection regulations and employs robust security measures. Communicate clearly to your attendees about how their data will be used and protected.

By effectively managing your technical and operational logistics, you're ensuring a smooth and secure experience for your attendees. This can enhance their trust in your organization and increase the chances of them attending future events.

Another way to host a smooth event is by having the right service partners.

Selecting Partners and Service Providers

In the realm of events, having dependable partners and service providers can be the difference between success and failure. Whether it's for technical support, content creation, marketing, or other services, these partnerships can enhance the quality of your event.

Identify Potential Vendors for Support

There are numerous services you may need support for, including:

1. *Technical Support:* This includes providers who can help with managing the online platform, handling AV requirements, troubleshooting technical issues during the event, etc.
2. *Content Creation:* You may need help with creating presentations, promotional materials, videos, or other event content.

3. *Marketing Services*: This could include SEO, social media marketing, email marketing, or other promotional activities.

When identifying potential vendors, consider their experience, portfolio, customer reviews, and pricing. Ask for recommendations from peers or look for vendors with experience in your industry or type of event.

Selecting the right partners and service providers can take your online event to the next level. With the right team, along with marketing and promotion, you can ensure a successful and memorable event.

Event Marketing and Promotion

Marketing and promotion are essential to driving attendance at your event. With the right strategies, you can reach a wider audience, generate interest, and increase event registrations.

Craft a Robust Digital Marketing Strategy

A comprehensive digital marketing strategy is the first step to promoting your online event. It should include:

1. **Have a Website or Landing Page.** Create a dedicated page for your event on your website or a standalone landing page. This page should contain all the essential details about the event and a clear call-to-action (CTA) for registration.
2. **Use SEO.** Optimize your event page for search engines to reach a wider audience. Use relevant keywords in your content, meta tags, and alt text.
3. **Take Advantage of Content Marketing.** Use blogs, webinars, infographics, or other forms of content to provide value to your audience and generate interest in your event.
4. **Invest in Paid Ads.** Consider using paid ads on Google, LinkedIn, Facebook, or other platforms to reach a targeted audience.

Use Social Media for Promotion

Social media platforms can be highly effective in spreading the word about your event.

- Choose platforms where your target audience is most active. This could be LinkedIn for professional events, Instagram for lifestyle or creative events, and so forth.
- Create a unique event hashtag and encourage attendees and speakers to use it.
- Use compelling visuals, like teaser videos or infographics, to capture attention and provide information.
- Partner with influencers who can help promote your event to their followers.

Utilize Email Marketing for Digital Invitations

Email remains one of the most effective channels for event promotion.

Craft a series of emails to send to your potential attendees. These might include an initial announcement, reminders, a last-chance email, and a day-of email with access information.

Your digital invitations should be enticing, informative, and professional. There are numerous online tools available to create visually appealing and customized email invitations.

Remember, online event marketing requires strategic planning, creativity, and persistence. But with the right approach, you can generate buzz around your event, attract more attendees, and ensure a successful event.

Registration and Ticketing for Online Events

As we delve further into our online event planning process, we come to a critical stage that bridges the gap between potential attendees and actual participants - registration and ticketing. This process may not seem as thrilling as theme selection or marketing, but it's just as essential. Let's dive into setting up an online registration system, managing online ticket sales, and implementing virtual event check-in procedures. And yes, we'll see how these relate to their offline counterparts.

Setting Up an Online Registration System

In offline events, attendees might fill out a paper form or make a phone call to register. But in the digital world, there are online registration systems that streamline this process beautifully.

These systems, such as Eventbrite, Cvent, or your event platform's built-in registration feature, allow attendees to register at their convenience. They can fill out a form, select their ticket, and even pay online if there's a fee involved.

When setting up your online registration system, keep the process straightforward. Minimize the number of fields to fill and ensure the system is mobile-friendly, as many attendees will register using their phones. And just as you would confirm a phone or in-person registration, send an immediate confirmation email after online registration.

While the tools and processes for registration and ticketing may differ between online and offline events, the basic principles remain the same. It's all about making the process as easy and clear as possible for your attendees.

Let's look at executing next.

Executing Your Event

After all the brainstorming, planning, and preparation, it's finally showtime. Executing your event successfully involves diligent preparation, effective management, and the flexibility to manage unexpected issues.

Final Preparations and System Checks

The final run-up to your event should involve thorough system checks. This includes:

- All speakers, performers, and presenters should conduct a final rehearsal with the actual hardware and software that will be used for the event. This can help identify and fix any technical issues in advance.
- Ensure that you and your presenters have a stable and fast internet connection. If possible, have a backup connection ready.
- Do a final check of all presentations, videos, graphics, and other event content to ensure everything is correct and ready to go.
- Confirm the event schedule and any last-minute details with all participants, including speakers, vendors, and staff.

On the day of the event, your primary role is to manage the event flow effectively. This involves:

1. Timeliness

Start the event on time and ensure that each segment sticks to the schedule as closely as possible.

2. Engagement

Use polls, Q&A sessions, chat functions, or other interactive features to engage your audience.

3. Moderation

Have a moderator to introduce speakers, facilitate discussions, and keep the event moving smoothly.

No matter how well you prepare, unexpected issues may arise. Here are a few tips to handle them:

Ensure you have a technical support team on hand who can quickly address any tech-related problems. Be ready with a backup plan if your internet connection fails or a speaker drops out unexpectedly.

Communicate any issues to your audience as they occur, explain how they're being addressed, and thank attendees for their patience. Remember, transparency helps maintain trust and goodwill even when things don't go as planned.

Legal and Safety Considerations for Online Events

Comply with legal requirements, implement necessary digital safety measures, and plan for virtual emergencies to ensure a safe and secure online event experience.

Online events bring with them a unique set of legal and safety considerations that event organizers must address to ensure a safe and secure experience for all attendees.

First, it's critical to comply with all applicable laws and regulations. These can range from data privacy regulations like GDPR or CCPA, which govern how you collect and handle attendee data, to copyright laws, which may come into play if you're sharing copyrighted material during your event.

You'll also need to be aware of laws related to accessibility, such as the Americans with Disabilities Act (ADA), which require you to make your event accessible to people with disabilities. This could involve providing closed captions for presentations or ensuring your event platform is compatible with screen readers.

Digital safety is another key concern. With the rise in cyber threats, it's important to implement stringent security measures to protect your event and your attendees' information. This includes using a secure and reliable event platform, requiring strong passwords for attendees, and having a plan in place to respond to any potential security breaches.

Executing your online event successfully requires careful planning, a keen eye on the event flow, and the agility to manage unexpected situations. With these elements in place, you'll be well on your way to a successful event.

Now that the event's over let's look at what to do next.

Post-Online Event Activities

After the conclusion of your online event, your work is not over yet. Post-event activities play a crucial role in measuring the event's success and maintaining the relationship with your attendees.

Collecting Feedback

Feedback is critical for understanding how your event was received and what can be improved for future editions. Here are some ways to gather it:

1. Send out a post-event survey to all attendees, asking them about their experiences. Tools like SurveyMonkey or Google Forms can help you create and distribute these surveys.
2. Monitor your event's hashtag and your brand mentions on social media platforms to gather feedback and gauge attendee sentiment.
3. Encourage attendees to share their thoughts via email, especially if they have more detailed feedback or suggestions.

You also want to measure the success of the event. Measuring success depends on the goals you set at the beginning. Success can be measured in various ways, from the number of attendees and engagement levels to the achievement of your event objectives. Analyze data from your event platform, registration system, and even social media to evaluate your event's performance.

Finally, your momentum with post-event follow-ups. Send a thank-you email to attendees, provide access to event resources, or share a highlight reel. Stay engaged with your audience, laying the groundwork for future events.

By prioritizing post-event activities, you can gather valuable insights, measure your success accurately, and keep your attendees engaged, increasing the chances they'll return for future events.

In-Person Events: A Note on the Unique Experience

While this guide primarily focuses on planning successful online events, we recognize the enduring value and distinctive nature of in-person gatherings. In-person events offer a tangible sense of connection, immersion, and shared energy that is difficult to replicate virtually.

Here are a few key considerations for planning in-person events:

1. In-person events allow attendees to experience the event environment with all their senses. Consider how you can create visually stunning displays, incorporate interactive elements, and curate memorable sensory experiences.
2. In-person events offer unparalleled opportunities for spontaneous conversations, networking, and relationship-building. Encourage attendees to interact, provide dedicated networking spaces, and organize activities that foster meaningful connections.
3. When organizing in-person events, logistics play a vital role. Consider factors such as venue selection, event flow, crowd management, and on-site amenities to ensure a smooth and enjoyable experience for attendees.
4. In-person events require a robust support system, including event staff, volunteers, and security personnel. Focus on providing clear directions, accessible information, and excellent on-site support to address any attendee needs or concerns.

Remember, while virtual events offer convenience and global reach, in-person events provide an unparalleled opportunity for personal interactions and immersive experiences. Adapt the strategies and principles outlined in this guide to suit the specific dynamics of your in-person event and create an unforgettable experience for your attendees.

Tools and Templates

To better help you plan and host your event more smoothly, we've included some tools and templates along with this guide.

1. Speaker Information Sheet Template
2. Hosting Your Event Checklist
3. Planning Your Event Worksheet
4. Event Budget Template
5. Online Platform Resources list

What To Do Next

As we conclude our guide to hosting successful events, let's revisit our journey. We've navigated through defining the purpose of the event, planning, designing, executing, and even post-event activities. We've shown you the importance of meticulous planning, audience engagement, marketing strategies, and technical preparedness. Additionally, we've shed light on critical aspects like registration and ticketing, as well as legal and safety considerations.

Each phase carries unique importance, contributing to the overall success of your event. But remember, successful event planning isn't just about getting each phase right. It's about blending these elements to create a memorable experience that resonates with your attendees and meets your objectives.

With each event you plan, you'll learn, adapt, and improve. So, go ahead and dive into the dynamic world of online event planning with confidence and enthusiasm. Good luck, and here's to hosting fantastic online events that leave your attendees waiting for more!