

**From Assessment
to Production**

*Key Considerations Before
Jumping on the Hybrid Bandwagon*

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Participant Introductions

In the chat box, please share:

What question did you bring to today's session on **hybrid meetings**?



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Zoom Refresher

- **View:** Toggle between speaker vs. gallery view
- **Mute:** Mute yourself when not speaking and state your name before speaking
- **Video:** Enable your video to the extent possible
- **Chat:** Engage with one another via “Chat” and direct messages to “Everyone”
- **Reactions:** Utilize “Reactions” as non-verbal communication
- **Rename:** Rename your tile with first name and organization



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Housekeeping

- We're scheduled to be together until 5 p.m. ET
- We're creating a road map of questions for you to consider and to discuss with your team
- Take care of your needs and those in your care
- We'll be sharing our resources with you following the session (e.g., PowerPoint)
- You're welcome to take screenshots of content
- This is intended to be an interactive session
- We encourage your questions, insights and resources



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Agenda

- **Introduction and context**
- **Assessment**
- **Key considerations**
 - Environment
 - Experience
 - Engagement
 - Content
 - Connectivity
 - Production
- **Wrap-up**

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Getting on the Same Page



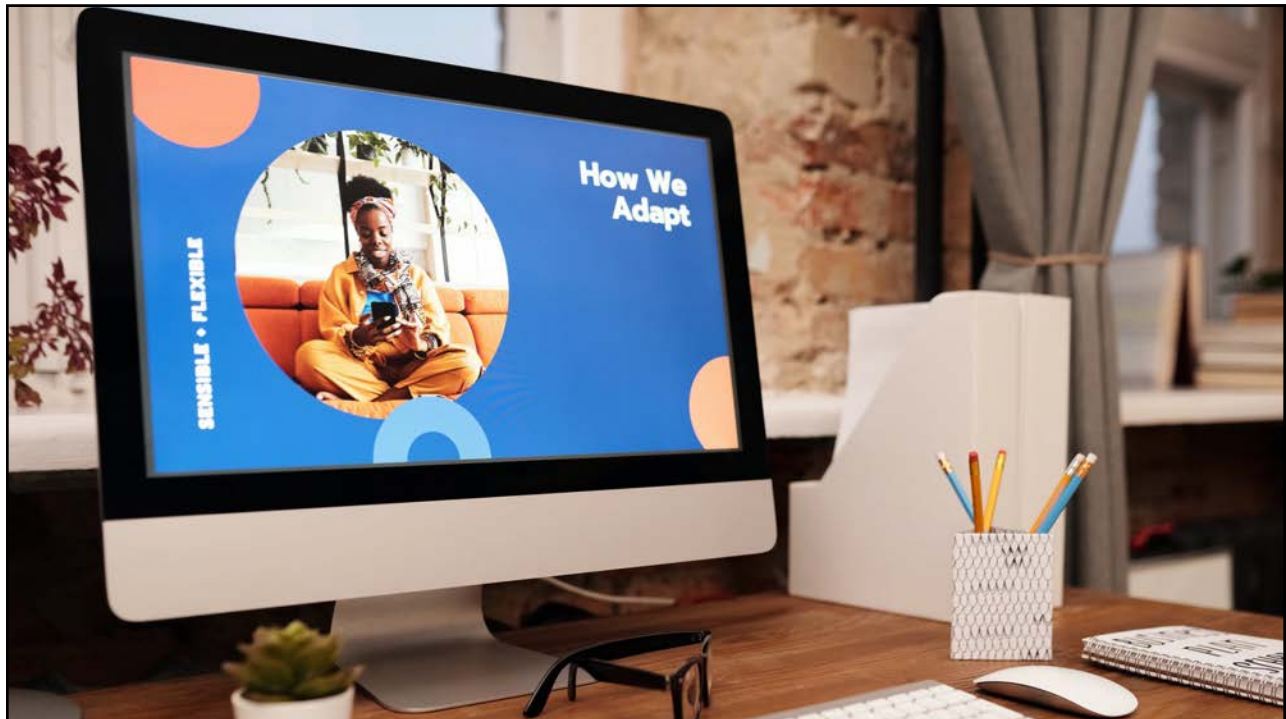
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Current Landscape

- “Open” vs. “closed” states
- Mask mandates (or not)
- Vaccine philosophy and availability
- Spiking cases
- Travel restrictions
- Reduced professional development budgets
- Personal comfort with travel and face-to-face events

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Different Hybrid Approaches

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A Cautionary Tale


- There's no silver bullet
- This is a strategy session – To hybrid or not to hybrid?
- We've found this approach successful with clients
- These are the questions you should be asking
- This session is not laden with data
- This is not a 147-item checklist
- Everyone's situation will be unique

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Who?

- Pre-pandemic, who was the target audience for this event? (Be as specific as possible.)
- For this hybrid event, are there any intentional adjustments to the target audience? (Be as specific as possible.)
- Return to this question throughout the process as the what, when, where, why and how is further assessed.

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What?

- Pre-pandemic, what was the typical agenda for this program?
- For this hybrid event, what elements are a must have?
- What elements can you let go?

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When?

- Pre-pandemic, what is the typical date and time for this program?
- For this hybrid event, what is the anticipated date, maximum duration and approximate timing?
- Will the date and time differ at all for the in-person vs. remote audience?

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Where?

- Pre-pandemic, where would this event typically be held?
- Pre-pandemic, what in conjunction with activities would you typically host with this program?
- Where would these in conjunction with activities typically be held?

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Where?

- For this hybrid event, where do you anticipate the in-person component will be held?
- For this hybrid event, what virtual platform/production partner do you anticipate using?
- For this hybrid event, what in conjunction with activities do you intend to host?
- Where do you intend to host them?

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Why?

- Pre-pandemic, what was the attendee (or sponsor/exhibitor) value proposition for hosting this program?
- Pre-pandemic, did this program have longevity (e.g., recorded content) following the live event?
- Pre-pandemic, what was your organization's primary purpose for hosting this event?

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Why?

- For this hybrid event, what's the new attendee value proposition for hosting this program?
- Does this hybrid event need longevity (e.g., recorded content) following the live event?
- For this hybrid event, what's your organization's primary purpose for hosting this program?

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How?

- Pre-pandemic, who were the key internal players planning this event?
- What were their roles in bringing this program to life?
- Pre-pandemic, who were the key external stakeholders (e.g., sponsors/exhibitors, production company) who supported this program and what roles did they play?

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How?

- For this hybrid event, have any of the internal key players and their roles changed? If so, note the changes.
- For this hybrid event, have any of the external stakeholders and their roles changed? If so, note the changes.

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Goals?

- Pre-pandemic, what were the following goals for this event:
 - Numbers (e.g., registration, attendance, membership conversion, sponsors, exhibitors, other)
 - Dollars (e.g., attendee, sponsor and exhibitor revenue; expenses; pricing strategy/categories)
 - Goals (e.g., learning, networking, other)

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Goals?

- For this hybrid event, how have goals changed in each category?
- How do you anticipate adapting sponsors/exhibitors to the hybrid event (e.g., revenue, deliverables)?
- How will your pricing strategy/categories changes as a result of the hybrid event?

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Milestones?

- Pre-pandemic, what are your traditional milestone dates?
 - Agenda finalized?
 - Registration open?
 - Marketing materials?
 - Speakers secured?
- For the hybrid event, what are your new milestone dates?

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Miscellaneous?

- Pre-pandemic, what other things did we just “know” about this program?
- For this hybrid event, what do we know about the tolerance of prospective attendees relative to virtual events?
- What about their comfort level with technology?
- What is top-of-mind for prospective attendees right now (e.g., specific education, networking activities)?

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Miscellaneous?

- What have we learned from other events over the last year?
- Examine evaluation data, attendee behaviors and the like.
- For this hybrid event, what else represents a “given” or a “previously made decision” it would be helpful to record?

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Trying to copy and paste a pre-pandemic approach?

Hanging on to too much from the past?

Adjusting facts and figures in a vacuum?

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key consideration #1
environment

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**How will you maximize both
the in-person and digital
environment?**

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In-Person Environment

- Can people meet in person?
- What is the max capacity?
- What are the safety precautions being put in place?
- What limitations must you navigate?
- How will your attendee experience be impacted?
- What new opportunities exist in-person?

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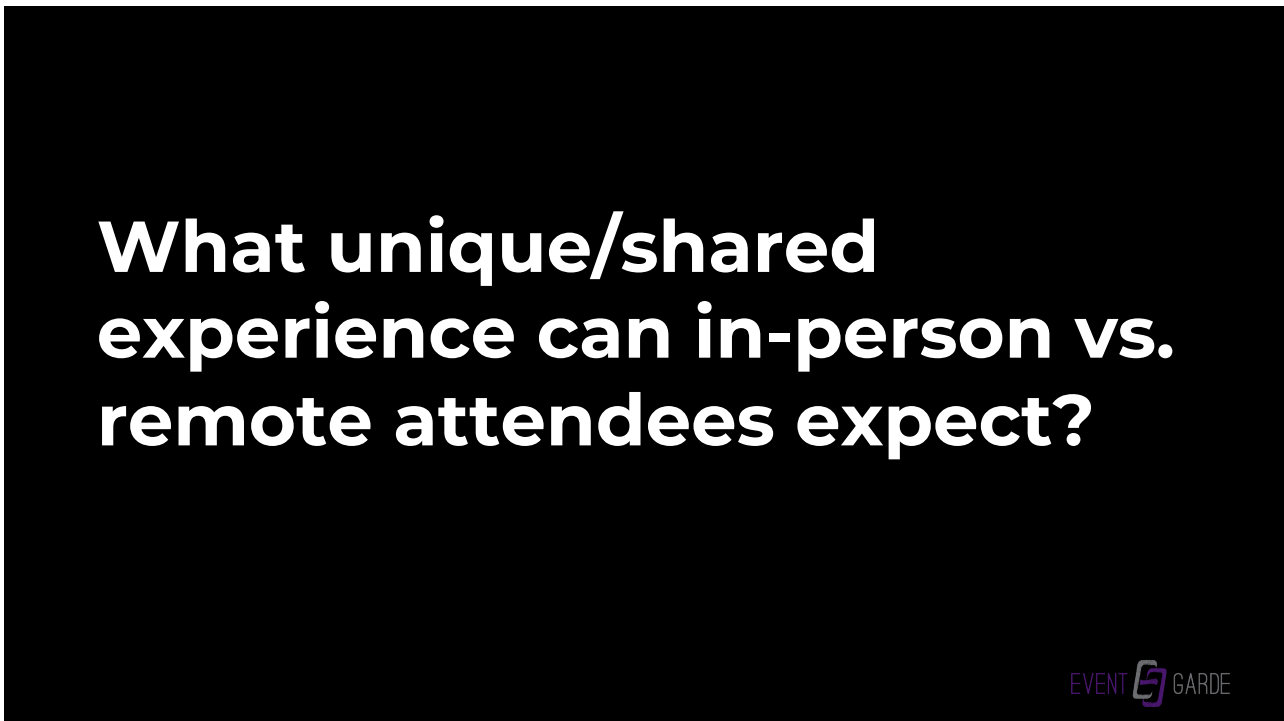
Digital Environment

- What are the tech skills of your target audience?
- What platforms are they already familiar with?
- What features do they value most?
- Are you looking to keep the digital experience contained in one platform?
- Will the experience be accessible on desktop, tablet and/or mobile device?
- Are there equity concerns with either the equipment or the level of internet access required?

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In-Person Attendees

- Live exhibits in a physical exhibit hall
- Food functions
- Social functions (e.g., receptions)
- Tours/offsite activities
- Sponsor/exhibitor giveaways
- Badges/ribbons
- Event programs and other collateral
- Sponsor logo placement and recognition onsite

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Remote Attendees

- Pre-recorded/live sessions with moderated chat
- Pre-recorded/live pop-up entertainment
- Interactive slide sharing, tech tools and breakout rooms
- Pre-event mailing of giveaways from sponsors/exhibitors
- Virtual exhibits and 1:1 chat rooms with sponsors
- Attendee landing page with access to all sessions/rooms
- Sponsor logo placement and recognition virtually
- Social activities (e.g., virtual happy hour, digital games)

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Shared Experience

- Keynote/general sessions
- Session polling
- Speaker Q&A
- Roundtables/communities of practice
- Breakout sessions
- Silent auctions
- Annual/business meetings
- Award/recognition events

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How will you create robust engagement opportunities among attendees?

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Audiences & Format

- Review your target audiences (e.g., attendees, sponsors, exhibitors, speakers)
- Map your desired connections
 - Attendee to attendee
 - Attendee to speaker
 - Attendee to sponsor/exhibitor
- Identify the format each of these connections will take
 - Attendee to attendee — 1:1 networking and small group (i.e., 3-5 people)
 - Attendee to sponsor/exhibitor — 1:1 networking and small group (i.e., 3-5 people)
 - Attendee to speakers — large group opportunities

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Touchpoints

- Determine the ideal number of touchpoints for each engagement opportunity
 - Attendee to attendee
 - **Example Goal: Each attendee should engage 1:1 with 5 other attendees and should have at least 2 small group opportunities.**
 - Attendee to sponsor/exhibitor
 - **Example Goal: Each attendee should visit 1:1 with at least 3 sponsors/exhibitors and should have small group opportunities at a minimum of 5 booths.**
 - Attendee to speakers
 - **Example Goal: Each attendee should have the option to attend 2 keynotes and 4 breakouts.**

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Delivery & Evaluation

- Determine how these engagement opportunities will be delivered:
 - In-person — What is safe to do in-person?
 - Digitally — What does the platform allow?
 - Shared — How will you navigate the cross-over?
- Determine how you will evaluate the quantity and quality of engagement during your hybrid event

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What strategy will you employ to identify and deliver high-quality content?

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Content

- Revisit the learning needs/goals of your target audience
- What are the continuing education needs/requirements for your target audience?
- Determine the session types that will help you achieve these goals:
 - Keynotes/general sessions
 - Concurrent sessions
 - Communities of practice/roundtables
 - Other
- Carefully examine the timing of each; duration may be shorter to accommodate remote audiences

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Content

- What format (e.g., Ted Talk, lecture) and how much engagement (e.g., polling, breakout rooms) do you anticipate in each session?
- What other expectations do you have of speakers (e.g., rehearsal, slides, resources)?
- Will you utilize a call for presentations (i.e., speaker develops the session) or a call for presenters (i.e., session learning objectives are pre-determined)?
- Are there expectations for any pre- or post-event materials (e.g., reading a blog post or watching a video)?
- Will content be delivered live, recorded and published after?
- Will any content be pre-recorded?

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Content

- How much content will be delivered synchronously vs. asynchronously?
- How will you answer attendee questions during sessions (e.g., chat moderator, Q&A function)?
- Are presenters willing to travel? Can they deliver remotely?
- How will the in-person vs. remote attendee experience be impacted?
- Will you plan to review content in advance and provide speakers with feedback prior to delivery?
- How will speaker sessions be evaluated, feedback aggregated, and outcomes shared with speakers following the event?

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How will you navigate the connectivity concerns of both the venue and the remote audience?

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Venue

- Does the venue have reliable and ample hard-wired internet services for streaming out?
- What backup plans exist for down internet service?
- Does the equipment being used connect via hard-wired Internet or WiFi?
- What connectivity limitations exist?
- What is the cost of this connectivity and backup connectivity?
- Do you need to renegotiate any pre-pandemic contracts that might now be financially unattainable?

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In-Person Audience

- What is the cost of everyone onsite to have internet so they can engage with remote attendees?
- What technologies/devices will they need, have and/or get provided to allow for this engagement?
- Are you considering other passive viewing options onsite (e.g., video display boards with scrolling comments/questions from the remote audience)?
- Does forcing engagement between in-person and remote audiences take away from or improve the overall experience?



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Remote Audience

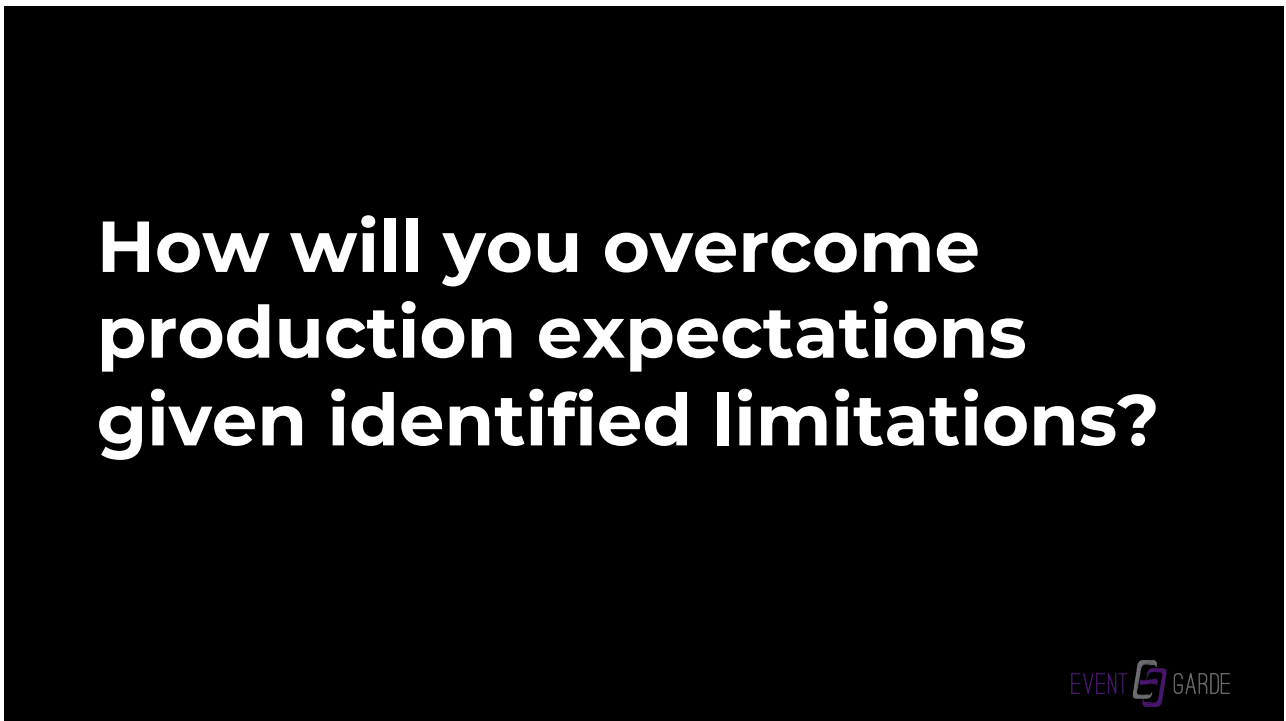
- Do people joining from home have the required technology to access the platform(s)?
- Are there any internet bandwidth concerns at their home/office?
- Will they be able to engage with both video (e.g., reliable camera) and audio?
- How will connection issues be supported?
- Are equity concerns being considered as they relate to your audience?



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Expectations

- Is your audience “cool” with a low production event?
- Have their expectations changed since March 2020 (up or down)?
- Does your audience expect a high level of production value?

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Budget

- What is your typical budget for the equivalent in-person event?
- What is your adjusted budget for this hybrid event?

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Team/Labor

- Is your team able to meet the demands of both virtual and in-person events?
- Are they clear on how they'll bridge the gap between the two groups?
- Will you need to partner with a production company?
- What labor is minimally needed to pull off this event successfully?
- Will you need to engage union labor or security?

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Equipment

- What equipment will be needed in-person (e.g., computers, cameras, audio, monitors, lighting, etc.)?
- How does the equipment onsite allow for presenters and audiences to interact with one another?
- What is the recommended equipment list for the remote audience?
 - Is that recommendation something that is easily accessible to your remote attendees?
 - How will their equipment haves/have-nots change their experience? Is this equitable?

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Space/Diagrams

- How will equipment be set up in-person to safely allow for ingress/egress?
- What setup will allow for optimal viewing for your in-person and remote audiences?
- How many and what styles of sets will be required (e.g., lectern, news desk, talk show)?
- Where will the production team be setup?
- How will attendee seating be adjusted to allow for social distancing?

Rehearsals/Support

- How many rehearsals will you require in advance?
- Who will coordinate/lead them?
- What will you cover/test in each rehearsal?
- How will you support attendees/speakers with technical difficulties?
- How will you handle speakers who do not participate in a rehearsal?

Platform Setup

- Who will gather all of the necessary information to setup the platform?
- Who will be responsible for designing platform graphics?
- Who will take responsibility for setting up the platform?
- Who will test the platform once it's setup?
- Who will edit the platform content once inputted?

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Let's Wrap Things Up

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Resources



 **Blog Posts:**
eventgarde.com/blog


 **Live Events:**
eventgarde.com/events

 **On-Demand Learning:**
eventgarde.com/learning




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Meet Our Team:
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