Effective Events Checklist

The following is a checklist of important items you’ll want to review before, during, and after your online event.

# Planning

Type of event/goals for the event

* All Hands event
* Continuing education
* Sales or demonstration
* Interactive or one way sharing of information

How do you plan to market the event?

* Will you be sending the invitations out through WebEx or will you be using an outside email service?
* If planning to use WebEx to send invitations you will be able to send no more than 10,000 emails per event
* Will you use sourceID to gauge the effectiveness of your event marketing efforts?
* How will you advertise for this event? Facebook, LinkedIn, Twitter, email, calls, webpage, newsletters, blogs, etc.

Will you require registration prior to joining the event?

* Is there any information you would like to gather prior to attendees joining the event? This will also gather information from those that may plan to attendee but are unable to make it.
* Will you need to approve those that plan to attend or will you automatically approve registrants?

What do you have planned for your presentation materials?

* If you plan to share any videos allow additional time to test the video in advance.
* PowerPoint, PDF, or other documents. Test animations and transitions.
* Web pages that we will need to share
* Applications sharing

Will webcams be used and if so, how many? Will you need to display more than one at a time?

Approximately how many attendees do you expect?

* There may be a cap on your site

Will you be holding a Q&A session?

* Do you plan to unmute attendee lines and allow them to ask a live question?

# Rehearsal session

Ensure that you have access to the panelist’s link for the Live Event.

Presenters and panelists should be encouraged to use High Speed Broadband Internet – and advised Wireless network – is **NOT Recommended**

Have an “attendee” there to test the experience

Review the content

* If you plan to share any videos - test this.
* PowerPoint, PDF, or other documents. Test animations and transitions.
* Web pages
* Applications sharing

Review the roles and expectations for the event

* Host: start the session, assign roles
* Panelists: monitor Q&A
* Presenters: present their material

# The Start of the Pre-conference

Log in with your host computer. Reclaim the “Host Role” if applicable.

Start the “Practice Session.”

* If you have lobby slides, ensure that they are loaded prior to starting the practice session.

Upload the PPT document(s).

Connect to the teleconference; greet any presenters that are on the line.

Check the “Event” option at the top-left of the WebEx session and select “Options.” Disable any features based on previous discussions. (Typically: “Raise Hand,” “Attention Tracking,” and “Video/Thumbnails.” This will vary based on the preferences for your event.)

Click the “Participant” option at the top-left of the WebEx session and select “Privileges” on the list and choose the “Attendees” option. Enable “Automatically approve requests for teleconference.” Disable all chat options for the attendees (unless client has asked for this feature to remain available).

# The Pre-conference:

Conduct final review the flow of the presentation with the presenters.

* Clarify housekeeping introduction details.
* Clarify pronunciation of the name of the first person speaking immediately after the producer’s housekeeping.
* Clarify the order of presenters and Q&A moderator (as well as polling coordinator, if necessary)

Test microphone audio quality with each speaker.

 Review how to control the slides with each presenter.

Review the Q&A process. Give examples (whether the Q&A panel will be used or the ‘Raise Hand’ option will be utilized to facilitate live Q&A.)

Ask if the presenters would like to start on time, or if they would like to have a 2 minute delay.

Deliver a 2 minute standby message to the audience in the lobby (2 minutes prior to the agreed start time)

Prompt the presenters before ending the practice session.

Wait until after your introduction to start the Network Based Recording.

# In Event

Introduce the event

**Sample introduction script:**

Good morning/ afternoon/ evening! Welcome to “***Insert event Name***” . Thank you for taking the time to attend. We have some great content, but before we get to it I have a few housekeeping items I want to share.

During the presentation, all participants will be in a listen-only mode.

There will be a Q&A session at the end of the call using the questions submitted using the Q&A feature.

If you have a question during the presentation, please submit by clicking on the Q&A tab, located on the right-hand side of your screen. Simply type your question into the dialog box at the bottom of the screen and click the Send button. Please be sure to address your questions to all panelists.

If you are running in full screen meeting display there is a floating toolbar in the lower right side of your screen. Look for a “?” icon and click on it. This will display the Q&A Panel.

 As a reminder, this presentation is being recorded, and it we will send the link to all our registered attendees.

Your Speaker for today is “***Insert Name and title***”.

I would now like to turn the call over to “**Name**”, “***Name***”please go ahead.

Monitor the chat and/ or the Q&A panels

Run any polls, sharing the results with the audience as relevant

Send the post event survey

# Post-Event

Save the Q&A transcript, polling questions, and/or chat

Pull the Post-Event reports (when available) and analyze the information