Digital Event Strategist

Lesson 1: Digital Event Strategic Planning

LEARNER OUTCOMES:

- Identify the differences among a Live, Simu live and On Demand session or event.
- Review a variety of event types and strategies to best align events with the right technology.
- Explore the types of events that are better-suited for self-service platforms vs. full-service platforms.

Presented by
Debi Scholar, GLP, GTP, CMM, CMP, SSGB, CTE, CTT, CBST, DES

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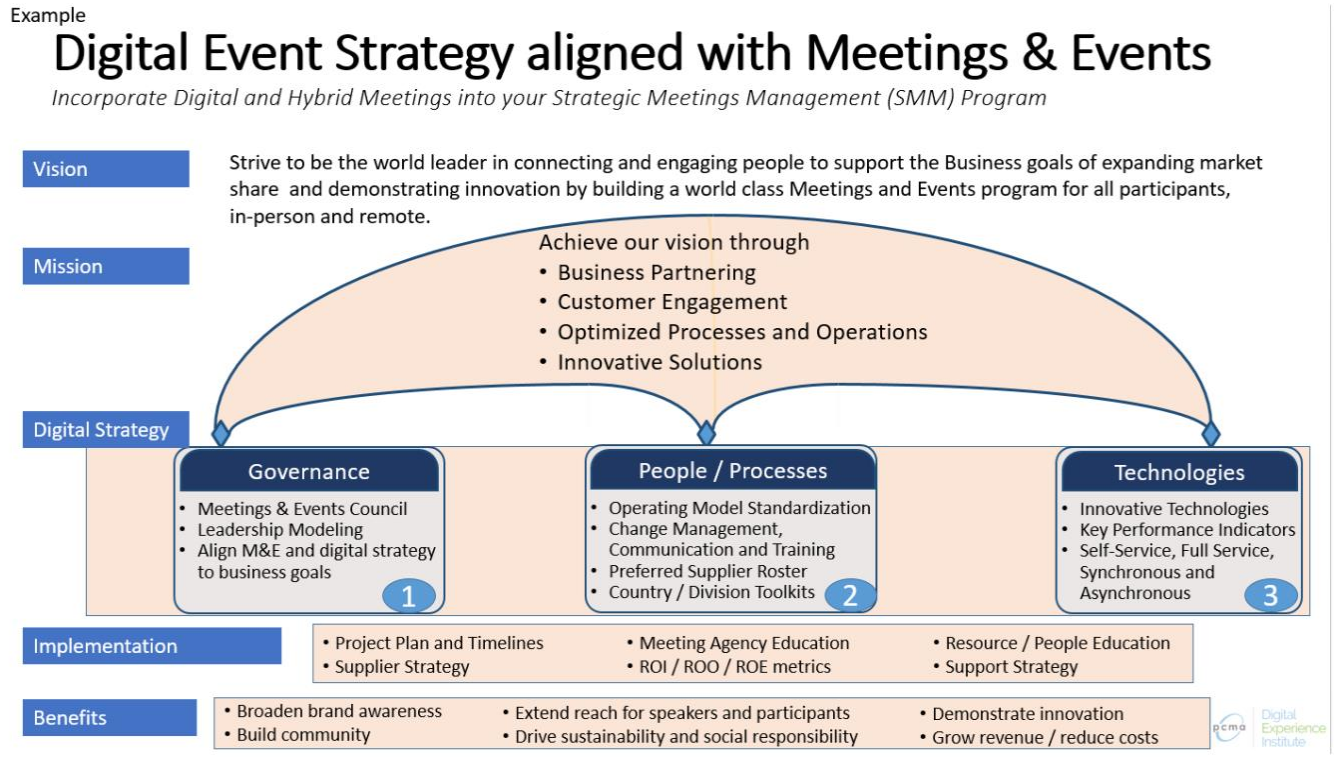
BUILDING DIGITAL INTO YOUR MEETING STRATEGY

INCORPORATING DIGITAL EVENTS INTO YOUR MEETING & EVENT STRATEGY

It's an exciting time in the digital events area with so many technologies, however, we have to put together the right strategy to be successful and show our successes in a measurable way.

Why is a one-page digital strategy articulation map important?

- We no longer look at things on an event by event basis
- What does your 3-5 year plan look like? Not only for your digital event but your entire organization's event strategy.



Key areas to articulate:

- Vision & Mission
  - Align with your organization goals
  - Integrate with your strategy for training, meetings and conventions
  - Covers in-person as well as the digital events
- Digital Strategy
  - How will you achieve it?
  - Do you need a governance model that brings stakeholders together?
  - What are you going to do about people, process and technologies?
- Implementation
  - What is the resource model?
  - Support strategy
  - Supplier strategy

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    - Project plan and timelines - What can we accomplish this year, next year and five years down the road?
- Benefits
    - Broaden awareness of product or service
    - Build community
    - Expand reach
    - Drive sustainability and social responsibility
    - Demonstrate innovation
    - Grow revenue/reduce costs

BUILDING YOUR STRATEGY

Do you have a 3-5 year digital strategy?
A digital meetings and events project charter will help you organize your thoughts.

Example

Project Charter Template

Digital Meetings & Events Project Charter

Project Name	Digital / Hybrid Meetings	**Scope**	Global, All Divisions
Project Leader	[Name]	**Sponsor**	Meetings Council

Title/description

Digital / Hybrid meetings incorporated into all Meeting Types (Marketing, Training, Customer, Exhibits, Leadership, etc.)

Scope-Define the Project

- Digital / Hybrid Meetings for internal business meetings including brand team meetings, general business meetings, training, etc.; for external meetings such as Customer Meetings, Conferences, etc.
- If applicable, define revenue streams from digital and hybrid
- All Divisions; all Countries

Measure-As Is vs. Future

- Return on Investment, Return on Objective, Return on Engagement
- Spend (Meetings, Events, Training, Travel, etc.)
- Participant and Speaker originating locations; identify opportunity to leverage additional speakers and attendance from other countries, virtually
- Other metrics by meeting type may be required

Deliverables (strategy, operations)

- Division and Country Toolkit includes:
  - How to measure success (ROI, ROO, ROE)
  - Governance structure, policies
  - Resources / Operations (people and processes)
  - Preferred supplier roster for each meeting type Technologies available, along with negotiated rate cards
  - Quick Reference Guides
  - Training for Planners, Trainers, Speakers, etc.
  - Change Management Plans (communications,

Key project milestones/activities (Link to project plan)

Milestone/activity	Deadline
• Align technology and suppliers to Use Cases by meeting type (internal, external, congresses)	[insert]
• Finalize education and toolkits for each meeting type	

Benefits Expected

- Adoption to digital meetings & events will continue to gain momentum and result in increased engagement, greater opportunities to use worldwide subject matter experts, ability to demonstrate innovation, and reduced costs for participants and possibly the organization.

Key issues/risks

- Adoption to digital meetings
- Cultural acceptance to digital events in some countries
- Country bandwidth and cultural acceptance
- Compliance / legal concerns

Next Steps/Actions Notes

- Continue to align project teams; provide ongoing communications
- Develop configurations based on Use Cases; align right technology providers with Use Cases; engage Procurement for strategic sourcing
- Develop toolkit(s) based on meeting type

- Scope - define the project
- Measure - current vs. future
- Deliverables
- Key project milestones/activities (project plan)
- Benefits expected
- Key risks and issues
- Next steps

ORGANIZE STAKEHOLDERS

Bring your stakeholders along on your journey! If they help you build it, they will come.

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Who are your stakeholders?

- Marketing
- Sales
- Meetings/Travel
- IT
- Procurement
- Finance

Listen! So you can create a project charter and vision that represents the entire organization.

Who are the "do-ers" that will help you achieve success? Build your dream team.

- Meetings & events manager/lead
- IT/digital support manager
- Training manager
- Procurement manager

Align leads with supporting work streams

- Marketing and sales
- IT/digital
- Meetings, travel and training
- Procurement
- Change management/communications

NOTES:

BUILDING TECHNICAL CAPABILITIES

Match Meeting Types to Technologies

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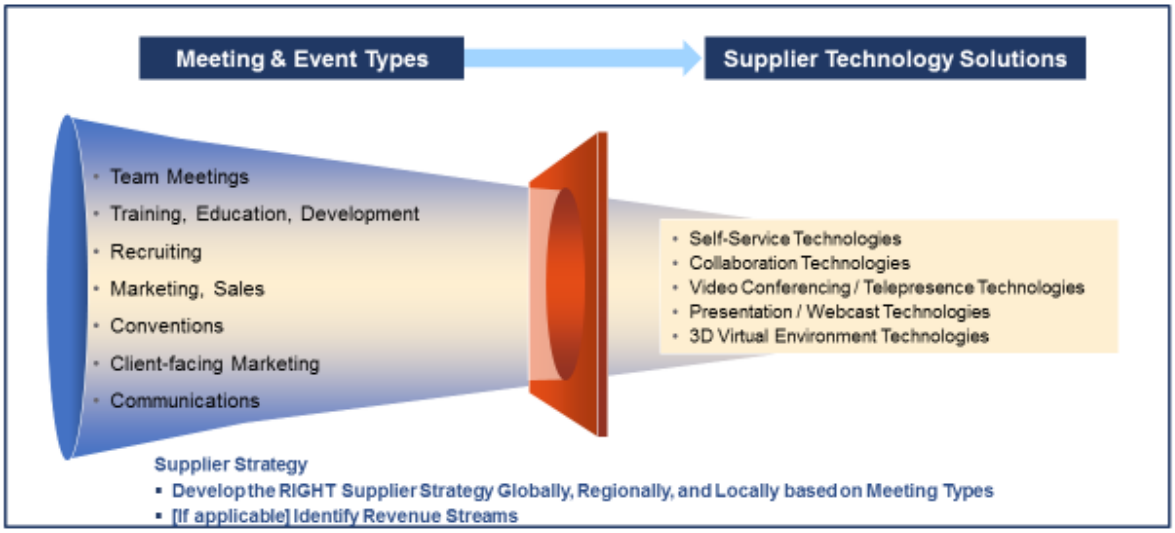
Strategy: Match Meeting Types to Technologies



Develop the right supplier strategy globally, regionally and locally based on your meeting types.

Build a program strategy around the five (5) As:

1. Any meeting type
2. Anytime
3. Anywhere
4. Any device
5. Any language

Does the meeting require a presentation or collaboration? Or both?

Presentation

- Presenters (one or more) address attendees
- Typically a one-way dialogue, sometimes two-way

Collaboration

- Collaboration among many presenters or attendees
    - Team meeting
    - Recruiting session

Select the right technologies for your meeting type based on collaboration vs. presentation.

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Strategy: Select the Right Technologies

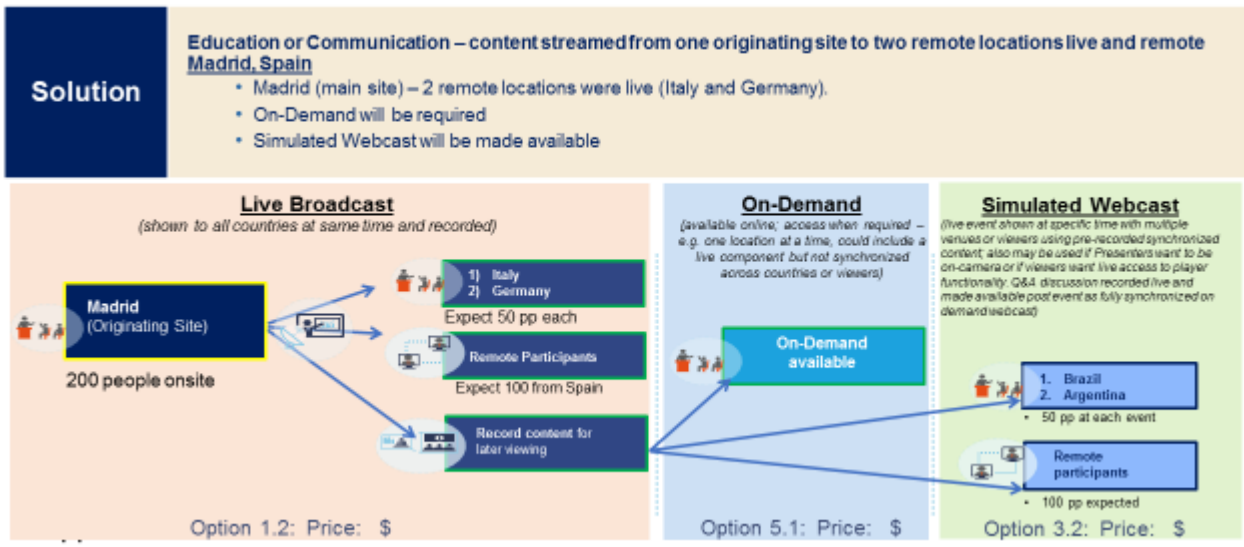
Meeting Type	Collaboration / Presentation	Service Provider
Team Meetings	Collaboration	Usually Self-Service using common tools
Training, Education	Collaboration with ability to use virtual break-out rooms, trainer back-channels, etc.	Self-Service or Supplier-Serviced using common tools
Recruiting	Collaboration but may have unique requirements for asynchronous uploads for initial interview questions	Self-Service or Video Conferencing / TelePresence
Marketing, Sales, Conventions	Presentation, Exhibits, Collaboration	Supplier-Serviced, e.g. Webcasts, Virtual Exhibits and Symposia
Communications	Collaboration and Presentation	Supplier-Serviced Town Halls, etc.
Ancillary engagement (e.g. social media, self-service live video streams, etc.)	Collaboration and Presentation	Self-Service or Supplier-Serviced

Meetings, Conventions, and Events may combine multiple technologies and services e.g. a) engagement through social media, b) webcast, c) Twitter, d) Periscope, e) perpetual on-demand environment

It's possible to combine multiple technologies and various services to meet your program strategy needs.

A variety of solutions can align with your digital event's needs.

For example:
Educational meeting in Madrid, Spain
200 on-site attendees
Broadcast to two remote sites with 50 attendees each
Record content for on-demand viewing



Communicating the options and suppliers to your stakeholders

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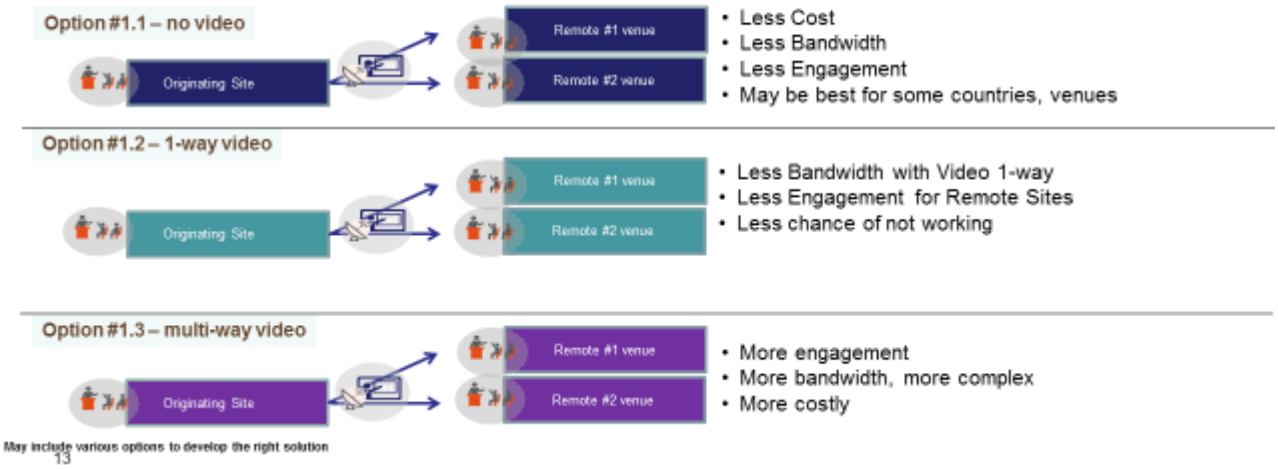
- Identify 2-5 options per meeting type
- Price out the options using your preferred meeting providers
- Encourage innovative approaches

Strategy: Offer Options with Simple Pricing

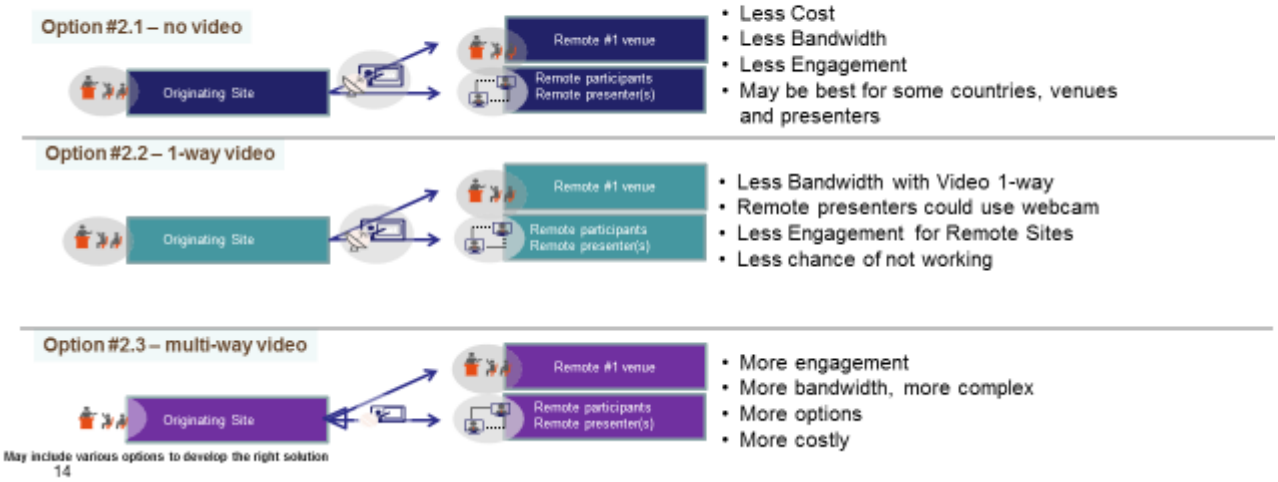
Hybrid Configurations

1. **Live** meeting originating in one location with one or several remote locations (**no** individual **remote** presenters or participants)



Hybrid Configurations

2. **Live** meeting originating in one location with one or several remote locations and **remote** participants; possibility of **remote** presenter(s))



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Hybrid Configurations

3. **Pre-Recorded ("simulated live" or "simulive")** originating from Streaming Supplier to one or several remote locations and **remote** participants; possibility of **live or remote** presenters during agenda

Option #3.1 – no video

- Unedited or Edited Recording streamed to Remote Venue(s)
- Recording may be accessed through URL or Portal
- Less costly without video for onsite

Option #3.2 – 1-way video

- Same as above except remote participants will have live experience with video as part of agenda streamed to them

Option #3.3 – multi-way video

- Same as above except if 2 or more remote venues, each location has camera
- More costly

15

Virtual Configurations

4. **All Virtual** originating from studio or remote presenters to remote participants

Option #4.1 – Speakers in Studio(s)

- Live Presenters may be in one or more Production Studios
- Video live broadcast/streaming or slides with static picture of presenter(s)
- Quality production will improve output and experience

Option #4.2 – Speakers in Studio(s) or Remote

- Same as above with remote presenters
- Record either 4.1 or 4.2 for on-demand replay

On-Demand Configurations (Perpetual Environment)

5. **Virtual, On-Demand** content for all remote participants

Option #5.1 – On-Demand 24/7

- Edit Content for improved quality
- Portal options available
- Questions can be asked and responded to within a reasonable amount of time

Option #5.2 – On-Demand 24/7 with virtual, scheduled live session

- Live virtual session can be scheduled periodically for those participants who attend the on-demand sessions
- Remote presenters may be in one or more Production Studios or Remote and present via Audio and/or Webcam

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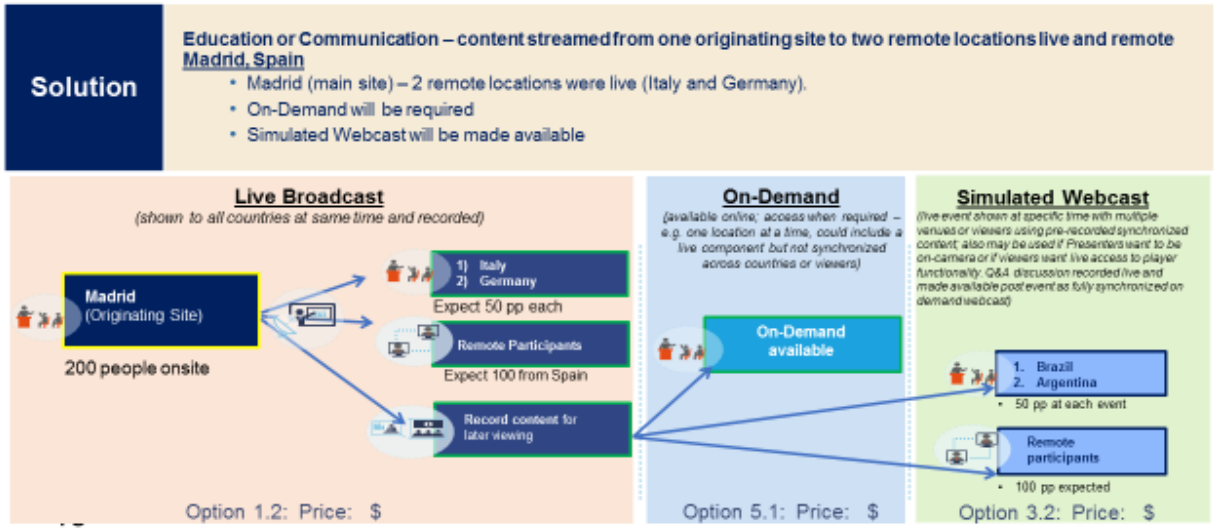

Configuration Options:

1. Hybrid - Live meeting originating in one location with one or several remote locations (NO individual remote presenters or participants)
    1. No video
    2. One-way video
    3. Multi-way video
2. Hybrid - Live meeting originating in one location with one or several remote locations AND remote participants, possibility of remote presenters
    1. No video
    2. One-way video
    3. Multi-way video
3. Hybrid - Pre-recorded ("simulated live" or simulive")
    1. No video
    2. One-way video
    3. Multi-way video
4. All Virtual
    1. Speaker in studio(s)
    2. Speakers in studio(s) or remote
5. On-Demand (Perpetual Environments)
    1. On-Demand 24/7
    2. On-Demand 24/7 with virtual, scheduled live session

Using the different meeting types and configurations and digital event providers, you can pull together a digital event strategy for any meeting type using the right suppliers in the right location for the right services.

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BUILDING THE RIGHT RESOURCE MODEL

What are the different resources you may need for one or meeting types in your digital event strategy?
Will you buy the services you need from one supplier or multiple?
If multiple suppliers, who will oversee and manage the whole project?

Strategy: Identify your Resource Requirements

Design a Strategy – Decouple suppliers or Combine suppliers based on need (e.g. hybrid, all virtual, etc.)

Meeting Management
- Project management; oversight of all suppliers
- Source venue; may be agency to select other suppliers including virtual / digital
- Pre-planning, onsite Implementation
- Attendee management, budget, meeting apps
- Post-meeting analysis from all suppliers

Creative or Content Agency
- Program development and consulting
- Speaker management
- Creative (invitations, communications, engagement, virtual booths, etc.)
- Writers, agenda management, rehearsals

Virtual / Digital Event Agency
- Video conferencing, streaming
- Virtual booths, environments
- Codecs (or AV supplier)
- Engineers, Producers
- Meeting applications, provisioned iPads, etc.
- Post-production edits

Audio Visual / On Site Production
- In room AV, e.g. microphones, computers, screens, pipe/drape, cameras, wireless clickers to advance slides, speaker phones, etc
- Video codecs for event are often supplied by AV supplier for the virtual supplier
- AV technicians

Exhibits / Booths
- Virtual and / or virtual booths for convention or virtual environment
- Booth design and build
- Drayage, storage, support

Portal / Archive Platform
- Portal / website that contains links to content repositories
- Enterprise video content management where the URL links to streaming
- Content Distribution Network (CDN)

Oversight of the suppliers may be provided by the Meeting Management Agency, Project Manager, or Virtual Meeting Planner / Producer

Digital Meeting Planner
- Consults with requester
- Receives request, adds to calendar
- May act as project manager
- Budgets, approvals, selection of suppliers, teams with in-person meeting planners if it is a separate team
- Understands the goals, objectives, and may talk through the possible answers for "45 Questions to Ask" briefing document
- Prepare communications, "save the dates" and manages attendees
- Prepares risk mitigation strategy
- Manages pre-event, during-event, and post-event activities
- Data analysis and reporting of logistics strategy

Digital Content Designer
- Establishes requirements and confirms target audience
- Identifies all ROI / ROO / ROE requirements and how to capture the metrics
- Designs storyboarding of digital event, synchronous and asynchronous
- Presents benchmarking data from other industries
- Part of creative team
- Identifies creative ways to engage with participants in-person and digitally before, during and after the event
- Debrief with all team members on successes and improvements
- Data analysis and reporting of content strategy

Procurement
- Teams with Education, Development, IT, Meetings, Travel, and other stakeholders to design Digital Strategy Program
- Owns supplier strategy for cross-divisional, worldwide, long-term digital program
- Negotiates contracts, KPIs, SLAs, and leads quarterly Business Review meetings

IT
- Provides technical guidance during supplier selection process
- Teams with all relevant stakeholders to support supplier strategy
- May provide support for self-service tools used within infrastructure
- Aligns with supplier strategy

Oversight of the suppliers may be provided by the Meeting Management Agency, Project Manager, or Virtual Meeting Planner / Producer

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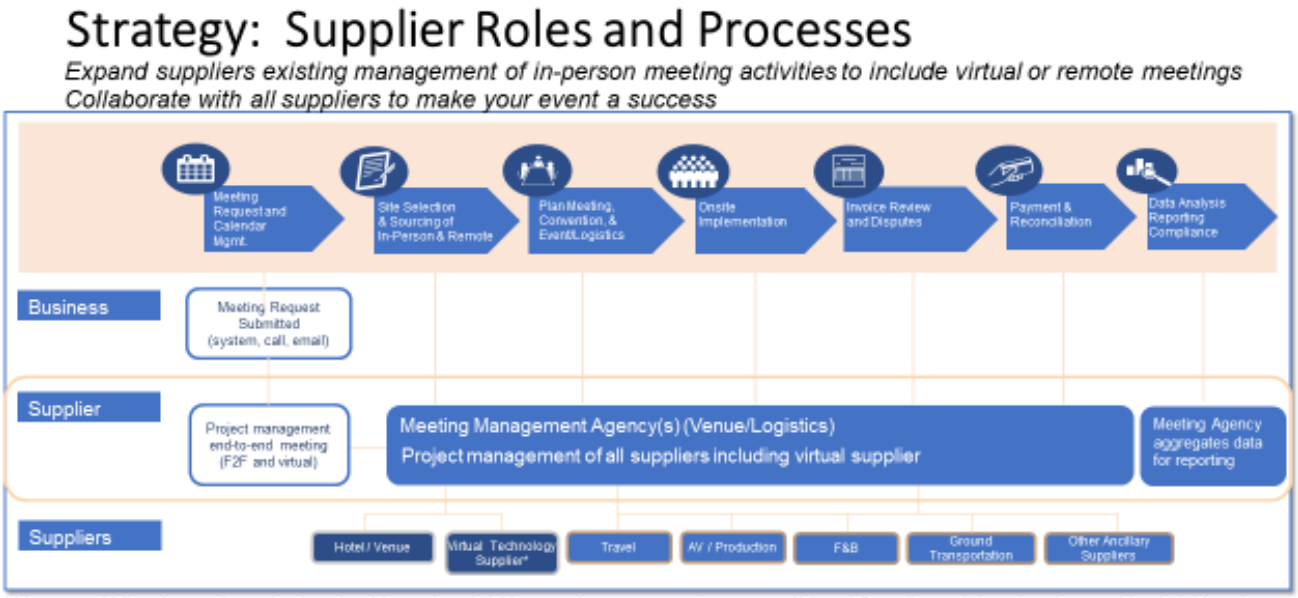
PROCESSES

- How do you build the processes for all of the activities required for your digital event?
- Who is going to oversee the end to end process?
- Which suppliers need to be involved?



GETTING STAKEHOLDER BUY-IN

Communicate the benefits of your digital event to build adoption.
What's in it for your organization? What drives that stakeholder?

Try one of these scripts to guide your conversation.

Preference - "Many associates (or customers) often prefer virtual meetings because it allows them to remain in their offices, retain productivity, and align with work/life balance and travel."

Reduce costs - "A digital or hybrid meeting will provide you with an opportunity to see, hear, and talk with each other, and share information while saving the organization. Savings are recognized by reducing travel and meeting costs; cost avoidance is recognized by reaching more attendees. We have experts and technologies that will help you transition your face-to-face meetings into a successful digital meeting."

Reach more attendees - "A digital or hybrid meeting gives you the opportunity to communicate with more people around the world quickly and consistently."

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Compete within the industry/be innovative - "Digital and hybrid meetings are used by other associations (or companies) and other industries as innovative solutions and as part of their digital transformation."

Sustainability - "Digital and hybrid meetings reduce our carbon emissions impact by reducing our travel."

PRICING STRATEGIES & SELECTION CRITERIA

Should you RFP for one event or a one year contract that spans several events? 3-5 years to reduce costs?
How will you price that strategy? How will you select the suppliers?

- Decouple/unbundle meeting logistics from virtual suppliers
- Ask for itemized pricing for:
    - Technology/equipment
    - Production
    - Creative
    - Resources/engineers/producers
    - Registration/communication/reporting
    - Portal/URLs/archives
    - Editing/add-on meetings (i.e., simulive)

Identify the best pricing method:

- Rate per the event, day, hour
- Rate per person
- Rate per month (i.e., archiving)
- Rater per invited guest
- Pass through costs

Build toolkits to help make others in your organization more self-sufficient when it comes to your digital event best practices, including:

- Meeting types and options, include visuals and pictures
- Suppliers and functionality
- Pricing/rate cards
- Pre and post meeting asynchronous and synchronous activities
- Savings methodologies
- Case studies/examples
- FAQs
- Contacts, resources, links to regulatory and legal parameters

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45 QUESTIONS TO ASK WHEN PLANNING A DIGITAL EVENT

What type of virtual or hybrid meeting do you want to create?
Then talk to the requester to really understand the goals, objectives, and the experience they want to create.

Basic Meeting Questions
1. When is the meeting? (Some meetings require hours to set up, some require months to plan)
2. What type of meeting is it? What is the Use Case?
3. What do you want to say about the meeting after the participants attend?
4. How will the success be measured?
5. What is your budget?

Presenter / Speaker Questions
6. Who are the presenters? (External? Internal staff?)
7. Where will the speakers be located? (in office? Or remote? What countries?)
8. What languages are required?
9. How many speakers are expected to present?
10. Do presenters / speakers require training to be able to present (on content or technology?); Will the PowerPoint be joined together with other presentations?

Experience Questions
11. What type of virtual or hybrid meeting do you want to create? (Collaboration? presentation?)
12. Will video (live or pre-recorded) be used?
13. One way or two way audio?
14. Do you want participants to be able to communicate with each other?
15. Do you want other functionality? (E.g. polling, webcams, screen sharing, white boarding, chat, etc.) How will online users and people in the hotel or venue audience ask questions? Through App only? (If there is a meeting app) What if they raise their hand? How will that information get pushed to other hotels and online users?
16. What is the duration of the meeting? (Can it be chunked into shorter sessions?)
17. Is this meeting part of a series?
What type of branding / theming will be used?

Security / Compliance Considerations
18. Recording of content / discoverability / archive
Client's approval of delivery method (do they have to agree to be on camera? Show speakers only?)
19. Meeting content rules (what is allowable on camera and in archive?)
20. Data dissemination rules
21. Intellectual capital rules
22. Copyright acceptance disclaimer, repeat onscreen, slides copyrighted
23. Data privacy (e.g. collecting data for registration)
24. Participants and local country requirements

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Participant Questions
25. Who are the participants? (Internal? External?)
26. Where will the participants be located? (In office? Or remote? What countries?)
27. How many participants are expected to attend?
28. What languages are required?
29. How will we invite the participants?
30. Will registration be required to attend the virtual meeting? (Secured? Unsecured?)

Venue Questions
31. Where will the speaker(s) be located?
32. Does the venue have the appropriate bandwidth based on the supplier's recommendations?
33. Is it dedicated bandwidth? (Both to upload and download?)
34. Is wired available? Or only wireless?
35. How much will connectivity cost? Improve it?

Technology Questions
36. What equipment will be used by the attendees? (E.g. computer, tablet, phone)
37. Do the attendees need any additional equipment? (E.g. webcam, headsets, other)
38. What does your interface/display look like for the user? May we see examples?
39. Are there firewalls that may restrict access? What type of security is required? E.g. passwords to access site, etc.
40. What support needed? *May be answered by supplier* - (creative director, producer, event manager, communications, technical support)
41. Does technology need to integrate with other technologies? (E.g. Content Distribution Network, SalesForce, Starcite, Cvent, etc.)

Content Questions
42. Is content already developed that can be repurposed? Or what needs to be developed? (E.g. invitations, reminders, testing of the interface with attendees memos, accreditation, disclaimers, video transcripts, abstracts, other)
43. What format is the content in? (Content may require storyboarding for engagement, different method of delivery, etc.)

Reporting Questions
44. What type of reporting is necessary? (E.g. participants joined, when and how long were they engaged, poll questions asked / answered, survey pre and post, satisfaction ratings, contributions by uploads / downloads, etc.)
45. Does reporting need to be exported to another tool? (E.g. SalesForce, Cvent, Lanyon's Starcite, Business Intelligence tool, etc.)

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