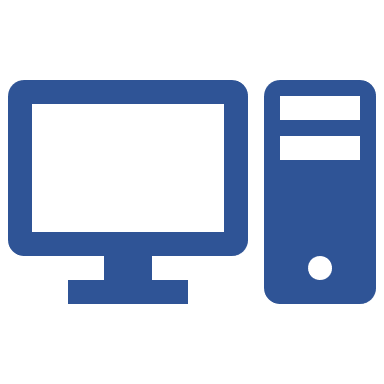
**Virtual Event Checklist**

Virtual Events are a great alternative to In-Person Events in instances when you are not able to host the event in person. This is a solid solution if your participants are geographically dispersed, or the participants have mobility issues and travelling to and from an event is not possible. This is also a great back-up if an event is compromised due to inclement weather making driving unsafe. A virtual event also allows you to easily access experts and speakers across North America without incurring additional travel and accommodation costs to do so.

Some events naturally lend themselves to the virtual event platform, while others may be more difficult. It is a wonderful alternative to help you stay connected to your clients and prospects in a variety of situations.

## **Setting the Stage**

Depending on how experienced you are with Virtual Events, and the necessary set-up, you may want to schedule a full test-run prior to the live Virtual Event. If this is your first Virtual Event, we highly recommend this. Otherwise, if you have done this before, you can follow the remainder of the guidance provided in this resource.

First, it is recommended that the host or organizer is ‘Virtually’ logged on to the Event about 20-30 minutes before it starts to ensure there are no technical issues, and so that everything can get fully set up. All panelists or guest speakers should be logged on at this time to have a full technical roll-call.

It’s a good idea to have someone on your team sign up as a participant so they can experience the event just as your clients and prospects would. This will also alert you to any issues your participants may have logging on. This team member should log on about 10 minutes after the main host & organizer haves.

Some virtual platforms have guests wait in the ‘Lobby’, so you can let them in a few minutes before the official start time. In this case, it’s best to have a professional screen (ie. Presentation title slide) there to greet them so they know they are in the right place – you don’t want people logging onto a blank screen or seeing other items not intended for audience view – refer to **Getting Ready** below.

**Virtual Event Inspiration:**

Virtual Tour of Paris (or any other wonderful city)

Deluxe Virtual Cooking Classes (Food is sent ahead for cooking during the class)

Standard Cooking Classes (ingredient and kitchen tool list sent in advance)

Motivational Speaker & Astronaut, Chris Hatfield

What Every Executor Needs to Know

If you are the host and presenter, it is recommended you have someone on your team as the technical coordinator and moderator for the event to facilitate troubleshooting, record the event (if appropriate), and manage chats, questions, or raised hands from the event participants.

If, during the technical check you are having issues accessing or logging on, try a few times. If the problem persists, immediately send a cancellation of the original event link, followed directly by the new link to all participants.

**Getting Ready**

* Forward your phone lines and shut your office door to avoid unnecessary interruptions.
* Close all unnecessary programs on your PC, and/or anything that may reveal private or confidential information which does not belong to the clients attending the meeting (especially pop-ups from Outlook, Skype, IM, etc.).
* Have all items you wish to share, open and ready-to-go on-screen during your event/meeting (minimized).

## **Visual Check**

* Set up the screen or window you do want to share – check ‘audience/participant view’ to ensure they are seeing what you believe they are.
* Know how to ‘freeze’ or ‘pause’ the screen to allow you to shift items being viewed without looking unprofessional or unorganized to the client (alternately use 2 screens and have one as your ‘showing screen’ and the other as your ‘private working screen’).
* If you are using a PC camera and will be visible by the client at any portion during the meeting, check to see your placement on the screen is appropriate (i.e., none of your head or face is cut off on the screen).
* If you are using a PC camera and will be visible, it is also important you are dressed professionally – this is especially important and ties directly to your branding.

## **Audio Check**

* Most programs have the option to log into audio via phone or PC – and in many cases the phone quality is better. The PC audio does sometimes allow additional background noise. This background noise can be minimized or eliminated through dialing in with a headset.
* It is important to not have both the PC audio and phone audio on at the same time as it may produce an echo and compromise sound quality for everyone listening.
* Test the sound quality at the beginning of the call and make changes as required – it is very distracting to participate in a call where you cannot properly hear the other person.
* For larger events, ensure as the host or organizer you can ‘mute’ all participants, so you do not have unnecessary or unwanted background noise to distract from or ruin your event (we have all experienced this, and it does detract from the event significantly).
* For smaller & more intimate events, you can direct all participants to ‘mute’ themselves and ask that they simply ‘unmute’ when they are directly participating by speaking or asking a question. You should do this at the top of the event as part of the welcome and logistics.

## **Show Time – Go Time**

* Look the part – dress right, have a professional background & ensure there is good lighting.
* Always start the call on time, warmly greet the audience, introduce the guest speaker, and then make sure the participants can see and hear just as well as you can before you officially begin.
* Either you or your moderator can start recording the event.
  + Some programs announce the event is being recorded so everyone is aware and is willingly continuing to participate.
  + If there is no automated announcement about the recording, it is important you tell the audience the event is going to be recorded.
  + If you are recording the event, be sure to let them know if you will be sending them a link afterwards so they can listen to it as a refresher or share it with others they believe may benefit.
* From here, run your event as you normally would – well organized, professional, and fully engaging the participants wherever possible.
* Be respectful of time and end on/or before the scheduled event end time.
* Be aware of any time constraints that may exist on your virtual platform so you do not accidentally get cut off.