Virtual Event Playbook

This Virtual Event Playbook was created to help individuals when planning virtual events and experiences with a developer focused audience, however, it can be replicated and used for any audience.

Transitioning to Digital Events

As the organizers and contributors to impactful events and experiences, we must take a collaborative approach to address the shift to more virtual and online experiences due to COVID-19 and the desire to globally scale. The virtual event experience can be enhanced through scalable content, inclusion and accessibility, process and strategy alignment, branding, and demand generation.

\*\*\*Please note that all events are not one-size-fits-all. Elements may require slight modification based on the audience, content, and desired outcome from the event. This playbook represents a set of strategies that have been found successful. \*\*\*

Key Digital Event Elements

**Core Content:** Content used to inform, inspire and educate the audience. These are video-focused experiences like keynotes and sessions with simple interactive moments like polling and chat.

**Intermittent/Interstitial Programming:** Scheduled portions of the event experience to add energy and fun to the experience. Programming may include interviews, performances, wellness, philanthropy, quizzes, and games.

**Interactive Breakouts:** Sessions that deliver core content in an interactive setting. Includes audience engagement and participation, typically moderated, and may include product feedback focus groups, expert connections, and personalized consultation.

**Meetups/Community Building:** "Connection” is the main priority when organizing a digital experience to support networking, relationship building, and long-lasting outcomes from each event experience. This is more audience and attendee led to facilitate natural collaboration and trust.

Virtual Event Standards and Requirements

**Event Registration:** An inclusive, accessible, and informative registration process to communicate the desired audience, content, and event logistics is key in generating attendance and low attrition.

Popular and widely used examples include:

* [Meetup](https://www.meetup.com/pro/microsoft-reactor): Offer workshops, presentations, and networking events over Meetup. Meetup has a very large, active community of users that can be leveraged to grow demand for your event.
* [Eventbrite](https://www.eventbrite.com/l/online-event-resources/?mkwid=UtKYFHIu_dc&pcrid=79989571666430&pkw=eventbrite&pmt=be&plc&_bk=eventbrite&_bt=79989571666430&_bm=e&_bn=o&msclkid=ab20c0317bbb173229d69eeff0c24676&utm_source=bing&utm_medium=cpc&utm_campaign=Croud_US_SEM_EN_Brand%20Core_Exact&utm_term=eventbrite&utm_content=Core&gclid=CNiW_an08ukCFYNjfgodDK0O6A&gclsrc=ds): Social platform for hosting and registering for events. One of the most popular Meetup alternatives. Easy and quick steps to create an event, set up pricing and logistics, and then share on other social media platforms. Audiences can use Eventbrite’s search engine to find events, but the organizers need to be proactive in their demand generation strategy.
* [LinkedIn Events](https://www.linkedin.com/help/linkedin/answer/98189/linkedin-events-overview?lang=en): LinkedIn members and page owners can use the LinkedIn Events feature to find and build communities, generate interest in various events, and create long-term relationships with community members.
* [SplashThat](https://splashthat.com/): Event marketing and registration site geared towards companies and organizations that want to measure, manage, and market their various event offerings on one platform.

**Demand Generation:** A successful demand generation strategy drives people to register and attend an event, where we deliver a phenomenal experience that motivates them to engage with us (or our content) afterwards. This positive end-to-end experience increases their propensity to attend *future* events and share with friends and colleagues.

Pre-Event Execution:

* + Quality registration system and way to announce the event
  + Clearly define the target audience for the event series and each event individually. Focus first on individuals that have attended in the past, then local groups that have a strong relationship with the event organizers, and then focus on new attendees.
  + List the criteria of your audience – Job Role, Region, and OK to contact.
  + Prepare invite templates to send immediately when contacts are identified
  + Ensure the Code of Conduct is on the event site and easily accessible
  + Social media and outreach strategy before, during, and after each event
    - (Before) Use prior third-party Meetup hosts to share events
    - (Before) Use third-party groups, event calendars, and accelerators to share events (ex: New Tech Seattle posts local events on their site for free)
    - (Before) Get contacts/organizations to help amplify on their social channels
    - (Before & After) Post articles and event listings on LinkedIn, Twitter, Facebook, and relevant social sites
    - (Before, During, After) Use established social media outlets and strategies to build hype, share photos and content throughout, and the success of the event with post-communication information, learnings, and future events to stay connected
  + Four days (on average) before the event, send a pre-event email to registrants reviewing logistics, pre-read materials, and ways to connect with the speaker(s) and/or local team.
  + On-Site Execution:
  + Provide detailed instructions on the schedule, how to navigate the event, where to go if you have a technical issue, where to go if you have a non-technical issue, and any other relevant information to make the experience as smooth as possible
  + Share and reference the Code of Conduct and ways to enforce it.
    - Ex: Create a welcome deck template (customizable per event) that links to consistent language. Share the Code of Conduct within the chats and pin them where applicable
  + Offer dedicated time for the audience and speakers to network with each other -- and fun ways to stay connected afterwards (“bringing the event home”).
    - Ex: Swag with event page links or social handle.
  + Make attendees feel included and comfortable (speakers play a big role here!)
    - Ex: Provide a 5-minute opportunity to introduce yourself and use the chat to have people start socializing
  + Deliver creative, unique content that focuses on education and growth. If technical in nature, give the audience a way to interact with relevant tools.
    - Ex. Provide Azure Passes to give attendees a low-friction way to try it themselves.

Post-Event Execution:

* + Send a post-event email/notification to all individuals who checked in, thanking them for attending, providing relevant session materials, and sharing info about future events.
  + Include a short survey on how to improve, such as desired topics for future events, ways to make the event more inclusive, and logistical feedback (e.g., more accessible timing).
  + Measure the number of people who interacted with the prospective advertising outlets like Meetup, Twitter, and Dev Newsletter unique clicks to assess the number of people receiving the event information vs. the number of people who attended.
  + Analyze what events bring new attendees and the number of repeat attendees and use the learned data to continue iterating on ways to get in front of large groups of developers.
  + Focus on using partner groups and cross-posting vs. email blasts and paid ads.

**Checklists:** Have a checklist to ensure all action items have been completed. Checklist items may include:

* determining the date and time
* finalizing the topics and speakers
* finalizing the schedule
* committing to the event platform
* working on demand generation and social media campaigns
* perform dry runs for all the participants including speakers, moderators, and event organizers
* execute successful event
* send follow up items like swag when applicable, survey, send thank you notes to participants
* connect with attendees on how to follow up and remain engaged
* analyze survey results and review learnings for the next event

**Staff/Speaker Training:** All staff, presenters, and moderators must complete [accessibility](https://youtu.be/qM7wFZo5yfI) and inclusion training. Please utilize the various reminders below to ensure speakers and presenters are prepared and supported.

* Accessibility and Inclusion Reminders
  + Experiences must be accessible to all and designed to enable and support the full range of human diversity. This includes creating content with closed captions, color contrast 4:5:1, livestream captions, play/pause control, audio description tracks, and transcripts.
  + Share the agenda, session objectives beforehand, and pre-reads to help the audience prepare, especially those that require additional time.
  + Use PowerPoint subtitles (slide show > check “Always use subtitles” > select “Spoken language” and “Subtitle language”) and videos/streams with subtitles
  + Check accessibility for shared material (Review > “Check Accessibility” > Solve results errors and warnings)
  + Be simple in your language, avoid using acronyms, verbally describe photos, and offer a question and answer opportunity for the audience.
    - Facilitate Q&A to ensure everyone can feel heard and solicit questions ahead of time, if possible.
  + Do not make any assumptions about the audience. For example, reduce the use of pronouns where applicable and do not assume a person’s pronoun when communicating with them.
* Recording Reminders
  + Physically plug in your computer to an outlet and use a wired network connection
  + Close all unnecessary programs and turn off all notifications on computer and nearby devices
  + Find a quiet location and smaller space with soft walls like curtains to ensure sufficient sound quality
  + Use a headset microphone if possible as well as a good webcam that should be stable and at or above eye level
  + Reduce clutter in the background and avoid anything distracting in the room
  + Presenter wardrobe should be solid colors, not white, and avoid prints, logos, or excessive jewelry
  + Prepare, practice, and add extra enthusiasm so your energy translates through the screen

**Code of Conduct:** All events must have an active and public facing Code of Conduct. Any incidents should be documented and reported immediately.

**Virtual Swag:** Virtual Swag is a great way to enhance the attendee experience and grow brand awareness in an accessible and sustainable way. Consider the following when making your selections:

* have attendees work for swag like completing a simple task to promote engagement
* keep sustainability in mind like providing application subscriptions, E-books, online learning, and downloadable “parent packets”
* relevance to the audience
* support local/social enterprises

**Event Evaluations & Activity Reports:** To ensure we evolve and continue to iterate on tooling, content, and processes, we must continue to evaluate each digital experience, openly share learnings, and achieve the reporting. The evaluation process and specific data points considered will shift based on learnings and a changing environment.

Platform Guidance

Research shows that attention span in a digital environment lasts 2 – 3 hours. Therefore, the content 1) must be recorded for future consumption, 2) offer live moderators to facilitate a personal experience and real-time answers, and 3) incorporate breaks and engagement throughout, for example yoga and polling during a session. Organizers should strive to provide the similar perks of a live experience (reference Key Digital Event Elements section), while recognizing that live interaction cannot be fully replicated.

**Teams Live:** Users can broadcast video and meeting content to large online audiences for four hours straight. The attendees can watch the live or recorded event and interact with the presenters using moderated Q&A.

Quick Facts:

* Accessibility: Languages supported by Teams Live Event captioning (as of April 20, 2020: Arabic, Chinese, Czech, Danish, Dutch, English, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian Bokmal, Polish, Portuguese, Romanian, Russian, Spanish, Swedish, Thai, Turkish, and Vietnamese)
* Length: 4 hours
* Capacity: Up to 10,000 attendees
* Attendee Experience: Limited execution modalities (live or broadcast) and limited attendee engagement experiences (only participate over moderated text)
* Invitation: Calendar invitation or sharing the URL link directly to the Teams Live Event

Resources:

[Microsoft Teams Live Events](https://docs.microsoft.com/en-us/microsoftteams/teams-live-events/what-are-teams-live-events)

[Teams Live Event Organizer Checklist](https://support.office.com/en-us/article/teams-live-event-organizer-checklist-44a80886-0fd9-42e5-8e7c-836c798096f8)

[Invite Attendees to a Teams Live Event](https://support.microsoft.com/en-us/office/invite-attendees-to-a-teams-live-event-99c34ccc-296d-40c5-b06c-b0afbc6674f8)

**Teams Meetings:** Users can broadcast video and meeting content to a small to medium-sized audience for up to 12 hours. The attendees enjoy an interactive experience to watch live or recorded content with open chat. Moderators must be very attentive in this setting, since attendees can quickly communicate back and forth and conversations can go quite fast, unmanaged.

Quick Facts:

* Accessibility: Languages similarly supported by PowerPoint captioning (as of April 20, 2020: Arabic, Chinese, English, French, German, Italian, Japanese, Korean, Norwegian Bokmal, Portuguese, Russian, and Spanish)
* Length: 12 hours
* Capacity: Up to 250 attendees
* Attendee Experience: Allows for real-time collaboration and conversation
* Invitation: Calendar invitation or sharing the URL link directly to the Teams Meeting

Resources:

[Microsoft Teams Meetings](https://docs.microsoft.com/en-us/microsoftteams/tutorial-meetings-in-teams)

**Additional Platforms:**

[Twitch](https://microsoft.sharepoint.com/:w:/t/CloudDevAdvocacy/EbGeOy4fvnhBtIHYEmWfs78BDMq86uBudJnDrj27VnCZfw?e=ptxuRX) - Millions of viewers log in daily to chat, interact, and make entertainment together. Great platform to live stream and has a growing developer audience when primarily was a gaming platform.

[Mixer](https://mixer.com/dashboard/onboarding/newToStreaming) - Similar to Twitch and a Microsoft-owned platform. Great platform to live stream and has a growing developer audience when primarily was a gaming platform. Benefit over Twitch is that the streamers and audience aren’t separated by a delay, creating a more interactive, engaging experience. It is much faster than both Twitch and YouTube Gaming for streaming.

[Zoom](https://restream.io/blog/how-to-multistream-with-zoom/#zoom-basic-account) - Widely recognized platform for community driven experiences – live chat, video and audio attendee use, and known for reliability. Lots of versatility for meetings, webinars, and conferences/breakouts, however, the capacity if 1,000 video participants and 10,000 viewers.

[On24](https://www.on24.com/) - Large amount of engagement tools including embedded media player, information, live chat, slide/presentation view, and resource lists. Really interesting and engaging user experience when attempting to “recreate” the live experience in a digital landscape.

[Discord](https://discord.com/) - Similar user interface to Slack and a great addition to other platforms when looking to create community experiences within text and video communication. Discord is targeted towards gamers and much more supportive towards voice and video interaction.

[StreamElements](https://docs.streamelements.com/docs) - Platform for live streamers using Twitch and YouTube to enhance the viewer experience. It includes overlay management, chatbots, tipping, alerts, and loyalty.

[YouTube Live](https://restream.io/blog/reach-wide-audiences-with-a-youtube-broadcast/) - Videos tend to rank relatively high when searching on Google, Bing, and Yahoo. The searchability and SEO is a top benefit, as well as the ability to send an email and push notifications in the app.

[Facebook Live](https://restream.io/blog/the-ultimate-guide-to-facebook-live-streaming/) - Not as easily found as YouTube streams and has lower quality and length capabilities. However, since Facebook is the most popular social media platform, you can leverage current audiences to promote engagement and easier to begin demand generation efforts. Additionally, it has more notifications built in to remind you audience that the stream is coming up in 1 hour, 20 minutes, and 1 minute vs. YouTube’s email and push notifications. Great platform if just starting out!

[Instagram Live](https://help.instagram.com/292478487812558) - Many people prefer Instagram over Facebook; therefore, the demographic is a bit more visually oriented and has a younger audience. A disadvantage though is that you can only go live with the mobile app, therefore, you need to prepare on how to manage that when filming.

[Twitter/Periscope Live](https://help.twitter.com/en/using-twitter/twitter-live): Alerts your followers when you go live and airs your livestream on the Twitter timeline. Anyone can view the stream without having to register, which is different from other platforms. However, you do have to use the Twitter mobile application to go live.

[Hopin.To](https://hopin.to/): Various ways to connect including stages, one-on-ones, sessions, and expos. Provides the solution of not needing to use multiple platforms, since it provides everything to host a full event experience in a digital landscape. Appears to be one of the best platforms when trying to replicate a live experience when reviewing their “watercooler” offerings and expo booths.

[AltspaceVR](https://altvr.com/): Virtual reality experience to host live events and connect with members of the community. Operates both with and without a headset. Owned by Microsoft and part of the Windows Mixed Reality experience and unique offering to audience members to have an avatar, attend events, and meet community members all around the globe.

Additional Non-Microsoft Resources

* [3P article on using Teams for virtual labs and hackathons](https://www.robertjgates.com/use-microsoft-teams-to-run-a-virtual-lab-or-virtual-hackathon-event/)
* [Meetup.com blog on hosting online events](https://www.meetup.com/blog/how-to-host-an-online-event-on-meetup/)
* Live streaming set up from Jeff Fritz ([link](https://jeffreyfritz.com/2019/01/live-streaming-setup-2019-edition/)) and James Montemagno ([link](https://gist.github.com/jamesmontemagno/72f513bff91678b2c0130a4427f21f0d))
* Closed Captioning OBS plugin using Google Speech Recognition ([link](https://github.com/ratwithacompiler/OBS-captions-plugin))
* [Best Streaming Software](https://www.epiphan.com/blog/best-streaming-software-2019/): [OBS Studio](https://obsproject.com/), [Streamlabs](https://streamlabs.com/), [StreamYard](https://streamyard.com/) and more