Microsoft 365 Live Event Sample Checklist

**Live Event Overview**

Use in your initial Live Event intake and planning. Delete placeholder text and unused rows.

|  |  |
| --- | --- |
| **Event Name** | [official event title that will be used everywhere] |
| **Event Description** | [2-3 sentence summary of the event] |
| **Event Date** |  |
| **Event Time** |  |
| **Event Goals** | 1.  2.  3. |
| **Target Audience** | * + What is the profile of a typical attendee?   + Have we validated their expectations?   + What are the outcomes/next steps we want them to take? |
| **Executive Sponsor** | [who has organizational resources/authority to assist] |
| **Action Items** | [what actions will attendees take next after the event] |
| **Post-Event Content** | [where is content to be posted? How will people access it?] |
| **Event Promotion** | [how will we tell people about the event?]  [do we need a formal registration]  [are there rules/policies on who can attend] |
| **Event Location** | [Which app will you use to schedule and host the Live Event?]  Teams - Live Event will be hosted and viewable in Teams  Yammer - Live Event will be hosted in a Yammer Group with an event page/conversation  Stream - Live Event will be hosted in Stream in embeddable Stream player |

**Teams-Produced Live Event Decision Points**

Settings you will need to make when you schedule a Live Event produced in Microsoft Teams

|  |  |
| --- | --- |
| **Live Event Permissions** | People and Groups - Specific people, contact groups, or Office 365 groups you name  Org-wide - Everyone in the organization can watch the live event  Public - Attendees outside your org, anonymous join, only for Teams-Produced events |
| **Attendee Recording** | Yes/No (attendees can watch the recording on demand for 180 days) |
| **Closed Captions** | Yes/No (Captions are available to event participants) |
| **Attendee Q&A** | Yes/No (attendees can interact with producers and presenters in a moderated Q&A) |
| **Attendee Report** | Yes/No (You can download a report that tracks attendee participation) |
| **Customer Support URL** | URL if attendees click “help” during event (default is https://support.office.com/) |

**External App or Device Live Event Decision Points**

Settings you will need to make when you schedule a Live Event produced in with an external encoder

|  |  |
| --- | --- |
| **Attendee Recording** | Events produced with an external encoder are automatically recorded. Attendees can watch the event on demand until the recording is explicitly deleted in Microsoft Stream. |
| **Captions** | Yes/No (captions are available to event participants) |
| **Attendee Q&A** | Yes/No (Teams-hosted only - attendees can interact in a moderated Q&A) |

**Event Production Team**

Your project team for this Live Event. Add rows as needed. Consider creating a Team or Channel to coordinate work.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Account Used** | **Mobile Phone** |
| Executive Sponsor | [A leader with a special and unique interest in the education or insights of the audience] | [account]@organization.com | [###.###.####] |
| Organizer | [Create the event, set permissions, invite event team, curate event links, manage recordings] | [account]@organization.com | [###.###.####] |
| Producer | [Responsible for starting and stopping the live event, queuing content, back channel chat. This could also be the Organizer. ] | [account]@organization.com | [###.###.####] |
| Producer | [Additional Producer] | [account]@organization.com | [###.###.####] |
| Q&A Moderator | [Moderator to help facilitate Teams Q&A or Yammer Conversation in the Live Event. In Presenter in Teams, Group Admin in Yammer] | [account]@organization.com | [###.###.####] |
| Presenter | [Presenter sharing content or webcam] | [account]@organization.com | [###.###.####] |
| Presenter | [Presenter sharing content or webcam] | [account]@organization.com | [###.###.####] |
| Presenter | [Presenter sharing content or webcam] | [account]@organization.com | [###.###.####] |

**Event Agenda and Content Notes**

Store the final agenda in Office 365 and work from a single source of truth. Check in directly with your presenters and discuss exactly what they plan to present. Do not rely on assistants or intermediaries to relay details.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Time** | **Length** | **Topic** | **Presenter(s)** | **A/V Requirements, Other Notes** |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |

**Live Event Links**

|  |  |  |
| --- | --- | --- |
| **Resources for Live Event** | **URL or Link** | **Notes** |
| **Attendee -** Attendee Link | [<https://teams-url-or-short-url>] | [List here so you can easily find the link. Consider using a link shortening or redirection service] |
| **Presenter -** Teams Meeting | [<https://teams-url-or-short-url>]  Conference: [###.###.####]  Conference ID: [######] | [DO NOT FORWARD - Remind presenters not to forward to anyone not on the event team. List dial here in as backup in case you need it quickly] |
| **Event Team -** Backchannel | [<https://teams-url-or-short-url>] | Back channel for Event Team to use for discussion during event. Can use the Chat in Teams Live Events |
| **Ingest URL** | [rtmp://ingest-url-for-encoder] | [Only if using external app or device instead of Teams - RTMP URL for External Encoder to connect] |

**Presenter Confirmation**

|  |
| --- |
| **Sample Confirmation Communication - Remind your presenters not to forward to attendees** |
| **Town Hall Meeting**  Thank you for presenting at the upcoming Town Hall. If you are presenting from a company office, make sure you coordinate with the site moderator for your location, so they are prepared for you to present. Let us know if you will be presenting from someone else’s computer or a room system.  **Presenter Information Only - DO NOT FORWARD**  Join in Microsoft Teams: [<https://teams-url-or-short-url>]  Conference Number: [###.###.####]  Conference ID: [######]  **Next Steps**   * Complete your Slide Presentation Here by [dd] [hh:mm] [a.m./p.m.] * Let us know if you will be presenting using anything other than your own computer in Microsoft Teams * Attend the Presenter Check-In Call at [dd] [hh:mm] [a.m./p.m.] |

**Attendee Invitation**

|  |
| --- |
| **Sample Confirmation Communication -Consider using a URL Redirector for the Join Meeting link** |
| **Town Hall Meeting**  Please join us for the upcoming All-Hands meeting.  **Date:** [mmm] [dd] [yyyy]  **Time:** [xx:xx am - xx:xx pm]  **Join the Live Event:** [<https://teams-url-or-short-url>]  **Instructions**: [How to attend a live event in Microsoft Teams](https://support.office.com/en-us/article/attend-a-live-event-in-teams-a1c7b989-ebb1-4479-b750-c86c9bc98d84)  **Office Locations and Site Moderators**  In the office? Please join your local team to watch the Live Event together in the room below.   |  |  |  | | --- | --- | --- | | **City** | **Room** | **Site Moderator** | | [city] | [room] | [moderator] | | [city] | [room] | [moderator] | |

**Event Planning**

Add or delete tasks as needed. Consider using Planner or Teams Tasks to coordinate across the event team.

| **T-Minus** | **Checklist - Content/Meeting Moderation/AV/Live Event** |
| --- | --- |
| **4 Weeks** | * **All:** Read<https://resources.techcommunity.microsoft.com/live-events> * **All:** Watch <https://youtu.be/8EzIsTaJWb8> (1 minute) * **All:** Determine if you need to create a “System Account” for podium computers or room systems * **Business Objectives/Outcomes -** Event goal/summary—one or two sentences * **Event Team Identified -** Consider use a Team in Microsoft Teams to coordinate * **Event Team Collaboration Space (Microsoft Teams) –** Add to Team or Channel * **Presenter Confirmation -** Confirm presenters. Confirm timelines. Confirm content expectations. * **Begin Working on Content -** Use placeholder content, communicate to speakers where it is stored. * **Schedule Live Event -** Schedule using the settings from the Live Events Decision Points table * **Secure Short URL -** Consider a link shortening/redirection service, with appropriate branding * **Send Presenter Invite/Attendee Invite** - Send save-the-date, Join and Attendee links |
| **2 Weeks** | * **Presenter Best Practices Training** - Test/Confirm the Following (Just run down the list with them): * **Video** - Have presenters practice positioning their webcam so they are in frame, well illuminated * **Audio** - Ensure presenters are using certified audio devices and know how to configure in Teams * **Audio** - Have presenters practice positioning their audio device for optimal clarity * **Audio –** Confirm if any presenters are dialing in (if you have Audio Conferencing.) \*6 to unmute * **Audio** - Have presenters practice using mute. Remind them they must unmute themselves * **Connectivity** - Remind presenters to use wired connection, not wireless, if possible * **Connectivity** - Remind presenters to test bandwidth (e.g. [www.speedtest.net](http://www.speedtest.net)), 1.5 Mbps needed * **Content -** Validate how you’ll share content: Each presenter sharing, or one PC showing slides * **Content** - Have each presenter practice sharing their screen if you will switch back and forth * **Content -** Have presenter practice advancing slides with a “clicker” (if presenting in person) * **Q&A** - Confirm presenters understand moderated Q&A is how they will interact with audience * **Q&A** - Confirm presenters understand questions may take 15-20 seconds to come over (ask early) * **Attire** - Confirm presenter will not wear striped or checkered clothing patterns that cause aliasing * **Attire -** Confirm presenter will wear clothing with closed neck if using lavaliere microphones * **Notifications** - Confirm presenter knows Focus Assist in Windows 10/Do Not Disturb on Mac * **Practice Live Event** – Conduct a Practice Live Event. See the instructions in the appendix * **Event Reminder -** Share event reminder to attendees via Intranet, Email, Yammer, etc. |
| **1 Week** | * **Presenter Checkpoint Call** * Review agenda * Remind of content deadlines, remind to work from content repository (don’t email attachments!) * Discuss event moderation, Q&A procedures, confirm who will help moderate * **Event Team Checkpoint Call** * Ensure moderators have appropriate event permissions (producer, presenter) * Stage boilerplate announcements, answers, links in a text file (to drop into Q&A as needed) * **Content Computer** (confirm for each presenter or the “podium computer” in common venue) * Provision “podium computer” (event laptop, venue computer, etc.) if presenters centrally located * Sync the collaboration repository (Teams, SharePoint) document library * Sign in using the Teams credentials to be used during the Live Event (e.g. user or system account) * Run Windows Update, apply any needed updates; pause updates for seven days * Power Plan set to *High Performance*, Turn Off Display set to *Never* * **Encoder Connection** (External App/Device Produced Event only, not used for Teams Live Events) * Connect encoder to the Ingest URLs, verify RTMP settings are correct * Do not start the event!   Encoder Connection (External App/Device Produced Event only, not used for Teams Live Events)   * **Event Reminder -** Share event reminder to attendees via Intranet, Email, Yammer, etc. |
| **3 Days** | * **Event Team Update -** Check in call, add any final presenters/producers to the Event Team * **Agenda Final -** Update and finalize the agenda * **Content Update -** Confirm status, remaining submissions. Validate if you’ll consolidate slide decks. * **Presenter Update -** Send/share presenter confirmation. Address questions/concerns. * **Presenter/Content Computer -** Verify content in synchronizing * **Event Reminder -** Share event reminder to attendees via Intranet, Email, Yammer, etc. |
| **1 Day** | * **Content Final -** Finalize deck(s), demos. Ensure content is synchronizing to Content Computer. * **Content Test -** Test deck animations, transitions. Check/embed fonts. Embed linked videos. * **Content Consolidated -** Merge into single deck if presenting from one computer * **Q & A Moderator –** Confirm pre-staged posts are ready in a text file for Teams Q&A or Yammer   + Welcome, Icebreakers, Announcements   + Links to content after event, Anticipated answers * **Presenter/Content Computer -** Pause Updates, enable Focus Assist, check Power Plan, clear Desktop. * **Presenter Update -** Send/share presenter confirmation. Remind to join early. * **Encoder Connection** - (if using) Test external encoder RTMP connection again * **Event Reminder -** Share event reminder via Intranet, Email, Yammer, etc. |
| **1 hour** | * **Event Team - Join Live Event**   + Sound checks, video check before presenters arrive on the call   + Do not start the event! * **Encoder Connection (External App or Device Produced Event)**   + Connect encoder to the Ingest URLs, verify RTMP settings are correct   + Do not start the event! * **Complete Room Preparation -** If Presenting from a physical location e.g. an auditorium * **Room A/V System Powered On, Tested.** Power on A/V, warm up projector, display routing * **Headset/Microphone Setup -** Prep/test mikes, replace batteries, position speaker phones * **Teams Room System -** Join the Live Event (if using a TRS). * **Podium/Content Computer**   + Open PowerPoint deck locally   + Ensure laptop has a wired Ethernet connection and can get to the Internet   + Join Live Event (Do not start the event!)   + Close any unneeded applications and services |
| **30 Minutes** | * **Presenters Join Live Event**   + Sound check, video check   + Test content sharing   + Remind to come off mute when speaking   + Remind how Q&A will work   + Remind to close any unneeded applications and services |
| **Pre-Flight** | **Teams Live Event - Pre-Flight**   * **Presenter/Podium Computer.** Click Share > Share desktop if sharing content * **Queue Content.** Set Live event video on opening slide or first speaker’s webcam * **Queue to Live.** Producers send the preview que to the live preview in Teams REMINDER: The Preview window is private to each Producer in Teams Live Events   **External App or Device - Pre-Flight**   * **Title Card**. Stage title card, bumper slide, intro video in the encoder   **Other**   * **Live Event Viewing.** Onsite moderators should set player to *Full Screen* for local audience. * **Final Sound and Webcam Check** - Check webcams. Ask each presenter for a sound check. * **Go/No Go -** Confirm Producers/Moderators/Speakers are ready * **Start** - Click **Start** to go live in Live Event * **Welcome and Intros -** Moderator or first speaker welcome and housekeeping**.** * **Teams Q&A** or **Yammer -** Moderator post a “welcome” message into the discussion * **Everyone** - Contribute/assist moderator with Yammer Conversation or Teams Q&A |
| **Live** | * **Producer** - Stage Video/Content View, Send Live, update as needed * **Producer -** Monitor Live Event call quality status * **Presenters -** Share Desktop if appropriate, ask for questions just prior (15 seconds) to Q&A * **Presenters** - Remember to unmute (Teams-produced event) * **Moderator -** Encourage engagement. Reminder how to participate in Teams Q&A or Yammer. Post links and resources as they are mentioned. Leverage prepared content. |
| **Wrap** | * **Moderator -** Add "Thanks for Joining Us" to Q&A or Yammer. Thank everyone verbally * **Moderator -** Post link to follow-up content. * **Producer -** End Event |
| **Post Event** | * **Moderator -** Escalate any unanswered Q&A to presenters as needed. Coordinate with Organizer. * **Organizer -** Manage event recording and access |

**Appendix I: Practice Live Event**

You can easily hold a practice Live Event with your event team. It will help you see what each role experiences and will prompt discussion on how you will manage the experience for your users.

**You will need at least four people:**

* **Organizer** - Person who schedules the Teams Live Event. Also has Producer controls.
* **Producer** - Person who manages the Live Event stream, moderates Q&A. Also has Presenter controls.
* **Presenter** - Person who shares their video, audio, and desktop into the Live Event. Also moderates Q&A
* **Attendee** - Person who participates as an Attendee (Producer/Presenter can also Join as Attendee.)

**Live Event Training Videos - Each Person Should Watch (5 min)**

* Video: [Plan and Schedule a Live Event in Teams](https://support.office.com/en-us/article/video-plan-and-schedule-a-live-event-f92363a0-6d98-46d2-bdd9-f2248075e502) (2 min)
* Video: [Produce a Live Event in Teams](https://support.office.com/en-us/article/video-produce-a-live-event-34c89e79-ffd4-4a6a-baf6-77055e0709cb) (1 min)
* Video: [Attend a Live Events in Teams](https://support.office.com/en-us/article/video-attend-a-live-event-d837ad8d-ce34-44d0-9744-9beb50e943ac) (45 secs)
* Video: [Moderating a Q&A](https://support.office.com/en-us/article/video-plan-and-schedule-a-live-event-f92363a0-6d98-46d2-bdd9-f2248075e502) (1.5 min)

**Follow these steps to practice your Live Event**

1. [Getting Started with Teams Live Events](https://support.office.com/en-us/article/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a) - Everyone (read)
2. [Schedule a live event](https://support.microsoft.com/en-us/office/schedule-a-teams-live-event-7a9ce97c-e1cd-470f-acaf-e6dfc179a0e2) - Organizer
3. [Invite attendees](https://support.microsoft.com/en-us/office/invite-attendees-to-a-teams-live-event-99c34ccc-296d-40c5-b06c-b0afbc6674f8) - Organizer
4. [Produce your live event](https://support.office.com/en-us/article/produce-a-live-event-using-teams-591bd694-121d-405c-b26d-730315e45a22) - Producer, Organizer
5. [Present in your live event](https://support.microsoft.com/en-us/office/present-in-a-live-event-in-teams-d58fc9db-ff5b-4633-afb3-b4b2ddef6c0a) - Presenter, Producer
6. [Attend a Live Event](https://support.office.com/en-us/article/attend-a-live-event-in-teams-a1c7b989-ebb1-4479-b750-c86c9bc98d84) - Attendee
7. [Manage the recording and reports](https://support.office.com/en-us/article/manage-a-live-event-recording-and-reports-in-teams-6d1f5da9-74b7-4771-977d-b89eba194578) - Producer, Organizer

**Practice Tips**

* Event Team - the Organize, Producer, and Presenter are the "event team" - when they join the Live Event, they will be in a Teams Meeting where they can talk and prep before the Producers starts the Live Event
* Have people try different roles and share what you are seeing - During the practice, describe what you are seeing to the other people. The UI is different for each role.
* Attendee Limitations - The Attendee person will not be able to talk or share video and can only interact via Q&A if the Organizer enabled it. Discuss how you will moderate Q&A in an actual event.
* Scheduling Dialog - When the Organizer schedules the Live Event in Teams, some of the settings may be hidden in the New Live Event dialog box. Scroll down on each pane to see them all.

**Internal Discussion**

Discuss how the practice event went. Validate that what happened was what you were expecting. Did the Live Event appear automatically on people's calendar? How did the Organizer get the invitation to everyone? Will you record your Live Event? Will you enable Transcription? Will someone need to be dedicated to moderating Q&A? How will you let each presenter know it is time to present? Should you invite your "talent" as Presenters or Producers?

**Appendix II: Office 365 Administrator (Teams Administrator)**

Live events enable anyone to create live and on-demand events that deliver compelling communications to employees, customers, and partners. Events use video and interactive discussion across Teams, Stream, or Yammer and can be as simple, or as sophisticated as needed. Up to 10,000 attendees can participate in real-time from anywhere, on any device, or catch up later with powerful AI features that unlock the content of the event recording.

**NOTE**: To help support our customers, through July 1, 2020, Microsoft will enable custom events for as many as 100,000 attendees though our live events assistance program (below).

**Overview**

* [Live Events Across Microsoft 365 in Yammer, Teams, and Stream](https://docs.microsoft.com/en-us/stream/live-event-m365) (Comparison table)
* [Live Event Assistance](https://resources.techcommunity.microsoft.com/live-events/assistance) (request assistance from Microsoft, free during preview spring 2020)
* [Teams Academy](https://aka.ms/teamsacademy): Video: <https://aka.ms/teams-live-events-session>, Deck: <https://aka.ms/teams-live-events-deck>
* [Microsoft Ignite 2019: Host Large Scale Town Halls](https://myignite.techcommunity.microsoft.com/sessions/83196) (recorded session)

**Networking**

* [How to quickly optimize Office 365 traffic for remote staff](https://techcommunity.microsoft.com/t5/office-365-blog/how-to-quickly-optimize-office-365-traffic-for-remote-staff-amp/ba-p/1214571) (VPN split tunneling)
* [Prepare your organization's network for Teams](https://docs.microsoft.com/microsoftteams/prepare-network) (general)
* [Make sure all endpoints are reachable in your network](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdocs.microsoft.com%2Fen-us%2Fstream%2Flive-event-troubleshooting%23make-sure-all-endpoints-are-reachable-in-your-network&data=02%7C01%7CBrown.Samantha%40microsoft.com%7Cdbb916291add46320b5508d7e0988c95%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637224818102028341&sdata=BgvD39yB6H9%2FpxImJZ4h5vtSsSH%2BUcx%2FL9SM7S7wFpg%3D&reserved=0) (ensure endpoints are white listed and accessible to viewers)
* [Microsoft Stream video delivery overview](https://docs.microsoft.com/en-us/stream/network-overview) (for events produced with an external app or device)
* [eCDN: Set up a Video Distribution Solution for Teams-Produced Events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/set-up-for-teams-live-events#step-4-set-up-a-video-distribution-solution-for-live-events-in-teams) (eCDN configuration for Teams production)
* [eCDN: Scale Video Deliver and Monitor Network Traffic](https://docs.microsoft.com/en-us/stream/ecdn) (eCDN configuration for external encoder production)

**Configuration - Teams-Live Events**

* [Plan for Teams Live Events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events): [Licenses needed to create/schedule live events,](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events#who-can-create-and-schedule-live-events) [Who can watch live events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events#who-can-watch-live-events)
* [Assign Office 365 Licenses to Users](https://docs.microsoft.com/en-us/office365/enterprise/assign-licenses-to-user-accounts) (Teams license is automatically assigned)
* [Manage End User Access to Teams](https://docs.microsoft.com/en-us/microsoftteams/user-access#manage-teams-through-the-microsoft-365-admin-center) (optional, granular control of Teams license)
* [Set up Live Events policies in Teams](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/set-up-for-teams-live-events#step-3-set-up-live-events-policies) (controls who can hold Live Events and features enabled)
* [Configure Live Events Settings in Teams](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/configure-teams-live-events) (connect Live Events to SDN/eCDN provider)

**Configuration - Stream Live Events**

* [Enable Microsoft Stream](https://docs.microsoft.com/en-us/stream/assign-user-licenses)
* [Administration controls for Microsoft Stream live events](https://docs.microsoft.com/en-us/stream/live-event-administration)

**Configuration - Yammer Live Events**

* [Enforce Office 365 Identity for Yammer Users](https://docs.microsoft.com/en-us/yammer/configure-your-yammer-network/enforce-office-365-identity) (Office 365 identity must be enabled in Yammer for Live Events)
* [Configure Office 365 Connected Yammer Groups](https://docs.microsoft.com/en-us/yammer/manage-yammer-groups/yammer-and-office-365-groups) (Only O365-connected groups can host a Live Event)
* Manage a Group in Yammer (read to understand the Yammer Group Admin role)