



# #Event

# Conferences & events

The Lean Approach to Event Organising

Jo Young



@joysci



The  
Scientific Editing  
Company



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## Using Zoom

Your control panel is located at the bottom of the Zoom screen. On the left hand side, you can control your audio and video via the buttons:

- |                   |   |
|-------------------|---|
| MUTE/ UNMUTE      | (switches off your audio/ switches on your audio) |
| START/ STOP VIDEO | (switches on/ off your webcam)                    |

*You may wish to mute your audio and stop your webcam video output while you participate, you will still see and hear everything.*

In the centre and right of your Zoom control panel you can see:

- |               |   |
|---------------|---|
| INVITE        | <i>(disabled - you won't need this)</i>                     |
| PARTICIPANTS  | (the other participants in the session)                     |
| SHARE SCREEN  | <i>(disabled - you won't need this)</i>                     |
| CHAT          | (the group conversation, opens in a new panel on the right) |
| LEAVE MEETING | (you can leave the session via this button at the end)      |

## About me



- BSc Microbiology, MSc Informatics, PhD Neuroscience (University of Edinburgh)
- Postdoctoral Research Associate (University of Edinburgh)
- Own company
- Organised over 100 events: academic, student, enterprise, publishing
- Ran an events and networking club for six years

# Agenda

- Welcome & introduction
- Generating event ideas
- Planning your event
- Business models for events

\*\*Coffee break\*\*

- Structure of events
- Marketing & promotions
- Attracting sponsors
- Event preparation & managing the event
- Post-event actions
- Questions

Finish

---

# Icebreaker



Using chat:

- 1) Describe your research in a sentence
- 2) Say where you are at the moment.





# #Event

# Generating event ideas

What type of event do you want to hold?

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# What is your motivation?

- Who do you want to meet?
  - peers/ key people in the field
  - potential partners/collaborators in your field?
  - your competition?
- What do you want to show people/ discuss?
- Building & motivating your team?
- Boosting your profile?
- To tackle issues/problems that are rarely discussed?

## **What do your delegates want to see/learn?**

- What will attract people to your event?
- What will prompt them to discuss your event with others?

# What do your delegates want to see/learn?

- What will attract people to your event?
- What will prompt them to discuss your event with others?

Stories  
from  
others

An edgy  
new  
theory

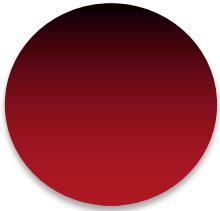
A well  
known  
speaker

To meet  
interesting  
people

Discussion  
of a  
popular  
issue

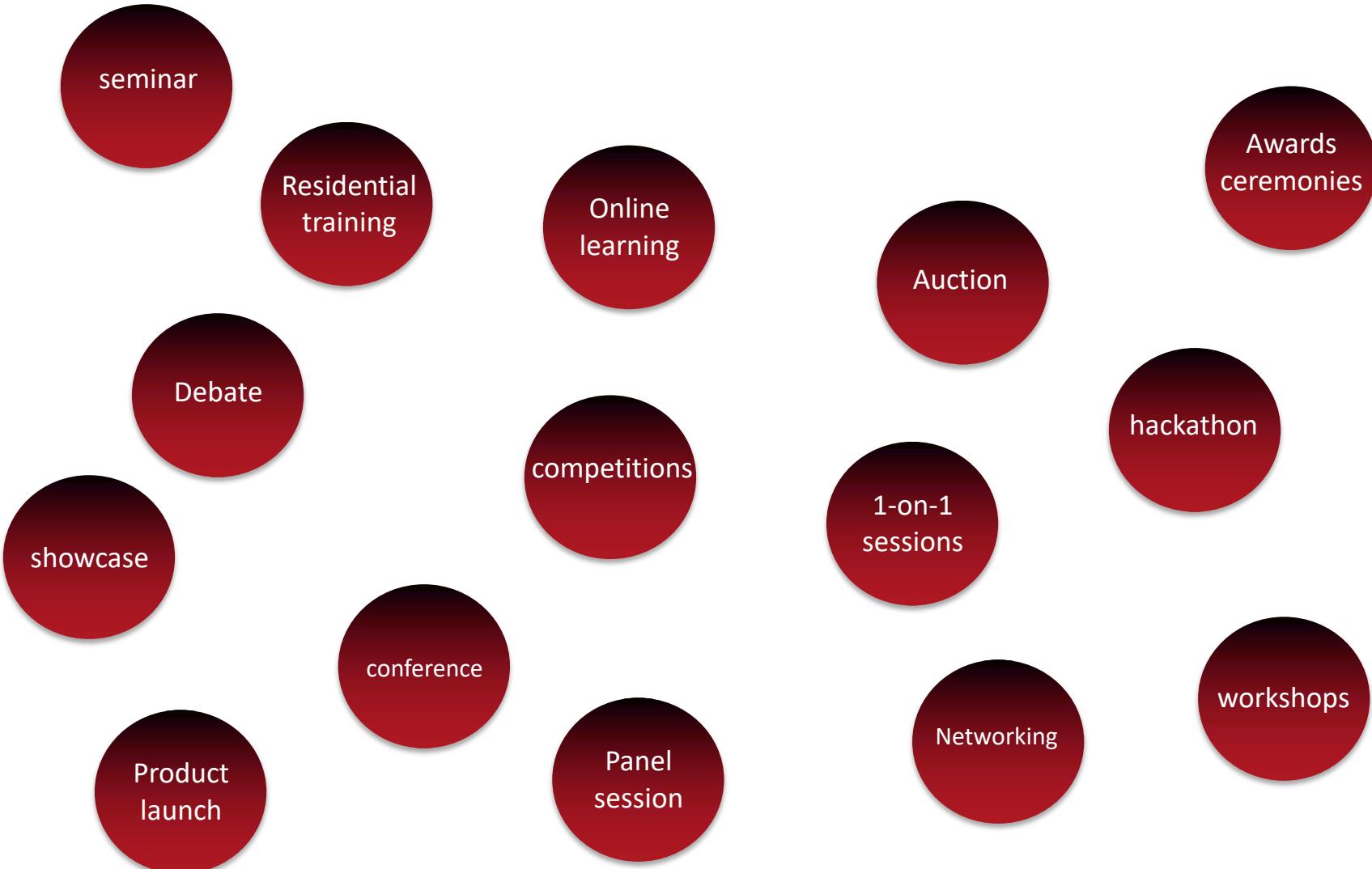
What's  
new in the  
field

## Event types?



Exercise: List three types of events...

# Event types



## How long will your event be?

- Evening event?
  - Shorter, local, people can attend after work
- Half-day?
  - Good for workshops, seminars, awards, courses
- Full day event or longer?
  - Chance for audience to be really engaged, multiple chances to meet people, more expensive

# Summary

- Outline your objectives for the event & what you hope to get out of it
- Decide how long you want the event to be (consider time & cost which will be covered later)
- Pick the type of event you want to run & don't try to do too much
- Consider who you want to invite and what they will be interested in seeing



# #Event

# Planning your event

Date, venue, team...

---

# Putting together a team?



- Can you do this alone?

## Advantages of having a team:

- Tap in to a larger network
- More people to spread the word
- People to bounce ideas off
- Bring more expertise
- More volunteers for the event

## Disadvantages of having a team:

- Consider their motivations
- Disagreements

# When do you want to hold your event?



- Which month?
- What day of the week?
- Is there another key event around the same time in your area?

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## Avoid:

- December, August
- Sunday evenings

# When do you want to hold your event?



- Which month?
- What day of the week?
- Is there another key event around the same time in your area?

## Avoid:

- December, August
- Sunday evenings

## Popular:

- Jan – June and Sept - November
- Weekdays

# Where do you want to hold your event?



- Location, location, location
- Cost
- Availability

## Avoid:

- Venues that are out of town
- Shabby venues
- Abuses to the senses: loud, cold/hot, smelly, dark



## Popular:

- Centrally located venues
- Attractive venues
- Easy to find/ travel to



# #Event

# Structure of events

Sessions, networking, breaks...

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## Day structure

0900 – 0930 Registration

0930 – 1100 Session 1

1100 – 1130 Coffee

1130 – 1300 Session 2

1300 – 1400 Lunch

1400 – 1530 Session 3

1530 – 1600 Coffee

1600 – 1730 Session 4

1730 - drinks

# Day structure

0900 – 0930 Registration

0930 – 1100 Session 1

1100 – 1130 Coffee

1130 – 1300 Session 2

1300 – 1400 Lunch

1400 – 1530 Session 3

1530 – 1600 Coffee

1600 – 1730 Session 4

1730 - drinks

Networking time



Comfort breaks



Food!



Caffeine!

# What type of sessions will you hold?

- What is the key focus of the event?
- Who are your keynote speakers?
- Panel sessions: would this be the first time your speakers have sat together on a panel?
- Will there be parallel workshop sessions?
- Do you want poster sessions?
- Do you want to hold partnering sessions?
- How about “unconference” style sessions?
- Lightning talks/ round table discussions

---

# Your event content



## Exercise:

Brainstorm the following for your ideal event (or an upcoming event):

- a list of session types you could organise
- a list of up to five speakers that you would invite



# Funding

Anticipating and estimating costs

---



## Anticipating & estimating costs



### Basic:

- Venue hire
- Catering
- Events insurance
- Name badges
- Stationery
- Staff
- Poster boards



# Anticipating & estimating costs



## Basic:

- Venue hire
- Catering
- Events insurance
- Name badges
- Stationery
- Staff
- Poster boards

## Optional:

- Speaker travel expenses
- Delegate bags
- Drinks reception
- Extra AV equipment
- Ticket booking fees
- Event branding materials
- Marketing costs
- Livestreaming
- Parallel sessions...



# Anticipating & estimating costs



## Basic:

- Venue hire
- Catering
- Events insurance
- Name badges
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- Poster boards

## Optional:

- Speaker travel expenses
- Delegate bags
- Drinks reception
- Extra AV equipment
- Ticket booking fees
- Event branding materials
- Marketing costs
- Livestreaming
- Parallel sessions...

## Premium:

- International speaker travel
- Speaker fees
- Freebies
- Networking software
- Professional entertainment
- Event manager
- PR agency, advertising



# Event attendance: fee or free?



## Advantages

- Lots of registrations
- Lower expectations
- Attract students, freelancers



## Advantages

- Funds!
- Good attendance
- Cover losses

## Disadvantages

- Non-attendance
- Limited finances
- Attracting sponsorship

## Disadvantages

- Harder to sell tickets
- Higher expectations
- Responsibility



# #Event

# Business models for events

Which is best for you?

---



# Business models for events x 4

## Bootstrap model

- Free venue, limited catering, no speaker costs, volunteer run



# Business models for events x 4

## Bootstrap model

- Free venue, limited catering, no speaker costs, volunteer run

## Sponsorship model

- Attract enough money from 3<sup>rd</sup> parties to fund your event



# Business models for events x 4

## Bootstrap model

- Free venue, limited catering, no speaker costs, volunteer run

## Sponsorship model

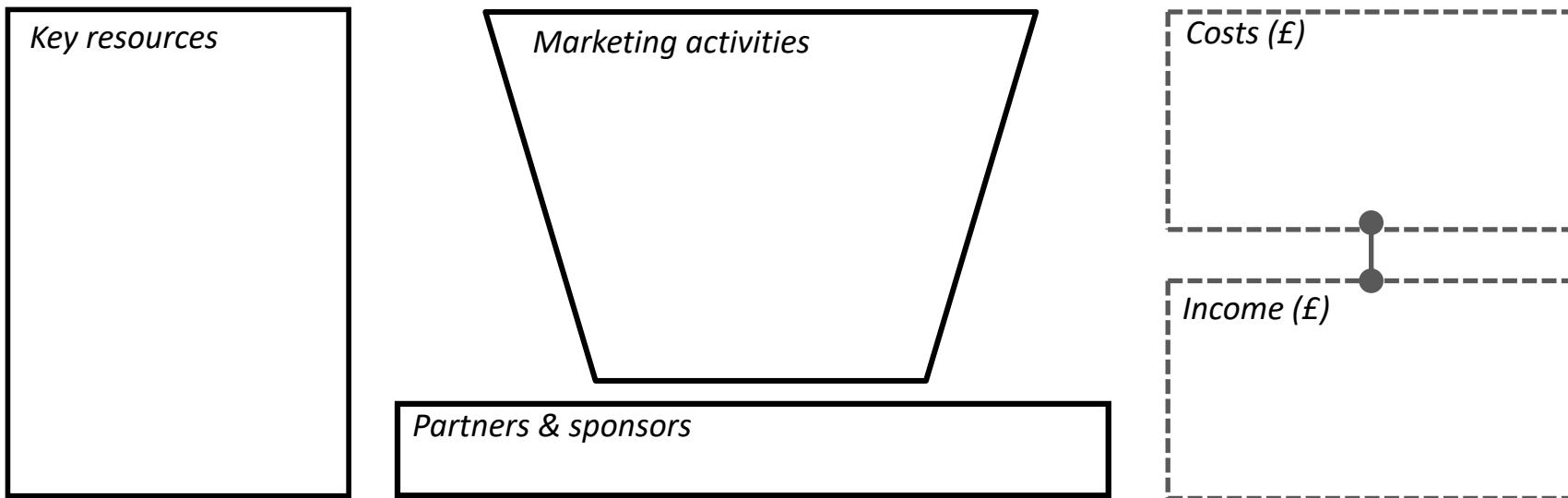
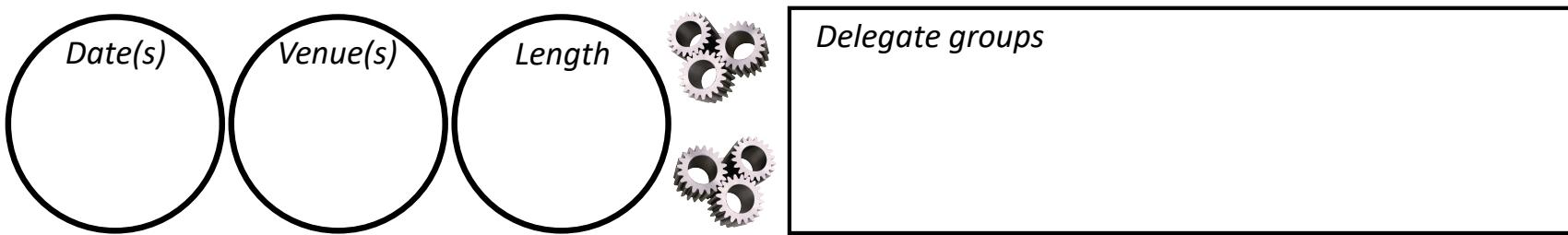
- Attract enough money from 3<sup>rd</sup> parties to fund your event

## Delegate pays model

- Paid tickets + sponsorship

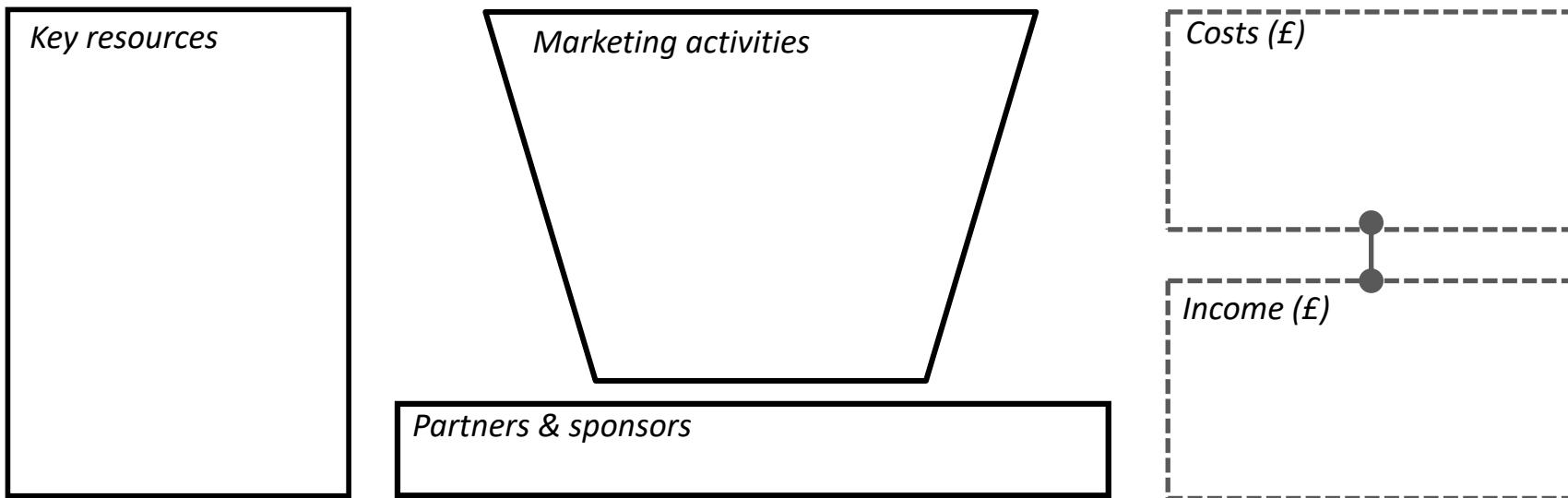
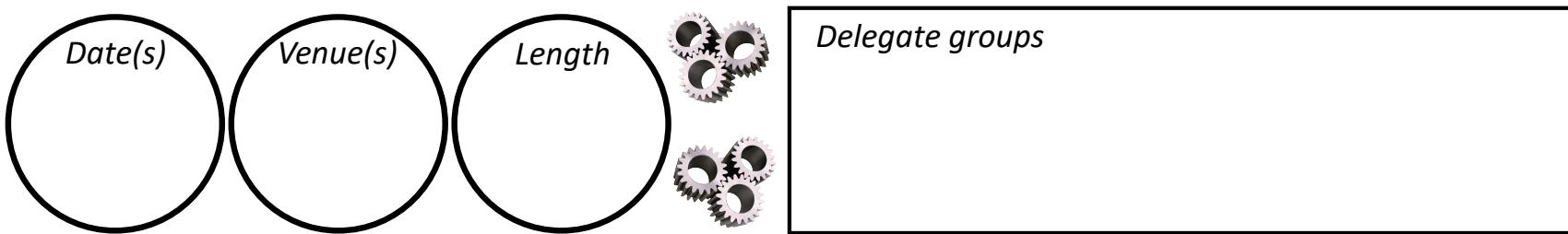
# Conference planning canvas<sup>®</sup>

<i>Title of event</i>		
<i>Unique value proposition</i>	<i>Event team</i>	<i>Event aims/ ambition</i>



# Conference planning canvas<sup>®</sup>

<i>Title of event</i> Disruption in the publishing industry: digital, analytics and the future		
<i>Unique value proposition</i>	<i>Event team</i>	<i>Event aims/ ambition</i>



# Conference planning canvas<sup>®</sup>

## *Title of event*

Disruption in the publishing industry: digital, analytics and the future

## *Unique value proposition*

A conference addressing changes and opportunities in publishing: altmetrics, data management, regulation and digital

## *Event team*

Jo  
Graham  
Jan  
Jim  
+volunteers

## *Event aims/ ambition*

Date(s)

Venue(s)

Length



## *Delegate groups*

## *Key resources*

## *Marketing activities*

## *Costs (£)*

## *Partners & sponsors*

## *Income (£)*

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- To inform researchers about the evolving publishing landscape & digital tools
- To discuss problems with current publishing model

Date(s)

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## Date(s)

20.6.14

## Venue(s)

UEBS,  
Edinburgh

## Length

One day



## Delegate groups

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## Delegate groups

Researchers

Librarians

Data  
management  
professionals

Publishers

Startups in the publishing industry

## Key resources

## Marketing activities

## Costs (£)

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## Delegate groups

Researchers

Librarians

Data  
management  
professionals

Publishers

Startups in the publishing industry

## Key resources

People  
Website  
Camera team  
Wifi  
Social networks  
Team's networks  
Speakers  
Eventbrite

## Marketing activities

## Partners & sponsors

## Costs (£)

## Income (£)

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Startups in the publishing industry

Librarians

Data  
management  
professionals

## Key resources

People  
Website  
Camera team  
Wifi  
Social networks  
Team's networks  
Speakers  
Eventbrite

## Marketing activities

Twitter hashtag, Fbook page  
Website  
Email lists  
Other newsletters (Publishing  
Scotland)  
Posters, flyers  
Banners

## Costs (£)

## Income (£)

## Partners & sponsors

# Conference planning canvas<sup>®</sup>

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Edinburgh

## *Length*

One day



## *Delegate groups*

Researchers

Publishers

Startups in the publishing industry

Librarians

Data  
management  
professionals

## *Key resources*

People  
Website  
Camera team  
Wifi  
Social networks  
Team's networks  
Speakers  
Eventbrite

## *Marketing activities*

Twitter hashtag, Fbook page  
Website  
Email lists  
Other newsletters (Publishing Scotland)  
Posters, flyers  
Banners

## *Partners & sponsors*

## *Costs (£)*

Venue hire  
Catering  
Events insurance  
Speaker travel/ accommodation  
Marketing

## *Income (£)*

Sponsorship  
Ticket sales

# Conference planning canvas<sup>®</sup>

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## *Date(s)*

20.6.14

## *Venue(s)*

UEBS,  
Edinburgh

## *Length*

One day



## *Delegate groups*

Total: 150

Researchers

Librarians

Publishers

Data  
management  
professionals

Startups in the publishing industry

## *Key resources*

People  
Website  
Camera team  
Wifi  
Social networks  
Team's networks  
Speakers  
Eventbrite

## *Marketing activities*

Twitter hashtag, Fbook page  
Website  
Email lists  
Other newsletters (Publishing Scotland)  
Posters, flyers  
Banners

## *Partners & sponsors*

Venue, Publishing companies

## *Costs (£)*

Venue hire  
Catering  
Events insurance  
Speaker travel/ accommodation  
Marketing

## *Income (£)*

Sponsorship  
Ticket sales

## Exercise:



- You would like to organise a one day academic conference.
- You are pitching your event to your University because you want them to give you a £5,000 grant.
- In a group, use the canvas to plan & pitch your event.

## Exercise:



- The University doesn't have enough grant money! There wasn't enough cash to go around.
- Use the canvas again and this time plan the event on a shoestring budget!



# #Event

# Marketing & promoting

Website, promotion, social media...

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# Website



DISRUPTION IN THE PUBLISHING INDUSTRY: DIGITAL, ANALYTICS & THE FUTURE  
CONFERENCE: 20TH JUNE 2014, EDINBURGH

HOME | REGISTER | PROGRAMME | ABOUT | EVENTS | EPC 2013 | CONTACT



**Disruption in the Publishing Industry: Digital, Analytics & the Future**  
**Next EPC conference: 20th June 2014**  
Earlybird tickets available in March 2014

 #pubconf

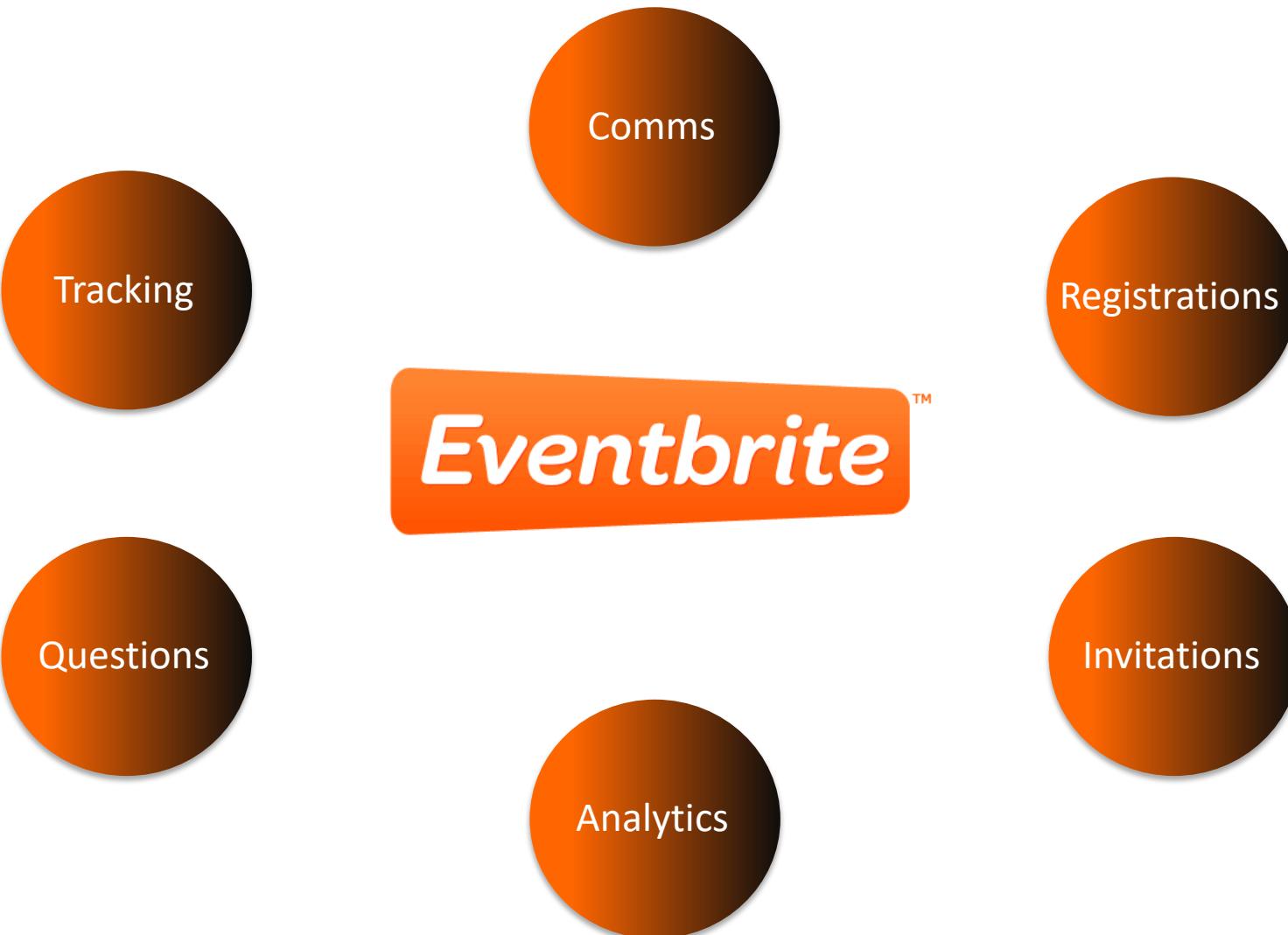
[Register Now](#)

[Overview](#)

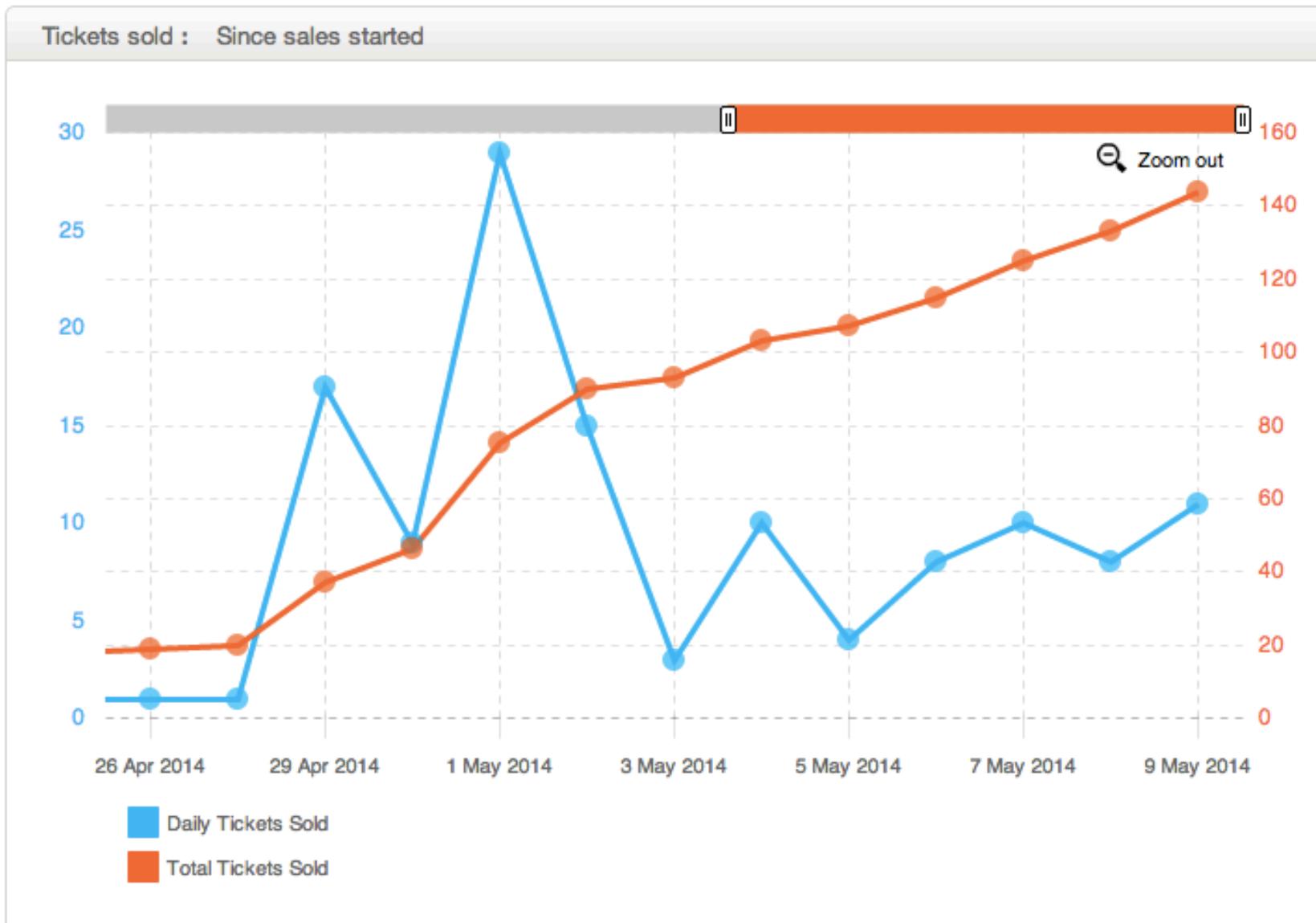
## Conference promotion tools



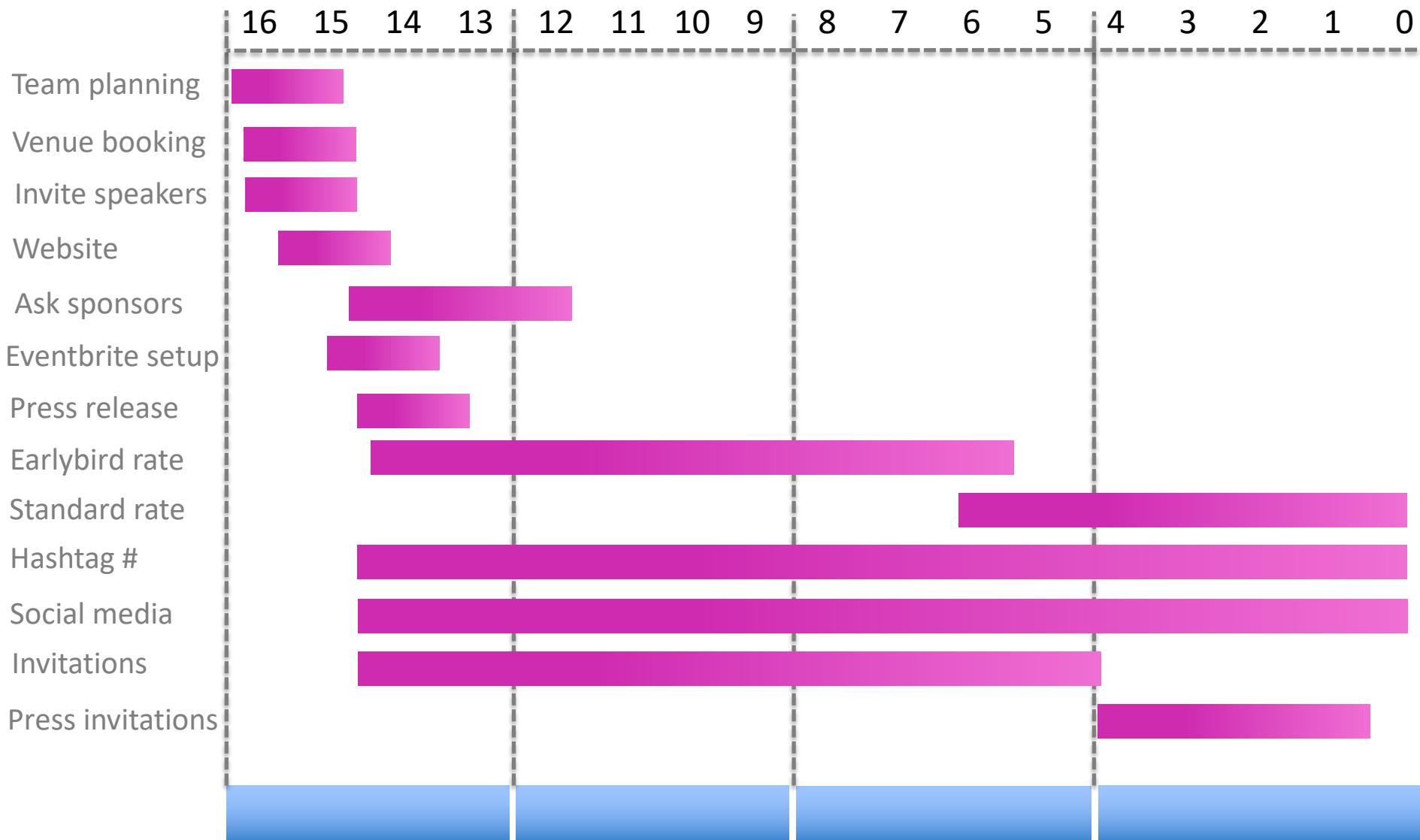
# Conference promotion tools



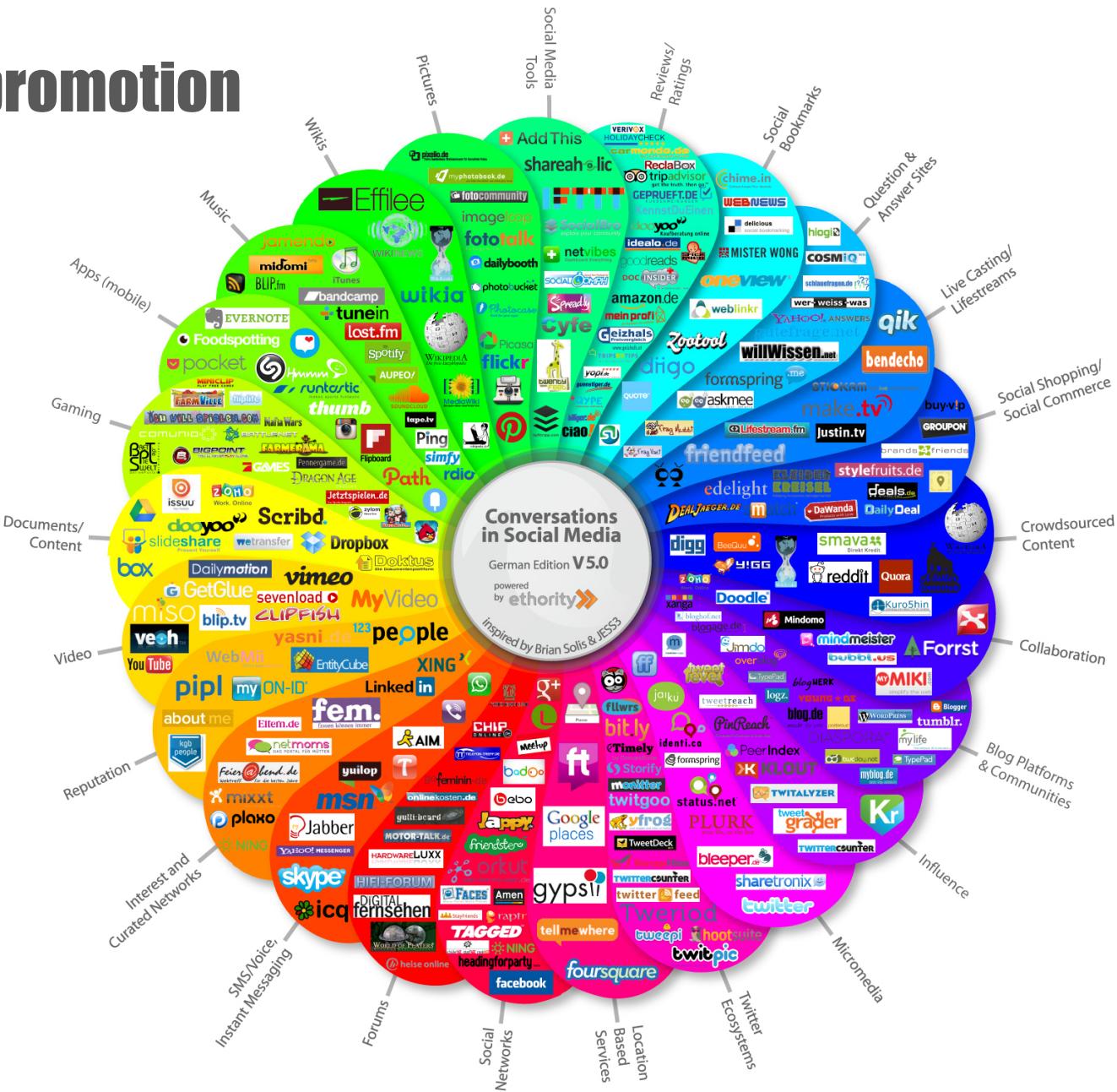
# Eventbrite



# Marketing schedule



# Social media promotion





**Jo Young**  
@Joysci

What disruptive forces exist in publishing & what will happen in future? Join us for a day of talks & discussion! [edinpubconf.net](http://edinpubconf.net)

Reply Delete ★ Favorite Buffer ... More

RETWEETS

6

FAVORITES

4



5:28 PM - 27 Apr 2014



**Jo Young**  
@Joysci

What disruptive forces exist in publishing & what will happen in future? Join us for a day of talks & discussion! [edinpubconf.net](http://edinpubconf.net)

Reply Delete Favorite Bu

RETWEETS FAVORITES

6

4



5:28 PM - 27 Apr 2014

RETWEETED BY



**SciEditCo** @scieditco · Apr 20

Only 10 days left to buy an earlybird ticket! Disruption in the Publishing Industry: Digital, Analytics & the Future

[edinpubconf.net](http://edinpubconf.net)



5



3

...



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Reply Delete Favorite Bu

RETWEETS FAVORITES

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**Jo Young** @Joysci · Apr 14

Disruption in the Publishing Industry: Digital, Analytics & the Future  
[journalclub30.com/2014/04/13/dis...](http://journalclub30.com/2014/04/13/disruption-in-the-publishing-industry-digital-analytics-the-future/)  
#innovation #business #content

Reply Retweet 4 Favorite 4 ...



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Reply Delete Favorite Bu

RETWEETS FAVORITES

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Disruption in the Publishing Industry: Digital, Analytics & the Future

[journalclub30.com/2014/04/13/](http://journalclub30.com/2014/04/13/)  
#innovation #business #content

Reply Retweet 4 Favorite 4 ...



**Jo Young** @Joysci ·

WOOt! Publishing conference tickets flying off the shelves! Must be because the extra earlybird rate is ending today... #Edinburgh #pubconf

Reply Retweet 3 Favorite ...

## Social media promotion - exercise



Write a few tweets for your event!

What images represent your event?



# #Event

# Attracting sponsors

Diamond, platinum, gold, silver, bronze...

---

# Who do you want to invite?



- What companies/ organisations would be interested in meeting your audience?
- Could certain companies promote their products/ services to your audience?
- Are there government organisations or academic societies that sponsor your type of event?
- Does your department have a fund for conferences?

# £ Levels of sponsorship



## Bronze - £500

- Sponsor a coffee reception
- Logo on website
- Something in delegate bag
- Name & logo on programme

# £ Levels of sponsorship



## Bronze - £500

- Sponsor a coffee reception
- Logo on website
- Something in delegate bag
- Name & logo on programme



## Silver - £1,000

- Sponsor lunch
- Stand in networking area
- Logo on website
- Something in delegate bag
- Name & logo on programme

# £ Levels of sponsorship



## Bronze - £500

- Sponsor a coffee reception
- Logo on website
- Something in delegate bag
- Name & logo on programme



## Silver - £1,000

- Sponsor lunch
- Stand in networking area
- Logo on website
- Something in delegate bag
- Name & logo on programme
- 1 free ticket



## Gold - £2,000

- Sponsor drinks reception
- 10 minute talk to delegates
- Stand in networking area
- Logo on website
- Something in delegate bag
- Name & logo on programme
- 2 free tickets

# Managing sponsor expectations

- Always keep in touch before the event and sign them up as delegates.
- Remind them what their sponsorship package includes
- Ask them to send marketing material for delegate bags through one month in advance
- Make sure their logos are prominent on the webpage, programme and marketing material
- Welcome them when they arrive, show them to their stand
- Be sure to mention them in the introduction/closing remarks



# #Event

# Event preparation

The days leading up to the event...

---

# Preparation, preparation, perparation... **The six Ts**

- **T**angible: name badges, delegate bags, swag
- **T**echnical: AV, Powerpoint presentations, sound checks
- **T**heatre: chairs set up correctly, networking area
- **T**asty: catering order, drinks
- **T**asks: who is taking registrations? Who is greeting sponsors?  
Who is setting up talks?
- **T**out: branding obvious? Sponsor stands set up?



# #Event

# Managing the event

Timing, audience, live tweeting...

---

# Registration



- Quick & efficient
- iPad + Eventbrite
- 2+ volunteers
- Can people buy tickets on the door?

## In lecture theatre

- Intro and closing remarks
- Chairs for each session
- Managing speakers
- Audience questions
- Live tweeting, Twitter questions
- Keep to Time!



# Networking



- Make sure there's enough time for networking
- Avoid over-running in the talk sessions

## Speed networking!

- Meet lots of people quickly!
- Fun, fast and efficient



# #Event

# Post-event actions

Mailing list, surveys, feedback...

---

## Post event survey

- Survey monkey, Google forms, Wufoo
- Keep it short (7-10 questions)
- Ask for ratings (1-5) or agree/strongly agree statements
- Keep it polite, straightforward and concise
- Ask about the speakers, the sessions, the venue, the food, the price, their favourite session, if they could summarise the event in one sentence...
- Would they attend similar events in future?



## Post event activities



- Thank all of the speakers
- Mailchimp list – thank you email to attendees
- Ask people when they sign up to the event to subscribe to mailing list
- Blogs – make a list of articles about the event
- Videos of speakers – Youtube channel
- Social media presence



www.electv.net



The  
Scientific Editing  
Company



@joysci

A wide-angle photograph of the Edinburgh skyline, featuring the Scott Monument, the Balmoral Hotel, and the National Gallery of Scotland, set against a clear blue sky.

Survey:  
<https://forms.gle/oyi7VUkGMV5xrABNA>