Microsoft

Virtual Event Playbook
Accessible ◆ Inclusive ◆ Engaging

Increase engagement with virtual events

Whether you are a seasoned producer or new to creating virtual events this playbook will walk you through the best practices for using Microsoft 365 technology to deliver compelling events. This content has been compiled through the contributions of many people across Microsoft who have been involved in delivering our flagship events, webinars and leadership townhalls in recent months. We strive to prioritize accessibility, inclusion and engagement as we create the new standard for the audience experience.

We have organized these resources by role and production phase with key sections for everyone. Appendixes provide supplemental information specific to event types. No matter the size of your organization you may find yourself fulfilling multiple roles. Read key information in the "For Everyone" section and what is specific to your role. Use our Event Organizer Checklist to ensure you are on track.

Every event is a learning opportunity. We are all learning together as we transition historically physical events to a digital setting. Be flexible with yourself and your teams as you make the transition. Embrace change and continuing to experiment with methods as you deliver more events.

You are not alone. Bring your questions to our Virtual Events forum to learn from other people who are on this journey. We are always here to help.

Karuana Gatimu
Principal Manager & Technical Producer
Microsoft Teams Customer Advocacy Group

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Virtual Event Forum

The Virtual Event forum is a community of people just like you who are navigating the new world of delivering virtual events. Join them and subject matter experts who can answer questions and share successful real-world experience.

https://aka.ms/VirtualEventForum

Table of Contents

This playbook is organized by role and event phase. We suggest the following approach to using it to get the most from these resources.

- ❑ Review "Introduction" & "Overview" sections
- ❑ Download organizer checklist
- ❑ Review full content by event phase, then role
- ❑ Schedule a practice event
- ❑ Join the Virtual Event forum

NOTE: This playbook will focus on the most common methods for producing virtual events that do not require custom production including external encoders. Please bring your advanced production questions to our online community at https://aka.ms/VirtualEventsForum.

Microsoft 365

Everyone

Overview

Microsoft 365

Compelling events are about people

Throughout your process of producing a virtual event it is critical to prioritize the following elements:

- ❑ The clarity of your message
- ❑ The attendee experience
- ❑ Your ongoing engagement strategy

All technology decisions should be made with these key elements in mind. Often the most important thing to invest in is the storytelling skills of your presenters who will land your core messages.

Ensure your content has a follow-up lifecycle for attendees who want to continue learning, review content or ask questions.

Events are no longer a destination - they fuel connection, ongoing learning and engagement.

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Event Design Model

The one thing we can never get back is time. This is the most valuable thing an event attendee shares with you.

The most successful virtual events are a part of a long-term audience acquisition & retention strategy. Below is an example framework of an acquisition strategy.

Ensure attendee satisfaction with valuable and engaging content & on-screen talent. Clear calls to action & post-event engagement will ensure the attendees you acquire would return for further events.

**Awareness** – Potential attendees know about you and your event.

Education – Potential attendees gain knowledge about the purpose of your event.

Intent – Potential attendees form intent to participate in your event.

Conversion – Potential attendees convert via registration.

Engagement – Attendee participation.

Satisfaction – Attendees are satisfied with your event and would recommend it to others.
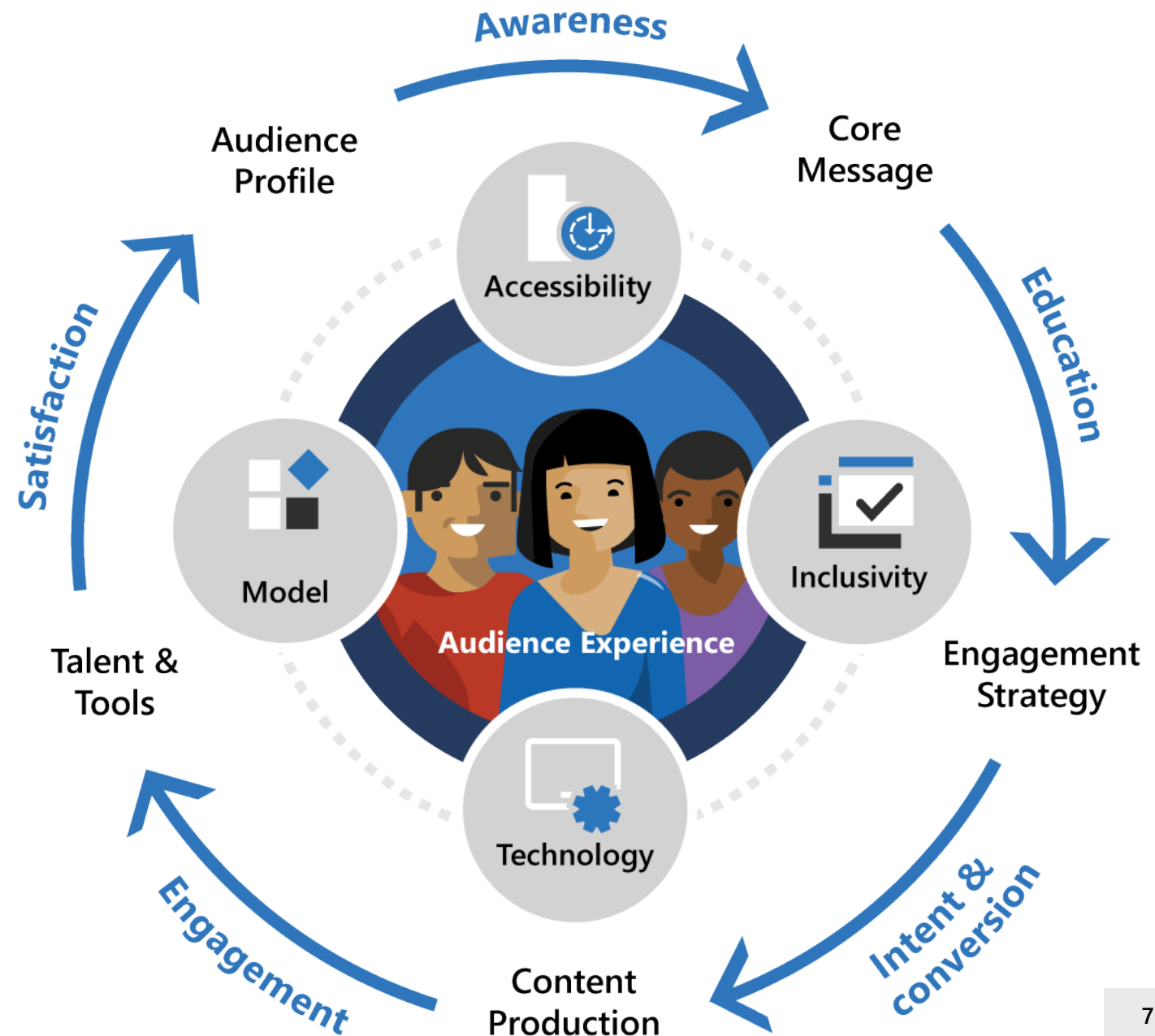
Example: Digital events guiding principles

Event Mission: Online content and interactive experiences that foster learning, connection and inspiration

Approach with empathy and inclusion
Adapt to audience needs/feelings, enabling
all to feel welcome, present and able to connect.

Be a digital content platform
Media and user experience optimized for digital consumption.

Communicate core narratives
Deliver learning content, core messaging, authentic brand experience, priority solutions and engagement opportunities.

Earn audience attention
Help users prioritize content via promotions, schedule reminders and participation rewards.

Access the experts
Reduce friction. Expand connection opportunities. Get information from the source.

## Embrace real time feedback & change
Incorporate real time feedback for content and event experiences. Be willing to quickly change to deliver a better event.

Accessible and inclusive events

Your audience is more diverse than you may think. Design an inclusive event by following our guidance and using our tools.

https://aka.ms/AccessibleEvents
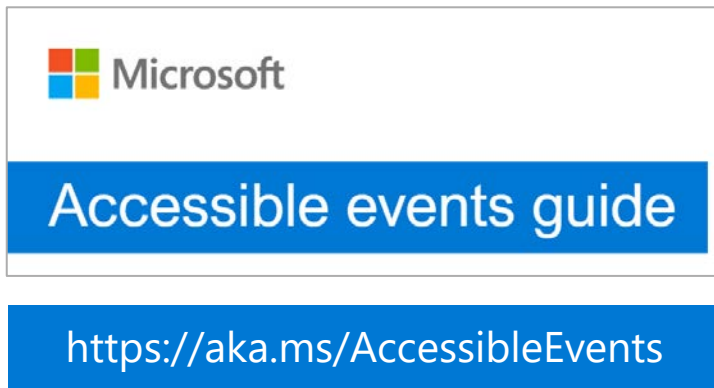
View our guidance for creating accessible events from registration to presentations. These simple but important tips will ensure everyone is included.
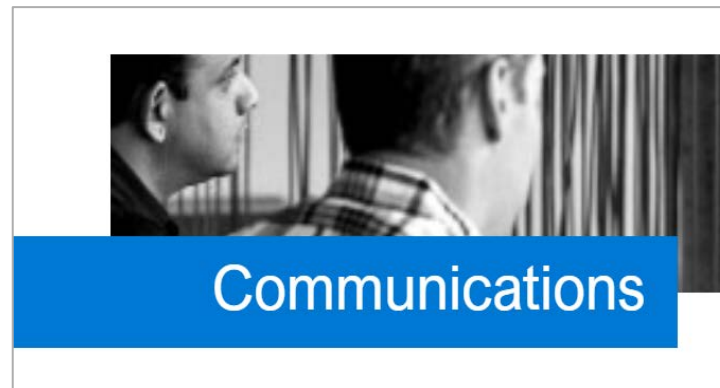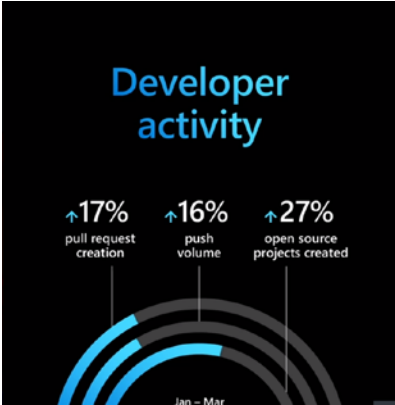
Create inclusive communications that use text and provide an ability for attendees to request accommodations or ask questions. Learn about making accessible e-mails and consider using Sway for event brochures or agendas provided in advance.
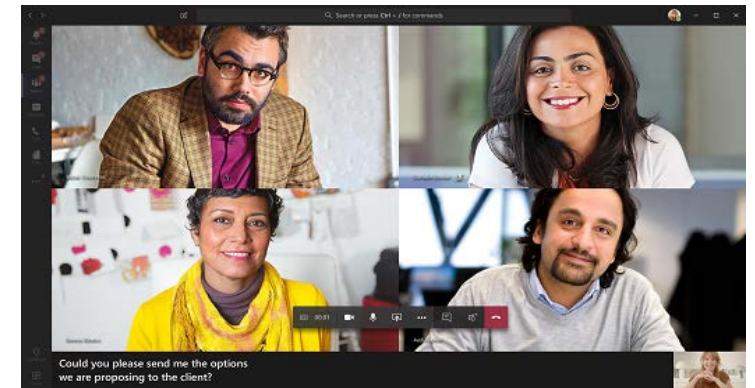
Ensure your audience knows they can turn on live captions in Live Events or PowerPoint Live. For video provided on demand, create caption files (.vtt) for inclusivity on streaming platforms or utilize the built-in capabilities of Microsoft Stream.

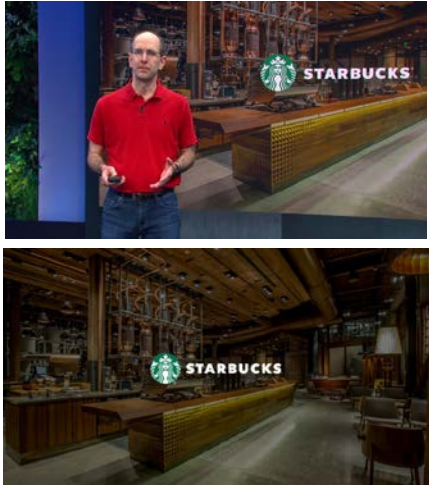# Components of presentation accessibility

Contrast

Developer activity

↑17% pull request creation ↑16% push volume ↑27% open source projects created

Jan – Mar

Shape and color

Subject 1 ●

Subject 2 ▲

Subject 3 ✖

● C1   ▲ C2   ✖ C3

Alt text

Slide layouts

Microsoft

Presentation title

Subtitle or speaker name

Text layout (without bullet points)

Main topic: Segoe UI, size 28pt
Segoe UI, size 20pt for second level
Segoe UI, size 18pt for third level

Three photos layout

Text placeholder   Text placeholder   Text placeholder

Reading order

Azure

Reading Order

☑ 1 Title 3: Azure databases
☐ — Rectangle 50: Decorative
☐ — Rectangle 46: Decorative
☐ — Rectangle 6: Decorative
☐ — Rectangle 48: Decorative
☐ — Rectangle 4: Decorative
☑ 2 Rectangle 31: Azure Cosmos DB
☑ 3 TextBox 69: Non-relational
☑ 4 Rectangle 30: Azure Cache for Redis
☑ 5 TextBox 68: Cache
☑ 6 Rectangle 67: Azure Database for MariaDB
☑ 7 Rectangle 66: Azure Database for PostgreS...
☑ 8 Rectangle 64: Azure Database for MySQL
☑ 9 Rectangle 63: Azure SQL Database
☑ 10 TextBox 277: Relational
☐ — Graphic 12: Decorative
☐ — Graphic 57: Decorative
☐ — Graphic 62: Decorative
☐ — Graphic 61: Decorative
☐ — Graphic 49: Decorative
☐ — Graphic 65: Decorative

Accessible color combinations

White R255 G255 B255			Rich Black R0 G0 B0		
AA R255 G147 B73	AA R254 G240 B0	AA R155 G240 B11	AA R48 G229 B208	AA R80 G230 B255	AA R213 G157 B255
AA R216 G59 B1	A R255 G185 B0	A R16 G124 B16	AA R0 G133 B117	AA R0 G120 B212	AA R134 G97 B197
AA R107 G41 B41	AA R106 G75 B22	A A R5 G75 B22	A A R39 G75 B71	A A R36 G58 B94	A A R59 G46 B88
R242 G242 B242	R230 G230 B230	R210 G210 B210	R115 G115 B115	R80 G80 B80	R47 G47 B47

Ensure slide content is accessible

Take the following steps to create accessible content that everyone can consume effectively.

Contrast

Use high contrast colors for maximum readability.
The recommended contrast ratio is at least 4.5:1.

Text | Text | Text
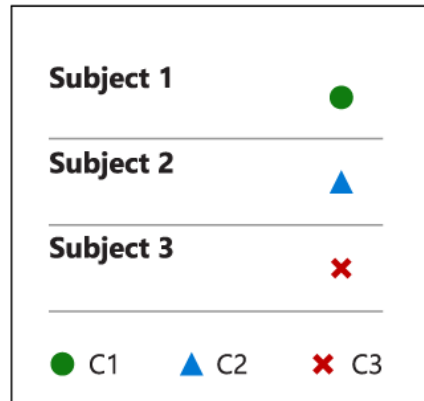
Color Contrast Analyzer

Download this tool to determine the legibility of text and the contrast of visual elements.

⬇ **Download**

Shape and color

Use different shapes with a legend to indicate statuses to accommodate for color blindness.

Example:

Subject 1 🟢
Subject 2 🔺
Subject 3 ✖

🟢 C1   🔺 C2   ✖ C3

Alt text

Alt text helps people with screen reader understand the content of slides. You should create alternative text for shapes, pictures, charts, tables, SmartArt graphics, or other objects.

Here's how:
Right click on item.
Select **Edit Alt Text**.
Enter a **Description**.
If an object is meant to add visual styling and doesn't contain meaning (*e.g.* stylistic borders), do not add alt text and instead check **Mark as decorative**.

Slide layouts

Using a built-in slide layout that matches your content ensures a hierarchical reading order of text blocks.

Example:
If a new slide will have a title, choose one of the built-in layouts with a title placeholder rather than starting with a blank layout and adding a text box for the title.

Click to add title

Reading order

Screen readers describe content on the screen in the order it was created. To ensure your content is read back in the order you prefer, arrange your objects in the Selection Pane appropriately. Objects on the bottom of the selection pane are read first.

Here's how:
Click the Home tab.
In the Drawing group, select the Arrange drop-down menu.
Click Selection Pane.

Additional tips

Be sure to run the **Accessibility Checker**! Go to **File** → click the **Check for Issues** drop down menu → click **Check Accessibility.**
Videos need to be accessible: If your presentation includes a video, ensure it is captioned and audio described (if appropriate).
Visit the Office Accessibility Center to learn more about accessibility in PowerPoint.

Inclusivity begins in planning

Creating an inclusive event begins with how you plan. Hear feedback from a variety of roles in your organization. Now is the time to address ideas as you reinvent your event for virtual delivery.

Some recommended tasks:

- ❑ Prepare, publish and enforce an event Code of Conduct (CoC). Use our [example](#) to get started.

- ❑ Include a CoC contact for concerns.

- ❑ Include ways for people to provide preferences in the registration form, including preferred pronouns, physical and mental requirements and any other necessary identifiers. (When in person - dietary needs and allergies)

- ❑ Engage various stakeholder groups early to get feedback and suggestions. Remember to include those who have not participated in the past.

- ❑ Review your speaker list. Is there an opportunity to bring in additional talent to work with seasoned presenters?

- ❑ Ensure your event team represents diverse perspectives across your organization.

- ❑ Plan for event/session surveys to get feedback from all involved.

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Your effort matters

Review our guidance about the simple ways you can be more inclusive of people with disabilities. Beyond virtual events, these items apply to the broader context of our work and professional relationships. The seven ways to be more inclusive of people with disabilities are below. Click through to the link to view short videos explaining each one.

1. **Be your usual self**
2. **Make sure your work is accessible**
3. **Disability is a strength**
4. **Follow the principles of inclusive design**
5. **Accept each person as a human first**
6. **Learn the appropriate etiquette**
7. **Follow our lead**

SIMPLE THINGS COUNT

Seven ways to be more inclusive of people with disabilities

SIMPLE THINGS COUNT

EMILY LADAU
DISABILITY RIGHTS ACTIVIST

EMILY LADAU | #1

Be your usual self

Organizer
Before your event

Transitioning to virtual events

Microsoft 365

Event Team

Essential

Organizer
Event host. Create the event, set permissions, invite event team, curate event links.

Producer
Responsible for starting and stopping the Live Event, queuing content, back channel chat. This could also be the Organizer.

Presenters
Responsible for content and commentary. They can present audio, video, and share their screen with the attendees. May moderate Q&A.

May be the same person

Recommended

Moderators
Moderator to help facilitate Teams Q&A or Yammer Conversation in the Live Event.*

IT Administrator
Ensures network and service health in advance of your event. Policy configuration and monitoring. Manages technical support requests.
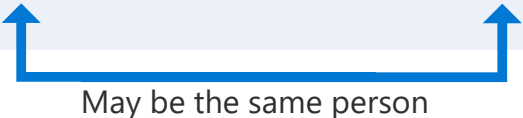
Tip: Event sponsors

In a larger organization you may additionally have an event sponsor with an interest in the education of audience or accountability for delivering the message. These executives are often non-technical and most engaged about the outcome of your event rather than the technical details.

*In Teams should be a person in the meeting Organizer or Presenter role, in Yammer should be a Group Admin.

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Your attendees

Your attendees may be participating in your event from unique locations. Consider who they are, what they are using and where they are joining from to mitigate common event issues.

Identity

Are attendees full members of your Microsoft 365 tenant?

Will you support guest attendees?

Will you support anonymous attendees?

Configure these items in your service policies and meeting options. Proactively decide the scope of your viewing audience.

Devices & Clients

Windows and Mac devices

Browsers and desktop clients

Mobile & tablet devices (Android, iOS)

Room devices

Text & screen readers

Device type dictates certain elements of the experience. Microsoft Teams minimizes that impact by prioritizing quality, allowing for meeting controls and focus modes.

Location

Hard wired or wireless?

Mobile networks?

Cellular service only?

Bandwidth considerations can impact your event. Include an on-demand viewing strategy to ensure content can be accessed when attendees return to a good signal location.

Accessibility

Strive to have an accessible event and content. Utilize features like closed captions in broadcasts, alt-text for images and the Accessibility Checker for PowerPoint.
Learn more at https://aka.ms/PowerPointAccessibility.

Avoiding common issues

Creating a quality event can feel daunting. Follow these recommended steps from our experts to avoid common issues.

❑ **Time to Prepare**: Even a simple one-person webcast needs production time. Schedule events in advance and avoid last minute productions when possible. Once you've done a few, you can reduce this time.

❑ **Service & Network Health**: Work with your IT department to ensure your network, service and devices are healthy.

❑ **Content Quality**: Smooth delivery will not make up for poor content. Is the message clear? Will someone new to the topic understand the intention?

❑ **Presentation Skills**: Your speakers are the heart of your event quality. Ensure they have ample time to prepare and understand the presentation process.

❑ **Event Support**: The longer and more complex your event is, the more you will need event support staff just like in a physical event. Train them early. Provide clear ways for attendees and speakers to request assistance.

Every event producer knows that things can and will go wrong, but your planning and rehearsals will mitigate your audience being aware. Keep your team morale high and relaxed for success.

Event scenarios

Webinars

- Destination learning events.
- Individual or series. Funnel to conferences and communities.
- Pre-recorded or live.
- 2-way engagement with attendees (open or moderated).
- Includes hands on learning scenarios.

Virtual conferences

- Single or multi-day experience.
- Multi-track and varying content types.
- Funnel to online communities for ongoing engagement.
- Moderated Q&A.

Online communities

- Managed communities for learning and ongoing engagement. Community management support needed.
- Ongoing schedule of events and meetings.
- Combination of recorded content & live discussion.

Leadership townhall

- 1 to Many with managed Q&A.
- Often moderated destination events.
- Sometimes crafted in a regular rhythm of business or on-demand.

Public broadcasts

- 1 to Many destination broadcast.
- Optional custom streaming configurations.
- May stream to additional platforms.

Tip: Scale and complexity matter

Teams meetings and Live Events can be self-produced. For large scale or multi-day events, a broader event team is recommended.

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Evolve your physical events to a digital format

New methods of sharing information are key to delivering a successful virtual event. It is important to embrace new ways of engagement to keep the interest of your audience. Strive to be different in alignment with your brand, context and message. Train team members on new skills to maximize this new event model.

Shorter sessions

Minimize the amount of information you are trying to share. Have a clear topic and follow-up call to action.

In multi-hour and multi-day events, plan breaks in your content delivery. Program short interstitial announcements or allow programming breaks to give time for attendees to stretch, walk the dog or visit their facilities.

Interactive content

Use online polls, trivia games relevant to your content and prepared video to keep the content moving.

Ensure you allow for Q&A time. Pre-seed questions in the chat window to get the ball rolling. Many people are hesitant to come off mute and speak in a virtual forum. Allow enough silence to accommodate for delays in audio transmission/unmuting.

Presenter skills

Rehearse! There is no replacement for preparation.

Online presentation skills are more complex when you are not receiving non-verbal feedback from your audience. Consider making speaker training mandatory as people adapt.

Semi-live model

Consider pre-recording core content. Play back pre-recorded sessions with live Q&A moderators, preferably the speakers. This reduces stress on production staff & speakers, allow for editing in additional on-screen elements and still provides interaction with the audience.

Use our checklist

Use our [checklist](#) to stay on track and prepare for your virtual event. Download it from https://aka.ms/OrganizerChecklist.

Microsoft 365 Virtual Event Sample Checklist

Event Overview

Use in your initial 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? Has this event ever been digital before? ○ Have we asked them for 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? See our decision tree.] 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

Microsoft 365

Organizer

Before your event

Selecting your event experience

Top

Microsoft 365

Combination events

Large scale, multi-day events may be a combination of Teams meetings and Live Event experiences. Match the interaction and broadcast method to the audience need.

Live Events

Teams Meetings

Keynotes

✓ All audience content

✓ Primary conference speakers

✓ Option for pre-recorded content

✓ No competing content scheduled

Breakouts

✓ Core conference content

✓ Organize into subject tracks

✓ Select experience by projected attendance

✓ Use moderators to increase Q&A satisfaction

Choose experience by audience size & interaction model

Interactive

✓ Two-way feedback sessions

✓ Interactive topics like feedback, ask-the-expert panels, hands-on-training

✓ Allowing attendees to unmute or share video

✓ Free flowing chat

Tips for a successful event:

• Provide navigation and awareness sign-posts on your primary attendee website or digital brochure.

• Make content available for attendees as soon as possible after event. Use Stream for Microsoft 365, Microsoft Teams or other popular online video portal technology to ensure a content lifecycle.

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Selecting your event experience

	I What type of event?	**II** What type of attendee experience?	**III** How many people will watch the event live?*	**IV** What level of video production?
	Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
	Event series	Managed Q&A	Up to 20,000	Multiple presenters
	Part of an engagement community	No attendee discussion or Q&A	Up to 100,000	Custom production

Event examples:

Single event: Product launch, organizational changes, town hall

Event series: Training, office hours, employee development

Engagement community: Customer community, company partners, product support

*Are your attendees' members or guests of your Microsoft 365 tenant? Microsoft Stream does not support guest access at this time.

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Selecting your event experience: Teams meeting

I	II	III	IV
What type of event?	**What type of attendee experience?**	**How many people will watch the event live?**	**What level of video production?**
Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
Event series	Managed Q&A	Up to 20,000	Multiple presenters
Part of an engagement community	No attendee discussion or Q&A	Up to 100,000	Custom production

Recommended: Teams meeting

Build community and authentic connection

- Provides open discussion features via audio and video for attendees
- Provide meetings as a part of a team to provide continuing engagement
- Support interactive chat during & multiple presenters in the meeting
- Familiar content and video sharing controls
- Use Yammer for your Teams produced meeting as a part of a community experience or series with continuing conversation

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Selecting your event experience: Live Events

	I	II	III	IV
	What type of event?	**What type of attendee experience?**	**How many people will watch the event live?**	**What level of video production?**
	Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
	Event series	Managed Q&A	Up to 20,000*	Multiple presenters
	Part of an engagement community	No attendee discussion or Q&A	Up to 100,000**	Custom production

Recommended: Live Events

Manage the attendee experience

- Multiple Live Event options for maximum flexibility
- Broad scale and highly managed content experience
- Supports self-produced to custom production scenarios
- Live Events can be publicized as a part of an engagement community

Next Step: Follow Live Event selection decision tree ➡️

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Which Live Event experience is right for me?

I — How many people will watch the live broadcast?

II — Are there external attendees?

III — What type of attendee experience?

IV — What level of video production?

V — Type of live event

Up to 20,000*

Include people from outside your organization

Moderated Q&A

Simple webcam and screen share or Custom production

Live event in Teams

Only people from inside your organization

Open discussion

Simple webcam and screen share or Custom production

Live event in Yammer

No attendee discussion or Q&A

Only Custom production

Live event in Stream

Start your live event experience here!

Up to 100,000**

Include people from inside and outside your organization

Custom event experience embed or view in Stream

*Attendee limit increases over 10,000 are temporarily available until July 1, 2020. Events above 20,000 attendees require Live Events Assistance Program (LEAP) Engagement.
**Stream live events can be delivered outside an organization when planned though the LEAP team. It's a case-by-case, temporary service to help customers communicate at scale outside their organization.
Custom production scenarios including external encoder and multi-camera configurations will be covered in additional documentation

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Considerations by meeting types

 Putting your attendees at the center of your decisions will often simplify overly complex plans.

Almost every consideration presented by the technology layer of your virtual event can be mitigated through planning, rehearsal, IT support and prioritization of features for the attendee experience.

Teams meetings	Live Events in Teams	Live Events in Yammer	Combination event
• All team members receive channel meeting notifications • Two-step process to export meeting chat for review & repurpose • Chat with large groups can be difficult to follow • Recorded meetings can't be accessed by tenant guests • Recorded meetings can only be downloaded by organizer	• Requires intermediate skills in Live Events and presentation software to self-produce • Once the event is started it cannot be stopped • Any event interruption requires new meeting URL. Use a short URL redirector for simplicity. • Chat is moderated • Attendees cannot unmute or share video/content • Download video and transfer to on-demand viewing system for external guests	Live Event items plus the following: • Content sharing in separate document library • Supports ongoing conversation and hashtags. Have clear post-event messaging for moderation or self-service.	• Increased event management complexity when using different experiences, Live Events and Teams meetings • Must manage schedule changes in conference site experience • Need dual skills for meeting production & moderation

Each organizer must set the priority of meeting size vs engagement

Live Events: Supported platforms by role

	Desktop	Web	Mobile
Producer	Yes	No	No
Presenter	Yes	No	Yes*
Attendee	Yes	Yes	Yes

***Presenter** can join a Live Events meeting via mobile with audio capability and to view shared content, along with video, but they cannot share content from their mobile device.

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Understanding Guest Attendee Behavior for Virtual Events

A "guest" in the event context means an Attendee who does not have log-in credentials issued from the host tenant. They have a log-in credential from their home domain.

Example: Sally@Contoso.com wants to host a Teams Live Event from contoso.com. She invites Bob@microsoft.com and John@outlook.com to attend the event. Bob and John are both a "guest" of the Contoso.com tenant for this event.

Considerations for Sally*:

Q: Does your tenant allow for external guests? (Guest access configuration) Yes/No
A: If No, discuss with your IT administrator

Q: Have Bob and/or John ever been invited and logged into Contoso.com? (Existing guest user) Yes/No
A: Consider adding the guests to a Team in advance so they can redeem their invitations to the tenant before the event. The tenant switcher will appear in Bob's Teams client to switch to contoso.com. John may also see the tenant switcher if his account has been invited as a guest to more than one organization. This will also allow Bob and/or John to present or produce in the Live Event..

Q: Does Bob's organization use Microsoft Teams? (Licensed user in home tenant) Yes/No
A: If No, Bob will not be able to be authenticated as he joins the event. He can only join anonymously.

Q: Does Bob's home tenant allow their accounts to be guests in other tenants? (Guest access configuration) Yes/No
A: If No, Bob will not be able to be able to accept guest invitations or be authenticated as he joins the event. He can only join anonymously and cannot present or produce.

Q: Has John been added as a guest in Microsoft Teams? (MSA guest) Yes/No
A: If No, John will not be able to be authenticated as he joins the event. He can only join anonymously.

Q: Does Sally require only authenticated users to attend her event? (Meeting options) Yes/No
A: If Yes, users must have either Teams or Stream license depending on the production method.

*For detailed, supplemental information review our product documentation on Planning for Live Events   Microsoft 365

Teams produced Live Events: For external contacts

Guest users

	Attendee	Presenter/ Producer
People & Groups	Y (CC)	Y (CC)
Org-wide	Y (CC)	Y (CC)
Public	Y	Y (CC)

(CC) = Change organization context via the tenant switcher in desktop client. Attendees can switch context and view via an in-private browsing experience. There is no support for producing from the Teams web experience.

Federated users

	Attendee	Presenter/ Producer
People & Groups	Y*	Y (L)
Org-wide	N	Y (L)
Public	Y	Y (L)

(L) = Wait in the lobby
**If member of selected group/user list*

Technical readiness creates a smooth event

Now that you've selected which technology will best serve the needs of your event, take these important steps:

❑ Talk with your IT administrator to ensure you have access to the selected services

❑ Assess the skills of your event team

❑ Review online training or ask for help to fill identified gaps

If you are also filling the role of the IT administrator in your organization review our materials on service health and readiness.

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IT Administrator

Before your event

Manage service access & configuration

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Technical preparation delivers smooth events

Use our resources to ensure your event organizers and producers have successful virtual events.

❑ Validate network health

❑ Review policies for service access and configuration

❑ Provide a clear path for support

Utilize our core technical documentation on docs.microsoft.com or visit our Virtual Event Forum to ask your questions of our experts.

Microsoft 365

Who can use live events?

Who can create events?

Grantee from the admin

Enterprise E1, E3, E5, or Education A3, A5

Enabled Microsoft Stream license

Special requirements:

- Teams produced events require a Teams license
- Yammer event creators must be group admins

Who can watch events?

Viewers granted permissions to the event

Viewers with a valid license

Exceptions: Teams produced events can be set as externally anonymous access

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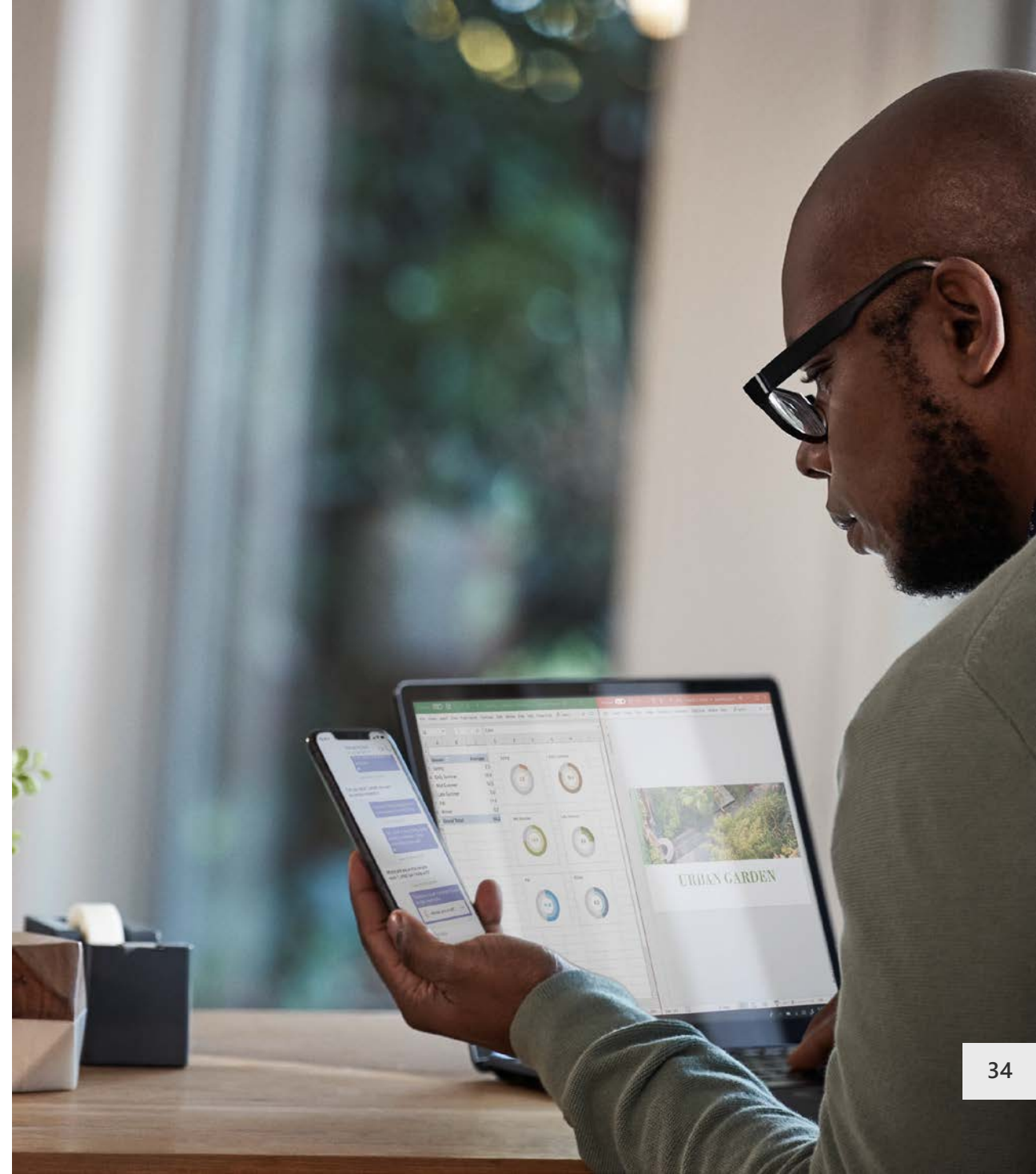
Networking & bandwidth considerations

- **"In Teams"**
  - **RTP traffic sensitive to network**
    - Delay can affect interaction between presenters
    - Jitter and packet loss can affect quality of audio and video
  - **Quality issues of presenter will affect all participants**

- **Externally**
  - **Quality issues of RTMP stream will affect all participants**

- **Live event attendees**
  - **Watching a video is not Real Time Communication and not as sensitive to networking issues**
  - **Networking issues might lead to delay and buffering or reduced video quality**
  - **Plan for sufficient bandwidth for multiple people to watch from the same location**

Network planning: https://aka.ms/teams-networking

Live Events high level architecture

Media Flows

Production (in Teams)

Presenter 1 Presenter N

Presenter

Production (externally)

Mic

Production Tools Media Mixer

Presenter "in Teams" leverages a Teams meeting

Traffic from Teams meeting is Real Time Protocol (RTP)

O365, Next-gen Skype Infra & Streams

Azure Media Services → Content Delivery Network (CDN) → Archiving

Leveraging Real Time Messaging Protocol (RTMP)

Video is provided by hardware or software encoder

Attendees watch Stream via TCP; this is not "real time communication"

Attendees

Player embedded in many clients (Desktop, Web, Mobile)

Microsoft 365

Live events policies

Why

Teams live events policies are used to manage event settings for groups of users

Considerations

You can use the default policy or create additional policies that can be assigned to users that hold live events within your organization

Does your organization have a requirement to host webinar style conferences?

Is the ability to record or transcribe a live event important to your organization?

How

Teams settings are configured via the Microsoft Teams Admin Center and PowerShell

Details: https://aka.ms/teams-live-events

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Live event policy setup

- Control who can host Live Events and the features that are available in the events they create

- Use the default policy or create one or more custom Live Events policies

- After you create a custom policy, assign it to a user or groups of users

Microsoft Teams Admin Center, Meetings, Live Events policy setup page

Microsoft 365

Live events settings

Allow scheduling

Allows users in your org to create and schedule Live Events in Teams.

Allow transcription for attendees

Enables attendees to see real-time captions and translation during the Event.

Can only be applied to quick start Events.

Who can join scheduled Live Events

Everyone – Users can create Events that employees internal and outside your org can attend.

Everyone in the org – Users can create Events that *only* people in your org can attend.

Specific users or groups – Users can create Events that *only specific users or groups* in your org can attend.

Microsoft Teams Admin Center, Live Event policies options

Recording

Always Record – Events created by users are always recorded and can be downloaded after the Event.

Never Record – Events created are never recorded.

Organizer can record or not – Users can decide whether to record the Live Event.

PowerShell:
[Get|set|new|grant]-CsTeamsMeetingBroadcastPolicy

Microsoft 365

Teams Live Events tenant-wide configuration

- **Tenant wide configuration PowerShell only**
  - [get|set]-CsTeamsMeetingBroadcastConfiguration

Attribute	Description
Support URL	Set up the support link that should be shown to Live Event attendees
Allow eCDN	Set up 'Hive' or 'Kollective' as the eCDN provider Note: Ramp is also supported but configured out-of-band


```
Windows PowerShell                                                      —    □    ✕

PS C:\Users\sonua> Set-CsTeamsMeetingBroadcastConfiguration -SupportURL "http:/www.contoso.com/broadcasthelp"
PS C:\Users\sonua> Get-CsTeamsMeetingBroadcastConfiguration


Identity                            : Global
SupportURL                          : http:/www.contoso.com/broadcasthelp
AllowSdnProviderForBroadcastMeeting : False
```

Microsoft 365

Other policies impacting Live Events
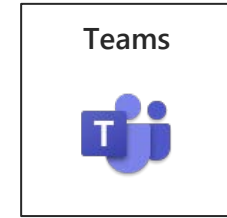
Users

Presenters need meeting policies that allow for screen sharing

Meeting policies should not limit the bandwidth for sharing

Microsoft 365

Considerations on leveraging Teams within virtual events:

	Product	TEAMS MEETING	M365 LIVE EVENTS PRODUCED VIA TEAMS	EXTERNAL ENCODER RTMP STREAM
	Delivery platform			
Audience	Audience	Internal External	Internal External	Internal
	Access	Internal: AAD External: Unsecured URL – self managed attendee list	Internal: AAD External: Gated URL unless anonymous selected	Internal: AAD
	Audience size	250	10k	10k
Production	Run yourself (no production involvement)	Yes	Yes	No
	Hardware requirements	PC/Camera	PC/Camera	Production (cameras audio, live switching) + Encoder (hardware or software)
	Duration	No limit	16 hours	4 hours
	Live mixing of sources/presenters in meeting Distinct roles empower producers, presenters and attendees	No	Yes	No
Captions	Captions	AI Captions only	AI Captions only (Captions not yet available in Yammer)	Human Captions only
	Caption translations	No	Up to 6 languages	No
Interactivity	Moderated Q&A (Chat)	No	Yes	Yes
	Unmoderated Q&A (Chat)	Yes	No	Yes
	Verbal Q&A within platform	Yes	Yes	No
Post-event	Automatic live to VOD transition	Yes *only available to internal on Stream	No	Yes
	Reporting	No	Unique Viewership GEO Viewing Duration Individual aliases	Unique Viewership GEO Viewing Duration

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Microsoft 365

Delivering content within the network

Client Requirements:

Live bitrate profile

    720p: 3.5 Mbps

    540p: 2.2 Mbps

    396p: 1.4 Mbps

    288p: 850 Kbps

    216p: 550 Kbps

    192p: 200 Kbps

eCDN solutions

    Reduce network traffic crossing the company firewall

    P2P or cache proxy solutions

    Real-time monitoring and in-depth analytics

[Video delivery and network overview documentation](#)

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Organizer
Before your event

Scheduling your Live Event

Microsoft 365

Meetings spectrum

Specialized scenarios on top of the collaboration platform

Learning and education

Webinars

Ad-hoc collaborative
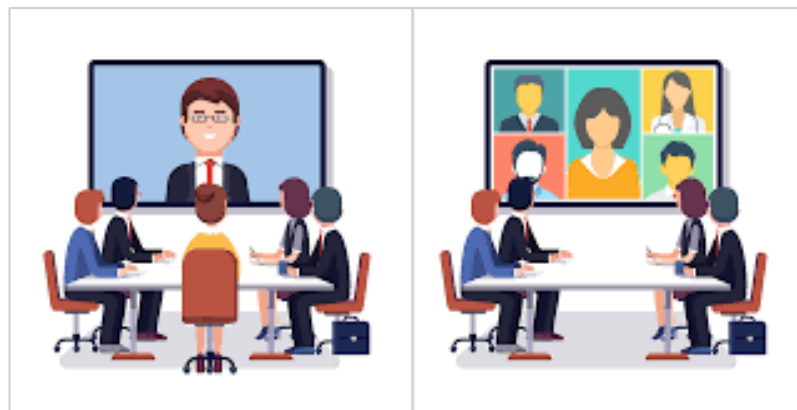
Persona: Eng Manager
Scenario: Daily Scrum

Persona: CEO
Scenario: LT Review

Self produced

Persona: Product Leader
Scenario: Tech Talk

Persona: Director
Scenario: Shiproom

Studio produced

Persona: Studio Producer
Scenario: Town Hall

Persona: Product Marketer
Scenario: Launch Demos

Collaboration platform

Microsoft 365

Teams Live Events

The following slides are to provide guidance on how to create a Live Event.

Note that some of the features may not be exactly what an end user will experience due to:

Teams policies set at the admin portal.

How the end user accesses Teams (e.g. web client vs desktop).

Where the company is at with new features being rolled out from the tenant level.

Ahead of scheduling your virtual event ensure you are coordinating with your IT administrator to be aware of any limitations placed on your meeting by tenant policies.

Microsoft 365
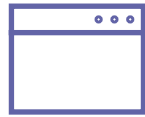
Schedule a Live Event from Teams

First time scheduling Live Events from Microsoft Teams? With this guide you will learn how to organize a Live Event and determine which roles your team should play in the production and moderation of the event.
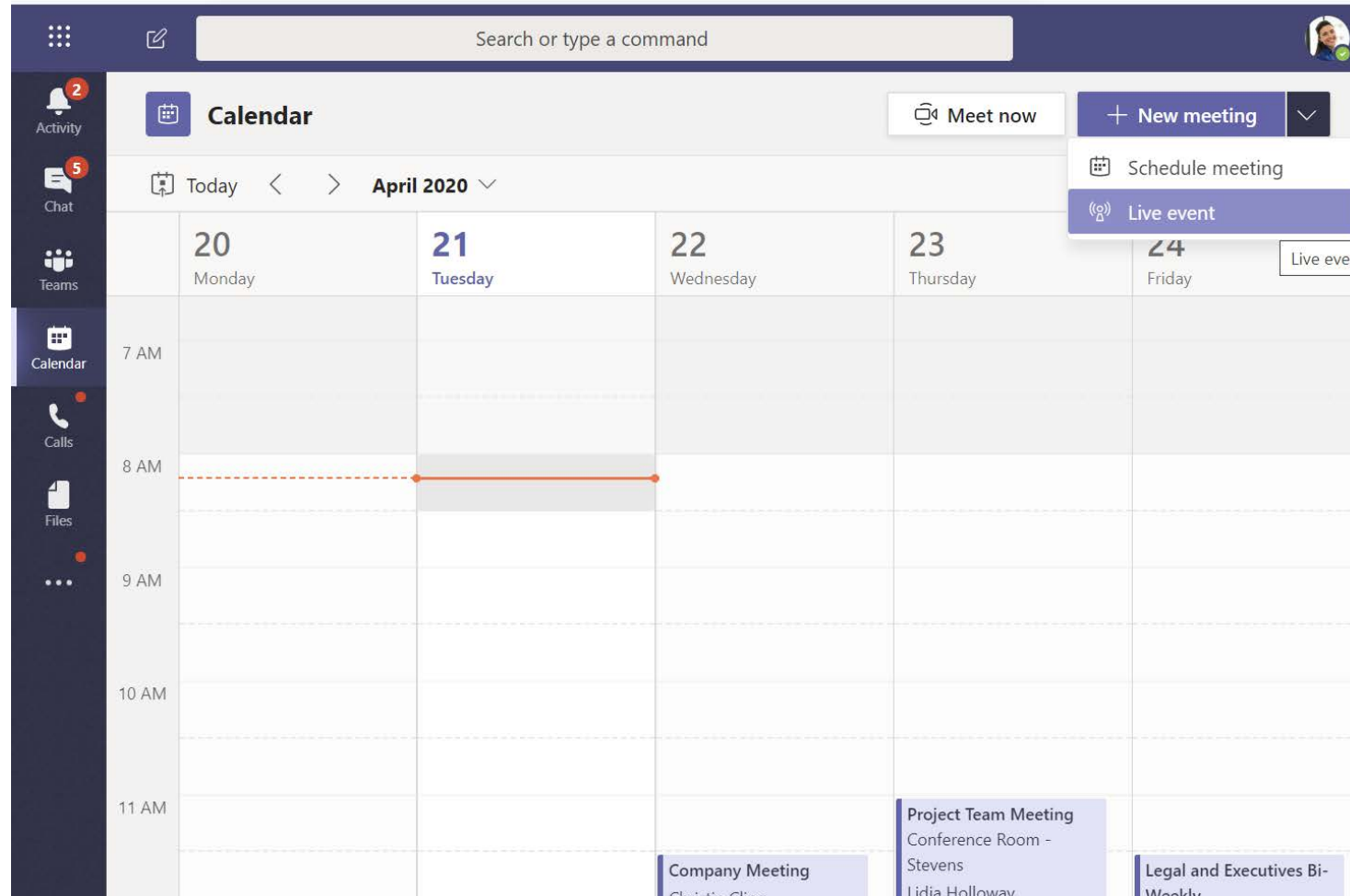
Schedule a Live Event
From your **Calendar** in Teams, click the drop down next to **New meeting** and select **Live event**

Setting up a Live Event

The **New live event** screen is where you define the following details about your event:
· **Title** of your Live Event
· **Date** and **Start** and **End** times of your event
· Who you will invite as **Producers** and **Presenters** for the event
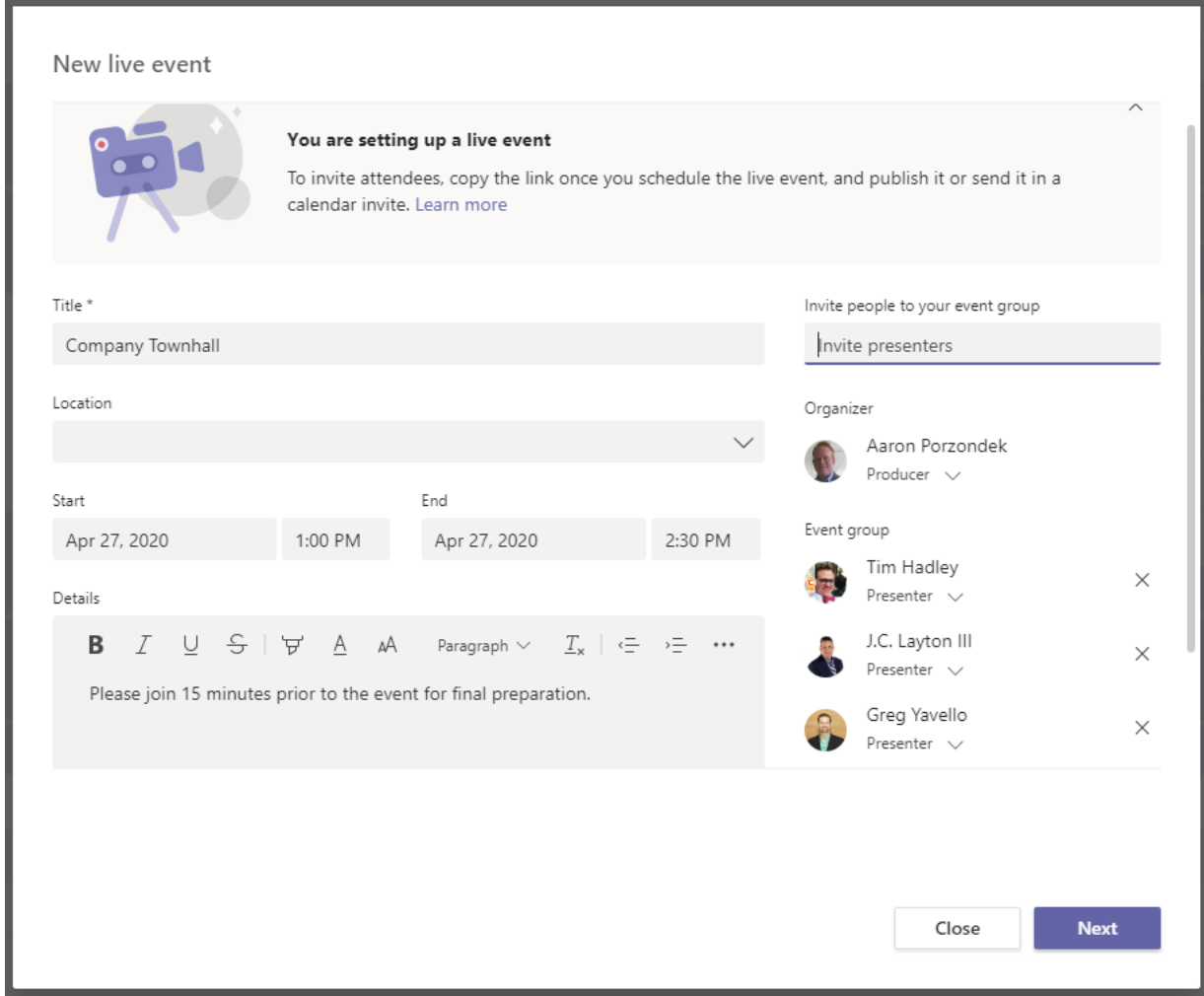
In the **Invite people to your event group** area is where you define the roles for your event team members. The following roles are available:

· **Producer:** As a host, makes sure attendees have a great viewing experience by controlling the live event stream. There is usually one producer, but you can have multiple for backup of the primary.
   · Starts and stops the live event
   · Shares own video
   · Share participant video
   · Shares active desktop or window
   · Selects layouts

· **Presenter:** Presents audio, video, or a screen to the live event, or moderates Q&A. There are usually multiple presenters, and some may only have the role of moderating the Q&A as an example.

Once you have completed all the fields, click **Next** to continue.

Important Note – We have not defined who will be viewing the Live Event as an attendee. We have simply defined who will be producing and presenting in your Live Event.

Microsoft 365

Live Event permissions

Next you will choose who can attend your event based on the following permission types:

- **People and groups** – The event can only be watched by people, contact groups or Microsoft 365 groups you name.
  - This permission type is ideal for confidential Live Events that should only be viewed by the specific people or groups defined here.

- **Org-wide** – Everyone in your org can watch the live event, including guests.
  - This permission type is best for all other Live Events where the content is not confidential.

- **Public** – Anyone can join – both people in your org and those outside of it.
  - This permission type would apply to a scenario where you intend for the general public to attend a Live Event, such as your customers or shareholders.
  - <u>Note</u> – In many organizations, this option is disabled by IT but can be permitted to certain individuals based on a policy.

Before clicking **Schedule**, scroll down to reveal options that pertain to **How will you produce your live event.** These will be covered on the next slide.

New live event

Live event permissions

People and groups
Only the specified people and groups can watch the live event.

Org-wide
Everyone in your org can watch the live event. (Sign-in required)

Public
The live event will be open to anyone. Use when most of the attendees are outside your org. (No sign-in required)

How will you produce your live event?

● Teams
You plan to use Teams to share content from presenters' webcams and screens.
☑ Recording available to producers and presenters
☑ Recording available to attendees ⓘ

Close   Back   Schedule

TIP: If your public event is supporting anonymous Attendees, do not select "Recording available to attendees" as they will not be able to access it. Follow the post-event guidance and publish in alternate locations.

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How will you produce your Live Event?

Finally you will select a number of available options for how your Live Event will be produced.

- **Teams** or **An external app or device**
  - To produce the event in Teams, keep the default option of **Teams.** The other option **An external app or device** is only if you desire to have your event produced by a formal audio and visual department or outside AV company.
- **Recording available to producers and presenters**
  - A recording is available to producers for download for 180 days after the event is over.
- **Recording available to attendees**
  - Attendees can watch the event on demand using DVR options for 180 days.
- **Captions**
  - Captions are available to event participants.
- **Attendee engagement report**
  - You can download a report that tracks attendee participation
- **Q&A**
  - Attendees can interact with producers and presenters in a moderated Q&A.

Now that you have selected all of the options you desire, you can click **Schedule** to continue.

New live event

Public
The live event will be open to anyone. Use when most of the attendees are outside your org. (No sign-in required)

How will you produce your live event?

◉ Teams
You plan to use Teams to share content from presenters' webcams and screens.
☑ Recording available to producers and presenters
☑ Recording available to attendees ⓘ
☑ Captions (preview)
Spoken language English (United States) ⌄
Translate to Choose up to 6 languages ⌄
☑ Attendee engagement report
☑ Q&A

○ An external app or device
You plan to use another tool to share content. Learn more

Close   Back   Schedule

TIP: If using an external device your video stream cannot be viewed by guests of the tenant.

Microsoft 365
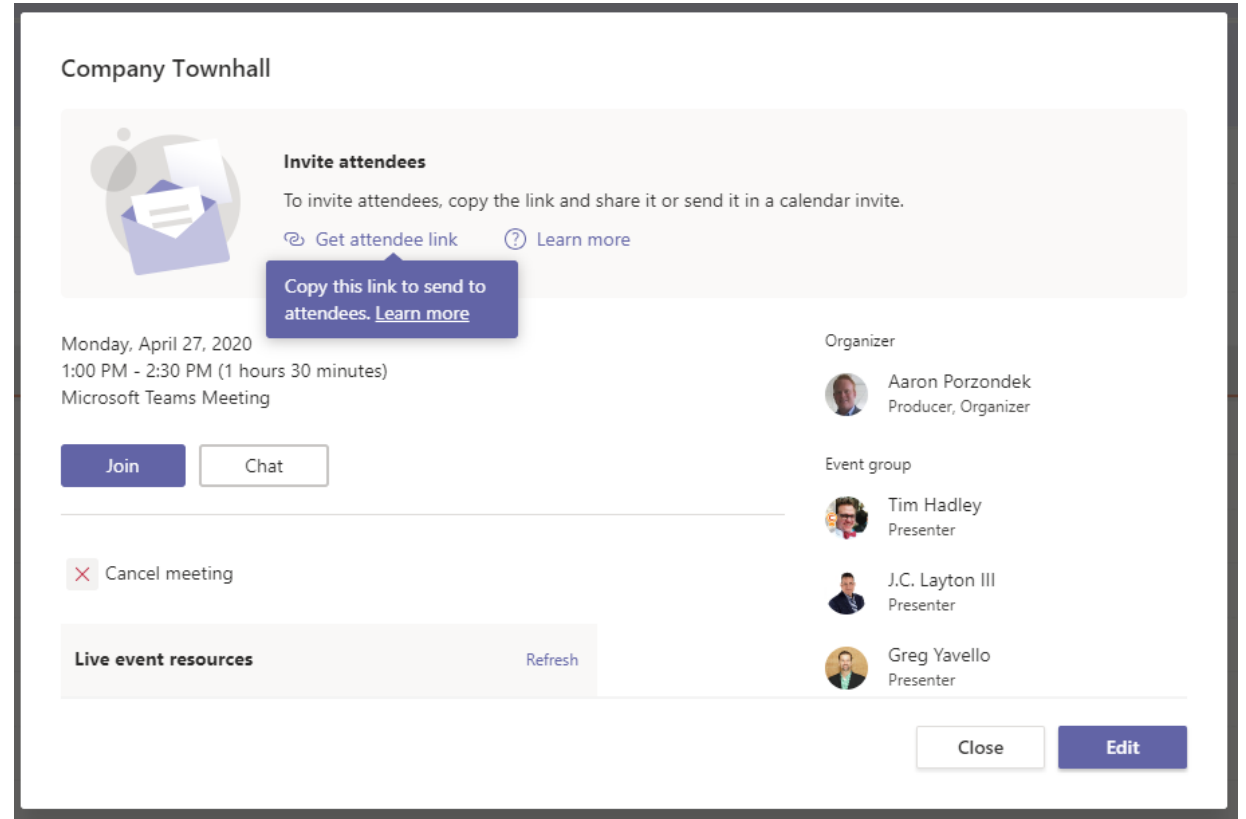
Get the link for Attendees

The next step in finalizing the setup of your Live Event is to copy the attendee link for your event. The attendee link is how your event attendees will attend the event.

Click the **Get attendee link** to copy the link to the clipboard. You can now publish that link however you desire. Common ways of publishing it include:

· Sending an Outlook invite to your intended attendees and pasting the attendee link into that Outlook appointment
· Publishing via a company newsletter
· Publishing to an internal Intranet site

Once you have copied the attendee link, you can now click Close to schedule the event. Producers and Presenters will receive an invitation in their emails with a link only valid for the Producers and Presenters of the event.

TIP: Forwarding invitations does not allow someone to become a producer or presenter. You must edit the event and add them through the Teams experience. Once an event has started you cannot add producers or presenters.

Microsoft 365

Organizer
Before your event

Scheduling your Teams meeting

Microsoft 365

Teams meeting options

Quick start

- ❏ Select / provision team where event will be held
- ❏ Create channel structure (see guidance)
- ❏ Create tabs & install additional apps (see guidance)
- ❏ Add production team
- ❏ Create private channel(s) for staff & speakers; add members
- ❏ Create scheduled or channel meetings

NOTE: Channel meetings will send notification to all team members. Consider provisioning a new team and completing ALL scheduling before adding attendee accounts to the team.

Example event

Review MVP Summit in the Microsoft Teams section for overview of how Microsoft delivered a virtual event to 4k attendees using this configuration.

Microsoft 365

Teams meeting

The following slides are to provide guidance on how to create a Teams meeting.

Note that some of the features may not be exactly what an end user will experience due to:

Teams policies set at the admin portal.
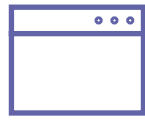
How the end user accesses Teams (e.g. web client vs desktop).

Where the company is at with new features being rolled out from the tenant level.

Ahead of scheduling your virtual event ensure you are coordinating with your IT administrator to be aware of any limitations placed on your meeting by tenant policies.

Creating a meeting invite in Outlook

1. Open your **Outlook Calendar***, click the **Home** tab, and then click the **Teams Meeting** icon (screenshot on the right).

2. Select the **Teams** icon. When you do so, a **Join a Microsoft Teams Meeting** link is created in the body of the invite. If you have an auto conferencing license, a phone number and conference ID will be included.

3. Create a **Title** for your meeting invite.

4. In the **Required** box, enter the email addresses for the people you want to invite to the meeting.

5. Select a **start and end time** for the meeting.

6. If you need the meeting to be recurring, please select the **Make Recurring** icon.

7. Add content to the body of the invite to inform participants of the purpose of the meeting.

8. Double check your information and then click the **Send** button.

*Your calendar in Teams is connected to your Exchange calendar. In other words, when you schedule a meeting in Outlook, it will show up in your Teams calendar, and vice versa.
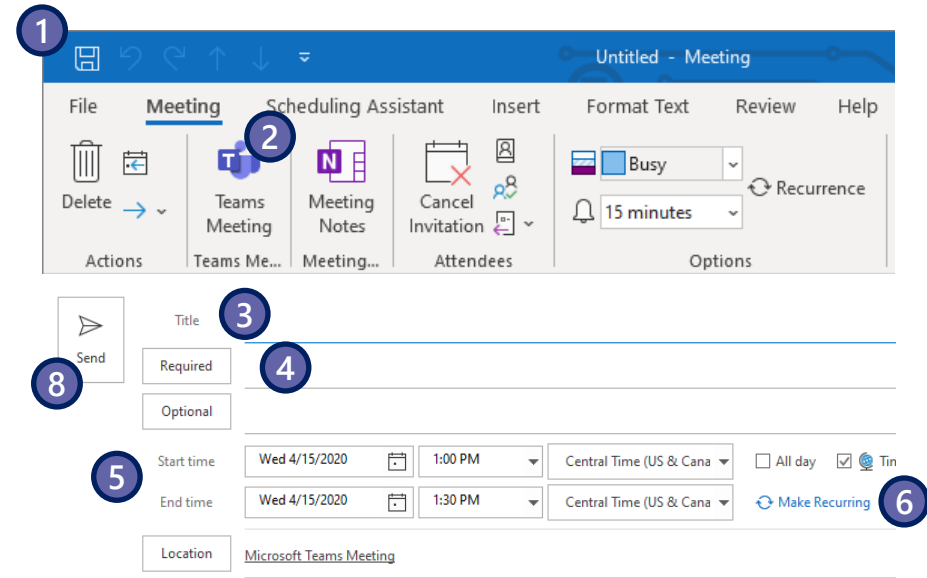
You're invited to join a Microsoft Teams meeting.

Join online now
Video conferencing, screen sharing, and more.
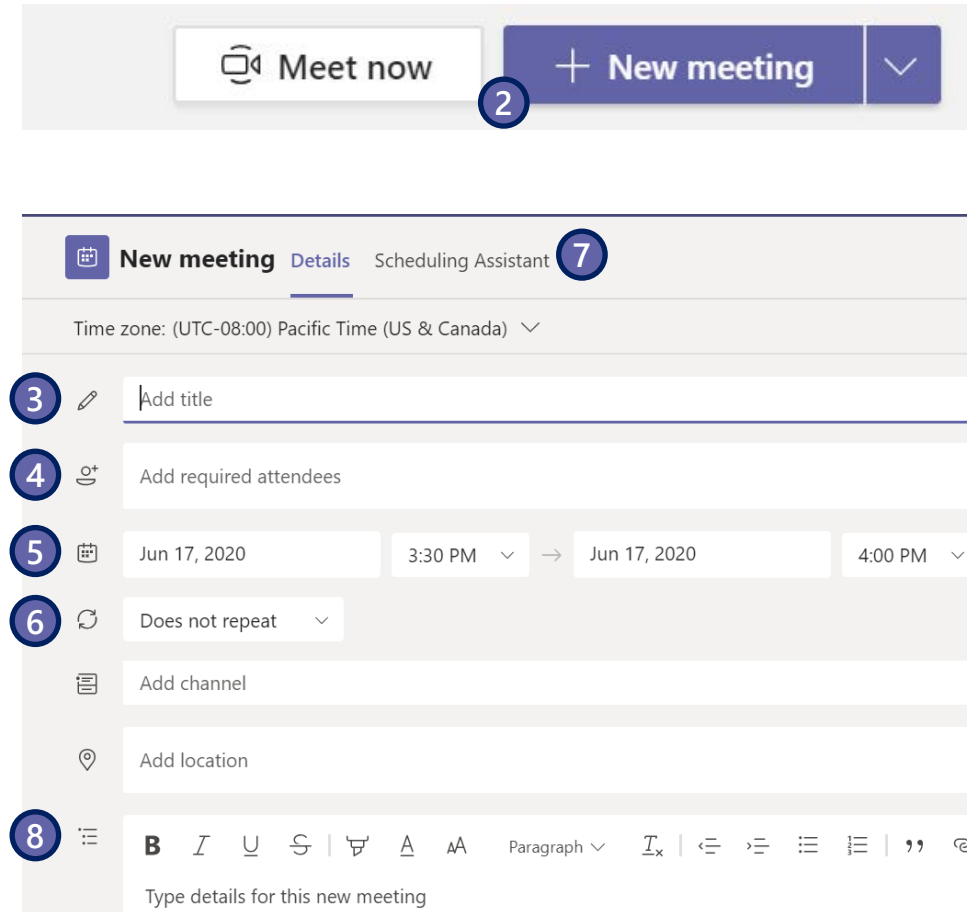
Or join by phone (audio only)

+1 425-616-0754,,210318751#   United States, Seattle

Phone Conference ID: 210 318 751#
Find a local number | Reset PIN

Help | Meeting options

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Creating a meeting invite in Teams

1. Open the Teams client, select the **Calendar** 🗓 icon located on the left side of the navigational side bar.

2. Select the **New Meeting** button located in the top right corner of the screen.

3. Create a **Title** for your meeting invite.

4. In the **Required Attendees** box, enter the email addresses for the people you want to invite to the meeting.

5. Select a **start and end time** for the meeting.

6. If you need the meeting to be recurring, select the **Does Not Repeat** drop down box and a recurring selection(s) drop down box will appear.

7. For internal attendee(s), select the **Scheduling Assistant** tab (top left) to see if the attendee(s) are available at the time you are proposing.

8. Add content to the body of the invite to inform participants on the purpose of the meeting.

9. Double check your information and then click the **Save*** button.

*When you select the **Save** icon, the Microsoft Teams meeting link info is automatically created and sent out in the invite. If you have an auto conferencing license, a phone number and conference ID will be included.

Microsoft 365

Edit meeting options

1. Once your meeting is scheduled you can edit the meeting options. Return to your Calendar and edit the meeting you just scheduled.

2. Your options will appear in a new browser window.

3. Select which meeting roles can bypass the lobby.

4. Toggle if audio caller can always bypass the lobby.

5. Toggle join/leave announcements.

6. Select which meeting roles can present in this meeting.

7. Select **Save** to save your options. Options can be changed until the meeting begins.

Meeting options

Who can bypass the lobby?
People in my organization

Always let callers bypass the lobby
No

Announce when callers join or leave
Yes

Who can present?
Everyone

Save

People in my organization
Everyone
People in my organization and trusted organizations
People in my organization
Only me

Everyone
Everyone
People in my organization
Specific people
Only me

Organizer

During your event

Managing your event

Managing a successful event

Ensure these planning items have been handled in advance so your day of is successful.

❑ Define production and support communication paths

❑ Validate from rehearsals who is managing visual content

❑ Start early ensuring final tests for Presenters & Producers

❑ Establish sign-off and post event procedures to provide a crisp ending

Breathe, hydrate and enjoy.

Microsoft 365

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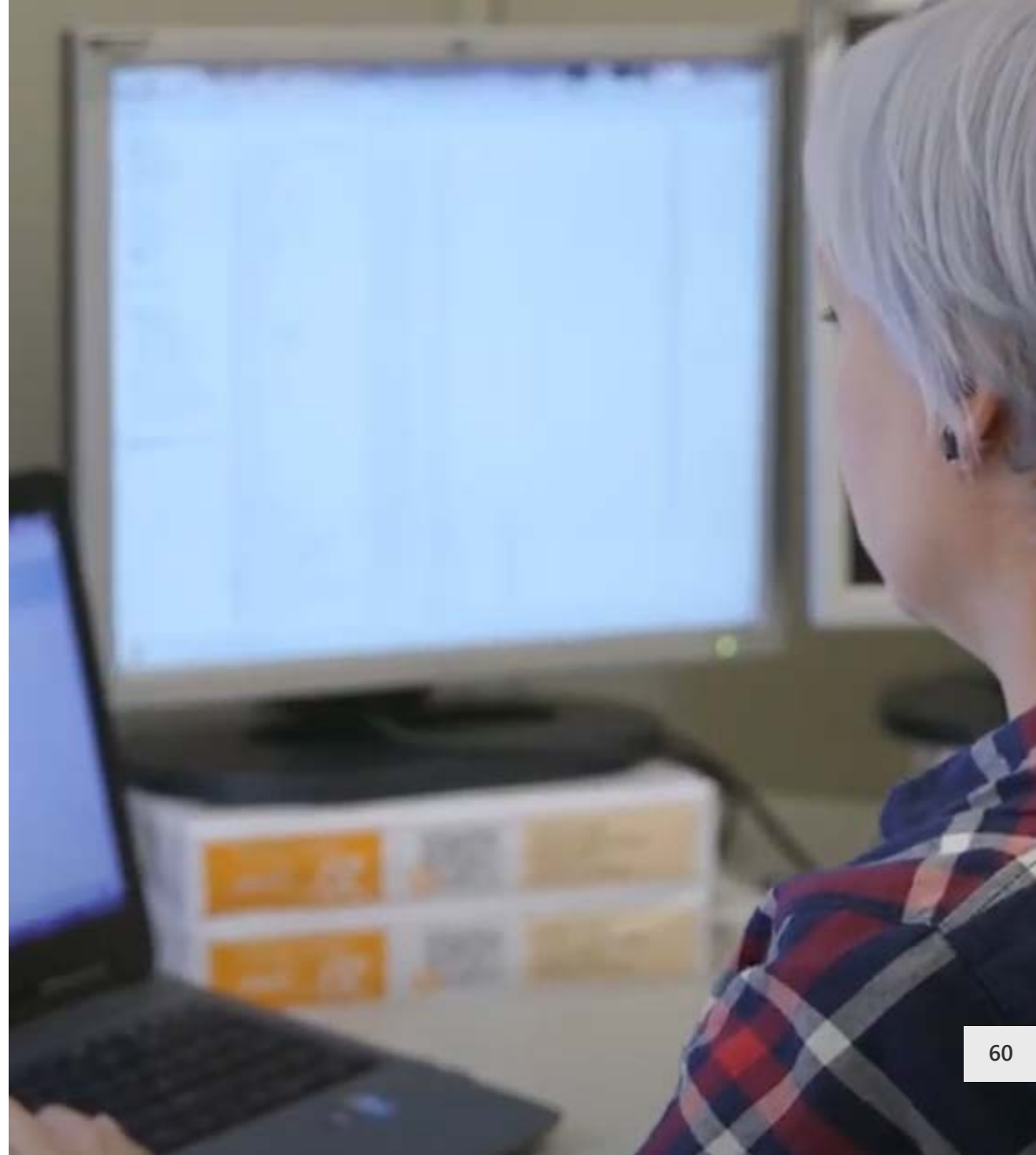
Best practices for managing Live Events

Event team

- ❑ Have more than one person in the event team; ideally one person joining from a different location
- ❑ If you lose internet, the remote person can still control the meeting
- ❑ Know who is responsible for each step such as producing, presenting, moderating Q&A

Consider using a redirection URL service in attendee invites

- ❑ E.g. bit.ly
- ❑ Allows you to share shorter, more readable URLs
- ❑ Allows you to change the URL of the meeting without having to update the invites

Meeting start

- ❑ Join your event 30 minutes ahead of time for final equipment check
- ❑ Have a slide ready with a nice intro ("Event will start soon") and start broadcast 10 minutes ahead of time
- ❑ Have audio source muted during that 10 minutes

Microsoft 365
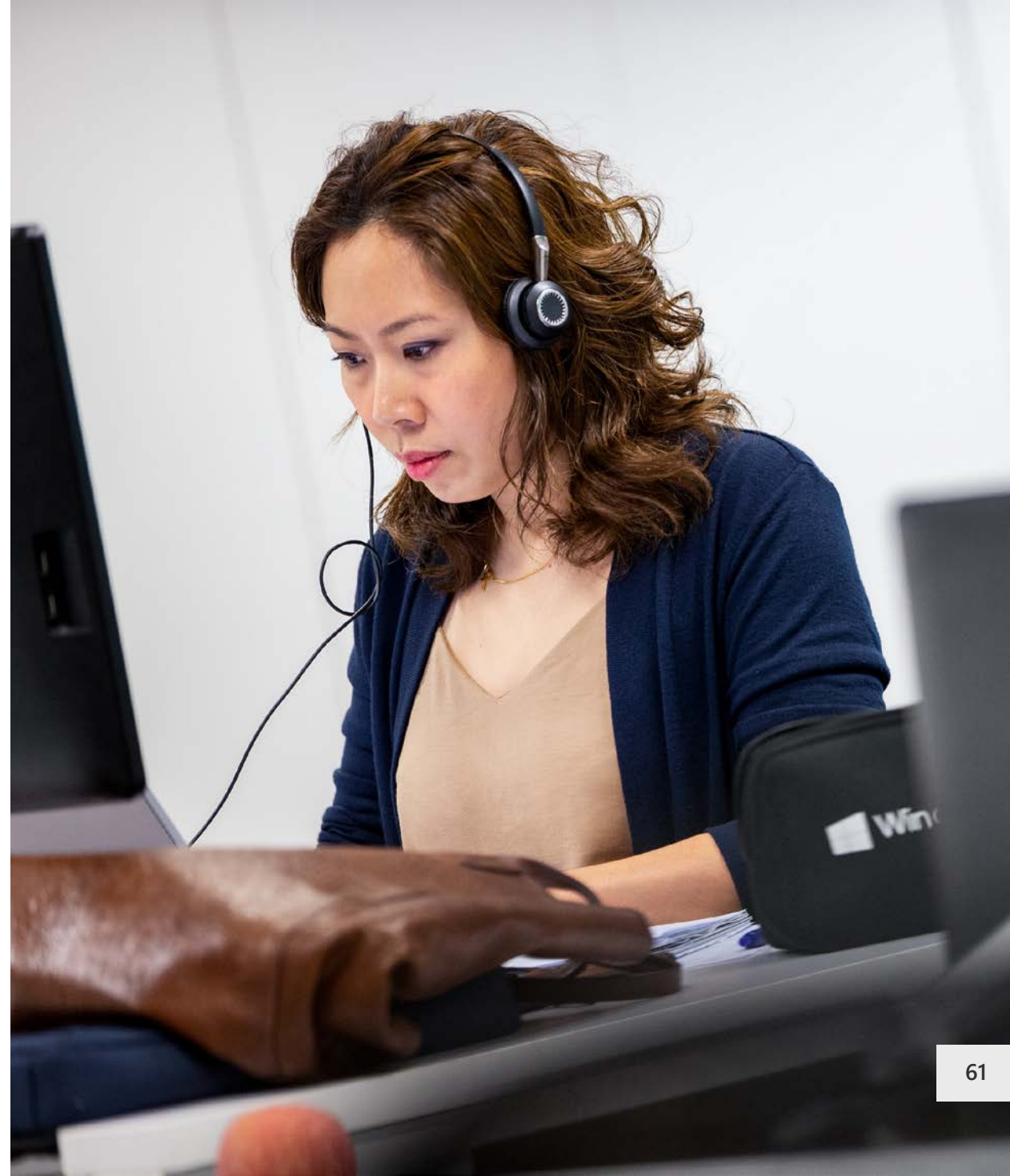
Example event support tiers

Multi-day/presenter/track events

❑ Fill this table in with the key Points of Contact (**POC**) in your organization.
  All roles should be identified for large scale events. Can be simplified for simple webinars.
❑ Review in coordination with existing IT Support Desk processes in your organization.

Level	Accountable group/POC	Tools & notes
Tier 0	Owner: Event organizer/**<POC>** Responsible: Support team Contributor: Technical production & IT teams	Provide self-help tools in Teams, in-event communications and/or via event website Ex: self-help attendee & speaker guides, FAQ documentation Event support email queue, e.g. "EventSupport@yourdomain.com"
Tier 1	Owner: Support team **<POC>** Contributor: Technical teams	Reactive engagement via event experience (Channels, email, chat) Ticketing system of choice that receives emails e.g. SharePoint, HubSpot.com or other tool
Tier 2	Owner: Event producer/**<POC>** Contributor: IT Administrator	Reactive support to escalations from Tier 1 Identify if further service escalation to IT is needed Staff requires intermediate/advanced level Teams & Live Event knowledge to triage issues Access to attendee ticket system not required but recommended
Tier 3	Owner: Event platform service owner (technical) **<POC>** Contributor: Microsoft support	Reactive support to escalation from Tier 2 Identified service health issue or bug Owns initiating support tickets

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Microsoft 365

Common issues & troubleshooting paths during an event

These questions represent most of the reported issues experienced during a meeting or live event. Though they may seem basic they create dissatisfaction on the part of your audience and speakers. Provide fast & easy ways to resolve these issues quickly by monitoring published support channels, having moderators and/or a dedicated attendee support channel (if using Teams as your event experience).

Category	Question / User Statement	Troubleshooting path
Scheduling	"I can't schedule a Live Event."	**Tenant Policy:** Speak to your IT Admin to have Live Event capabilities enabled for your user identity. Often you will need to be added to a group that is being used to manage how many people can schedule them. It will take 24/48 hours for this to be active after a policy change.
Meeting Join	"I can't join the meeting/Live Event."	**Identity**: Do they need to be/are they logged into the experience? Are they joining as an attendee instead of producer or vice versa? **Information**: Do they have the right link for the right session at the proper time? **Device/Client**: What browser or client are they using? Are they on mobile?
Audio	"I can't hear the presenter audio."	**Client Settings**: Check their audio speaker settings. Are they to the correct device? If yes test from outside of the meeting experience to ensure they are working for other apps. Is the volume adjusted properly?
Video	"I can't turn on my video."	**Client Settings**: Check their audio speaker settings. Are they to the correct device? If yes test from outside of the meeting experience to ensure they are working for other apps. Is the volume adjusted properly? **Device**: Have the video drives been recently updated? Does the device need a restart?
Content	"I can't see any slides." aka "I can't see the presenter's content."	**Speaker Sharing:** Ensure the speaker is sharing their screen or the correct window into the meeting. Have the speaker re-share the content into the meeting.
Chat	"I can't access chat."	**Tenant Policy**: Is chat enabled for this type of user? (Guest, federated?) **Client Settings:** Is the user a member of the team where the channel meeting is being held?

Microsoft 365

Producer
During your event

Producing your Live Event

Microsoft 365

Joining as a Producer – from Teams or Outlook

Join the Live Event as a **Producer** or **Presenter** from your Teams calendar or from your Outlook Calendar.

Joining as a Producer or Presenter

Event Team members will join as their assigned roles (**Producer** or **Presenter**).
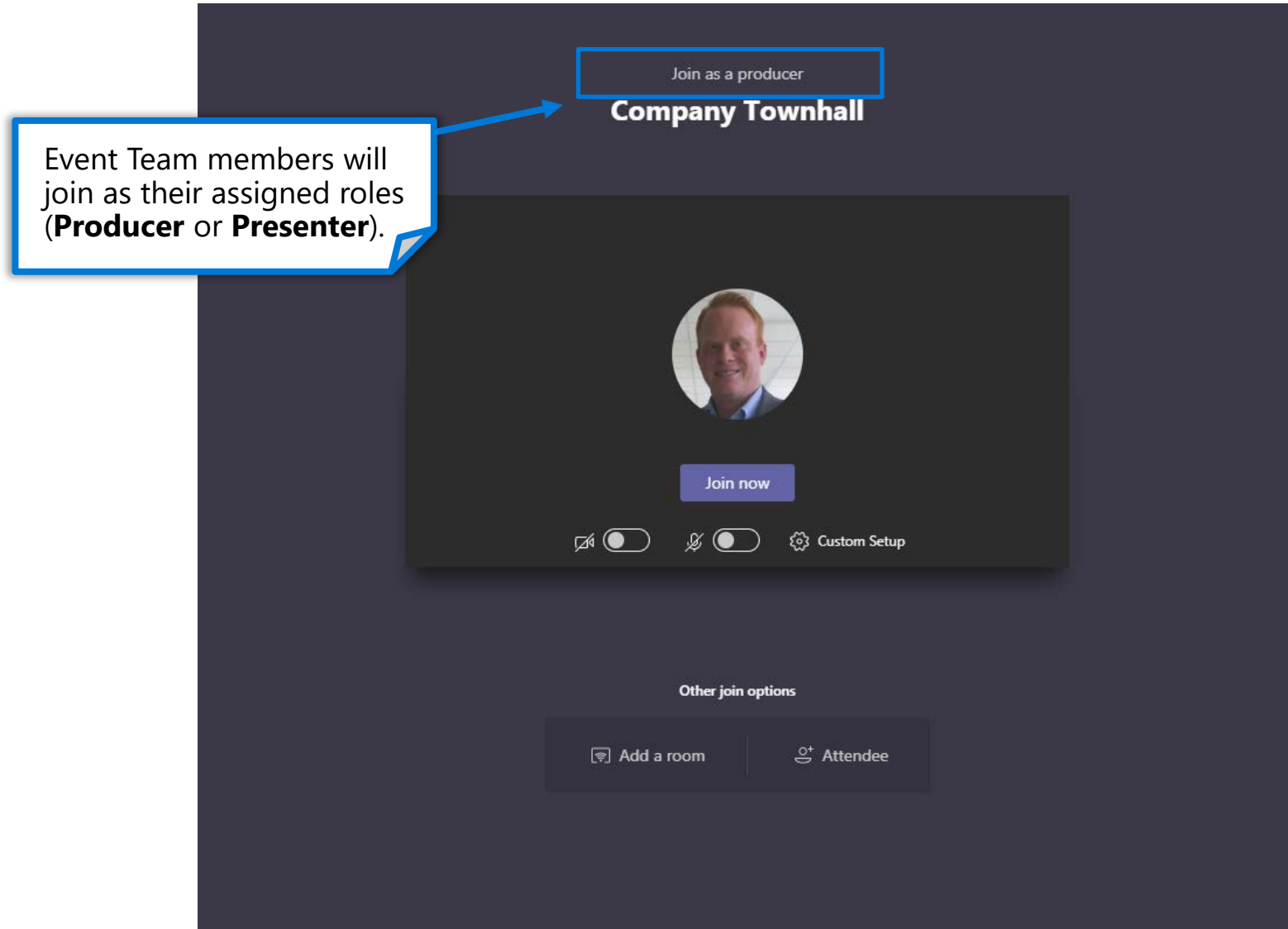
Microsoft 365

Producer's view overview

Monitor the number of Attendees connected to the Live Event

Display the attendee indicator throughout the session.

Manage the content before sending to the Live Event

Manage the content to be presented in the Live Event before sending the content to the Live Event screen when you're ready.
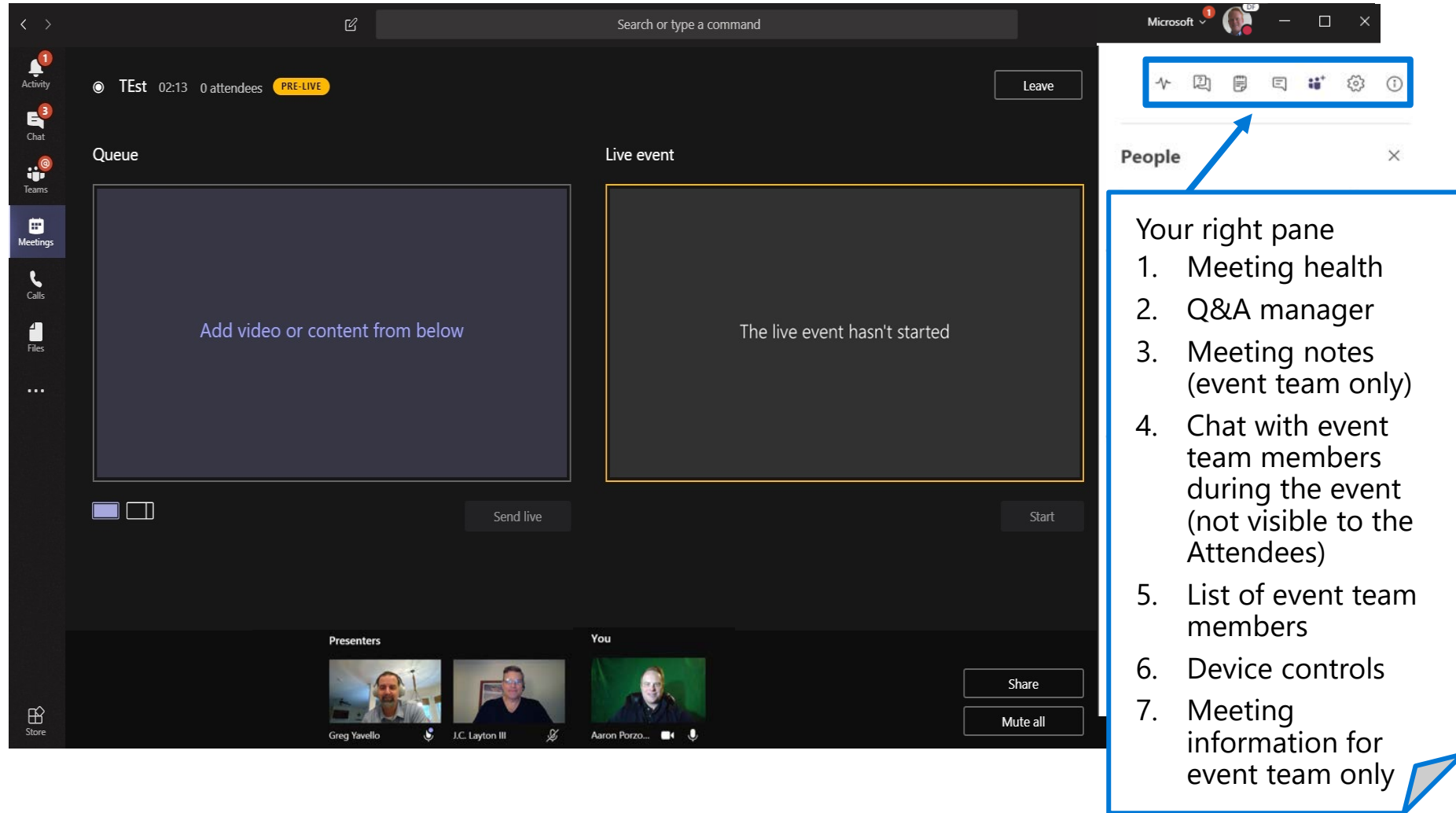
See the Live Production screen

Send content to the Production screen and select Start when you're ready to start.

Decide what content you're sharing at the event

Select the content that you want to share. It can be a document or an app to perform a live demo.

Share your screen with the team of Presenters/Moderators and with the Attendees

View people who have connected to the Moderator or Producer role to the event. If they turn on their camera, you can see their image.

Enable your camera and/or microphone to comment with the team of Presenters/Moderators and with Attendees

Share with the team of Presenters and Moderators before launching the event live, and with Attendees once the event is live.

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Producer's controls – Q&A, chat, devices, etc.

Your right pane
1. Meeting health
2. Q&A manager
3. Meeting notes (event team only)
4. Chat with event team members during the event (not visible to the Attendees)
5. List of event team members
6. Device controls
7. Meeting information for event team only

Producer's view – pre-live screen

The **Queue** and **Live Event** windows allow you to prepare the Video (camera) and Content that you wish to Send live to the Live Event.

Note that you can see when your invited Presenters have joined.

As the Producer, you can Mute your Presenters' audio. They must unmute themselves.

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Producer's view – managing Presenters

Access your Producers and Presenters list here.

Need to add a Presenter ad-hoc? You can do that here before you go Live if they are an external/federated member of the tenant.

Is one of your invited Presenters late? Ask them to join the meeting by clicking the menu next to their name and select "Ask to Join".

Producer's view – preparing Speakers

Ask your Presenter to turn on their Video (Camera) and then select them to add them to the Queue window.
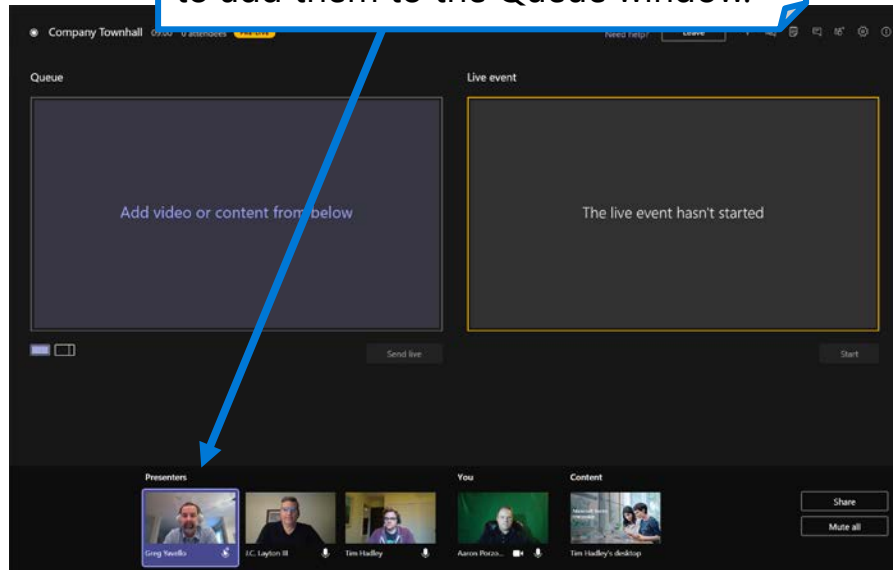
Your Presenter's Video (Camera) will then appear in the Queue window.

Microsoft 365
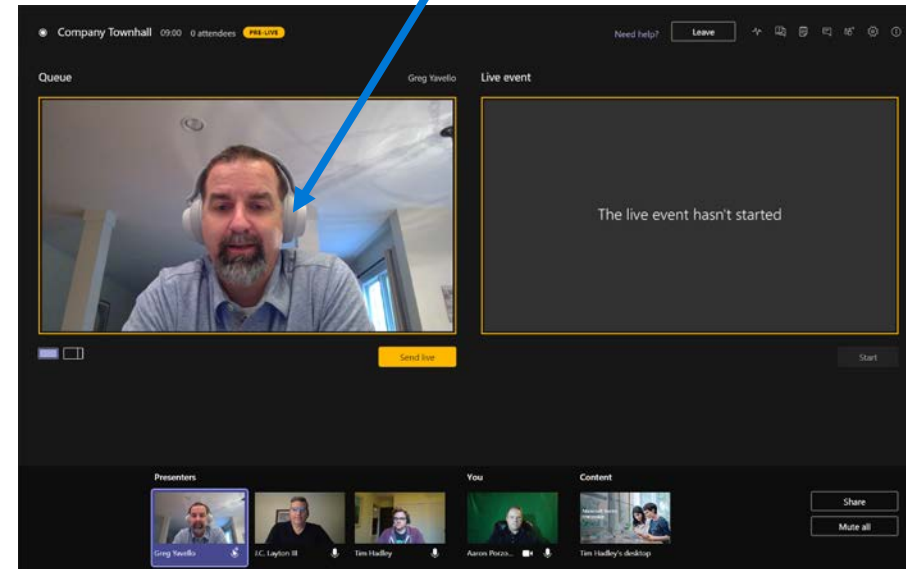
Producer's view – preparing Content

To present both Content (PowerPoint, etc.) and a Presenter's Video, change to this layout.
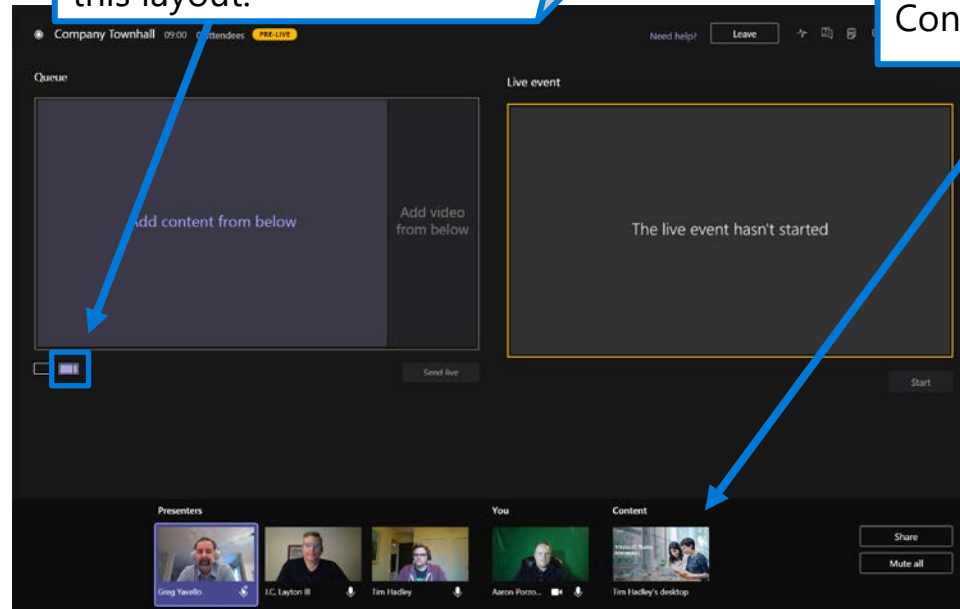
To present Content, for example a PowerPoint presentation, ask your Presenter to share their screen. Their shared screen will then appear in the Content tray at the bottom.

Use the Producer/Presenter chat to coordinate with your content team.

Once both the Presenter and the Content are selected, both will appear in the **Queue** window.
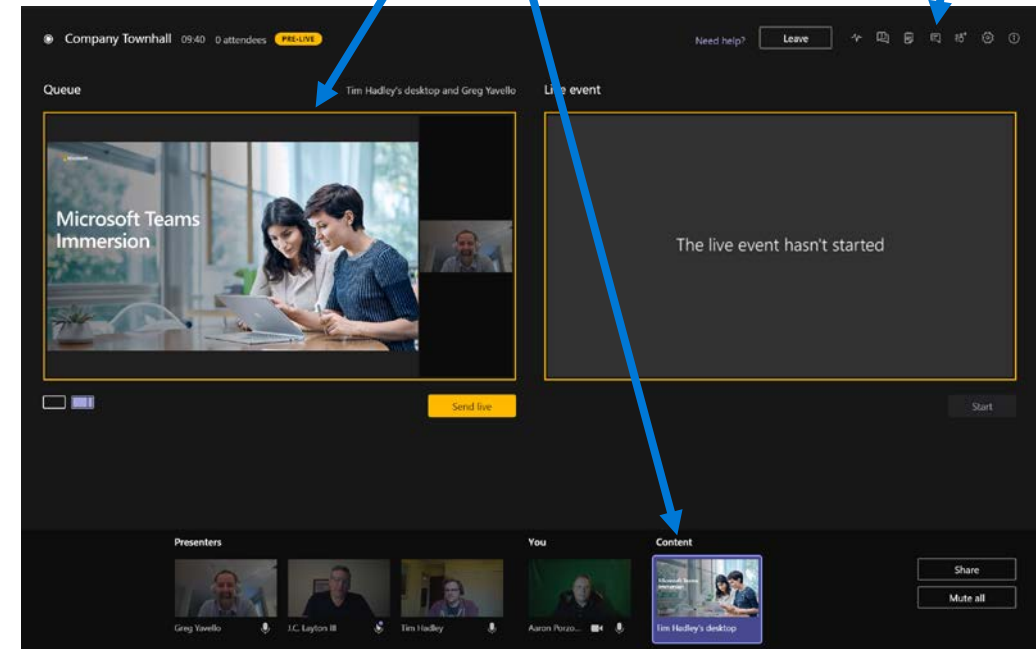
Important Note – Any of the event Presenters can share their screen during the Live event and their screen will override the active Presenter. It is therefore important to coordinate any change of Content Presenters during preparation for the Live Event.

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Producer's view – sending Presenter and Content to the Live Event

Now that you have your Presenter's Video and Content in the Queue window, you can press the **Send live** button to send to the Live Event window.
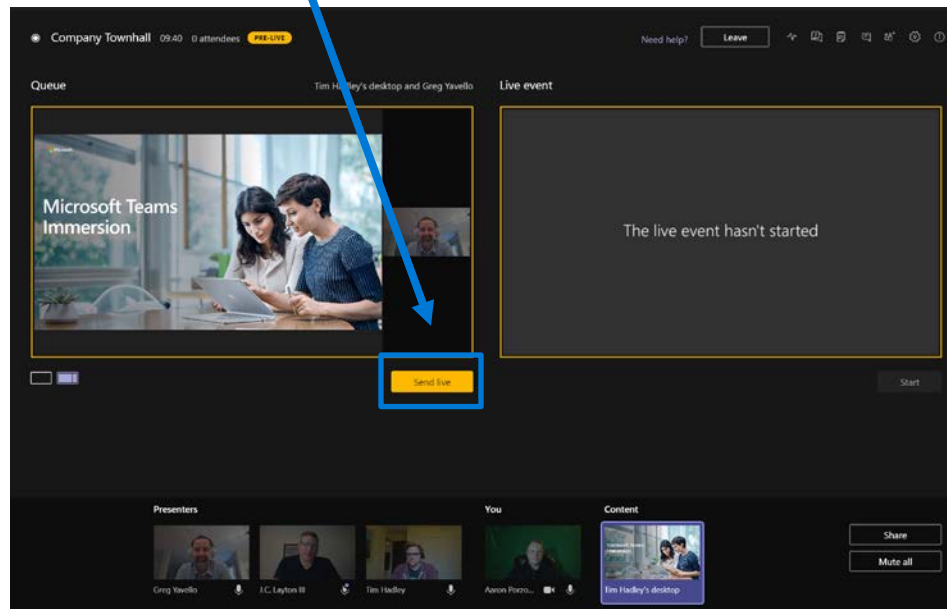
The contents of the **Queue** window have now been transferred to the **Live Event** window.

You are now ready to start the Live Event. By clicking the **Start** button, the Live Event will begin broadcasting your Presenter's Audio, Video and Content to all Attendees.

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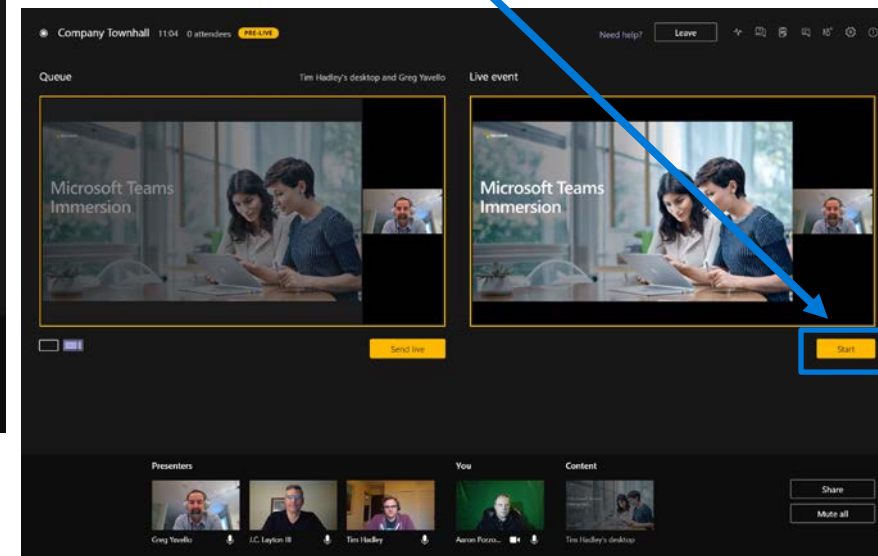
Producer's view – starting your Live Event

Attendee count is displayed as well.

Your Live Event is now running, evident by the Live label at the top and red boxes around your Live event window and the windows of your Presenter and Content.

Microsoft 365

Producer's view – switching to a new Presenter's Camera

If you wish to switch to a different Presenter's Camera, you can easily do that in the **Queue** window by selecting your desired Presenter's Camera. In this example, we also changed the layout to just the Camera feed and not the Shared Screen (Content). By clicking **Send live**, we would replace the current feed with the items from the **Queue** window.

Producer's view – chatting with Presenters during the event

If you need to Chat with your fellow Producers or Presenters, you can do that via the Chat window. **Note** – these chats are **not** visible to your Attendees.

Microsoft 365

Producer's view – moderating Attendee Q&A

If you enabled **Q&A** when setting up your Live Event, your Attendees will be able to post questions. The **Producers** and **Presenters** can then review those questions in the **Q&A Manager**. New questions will appear in the **New** area. You can reply privately to those and Publish them or Publish and then reply to them in the **Published** area. You can also Dismiss messages which will move them to the **Dismissed** area.

Microsoft 365

Producer's view – ending your Live Event

When you are ready to end your event, mute everyone's Audio, wait about 20-30 seconds and then select **End.** This will allow your final closing remarks to reach your Attendees.

Microsoft 365

Presenter

Before your event

Presenter best practices

Microsoft 365

Presenting with ease

Optimize your content for digital delivery

❑ Identify your central message.

❑ Have a clear call to action within your presentation.

❑ Prepare content that you are familiar with and uses both text and visual images.

❑ Do not read your slides to the audience. Use a bullet point format and add value with your expertise.

❑ **New!** Use the PowerPoint Presenter Coach to evaluate your presentation delivery.

❑ Review settings under the Slide Show menu (if using PowerPoint) to customize your defaults.

❑ Rehearse timing to ensure you can adequately cover your content in the time provided (Slide Show | Rehearse Timings command).

❑ Consider putting housekeeping and resource slides at the beginning when you have people's attention, so you do not disrupt Q&A toward the end of your session.

❑ Ask your organizer how and where to share your final materials with your audience.

Microsoft 365

Example: **Building a 30-minute digital breakout**

1. Focus your message
2. Be concise
3. Use demos to show your point, but don't be afraid to short cut
4. Deliver the roadmap for ongoing engagement (skilling, online support, other programs)
5. Use the rehearsals for feedback
6. Prepare lead-in questions to get the Q&A started

Session flow

Time (min)	Description	Owner
1	Introduce presenter and set expectations about the session.	Moderator
10-15	Session content delivery, including slides, demos and call to action.	Presenter
15-19	Open Q&A, questions will be read and answered for attendees.	Presenter/ Moderator

Microsoft 365
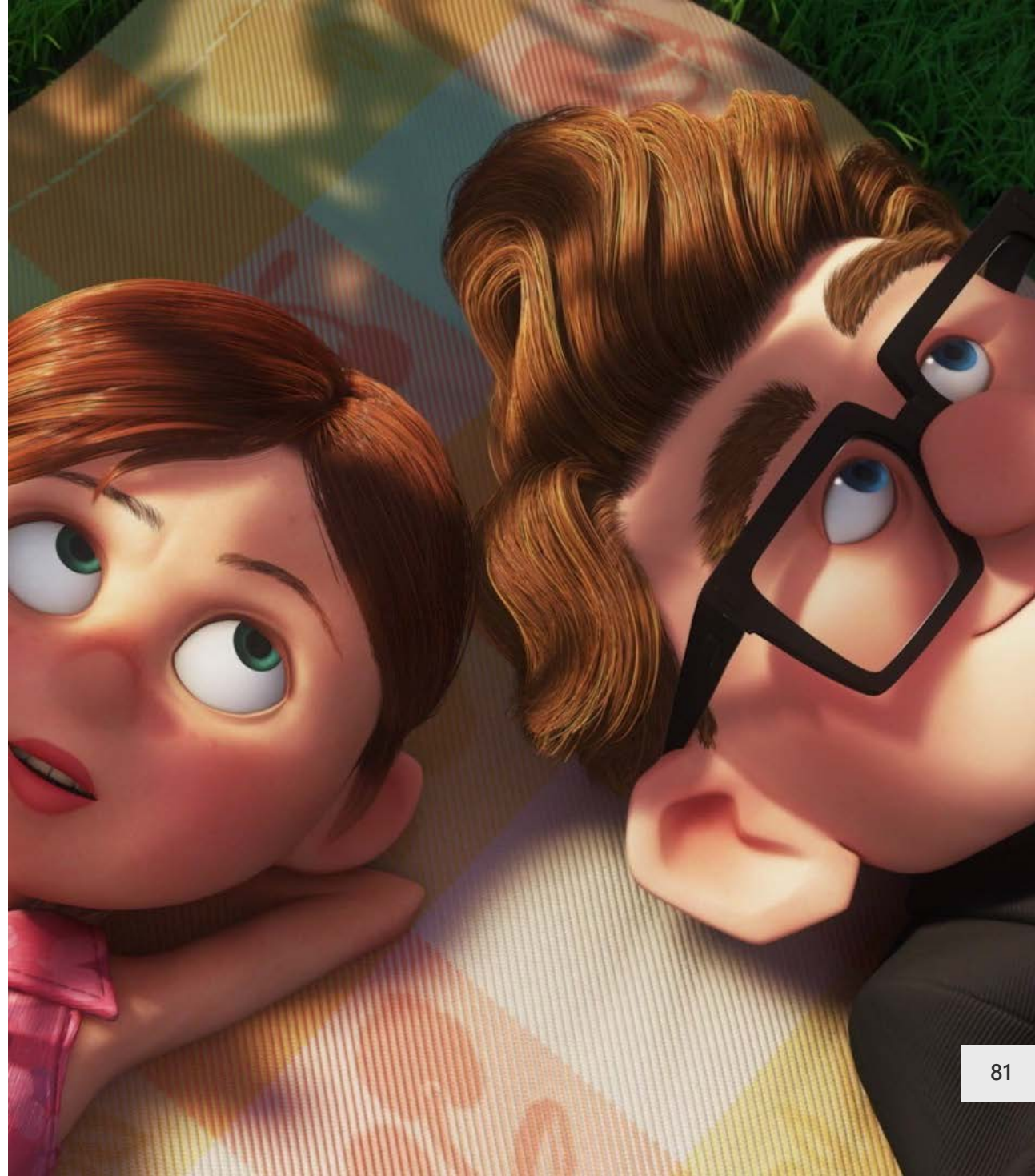
Presentation structure

This simple outline shows how the parts of your presentation will be combined before being presented to your audience. Some elements will be added by the post-production team before distribution.

1. Opening slate

10-second opening title that includes event branding, session title and your name/title/social contact information.

2. Video greeting

Overview of what will be presented. Recorded via Windows Camera, Mac tools or other 3rd party app. **Key Learning**: Let your audience visually connect with you as you start.

3. Core content
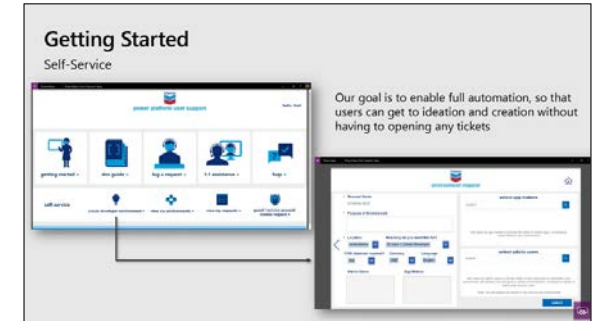
Recorded via PowerPoint screen record feature or other 3rd party app. Can be concurrent with opening.

4. Core content – cont'd
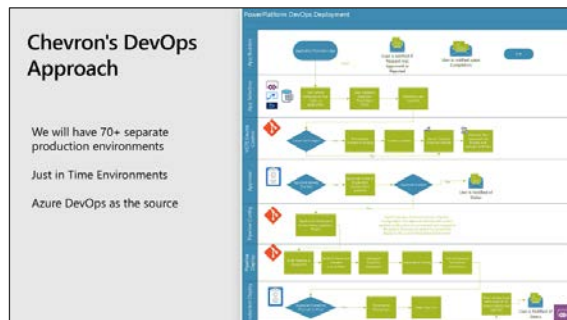
Continued content from PowerPoint.

5. Short conclusion

Call to action or pointer to resources. Recorded via Windows Camera App or other 3rd party tool. **Key Learning**: Connect with your audience visually at the end of your presentation.

6. End slate

Branded ending slate. Use an end slide that is appropriate for your organization.

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Equipment and Environment

Your equipment

External Microphone: Audio is the most important portion of your presentation. You should plan to have a microphone that is external to your computer. Avoid using laptop speakers/microphones for the best audio.

Web Camera: Select a web camera that delivers a minimum 720p (ideally 1080p) resolution. Position camera at or slightly above eye level.

Test it! Ask for a rehearsal time or schedule your own Live Event/Teams meeting to test the process. Use the test call feature in Microsoft Teams to record a voicemail that will playback to you so you can hear your own voice.

Lighting: If you will be frequently presenting, consider getting a stand-alone LED light that will provide you with a higher quality image on video. Avoid sitting where there is heavy backlighting.

Your environment

Validate you are in a relatively quiet location with a good quality microphone.

Utilize a comfortable seating or standing arrangement. Ensure your setup does not introduce additional noises (squeaky chairs, ceiling fans).

We all have interruptions but consider putting a sign on your home office door, so family members know when you are presenting or recording.

Location and lighting

Take a moment to prepare your recording space.

- An HD webcam is preferred, but a new PC or tablet will have a good camera
- Your camera should be stable at, or slightly above, eye level
- Make sure your face is in good, even light, with no harsh backlight
  In addition, avoid mixing light sources (e.g., window and lamp light) as the different color temperatures will show up in the video
- Do not sit in front of a window. Your webcam will compensate, which will cause your face to look dim or dark.
- Reduce clutter and distracting or bright images in the background

Wardrobe

Consider what you plan on wearing and how that will show up to your audience. Make sure your wardrobe matches the tone of your presentation.

- Please do NOT wear white
- Solid colors work best
- Avoid small prints, stripes, plaid or patterns
- Unless otherwise specified, shirts with logos and trademarks should be avoided
- Avoid noisy jewelry (necklaces, bracelets, earrings) as it can be distracting to the viewer

Audio quality

Find a quiet location, sit for a minute and listen to your environment.

Can you hear noises in the hall, an air conditioner, or the buzz of a fan in your computer or laptop? These things can have an impact on the quality of your audio.

Try to pick a space that is smaller and with soft walls such as curtains. It will keep the sound from bouncing around which will make your audio sound hallow. Finally, make sure to turn off any nearby mobile devices.

For the best quality review your device options at https://aka.ms/TeamsDevices

Audio equipment

It's best to have a headset if possible. A USB mic is preferred.

Wired headsets can be a good alternative to the USB microphone. You will want to find a quality headset microphone that does not obstruct your face too much since your image will be visible in most cases.

Be sure to keep the headset microphone about a half inch off your face. Soft spoken words tend to get garbled for the listener on the other end. Speaking up and keeping your level consistent will also help listeners set their volume correctly.

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Presentation modes

Conversational speaking

How you present to your audience is important. Varying the source of information as you speak keeps your presentation dynamic and accommodates diverse learning needs.

Try to change presentation modes (talking to camera, video, PowerPoint, demo, video, interview, etc.) every 3-5 minutes. For example, if your presentation is heavy on PowerPoint, consider either adding a secondary element (i.e., video), or at least change back to camera every so often so that the audience can see you again and have a momentary change of pace and medium.

Remember that your audience is most likely at home watching you on a small screen. Sessions are much more intimate and on-demand now.

Speak with energy and with a tone of voice that you would normally have, as if you're holding a conversation with some dear colleagues. Your time will go by quickly, as it always does. Keeping your content tight, focused and trying not to repeat yourself helps the audience stay engaged.

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Example presenter kit

Good quality hardware will streamline your presentation experience not only for virtual events but for day to day video calls. These devices are examples only and similar items from different providers are also acceptable. Encourage Presenters to also consider Teams certified devices for the best audio experience.

USB Lapel Mic

USB ethernet dongle
50' ethernet cable

Laptop stand for laptop webcam to be at eye level

Rain Design mStand Laptop Stand

Keylight with stand and power supply

Genaray Ultra-Thin Bicolor 288 SMD LED
On-Camera Light Basic Kit

Checklist: recording from home

Presenting

- ❑ Computer is plugged into a power outlet
- ❑ Wired network connection is preferred
- ❑ Minimize WiFi traffic on your network while recording
- ❑ Turn off / silence your cell phone
- ❑ Webcam that delivers a minimum 720p (ideally 1080p)
- ❑ Invest in a good external microphone or speaker puck
- ❑ Camera should be at or slightly above eye level
- ❑ Backup of materials should be on your local computer
- ❑ Rehearse enough to be comfortable with you material so your personality will shine through.
- ❑ Avoid reading your slides to the audience.

Computer

- ❑ Clean up desktop
- ❑ Hide the taskbar if showing desktop
- ❑ If showing demo, 1920X1080 screen resolution
- ❑ Use latest browser (Edge or Chrome)
- ❑ Clear browser history or switch profiles
- ❑ Close unnecessary applications
- ❑ Turn off all notifications
- ❑ Update your computer prior to your recording date or disable

Environment & Wardrobe

- ❑ Record from a private room or location (avoid disruptions)
- ❑ No harsh lighting on your face or behind you
- ❑ Warm light (desk lamp) is preferred
- ❑ Backdrop should be natural but uncluttered
- ❑ Teams background effects are useful. Consider one for your event.
- ❑ Solid or subtle pattern shirt appropriate for your audience
- ❑ Avoid busy pattern, all white or grass-green shirts (for green screen effects)

Distractions   Good camera angle   Bad camera angle

Microsoft 365
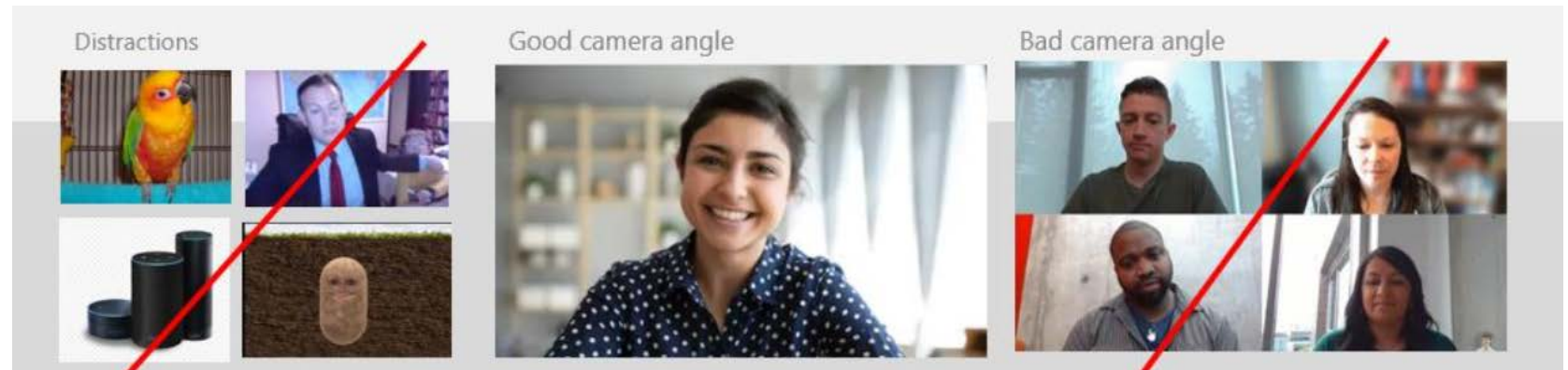
Recording – PowerPoint

1. To start recording within PowerPoint, open a new or blank presentation. On the Insert tab of the ribbon, select Screen Recording.

2. On the Control Dock, click on Select Area and either select the entire screen for recording or press Win Key+Shift+F. It is critical that the entire screen is selected.

   PowerPoint automatically records the audio and mouse pointer. To turn them off, deselect Audio and Record Pointer in the Control Dock.

3. To start, click Record or use the following key commands:

   • Start recording: Win Key+Shift+R

   • Pause/resume: Win Key+Shift+R

   • Stop recording: Win Key+Shift+Q

4. When you're finished recording, save your video. Right-click the inserted file on the slide that represents the recording and select Save Media as. In the dialog box, specify a filename and location.

   Sample naming convention:

   SESSIONCODE_SpeakerName_PRES.filetype or

   EVENTNAME_SpeakerName_MMDD.filetype
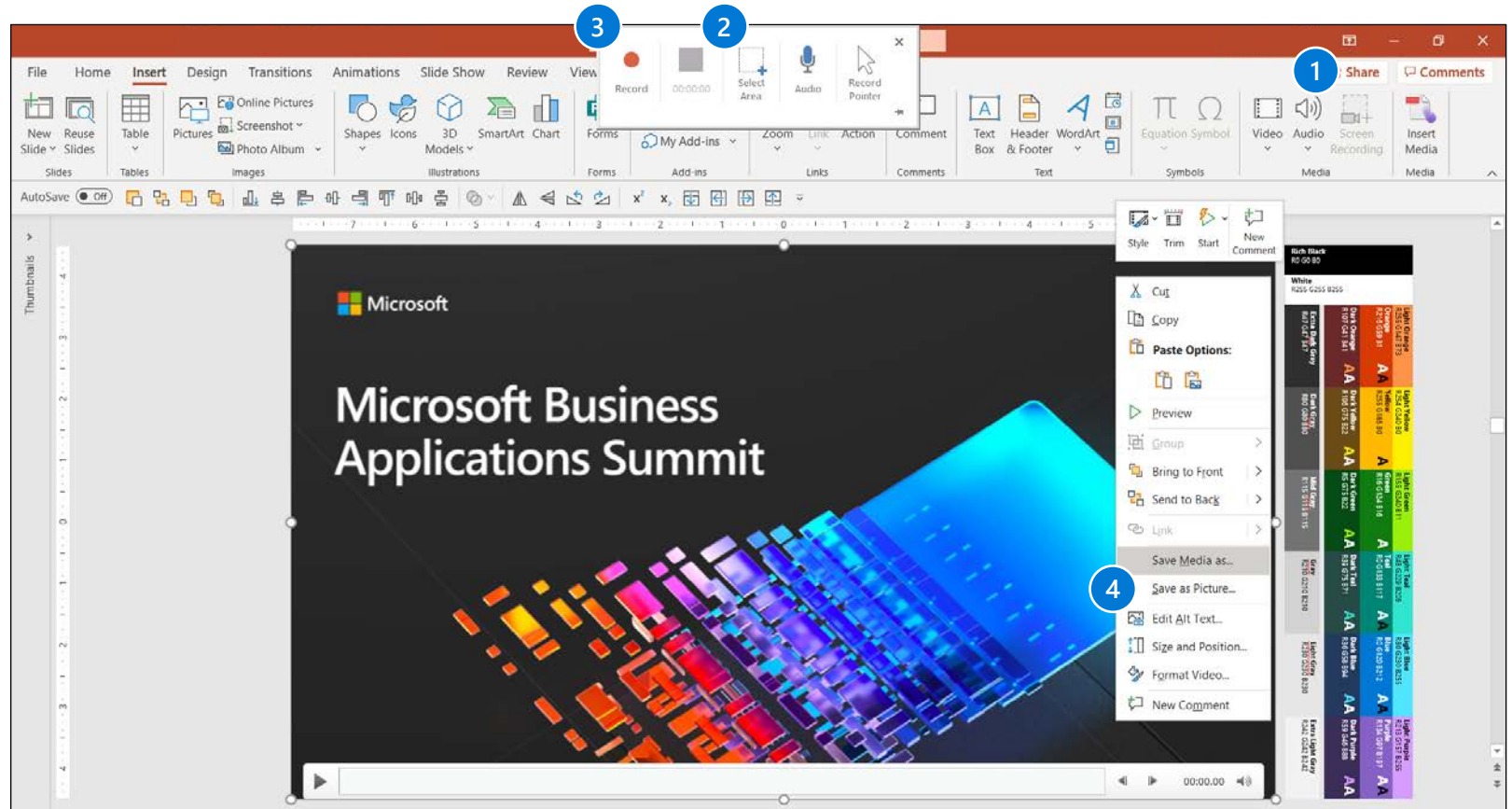
Tip: Unless you pin the Control Dock to the screen, it will slide up into the margin while you record. To make the unpinned Control Dock reappear, point the mouse cursor at the top of the screen.

Microsoft 365

Recording – Windows 10 Camera App

1. App settings:
   - Search for "Camera" in Windows Search
   - Select "Camera App"
   - Make sure that "video quality" is set to 1080p 30fps in settings

2. Getting ready:

   On the main navigation "Take Video" button. It may be defaulted to pictures. Set up your shot and center your face within the frame. Make sure you have good lighting, be careful of reflection in your glasses. Click the "Take Video" button again to record. Rename file & upload.

3. When complete, review your video in the lower right corner of the App or go the file location located in this folder C:\Users\username\Pictures\Camera Roll.

   Sample naming convention:

   SESSIONCODE_SpeakerName_CAM.filetype or

   EVENTNAME_SpeakerName_MMDD.filetype

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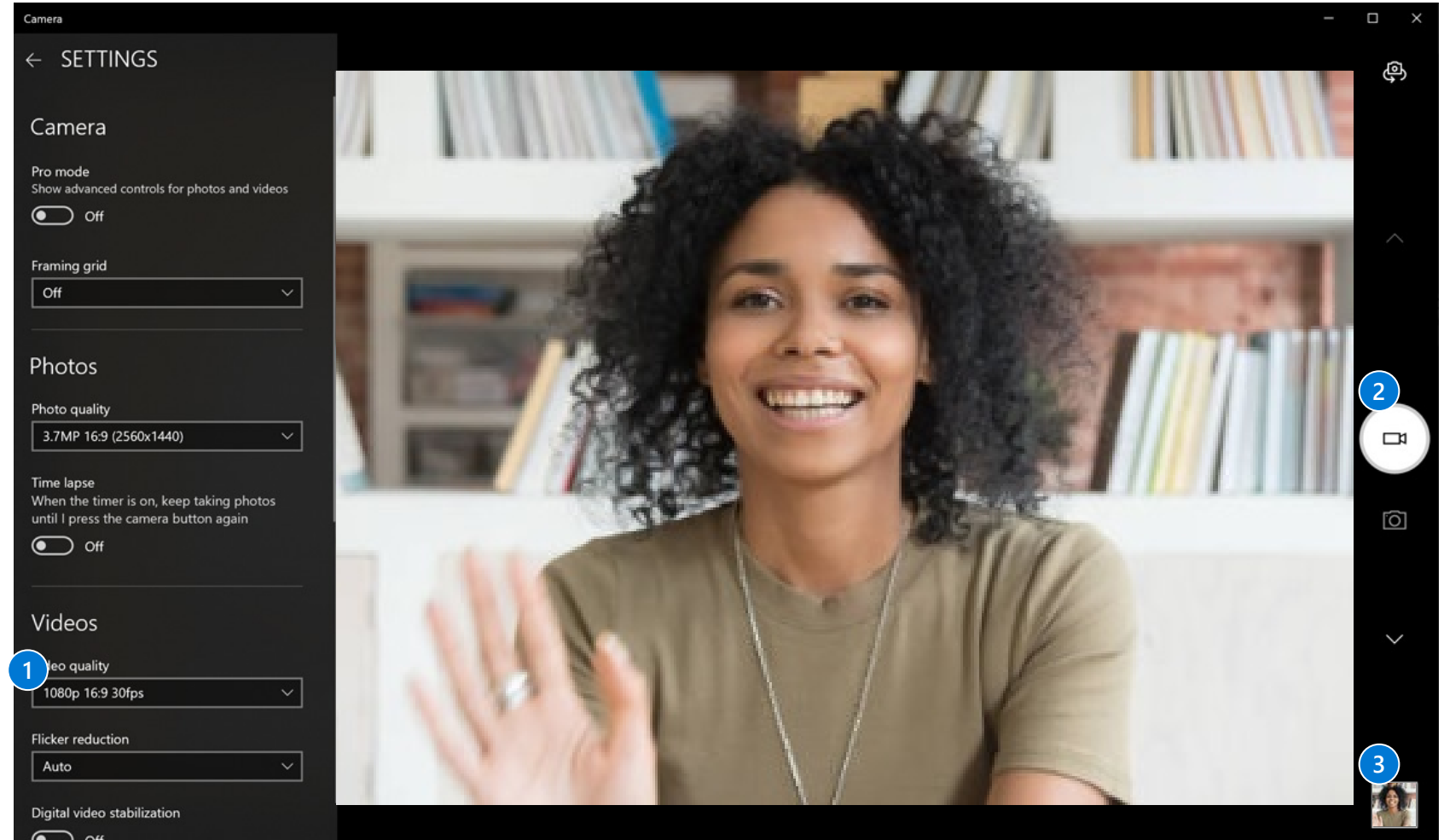
Moderator

During and after your event

Moderator best practices

Microsoft 365

Moderators – the secret to success

A moderator is an extra set of eyes, ears and hands managing the virtual logistics and audience, so the speaker can focus on content, ensuring a smooth session. Presenters should not have to think about anything else other than showing up, good audio/video quality and delivering their content. Moderators improve attendee engagement, minimize load on technical support staff and provide event polish with pre-designed introductions and closing messages in larger scale events. Share our Moderator Checklist with your staff to get started.

Support for presenters

✓ Resolve basic technical issues

✓ Manage audience mute/unmute in Teams meetings

✓ Moderate panel sessions

✓ Take session notes

✓ Download/transfer recordings and transcripts

✓ Gather session data

Support for attendees

✓ Triage and aggregate similar questions

✓ Answer basic technical issues

✓ Provide links/pointers to content

✓ Provide follow up to specific attendees

✓ Open/close session and Q&A segments

Microsoft 365

Presenter
During your event

Live Event Presenter experience

Top

Microsoft 365

Machine setup

1. Hardwire your internet connection if pos
2. Clean desktop by hiding extra icons
3. Remove date and time from the system t
4. Set resolution to 1920X1080
5. Set zoom level to 125%
6. Turn off windows updates

Microsoft 365
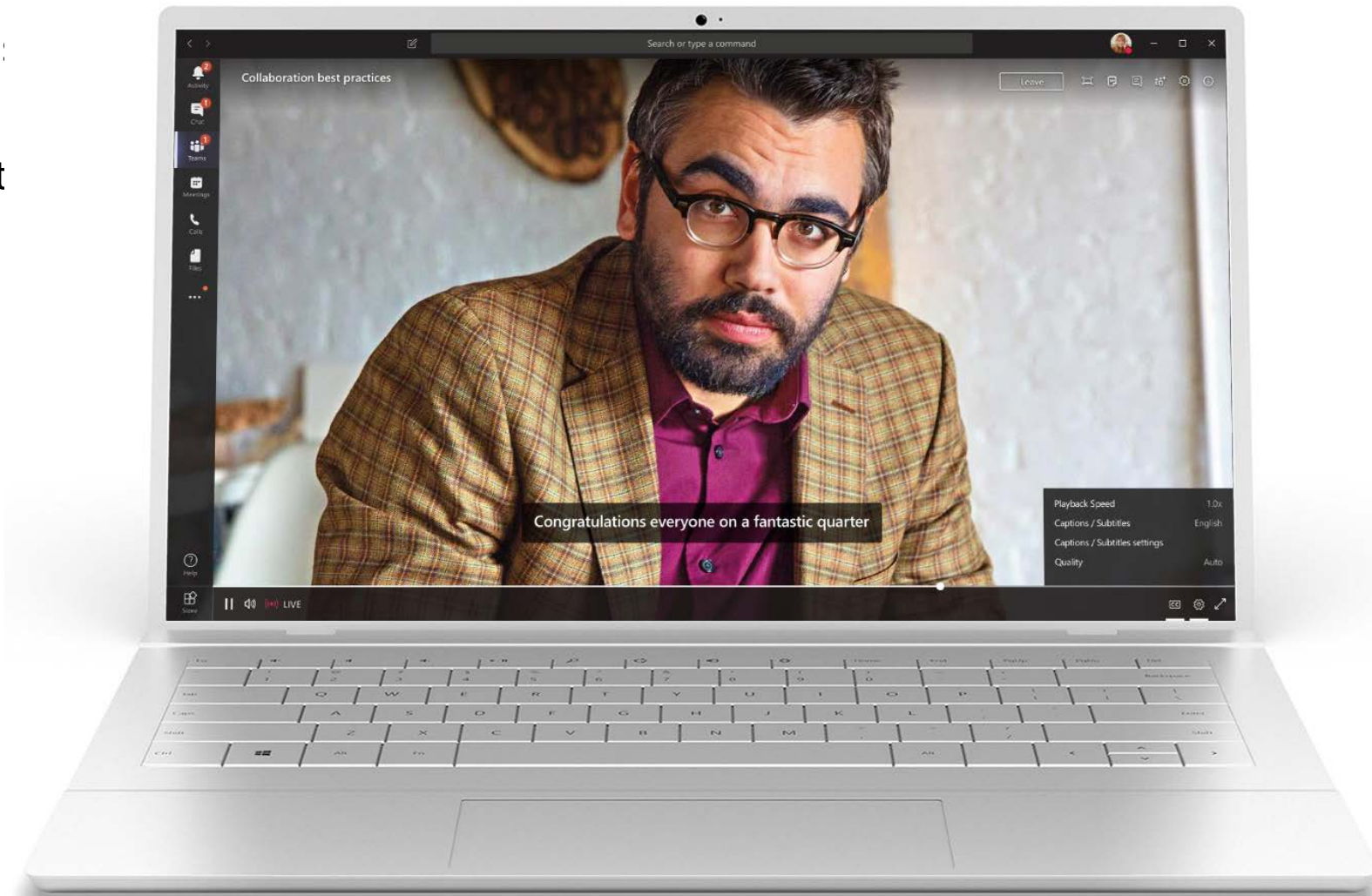
Software setup

1. Close any apps you are not using (Outloc browsers, etc.)

2. Clear browser history or use separate demonstration profile

3. Preload necessary webpages

4. Turn off notifications

5. Remote date/time from the system task l

6. Log in to the meeting using the appropri credentials. They may be different from your day to day account depending on t event design.

7. Test audio, video, sharing and any background (Teams meeting)

8. Put yourself on mute until you begin
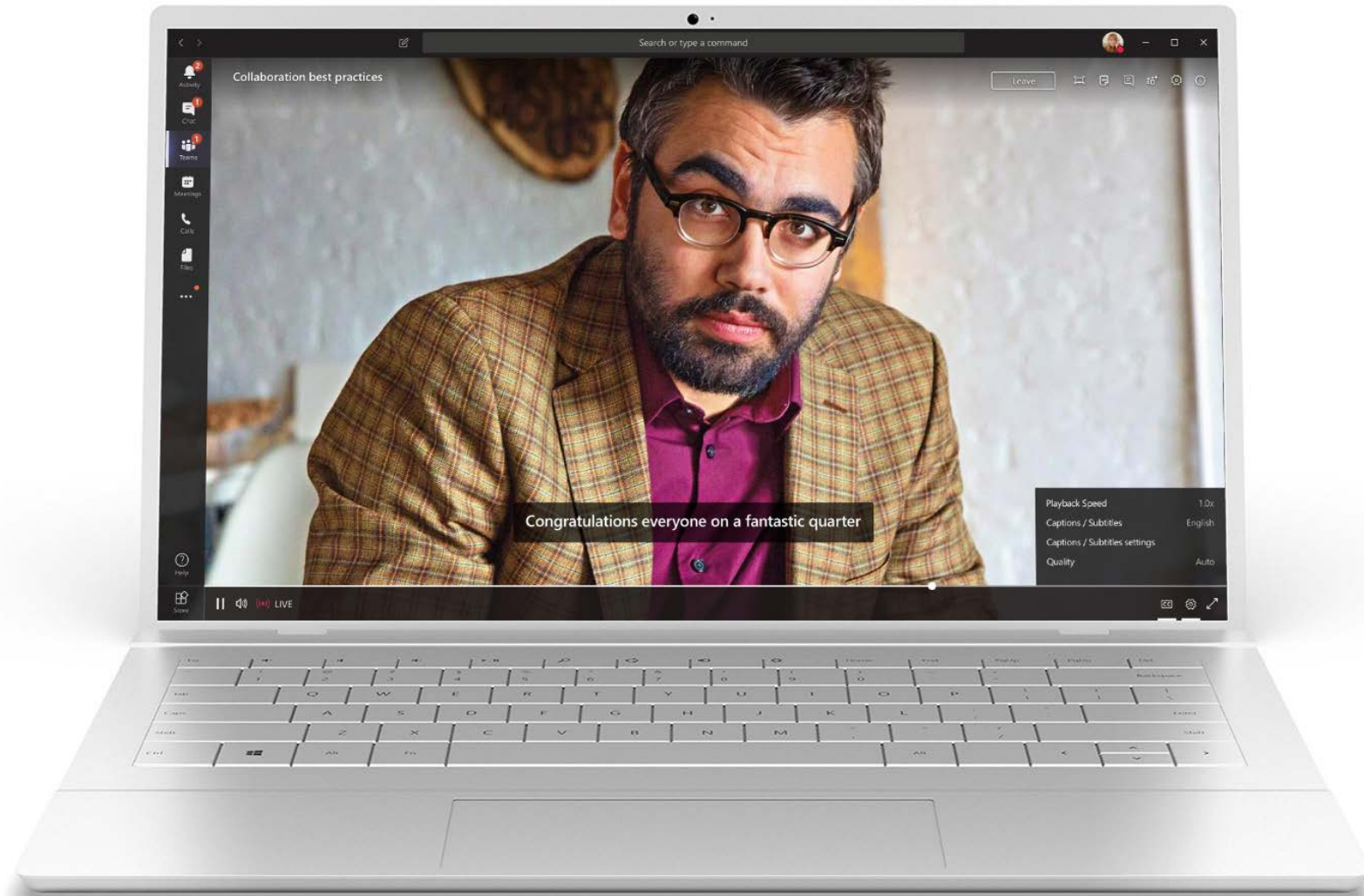
Live Event Presenter's view

The Presenter role participates in the event with the ability to speak, present content and moderate the chat stream. It is a best practice to join in advance of the event to complete your final technical readiness check.

1 Select Join Microsoft Teams meeting in your meeting invite to be taken to a page where you can choose to either join on the web or download the desktop app. **Please join via the full Teams application.**

2 Make a note of the phone number and conference ID in the meeting invite, so you can dial the number to join in the case of connection loss.

3 Once you are on the Teams call, turn on your microphone, camera and share your desktop.

4 Make sure that the Teams panel is hidden out of the way on a second monitor or minimized.

5 Keep an eye on the Teams meeting chat on another monitor or another device. Moderators, producers and switching operators will use this chat to communicate with you during your session.
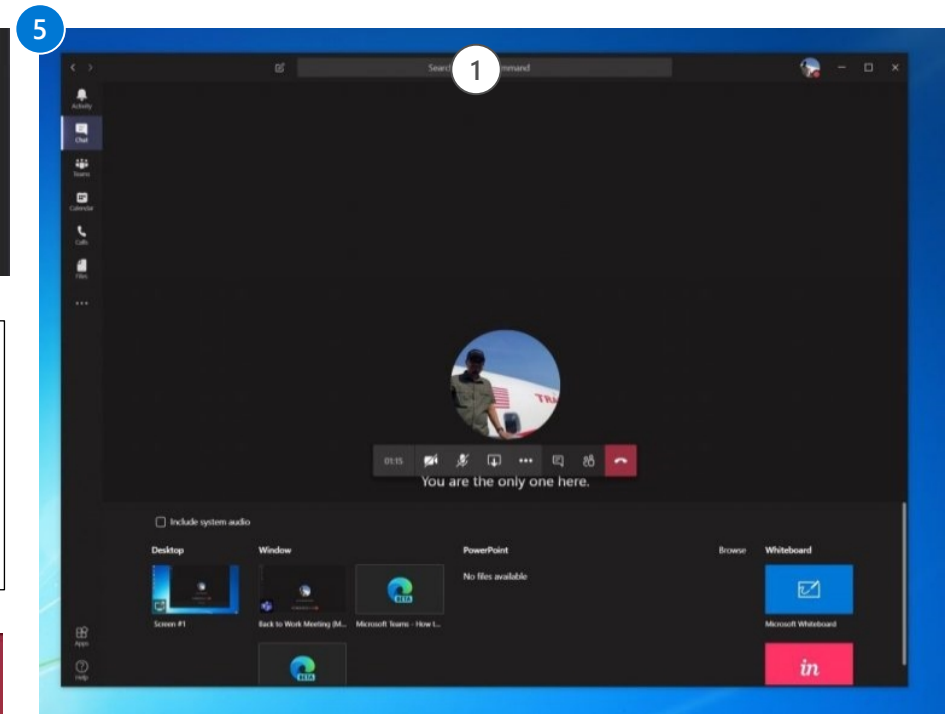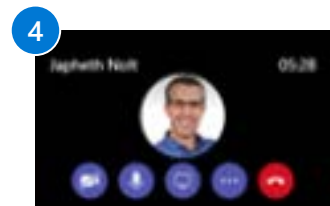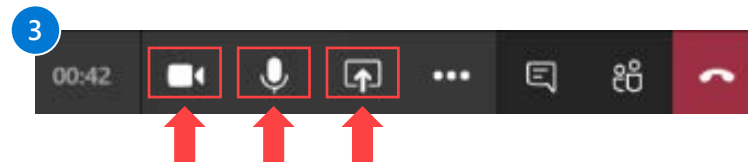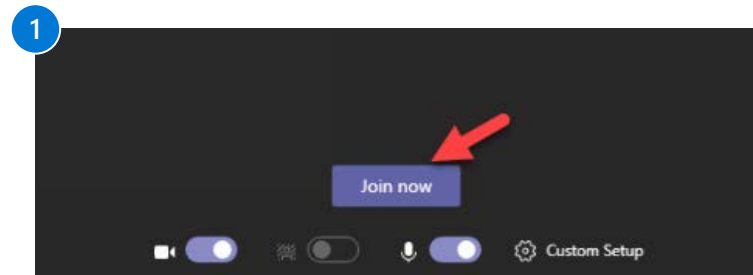
NOTE: You can only present in a Live Event from your Windows or Mac desktop device. There is no support for mobile presenting in Live Events at this time.

Microsoft 365

Live Event Presenter's view

While speaking and presenting
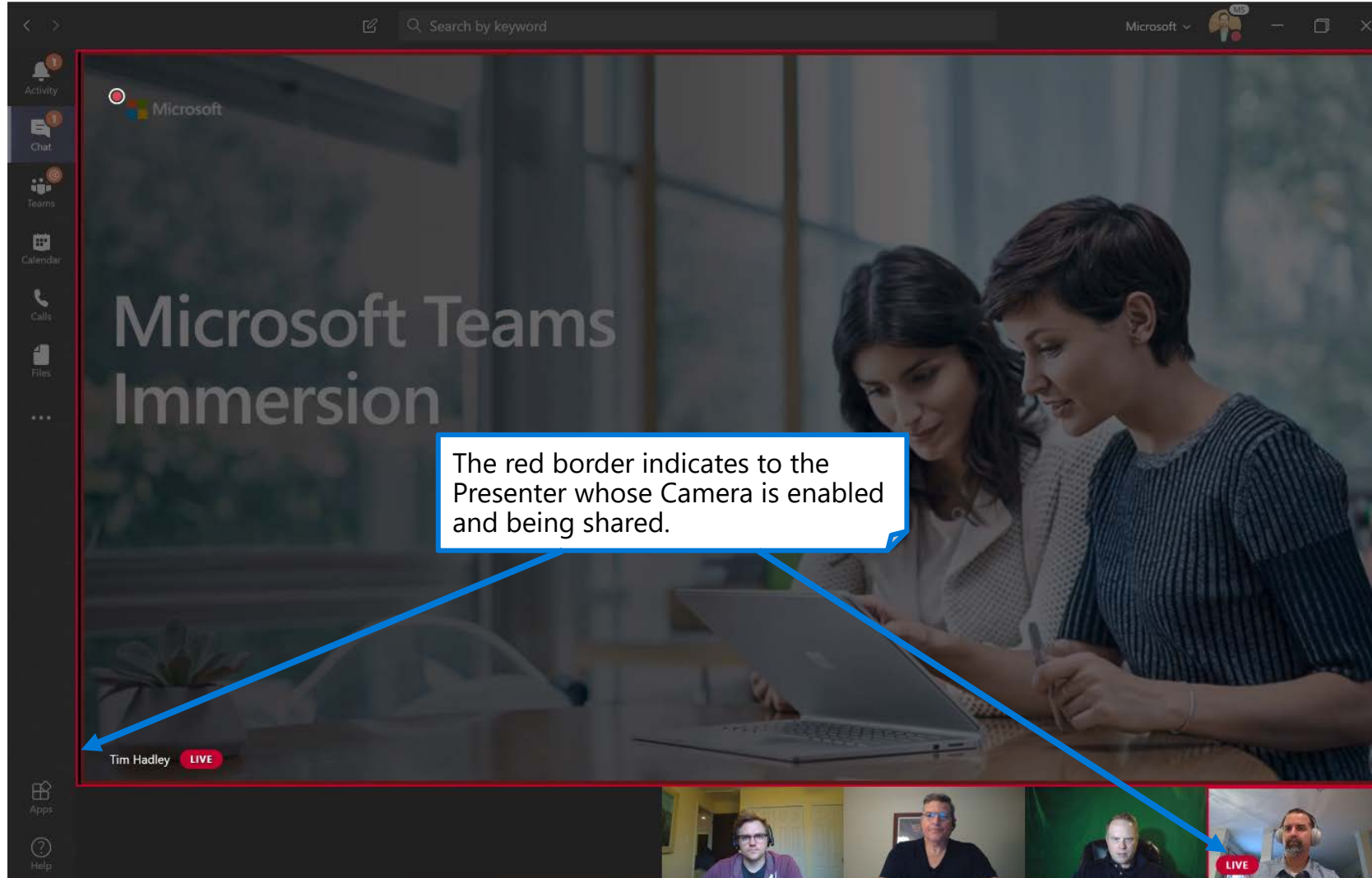
The red border indicates to the Presenter whose Camera is enabled and being shared.

Microsoft 365

Live Event Presenter's view – additional details

The Presenter role participates in the event with the ability to speak and present content and moderate Q&A (there will likely be multiple Presenters invited to the event). Presenters have access to a private chat during the event with the other Presenters and the Producer. This chat is not visible to the Attendees of the event.

Enable Chat Private to interact with the team of Moderators/ Producers
Keep this chat open throughout the event to coordinate with the team of Producers and Presenters privately. This chat will not be visible to Attendees.

Enable your Microphone and/or Camera to interact with the other Presenters and Producer
View people who have connected to the Presenter or Producer role for the event. If they turn on their Camera, you can see your image.

Moderate the Attendees' Q&A window
This window will display questions from Attendees during the event. Remember that Attendees do not have access to the microphone.

The Attendees' questions will be deployed in the New tab. You can then publish it to the entire group of Attendees, which will move it to the Published tab, or keep your answer private.

You can also dismiss any redundant or out-of-context questions, which will move them to the Discarded tab.

Share your screen with the Producer
Share your screen with the Producer to finalize the event details. The Producer may present his/her screen at the Live Event if he/she wishes.

See the Producer and other Presenters
View people who have connected to the Producer or Presenter role for the event. If they turn on their Camera, you can see their image.

Microsoft 365

Presenter
During your event

Teams meeting Presenter experience

Top

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Microsoft 365

Screen prior to joining a Teams meeting

Next you will see the following screen, in which you will have the following selections prior to joining the meeting.

1

Camera
If you turn on your camera you may notice the icon below. This is to enable background effects. This will **not** be available if you are using the Teams web client.

2

Microphone
If 3 or more people have already joined the meeting, you will be joining the meeting on mute. Select the slider to activate your microphone.

Choose your audio and video settings for
Test

AL

Join now

PC Mic and Speakers

1   **2**   **3**

Other join options

Audio off   Phone audio   Add a room

5   **6**   **7**

3

Device settings
Select audio device and camera settings to make adjustments to your audio or camera source.

4

Join now
Join and connect to audio using your computer speaker and microphone or a headset connected to your computer (wired/Bluetooth).

Other Join Options:

5

Audio off
Select this option when there's already an active mic and speaker in the same room as you. This will ensure there is no echo.

6

Phone audio
Join and connect to audio using your desk phone or mobile phone. Video will only be displayed on screen. This includes:
• "Call me" option
• Information to dial in manually

7

Add a room
Join and connect audio to a conference room. Your device will connect without audio to prevent echoing.

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Options available in meeting

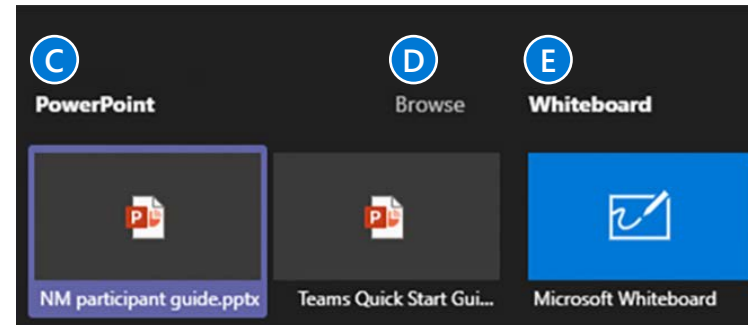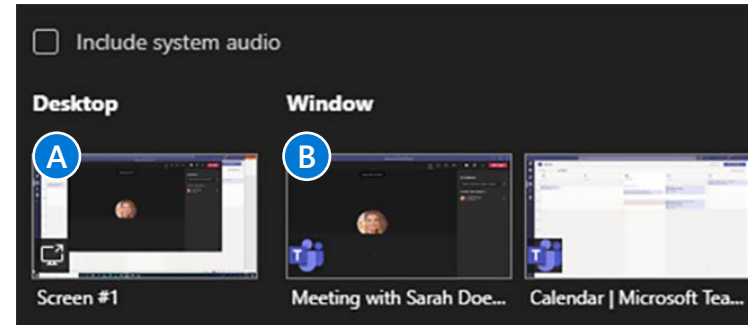|			
🎥	Turn camera on/off	💬	Show meeting chat
🎤	Mute/unmute sound	👥	Show participants
⬆️	Share screen: options include desktop, window, specific application	📞	Hang up/leave meeting
•••	More actions	✋	Raise your hand

For more details on Share Screen and More Actions, refer to the next slides.

Microsoft 365

Share Screen icon

1. Select the **Share Screen** icon 📤

2. Select what you want to share:

   (A) **Desktop** lets you show everything on your screen.

   (B) **Window** lets you show a specific app.

   (C) **PowerPoint*** lets you show a presentation.

   (D) **Browse** lets you find the file you want to show.

   (E) **Whiteboard** allows you draw/write on the screen.

3. After you select what you want to show, a purple border surrounds what you're sharing. Double click the item selected to start sharing.

Note that the **Include System Audio** box is unchecked by default. Check if you want to play a video or audio clip as part of a presentation.

*When sharing directly from PowerPoint, Word, etc. the audience may scroll through the pages independently of the presenter (without impacting the presentation). If you don't want people to be able to independently navigate through the PowerPoint file you are sharing, select 👁️⃠ next to **Stop presenting**) to prevent it.

More Actions icon

1. **Device Settings**: Select audio device and camera settings. Set restrictions to allow parties to move through shared presentations on their own.

2. **Show Meeting Notes**: Notes you take are shared with others and are accessible before, during and after the meeting.

3. **Meeting Details**: Join meeting link info/ dial info.

4. **Call Me**: Transfer call to another device.

5. **Apply Background Effects**: Apply blur background or apply a custom background so participants in the meeting are not distracted by what's going on behind you when your camera is turned on.

6. **Turn On Live Captions**: Live captions can make your meeting more inclusive to participants who are deaf or hard of hearing, people with different levels of language proficiency, and participants in a loud place.

7. **Start Recording**: When you record a meeting, a banner will appear, letting attendees know that the recording has begun. You can access the recording after the meeting ends in the meeting chat or in Stream.

8. **Keypad**: Dial out from the Teams meeting using the Teams Audio Conferencing Services.

9. **Turn Off Incoming Video**: Help the quality of the audio on incoming video by turning off video.

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Attendee
During your event

Attendee experience in Teams meetings & Live Events

Microsoft 365

Live Event Attendee experience

The Attendee experience includes controls for Pause and Play, as well as Fast Forward through the event. You can also turn on Closed Captioning if it has been enabled for your event, and the Q&A appears on the right.

Welcome to our Microsoft Teams Immersion live event

Live event Q&A

Featured   My questions   Most recent

Anonymous 4/23/2020 11:45 AM   👍 1
When will Teams be rolled out to us all?

Moderator 4/23/2020 11:46 AM
Teams is coming next week.

Ask a question

0:20:20 / 1:09:01

NOTE: The link to your Live Event can be provided to attendees in a variety of ways. You may put it in the body of a placeholder appointment, share it via a formatted invitation email or place on an internal event webpage. You can not simply forward the producer/presenter appointment.

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Live Event with Captions

Microsoft 365

Teams meetings – join from Outlook

(A) Option A:
Click **Join Online Now** link in the meeting request.*

You're invited to join a Microsoft Teams meeting.

(A) Join online now

Video conferencing, screen sharing, and more.

Or join by phone (audio only)

+1 425-616-0754,,210318751#   United States, Seattle

Phone Conference ID: 210 318 751#

Find a local number | Reset PIN

Help | Meeting options
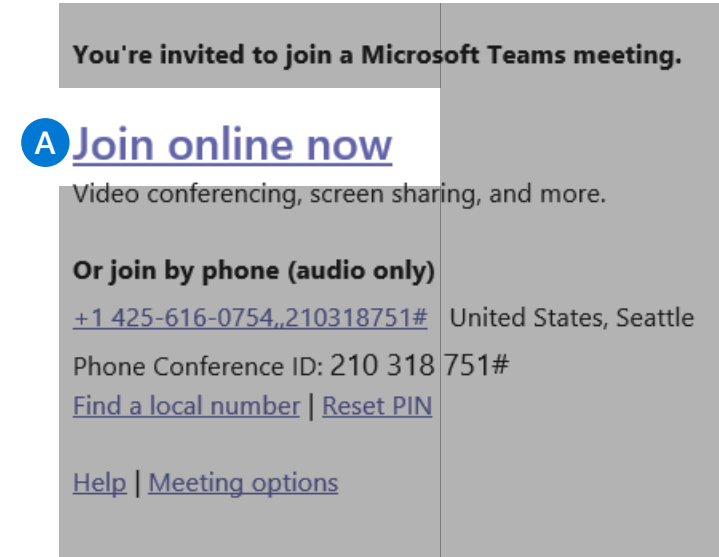
(B) Option B:
In the meeting reminder click **Join Online.**
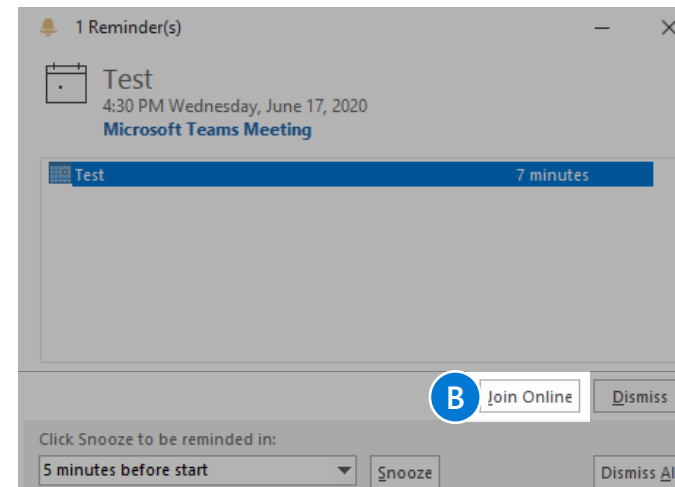
*If a conference number appears in the invite, you should only be leveraging the number and ID if you are unable to access the Teams app or Teams through the web.

1 Reminder(s)   —   ✕

Test
4:30 PM Wednesday, June 17, 2020
Microsoft Teams Meeting

Test   7 minutes

(B) Join Online   Dismiss

Click Snooze to be reminded in:

5 minutes before start   Snooze   Dismiss All

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Teams meeting – join from Teams

Open the **Teams** client, select the Calendar 📅 icon located on the left side in the navigational side bar. Select the meeting invite in the calendar. You have two options to join the meeting:

A Option A:
Select the Join Microsoft Teams Meeting link in the meeting invite.

B Option B:
Select the **Join** button located on the top right side of the screen.

Microsoft 365
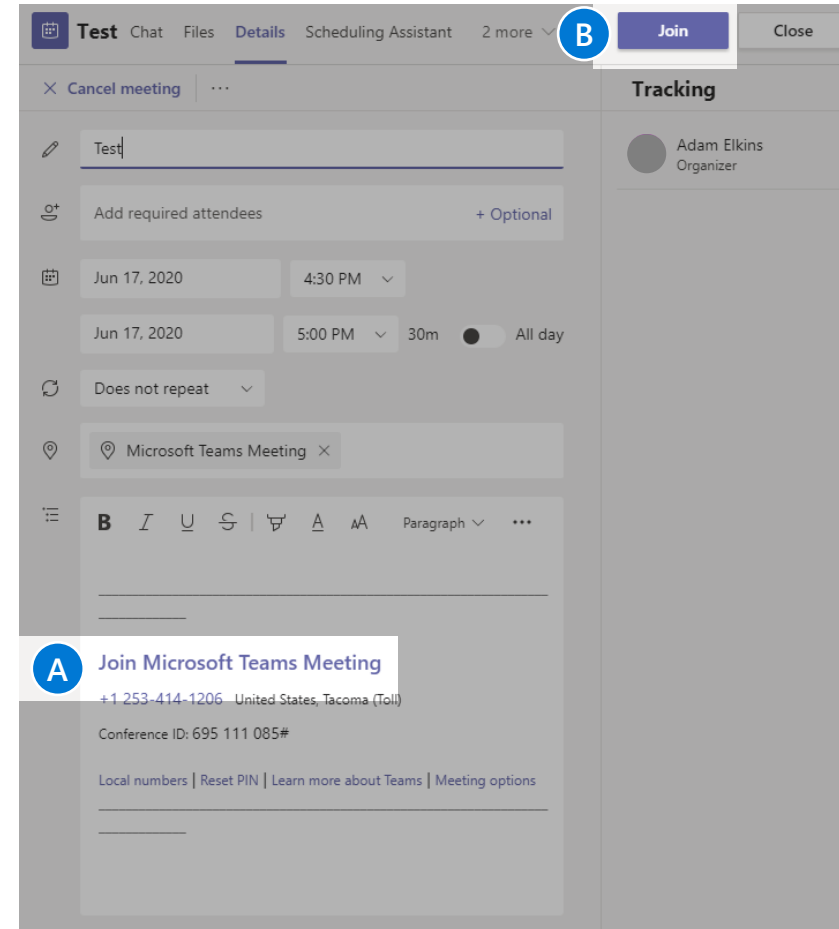
Teams meetings – join or create from mobile

1 Open the **Teams** app and select the **Calendar** 🗓 icon located at the bottom of the screen.

2 Next you will see your meetings listed in your calendar. Find the meeting you want, and then select the **Join** button which will connect you to your meeting.

3. Tap anywhere in the meeting to have the meeting icon bar pop up (ex: mute icon).

4 To create a new meeting invite, select the **Calendar** 🗓 icon located at the top of the screen.

Microsoft 365
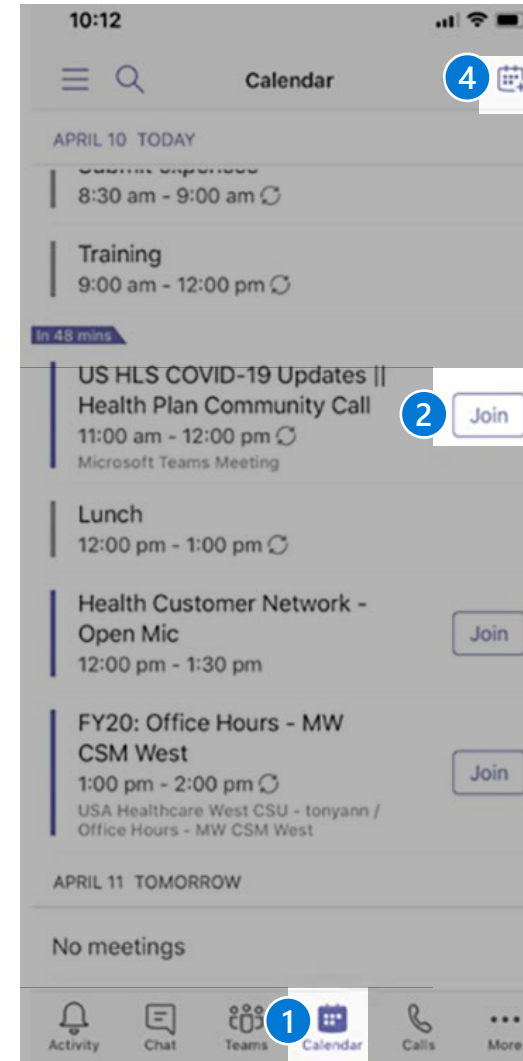
Teams meetings – pre-join settings

Next you will see the following screen, in which you will have the following selections prior to joining the meeting
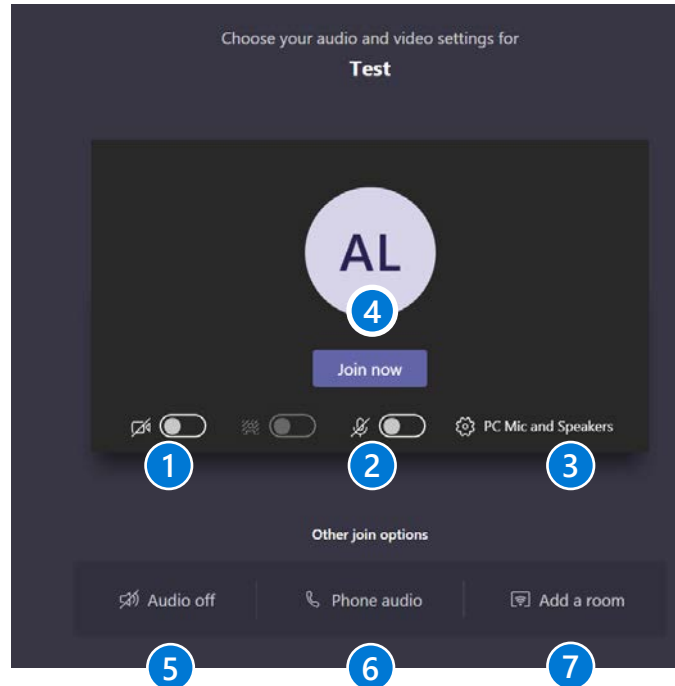
1

Camera
If you turn on your camera you may notice the icon below. This is to enable background effects. This will **not** be available if you are using the Teams web client.

2

Microphone
If 3 or more people have already joined the meeting, you will be joining the meeting on mute. Select the slider to activate your microphone.

3

Device settings
Select audio device and camera settings to make adjustments to your audio or camera source.

4

Join now
Join and connect to audio using your computer speaker and microphone or a headset connected to your computer (wired/Bluetooth).

Other Join Options:

5

Audio off
Select this option when there's already an active mic and speaker in the same room as you. This will ensure there is no echo.

6

Phone audio
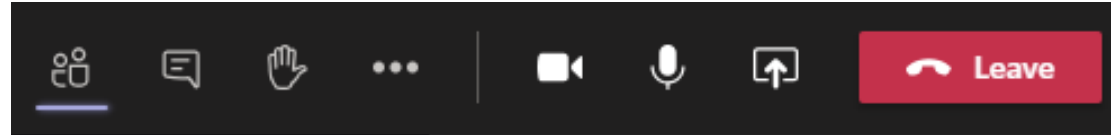Join and connect to audio using your desk phone or mobile phone. Video will only be displayed on screen. This includes:
• "Call me" option
• Information to dial in manually

7

Add a room
Join and connect audio to a conference room. Your device will connect without audio to prevent echoing.

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Microsoft 365

Options available in Teams meetings

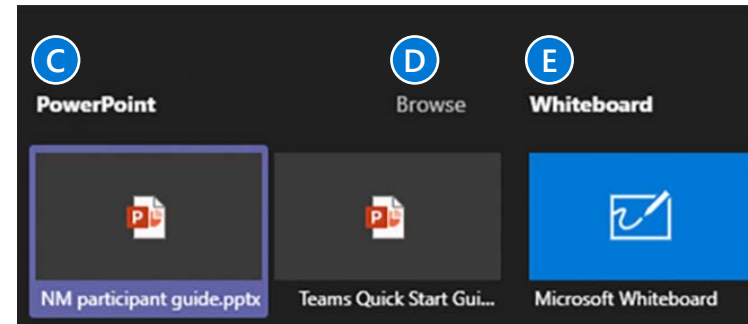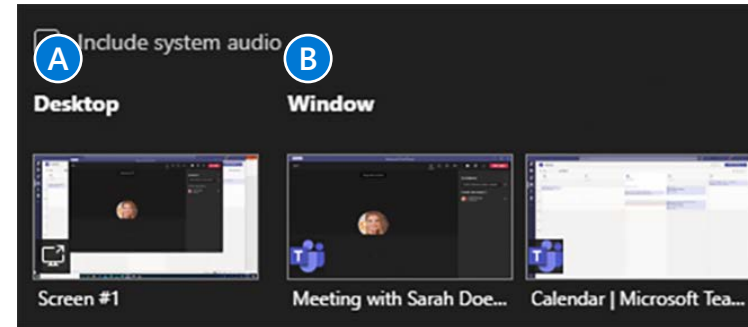|			
📹	Turn camera on/off	💬	Show meeting chat
🎤	Mute/unmute sound	👥	Show participants
🔼	Share screen: options include desktop, window, specific application	📞	Hang up/leave meeting
•••	More actions	✋	Raise your hand

For more details on Share Screen and More Actions, refer to the next slides.

Share Screen icon

1. Select the **Share Screen** icon ⬆️

2. Select what you want to share:

   (A) Desktop lets you show everything on your screen.

   (B) Window lets you show a specific app.

   (C) PowerPoint* lets you show a presentation.

   (D) Browse lets you find the file you want to show.

   (E) Whiteboard allows you draw/write on the screen.

3. After you select what you want to show, a purple border surrounds what you're sharing. Double click the item selected to start sharing.

Note that the **Include System Audio** box is unchecked by default. Check if you want to play a video or audio clip as part of a presentation.

*When sharing directly from PowerPoint, Word, etc. the audience may scroll through the pages independently of the presenter (without impacting the presentation). If you don't want people to be able to independently navigate through the PowerPoint file you are sharing, select (it's 🚫 it to **Stop presenting**) to prevent it.

Microsoft 365

More Actions icon

1. **Device Settings**: Select audio device and camera settings. Set restrictions to allow parties to move through shared presentations on their own.

2. **Show Meeting Notes**: Notes you take are shared with others and are accessible before, during and after the meeting.

3. **Meeting Details**: Join meeting link info/dial info.

4. **Call Me**: Transfer call to another device.

5. **Apply Background Effects**: Apply blur background or apply a custom background so participants in the meeting are not distracted by what's going on behind you when your camera is turned on.

6. **Turn On Live Captions**: Live captions can make your meeting more inclusive to participants who are deaf or hard of hearing, people with different levels of language proficiency and participants in a loud place.

7. **Start Recording**: When you record a meeting, a banner will appear, letting attendees know that the recording has begun. You can access the recording after the meeting ends in the meeting chat or in Stream.

8. **Keypad**: Dial out from the Teams meeting using the Teams Audio Conferencing Services.

9. **Turn Off Incoming Video**: Help the quality of the audio on incoming video by turning off video.

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Attendee

During your event

Guest Attendee join experience in Teams meetings

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Microsoft Teams

External users joining a Teams meeting

The following slides are to provide examples on what an external user will experience when joining a Teams meeting. Anyone can join a Teams meeting as along as they have an email address. Teams can be accessed through Mac, iOS, Android and Windows devices.

As Teams evolves, please continue to refer to the following links below for new feature updates to the application.

→ **Microsoft 365 Roadmap**

→ **Join a Teams meeting (Desktop and Mobile)**
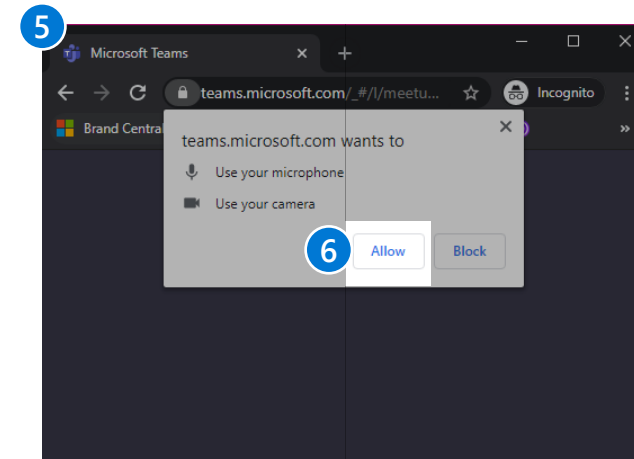
Microsoft 365

Joining from desktop as an external user (slide 1 of 3)

1. Teams lets you invite people outside your organization, including those who don't have a Teams license. The only thing that is needed to join a Teams meeting is an email address. To the right is a snapshot of what an end user will see in their inbox once a Teams meeting invite has been sent out.

2. To accept the meeting invite, the participant will need to select Yes.

3. If the participant selects the **Join Online Now** link, they will see the screen to the right if they don't have the Teams app installed.

Microsoft 365
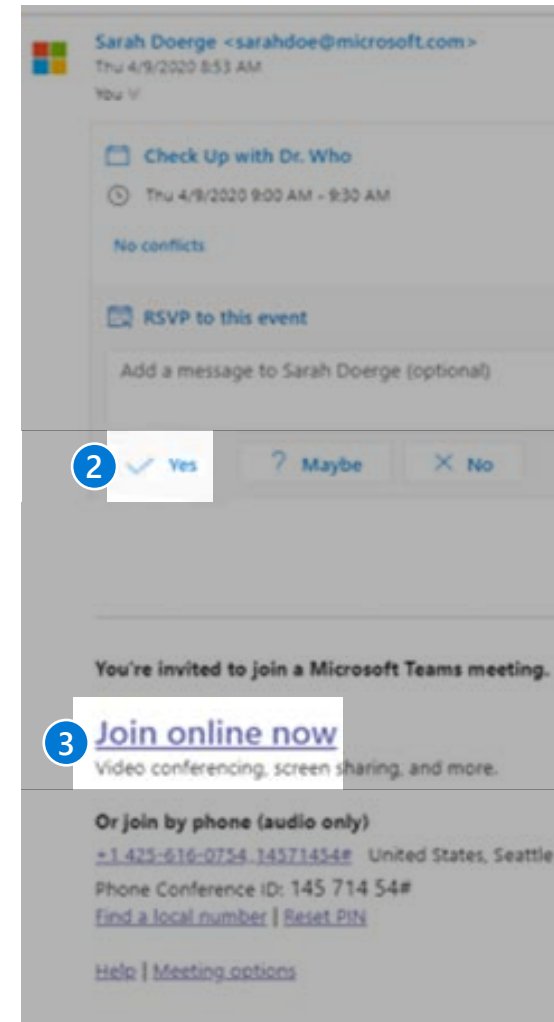
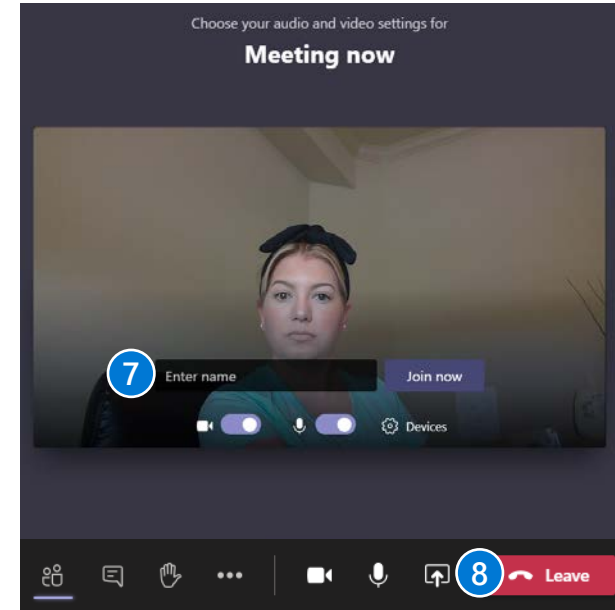# Joining from desktop as an external user (slide 2 of 3)

4. The user will have **two options** if they don't have the Teams app:

   Ⓐ Download the Teams App

   Ⓑ or Join on the Web Instead.
   Supported Web Browsers

5. If the participant selects **Join on the Web** Instead, they will then see this screen. This is requesting access to the microphone and the camera.

6. Select **Allow**.

Microsoft 365
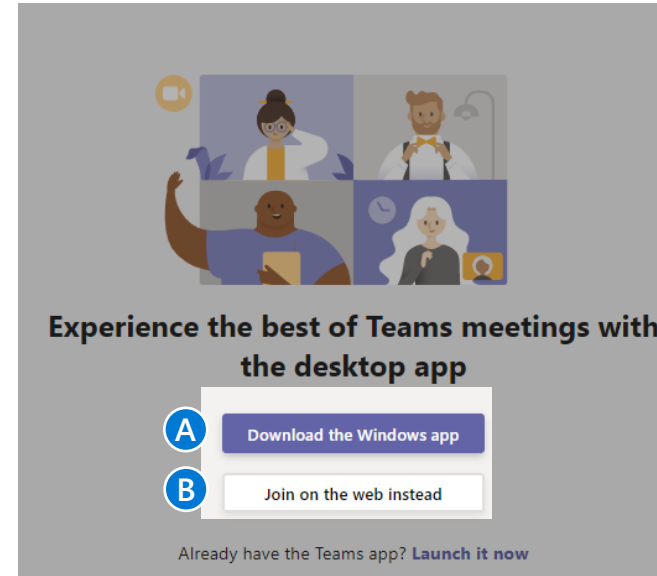
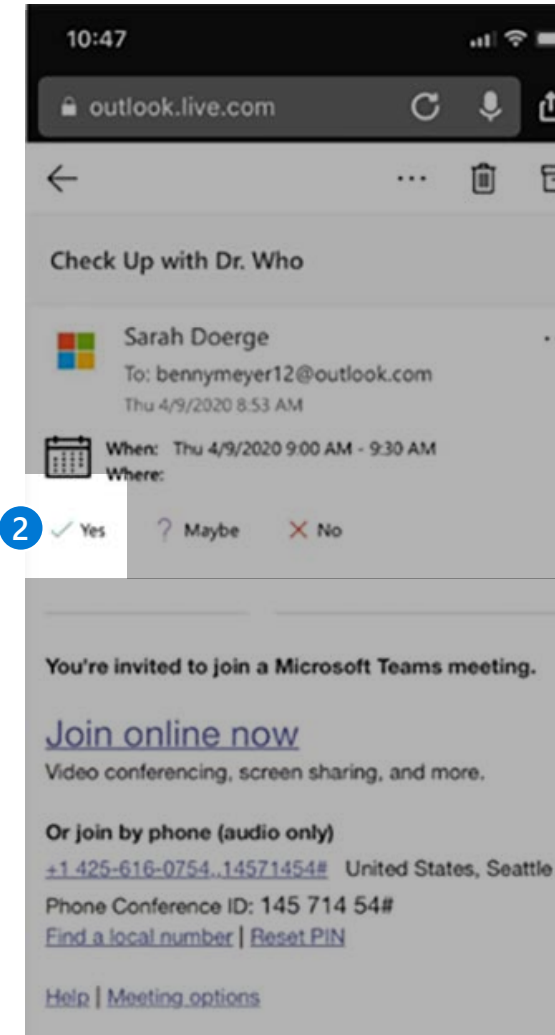# Joining from desktop as an external user (slide 3 of 3)

7 Next, the participant will see the following screen. They will need to input their **Name** and select the **Join now** button.

- They will also have the option to turn off the camera and/or mute themselves prior to joining the meeting.

8 To leave the meeting, select the **Red phone** icon listed in the user bar.

Microsoft 365

Joining from mobile as an external user (slide 1 of 3)

1. Teams lets you invite people outside your organization, including those who don't have a Teams license. The only thing that is needed to join a Teams meeting is an email address. To the right is a snapshot of what an end user will see in their mobile email inbox once a Teams meeting invite has been sent out.

2. To accept the meeting invite the participant will need to select **Yes**.

Microsoft 365

Joining from mobile as an external user (slide 2 of 3)

3. To join the meeting the participant can select:

A Option A:
Join Online Now link listed in the email or

B Option B:
Join button listed in their calendar.

Microsoft 365
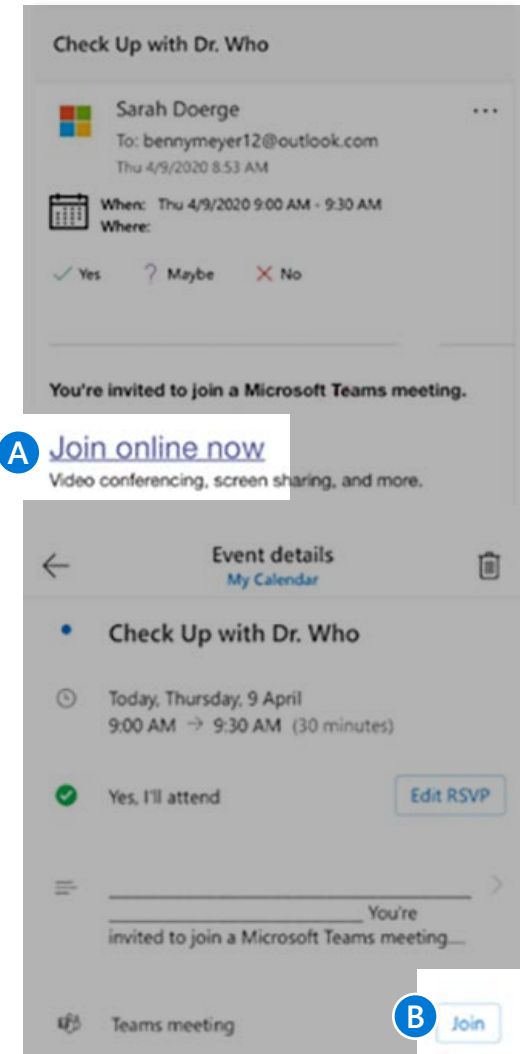
Joining from mobile as an external user (slide 3 of 3)

4 If the participant does not have the Teams mobile app, they will be directed to a screen to **download the app.**

5 Next the participant will see the following screen. To join the meeting, select the **Join Now** icon. The participant has the following selection options prior to joining the meeting.

A **Join now** – Select to join the meeting with current meeting options.

B **Blurred background** – Select this option to blur the background of your video call.

C **Camera** – Select this to turn your camera on or off.

D **Microphone** – Select this button to turn your microphone on or off. If it's off, others will not be able to hear you.

E **Speaker** – Turn your speakers on in order to hear the conversation.

6 To leave the meeting, select the Red Phone icon listed in the user bar.

121
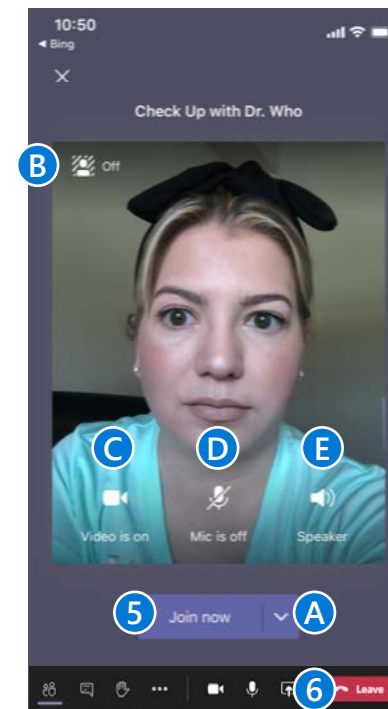
Organizer

After your event

Post event actions

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Post event actions

Capture event feedback from attendees, presenters and organizing team directly after your event.
Be open to suggestions and insights for what can improve. Clarify immediate next steps for your team.
Rest! Let the event experience settle in your mind before making follow up decisions.

Processing Feedback

❑ Provide reminders to complete follow up event surveys.

❑ Extend event surveys to presenters, organizers and core team.

❑ Gather data from survey tools.

❑ Pivot data by type of attendee and session.

❑ Provide attendee feedback to speakers as soon as possible. Within 72 hours after the close of the event is an industry norm.

Content publishing

❑ Prepare presentations and/or recordings for publication.

❑ Release "Thank you for attending" communications.

❑ Release "Thank you for participating" communication to presenters and core team.

❑ Publish recap blog post or other communication broadly.

Ongoing Strategy & Next Steps

How will you continue to engage with your audience?

What follow up engagements will you conduct?

How will you improve your next event?

How will you continue to invest in presenter skills and recruiting new presenters?

Schedule an event review to discuss operational improvements.

Pro Tip: Thank your Team

Build morale within your production team. They are essential to your success. Host a "Wrap Party" to thank them for their hard work. Producing live events can be very taxing on the team involved. Make sure you thank them and invest in their health and well being by ensuring appropriate time off for recuperation, especially after producing a large scale or high profile event. **Do this BEFORE you conduct an event review.**

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Content lifecycle

Your attendees will want to review content after your scheduled live event. Plan for the lifecycle of your content by sharing recordings and presentations in a location you manage. Permissions, extended sharing and rebroadcast decisions should be handled during pre-production.

Content on-demand

Will you publish content internally (Microsoft 365 via Stream) or externally (YouTube or other platform)?

Will you publish video only or presentation assets as well?

Ongoing conversation

Do you have a community forum where your attendees can continue to ask questions and engage?

Consider providing access to ongoing resources and experts.

Accessibility

Strive to have an accessible event and content.

Utilize features like closed captions in broadcasts, alt-text for images and the Accessibility Checker for PowerPoint.

Consider releasing content in Sway or PDF format using the Export to PDF function within PowerPoint to ensure consistency and availability.

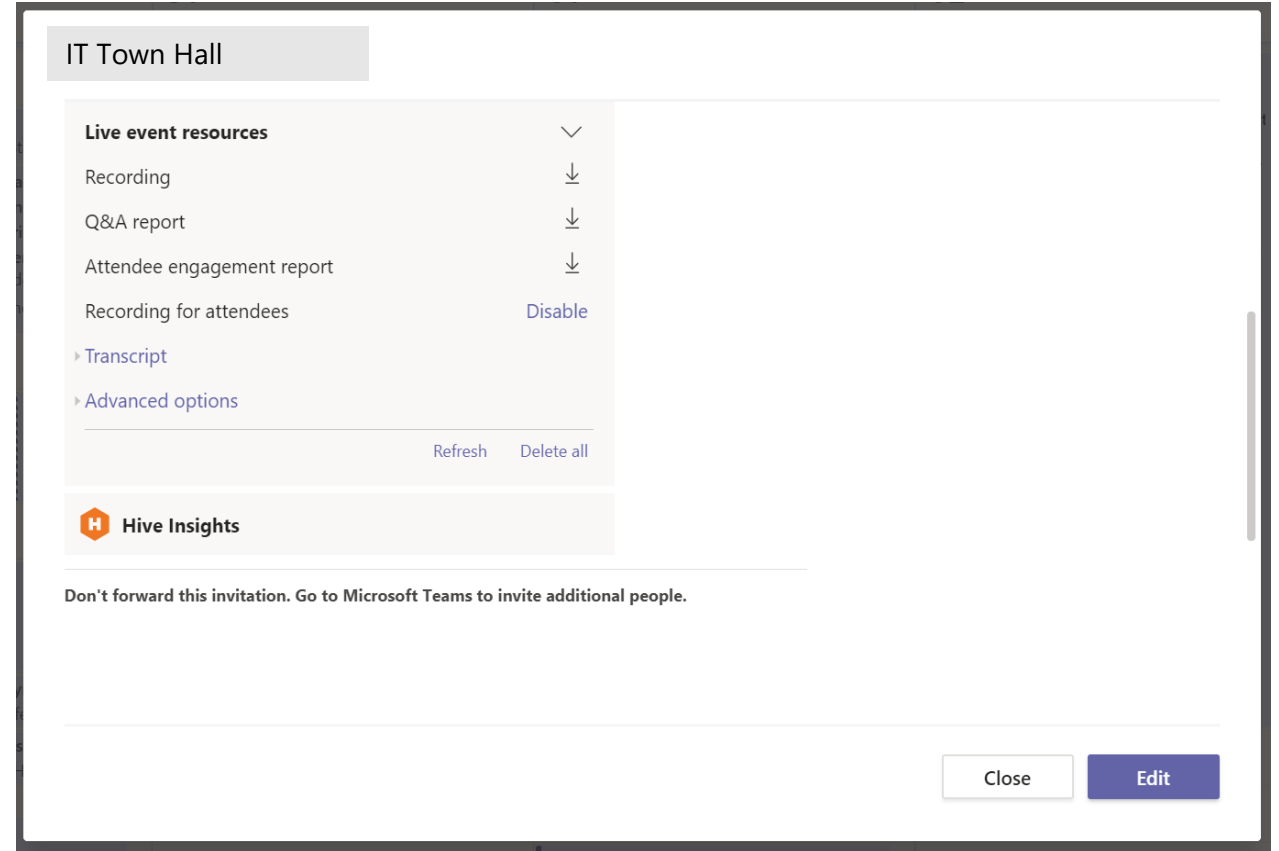Learn more at https://aka.ms/PowerPointAccessibility.

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Manage Live Event resources after the event

At the end of the Live Event, a Producer or Presenter can access the following event resources by going back to the event invitation in your Teams Calendar:

- Event recording

- Q&A report

- Attendee engagement report

- Recording for the Attendees (ability to disable)

- Etc.

If you want to access this option later, open the event invitation from Teams and access this window.

This view is not available to guests.

IT Town Hall

Live event resources   ⌄
Recording   ↓
Q&A report   ↓
Attendee engagement report   ↓
Recording for attendees   Disable
▸ Transcript
▸ Advanced options
                               Refresh   Delete all

H Hive Insights

Don't forward this invitation. Go to Microsoft Teams to invite additional people.

Close   Edit

Appendix:

Channels & announcements in Microsoft Teams for virtual events

Top

Creating a multi-channel virtual event in Microsoft Teams

Decide what your event will be called, if you are building a community and will be using your events team on a reoccurring basis throughout the year. Here are three samples of potential channels for your event:

Contoso Conference	Contoso Media Summit	Contoso Hackathon
General	General	General
Birds of a Feather Sessions	Career Corner	Code Share
Community Zone	Day 1 Sessions	Day 1 Hack
Event Support	Day 2 Sessions	Demos
Speaker Support	Day 3 Sessions	Event Support
Supplier Comms (Private Channel)	Demos	Logistics Team (Private Channel)
Technical Talks – June 2-4	Event Support	Speaker Support
Technical Talks – June 9-11	Production Team (Private Channel)	
	Speaker Support	

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Creating Microsoft Teams channels for your virtual event

For those that are creating an event team in Microsoft Teams, these are the recommended channels and how to use them. Start with the General channel.

General

The General channel is added when your event team in Microsoft Teams is created and cannot be removed. It is also where attendees will show up when they have been added to your event team.

A document of all your announcements should be created for pre-event, during and post-event.

Additional channel examples are:

Announcements

Attendee Support

Channels by Content Track

Channels for Activities: Meet our Attendees, Lounge

A few ideas on major announcements about your event:

- **Pre-event**
  - Welcome
- **During event**
  - Repeat welcome
  - How to access support
  - Keynote
  - Overall session starting
  - Ancillary events and community moments
  - Information on accessing recordings
  - How to access surveys and evaluations
  - End-of-day messages
    - Polls – ask your attendees questions
- **Post-event**
  - Thank-you message
  - Information on accessing recordings
  - How to access surveys and evaluations

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Announcements for your channels

Writing channel messages pre-event is a best practice, to have at the ready to cut and paste into your General channel, and other channels should be part of your logistics planning.

To create an announcement in Teams:

Go to Posts at the top of the General channel

Click **New conversation** and Format [A] at the bottom left of the post

At the top left click the dropdown at New Conversation and choose **Announcement**
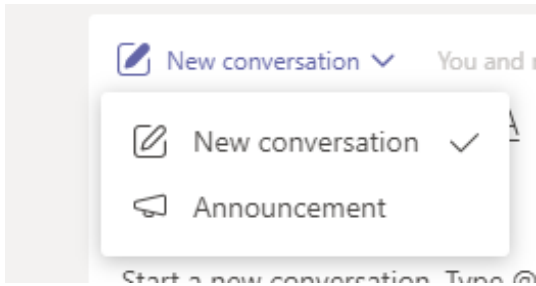
On the right in the **Type a headline** area, you can change the color of the headline and add a graphic. Add your subhead and type your announcement. Currently, you cannot 'pin' an announcement to the top of Posts.

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Create a graphic for your announcements

All announcements have the capability to change the background color of the announcement and you can add a graphic.

Best practices for creating a graphic – the size is 918x120px. A darker background is best for this as the headline color of the announcement text is white. You can also choose to leave out the headline text or use a color with text only. Samples:

Microsoft 365

How to cross post in multiple channels

You will want to cross-post announcements in multiple channels to share the same content in all your event channels. To cross post choose **Post in multiple channels**.
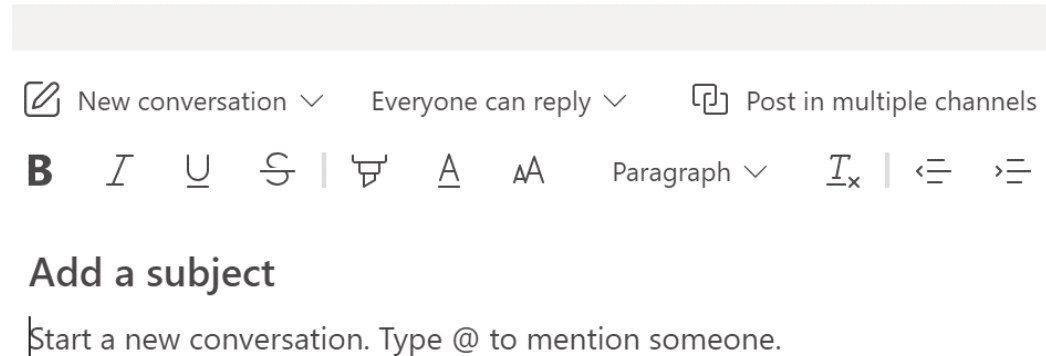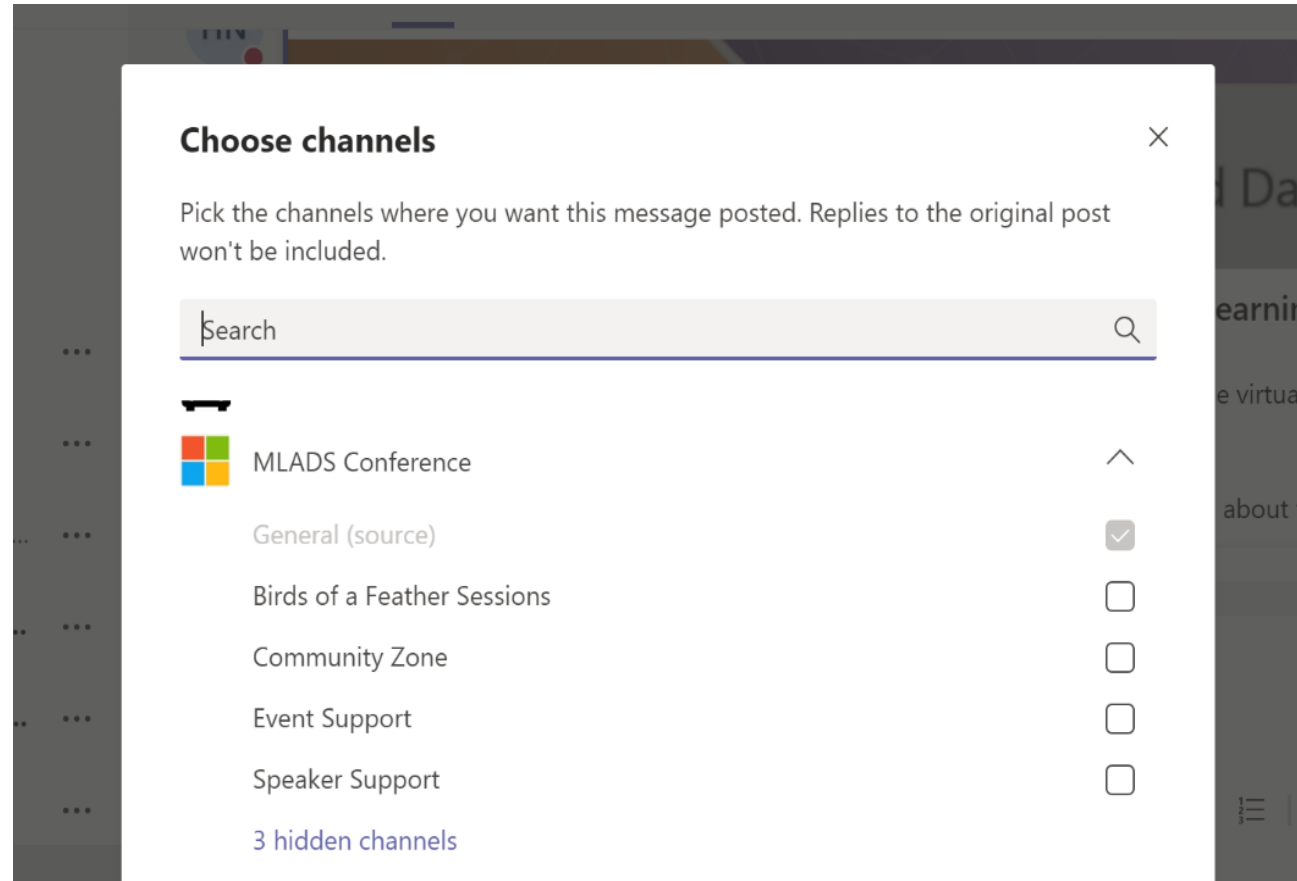

You will see the channel you are posting into on the left (source) and the button **Select channels**.

Microsoft 365
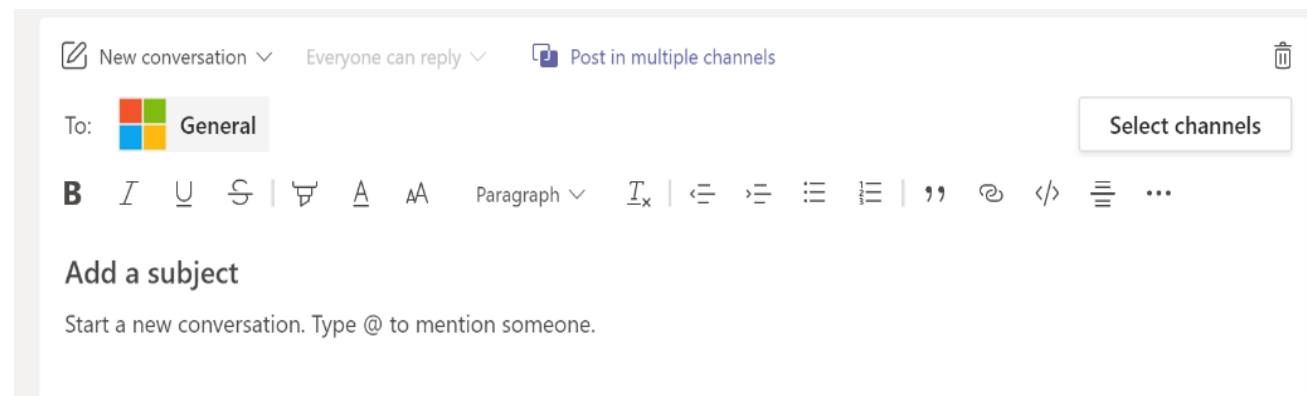
How to cross post in multiple channels – con't.

Choose **Select channels** and choose the channels where you would like to cross post.

Timing of Announcements in the General channel

As you are building out your event team, you will want to add in announcements at certain times.

After Attendees are added to Teams:

You will want to post a welcome announcement after your attendees are added to Teams if your event team is new.

Pre-event:

You will want to repeat your welcome announcement the day before and the day of the event. You can add more info as you get closer to your start time.

During event:

Use the General channel for keynote and session announcements, how to get to support, and activities in your ancillary channels, like Career Corner, Community Zone, The Lounge, Demos and Product Fair (whichever ones you have for your event).

General channel announcement sample content

Welcome announcement

- Welcome to *insert event name*
- We are excited to welcome you to our Teams Platform for *insert event name and dates*
- Please explore our *insert event name* team
- Our "FAQ" or "How Do I?" (in the top Tab list) provides effective best practices on how to navigate Teams

Keynote announcement

- Our keynote will begin shortly!
- Join us for our Welcome Keynote | Starting at *insert time and time zone*
- Our keynote will feature *insert speaker names and titles* and any additional sessions inside the keynote section of your event
- Join us (this can be a link to the keynote, a Teams meeting link or Teams Live Event link)

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Welcome to Contoso Conference – announcement example

We are excited to welcome you to our first Virtual Contoso Conference – Tuesday, June 2-Thursday, June 4.

Feel free to explore our Contoso team and join us to participate in this first-time virtual experience for our event hosted on the Microsoft Teams platform.

Please check out our Welcome tab (at the top of the channel) for overall information about the event.

Check out our Session Catalog tab, which take you to the entire Contoso Conference Schedule. From there you will see a high-level view of each session with the ability to filter on sessions and links to view sessions.

Should you need any assistance, select our "Event Support Channel" on the left navigation pane. You can ask for assistance within this channel or email supportemail.

We look forward to having you join us live, starting at 9:00 AM PT/Noon ET for our Opening Keynote.

Thank you,
Contoso Crew

Microsoft 365

Sessions and content by day or track

Depending on how your event is set up, it will have birds of a feather, tech talks, tracks, sessions, hacks – there are many names for content that we all present in virtual events – and these will either be Teams meetings or Team Live Events, depending on how you are producing your event.

A best practice is to set up channels either by day or by grouping them by what kind of content they are. Some will leverage a third-party content management system.

Having a channel for chat/conversations is a best practice whether you use a CMS or not.

Microsoft 365

Session announcement example

Our *insert session type* is about to begin!

Join us now for our *insert session name* | Starting at *insert time and time zone*

This session is presented by *insert speaker name and title*

Insert the abstract if you'd like

Or

Join our sessions 10:00 AM – 11:30 AM PT

Learning about Microsoft Teams | Track: 101

Deep noise suppression in Teams | Track: Deep Learning

Chat in Microsoft Teams | Track: Product features & improvements

To access the session content, go to our CMS/Session Catalog tab

Microsoft 365

Additional channels

Career Corner (channel)

Welcome to our Career Corner

Please feel free to network here and post who you are, where you work and add a link to your LinkedIn profile. Are you looking for a new job? Have an open position to share? Feel free to post here as well.

Demo and Product Fair (channel)

Welcome to the Demo and Product Fair

Experience hands-on understanding of the latest and greatest Microsoft innovations!

Within our Demo & Product Fair channel, attendees can navigate to the top tab and select Demo & Product Fair. Here, you will find our full list of XX+ demos from our leading Microsoft experts.

Ancillary channels

A best practice for your virtual event is to create a channel for community, networking and fun. Naming can be Community Zone, The Lounge, or a name that is consistent with the theme of your event.

Samples:

Community Zone

Welcome to our Community Zone

The Lounge

Networking Corner

Sample content for your announcement:

We look forward to great conversations, sharing, and some fun here in our Community Zone. We will be posting activities for in-between sessions and feel free to drop-in to participate in trivia and other activities throughout the event.

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Microsoft 365

Community zone announcements ideas

Where are you streaming from?

In case you missed it, check out the Attendees Around the World tab and share where you are streaming from. ou can also comment on other's pins/posts. (Many teams are leveraging the Uebermaps for pinning the locations of attendees.)

Help make a difference – Red Cross Missing Maps

Help make emergency response around the globe more effective! Join us for the Red Cross Missing Maps session in 30 minutes to make a difference for first responders. Information can be found in the Missing Maps tab in the Community Zone.

Microsoft 365

Additional announcement/ activity ideas

- Countdown to yoga
- Create a poll: How many sessions did you attend today?
- Feedback requested – a reminder to fill in evaluations
- Ice breaker: share a pic of your pet
- Ice breaker: share a pic of your keyboard
- Invitation to a community organization or group
- Share your favorite movie
- Share your favorite or your podcast
- Social media reminder: please use our official hashtag on your social media posts – *insert hashtag*. Thank you.
- Test your knowledge
- Trivia questions are live

Organizer
Before your event

Appendix:

Tabs in Microsoft Teams for virtual events

Microsoft 365

Best practices for creating tabs

When your event team is created, you will have the following tabs automatically created in your General channel and all additional channels: Posts, Files, Wiki. **Tabs** are **Teams**-aware webpages embedded in **Microsoft Teams**.

In your General channel and additional channels, you will want to "pin" certain information about your event.

Microsoft 365
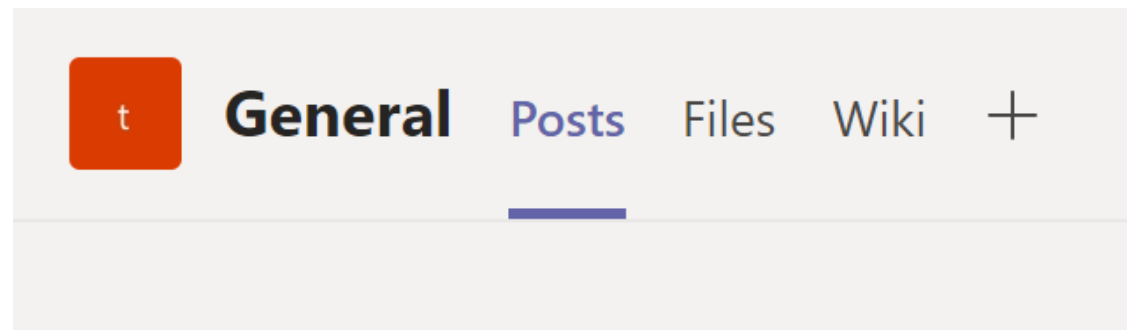
Best practices for creating tabs – con't.

In your **General channel** and additional channels, you will want to "pin" the following information about your event. These are some examples of what you can share with your attendees:

· Master Session List (typically a SharePoint list of your sessions)

· How Do I? (this can be a how to use Microsoft Teams)

· Session Evaluations (typically a link to your survey/Microsoft Forms tool)

· Code of Conduct

· Event Support (as a best practice Event Support should also be a separate channel for attendees to be able to ask for support)

The master session list and survey link should be pinned in all your channels.

How to create a tab or "pin" something to your channel

How to Add a Tab in Microsoft Teams

Select + on the **tab** bar

Select the type of **tab** you want

Choose what the **tab** will point to and give the **tab** a name
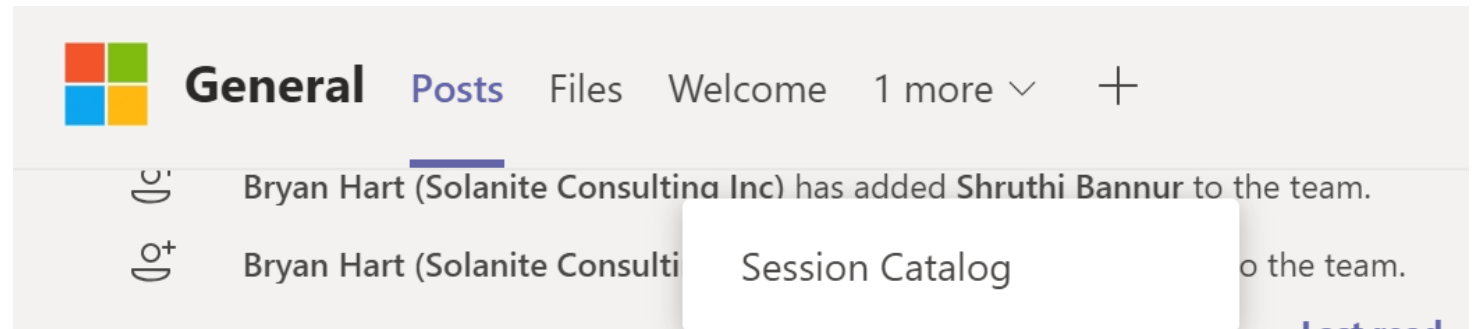
Select Save

Sample – MVP Summit:
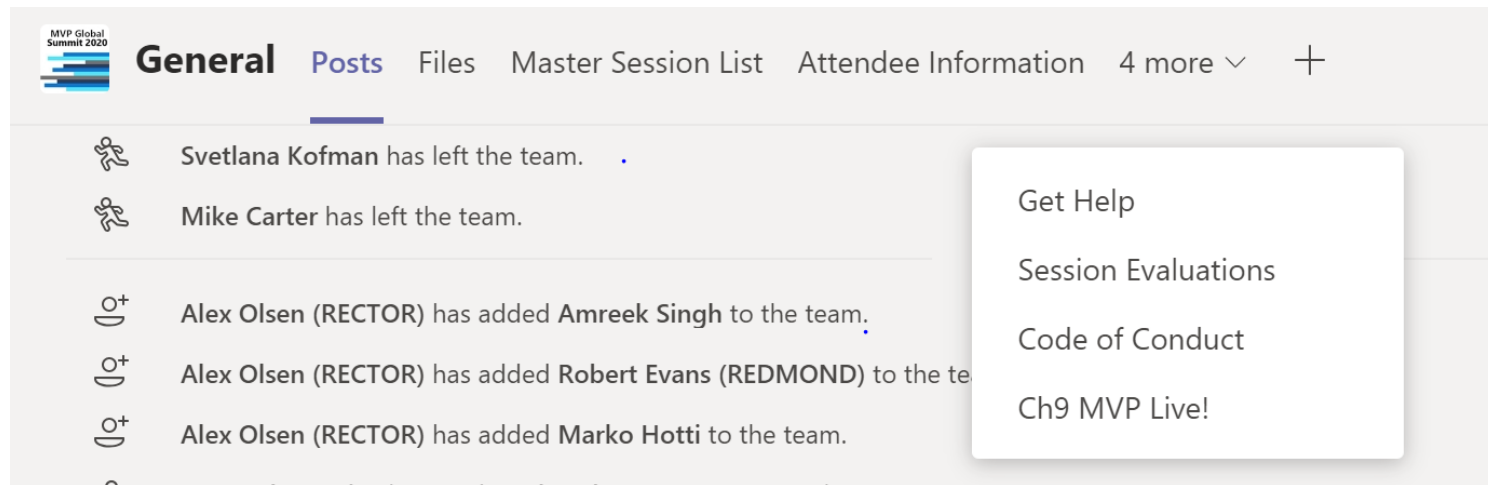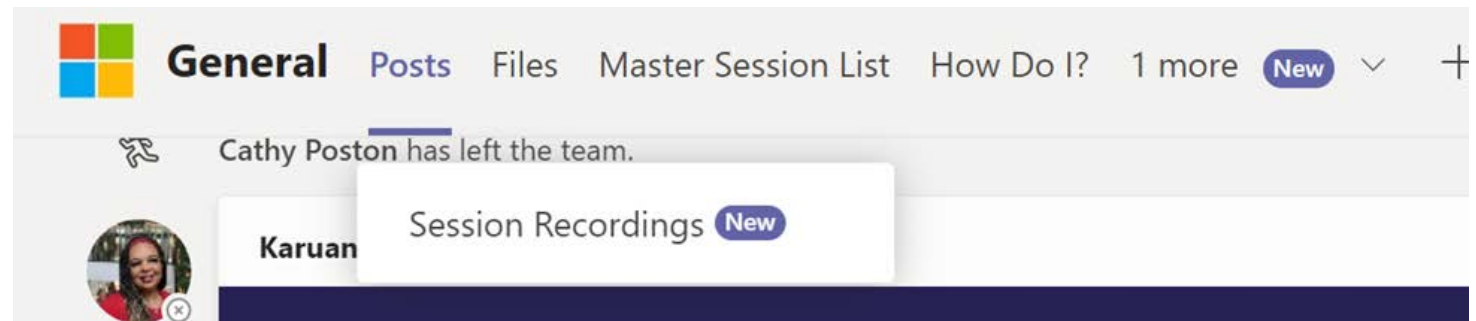
Microsoft 365

Samples of pinned tabs

Sample

Microsoft 365

Building tabs and pins for your virtual event

Best practices are to leverage SharePoint or Sway for sharing information about your event. Every Microsoft Teams has a SharePoint site that can be built out for this purpose.

A welcome letter can be created in a SharePoint page or Sway.
A master session lists can be created in a SharePoint list.
A "How Do I" can be created in a SharePoint page or Sway.

Session recordings can be shared using a Microsoft Stream channel or put in a Teams channel or area that you own for later viewing.

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Tabs for your additional channels

If you have channels for your sessions by day or by track, you can add a tab of the session list created in SharePoint.

Microsoft 365

Microsoft MVP & RD Summit March 2020

Event type: Multi-day, multi-track invitation only conference

Conference Site: SharePoint
Attendee Experience: Microsoft Teams
Meeting Types: Live Events, Teams channel meetings

↑
Top

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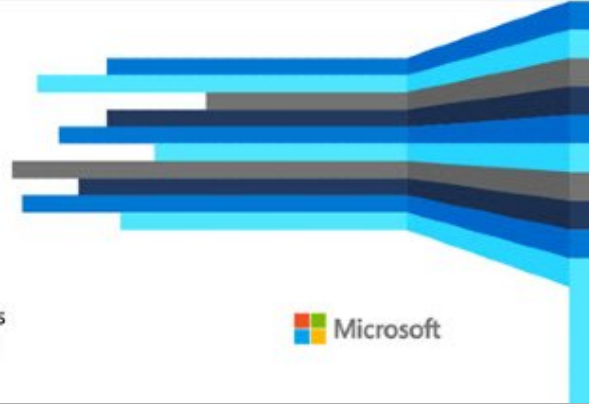# Using Teams for global events

MVP Global Summit

March 16-19, 2020 | Microsoft has made the decision that this year's MVP/ Regional Director Summit will be an online-only / virtual event.

Microsoft

100% in Teams
4,000 attendees
4 days
100s of sessions
2 teams in MS tenant

Organized in a few weeks

Universal access

Strong feedback from MVPs
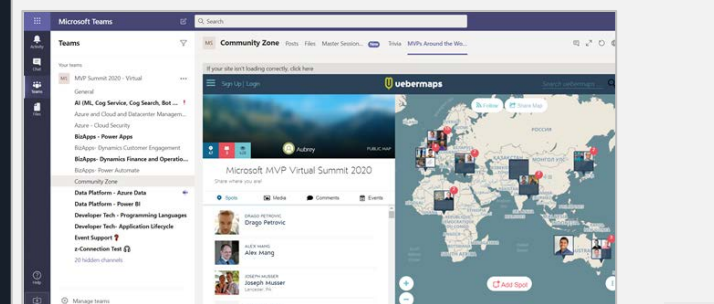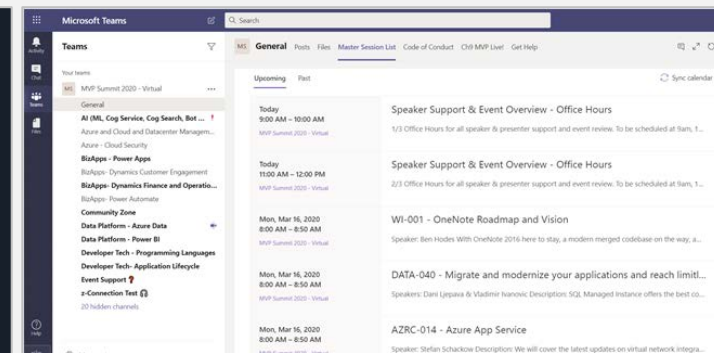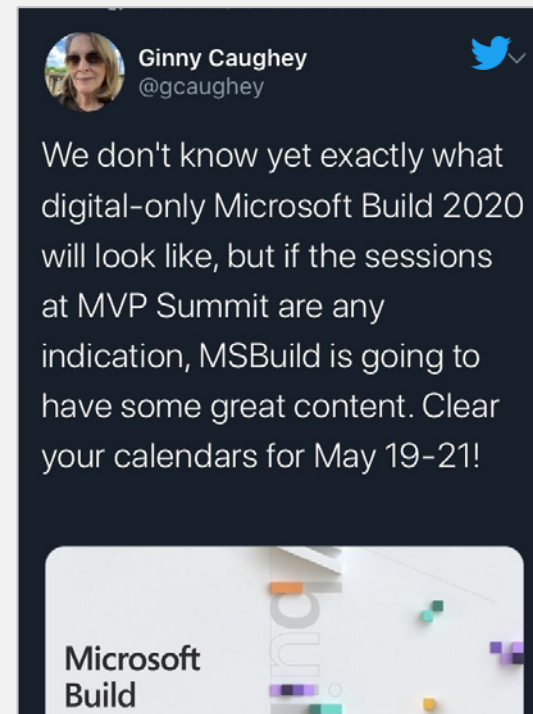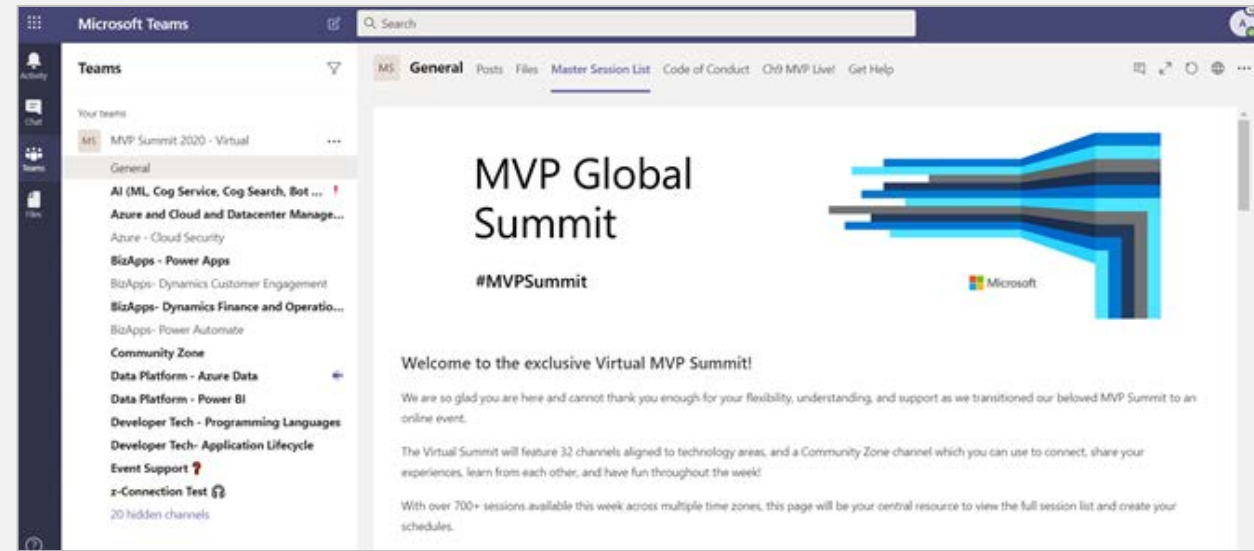
MVP Summit
March 2020

150

MVP/RD Summit detail

Situation

Due to the pandemic, we quickly transitioned our previously scheduled MVP/RD Summit in March to a virtual event. This event brings together Microsoft executives, product leaders and developers with our Most Valuable Professional (MVP) and Regional Director (RD) communities and served all Microsoft product areas including Azure, Microsoft 365 and Business Applications Groups. The event was produced by Karuana Gatimu of the Customer Advocacy Group in Microsoft Teams and hosted on the **Microsoft Tenant** to validate our virtual event strategy in this unfamiliar situation.

Results

- **Feedback**: Roundly positive, with gratitude for not canceling the event and providing an outlet for connectivity with supportive peers

- Chat logs were very active with users staying all day, across multiple times zones

- 4,826 users in MVP Summit team; 230 users in RD Summit team

- Maintained high engagement throughout 3-day schedule with 3844, 3622, and 3388 active users

- Day-over-day drop-off were much lower than anticipated for an online/virtual event

- Users interacted with Presenters and each other at an unprecedented scale (Community Zone!)

  - Over first 3 days saw 15,758, 18,404, 18,647 messages respectively

  - Engagement saw 2,162 tweets with #MVPSummit hashtag reaching 3.4m people and generating 8.5m impressions with extremely high sentiment

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Microsoft 365

MVP Summit – virtual

- Event was fully hosted in Microsoft Teams leveraging SharePoint, OneNote and other components of Microsoft 365
- Used combination of Teams Live Events and channel meetings

Final Numbers

- 4 days of event
- 15 executive meetings
- 800+ sessions, including keynotes and reruns
- 600+ speakers
- 3,300 guests loaded to the tenant
- Event registration handled with SharePoint lists & Forms

Microsoft 365

MVP Summit team design

- Custom produced Teams Live Events for keynotes
- Conference information hosted on SharePoint included with Microsoft Teams
- On-demand content hosted in a Stream channel for follow-up viewing
- Channels for each track
- Main agenda and links in SharePoint page pinned in Teams
- Each session scheduled as channel meeting
- Community Zone channel
- Event Support channel
- Speaker Support channel
- Private channels for event organizers
- Custom survey tool used for session feedback; results aggregated in Power BI dashboard

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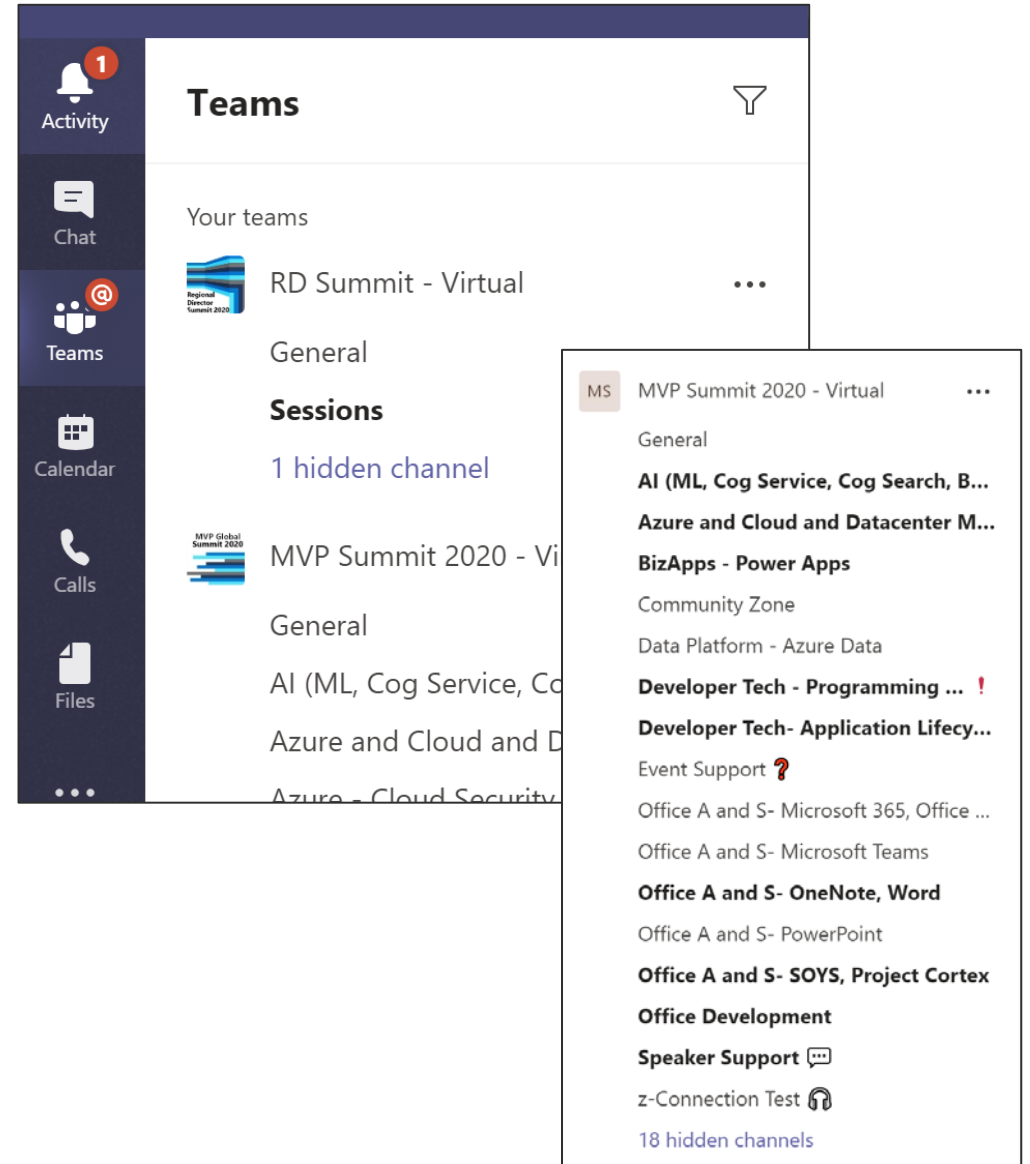
Week at-a-glance

Given the global distribution of our MVP and RD communities, planning a virtual event agenda that worked for everyone was incredibly challenging. We designed the virtual event to be as inclusive as possible, with the sessions scheduled to accommodate a globally distributed audience.

CORE A	Monday, March 16		CORE A	Tuesday, Wednesday, Thursday (March 17 - 19)	
	Event Welcome & Overview: Jeff Sandquist, CVP Developer Relations	07:30-07:55			
	Sessions	08:00-08:50		Sessions	08:00-08:50
	Sessions	09:00-09:50		Sessions	09:00-09:50
	Sessions	10:00-10:50		Sessions	10:00-10:50
	Sessions	11:00-11:50		Sessions	11:00-11:50
	Break	12:00-12:50p		Break	12:00-12:50p
	Executive Sessions	1:00-1:50p		Executive Sessions	1:00-1:50p
	Ancillary Events + Networking in The Community Zone	2:00-2:50p 2:55-3:15p		Ancillary Events + Networking in The Community Zone	2:00-2:50p 2:55-3:15p
Core B	Break	3:15-3:30p	Core B	Break	3:15p-4:00p
	Event Welcome & Overview: Jeff Sandquist, CVP Developer Relations	3:30-3:55p			
	Sessions (Repeated)	4:00-4:50p		Sessions (Repeated)	4:00-4:50p
	Sessions (Repeated)	5:00-5:50p		Sessions (Repeated)	5:00-5:50p
	Sessions (Repeated)	6:00-6:50p		Sessions (Repeated)	6:00-6:50p
	Sessions (Repeated)	7:00-7:50p		Sessions (Repeated)	7:00-7:50p
	Ancillary Events + Networking in The Community Zone	8:00-8:50p 8:55-9:15p		Ancillary Events + Networking in The Community Zone	8:00-8:50p 8:55-9:15p

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Example: MVP event support

- A standard support tier model was implemented for the virtual event
- Key focus on self-service and community support via the dedicated channels
- Issue escalation & technical support handled issues referred by event staff

Tier 0 – Self Service*

Documentation throughout event experience teams & channels

Tier 1 – Chat in channel

Schedule for moderators to answer event questions

Speaker and Attendee support channels moderated by organizer staff trained by PG

Tier 2 – Support request

Technical issues escalated from chat to event technical support (IT and service experts)

Tier 3 – Engineering support

Support staff escalations to product group support

*For future events, a chatbot to handle basic queries will be made available

Resources

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Resources

	General Guidance	Live Events in Teams	Live Events in Yammer	Live Events in Stream
IT Admin	❑ Docs.microsoft.com	❑ Teams Live Event technical documentation ❑ Configure Live Event settings ❑ Video delivery and network overview documentation	❑ FAQ for Yammer Live Events ❑ Tips for engagement ❑ Coming soon: Produce in Teams	❑ Overview
Organizers & Producers	❑ Adoption.microsoft.com	❑ Get Started article ❑ Producing an Event ❑ Manage recordings & reports	❑ Setup your Live Event ❑ Who can watch Live Events ❑ Live Events in Yammer ❑ https://aka.ms/LiveEventsinYammerplaybook ❑ Organize a Live Event in Yammer	❑ Stream Live Event Overview ❑ Create a Live Event in Stream
Presenters	LinkedIn Learning Course: Creating a basic lighting setup in a home or office Scott Hanselman Blog: Take remote worker webcam videos to the next level			

Questions

Should you have any questions about this the information in this guide please join us in our Virtual Event forum on the Microsoft Technical Community.

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