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ULTIMATE VIRTUAL EVENTS CHECKLIST

INTRODUCTION

Virtual and hybrid events are now as vital a part of the events landscape as any traditional in-person conference or trade show. Even in the post-pandemic era, virtual events are as relevant as ever.

This permanent shift in how we as event professionals approach planning and execution means staying on top of technology, audience expectations, and leveraging event data to measure outcomes and demonstrate value.
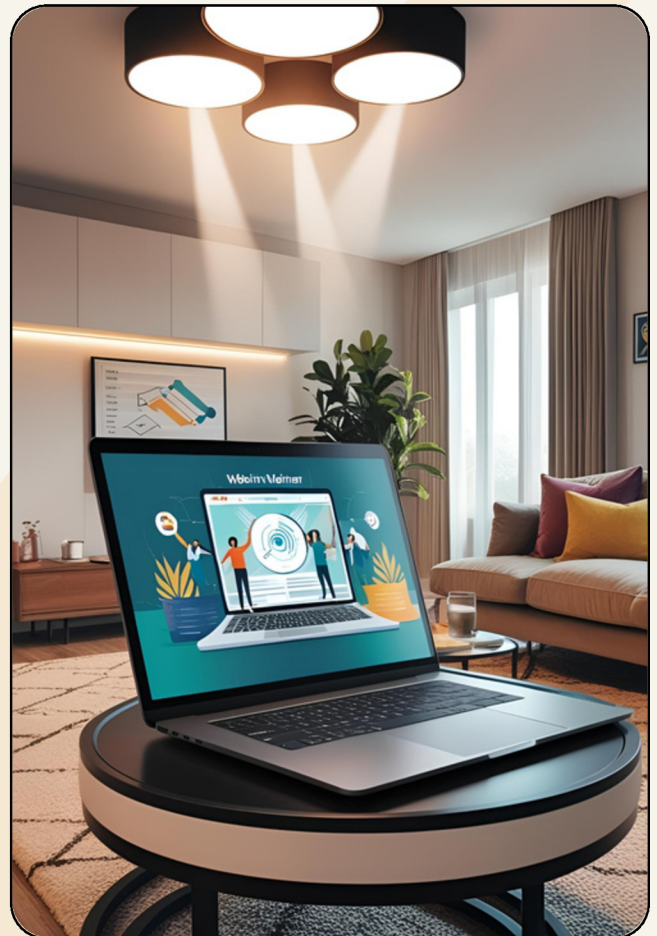
With these new unknowns on the horizon for the events industry, we decided now was the perfect time to update our Ultimate Checklist, offering you fresh guidance and helping you plan proactively to withstand any storm.

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UNCERTAINTIES = FLEXIBILITY

Recent changes in the global economy, including increased costs due to tariffs, supply chain disruptions, the potential for travel to be negatively affected, and more, these economic uncertainties are having a ripple effect in the areas of budgeting and planning for in-person events. Now, once again, virtual and hybrid events are playing a key role in helping event planners stay resilient.

Online events offer organizers increased accessibility, greater global reach, reduced costs, and offer the flexibility and adaptability needed to meet changing circumstances. Virtual events continue to help mitigate unknowns and keep organizers delivering engaging, valuable experiences. Stay open and nimble to maintain the quality of your events, even in the face of rapid change.

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CHECK YOUR EVENT TECH STACK

Your event platform is an under-the-radar area where money may be leaking out of your event budget.

Perform an audit of what you're currently using and whether it's meeting your event needs and your budget. Assess:

- **Current Capabilities** - Evaluate what your software's current capabilities are and familiarize yourself with any new features and functionality. Is it still a good fit for your program?
- **Scale** - Determine current and future tech needs and whether your event software aligns with your growth goals.
- **Flexibility** - Ensure your tech can support multiple delivery methods, such as hybrid and multi-track sessions.
- **Engagement Tools and Analytics** - What kind of data and reporting tools does your tech have? Are there integrations available?
- **Attendee Expectations** - Can it meet the audience's expectations for experience, features, and stability?
- **Capacity** - Can it reliably support the number of attendees you expect?
- **Event and Technology Match** - Is your current tech capable of delivering the type of events you're planning?
- **Redundancies** - Are you running different platforms concurrently? Consider consolidating your event technologies to save on licensing fees.

EVENT STAFFING: PLANNING YOUR PEOPLE POWER

Successful virtual events don't happen by accident!

They're the result of thoughtful planning, including making sure the right people are in the right seats. As you outline your event calendar, take a long view of your staffing needs. Don't wait until you're a week out to nail down who's doing what! At a minimum, plan for two to three people per event:

- **Moderator** - Experienced moderators are vital to your event's flow, audience engagement, and presenter support.

- **Technical Producer/Support Specialist** - These pros are the key to handling behind-the-scenes logistics and troubleshooting live issues quickly, minimizing any technical disruptions.

- **Accessibility Partner** - Specialists such as live captioners and on-screen ASL interpreters play an essential role in accessibility and engagement.

As audience expectations and virtual event platforms evolve, so should your staffing strategy. Today's attendee's expect seamless, polished experiences, which means your staff should be well-trained, confident, and equipped to handle everything from breakout room transitions to tech glitches.

EVENT STAFFING: PLANNING YOUR PEOPLE POWER

Here's how to set your team up for success:

- **Document Your Event Workflows** - Clear, accessible, and up-to-date best practices documentation makes it easier to onboard new team members and ensure consistency.

- **Schedule Training Refreshers** - Update your training materials to include new features or platform updates.

- **Do Full Event Rehearsals** - Test both your tech and the timing, and have your presenter do a run-through to help them familiarize themselves with the format.

- **Build a Contingency Plan** - A solid backup plan is the best way to stay cool if things go sideways.

If your internal team is stretched thin - or if virtual events aren't their day job - consider bringing in outside support. Virtual event services providers can supplement your team with professional moderators, tech producers, platform experts, and attendee support. Whether you need full-scale support or a backup for your internal staff, outsourcing can save you time, resources, and stress.

At the end of the day, well-staffed events aren't just easier to run - they create a better experience for everyone involved.

BUILD CONTENT AROUND STORYTELLING AND VALUE

Attendees are coming to your event with higher expectations than ever. They want more than just a presenter with a good slide deck; they want a polished, interactive experience that delivers value and respects their time and attention. If your content is boring and flat, not even the most dynamic speaker can rescue your session.

To stand out in a crowded market, start by anchoring your content in a larger story - one that reflects your organization's values, vision, and the real-world impact you're trying to make with your event's purpose. When attendees connect with your message and see the bigger picture, they're more likely to stay engaged and take meaningful action.

Increasingly, we see a continued shift toward elevated production quality and media-rich experiences, such as:

- Short, lively video intros
- Clear, high-contrast slides designed for readability
- Live demos and streams with multiple camera angles
- On-brand visuals and intentional transitions

SHAPE CONTENT AROUND STORYTELLING, ENGAGEMENT, AND REACH

Additionally, interactivity is a must-have. Virtual fatigue still exists, and attention spans are shorter than ever. Keep your audience engaged by including:

- Live polls and real-time feedback
- Q&A sessions with voting features
- Interactive chat and moderated discussions
- Breakout rooms for small-group collaboration

When it comes to your presenters? Be picky! A few well-prepared, experienced and relevant subject matter experts will always outperform a longer roster of "so-so" speakers. Each voice should serve a clear purpose, driving your event's message forward with clarity and authority.

Practice Makes Perfect!

Rehearse! Not just to test your tech, but to fine-tune flow, timing, and transitions. A well-rehearsed event feels seamless and professional, creating a better experience for your audience and speakers alike.

ACCESSIBILITY & INCLUSION

Accessibility is foundational to a truly successful event. Designing your virtual events with inclusion in mind ensures your content connects with the broadest possible audience, and when people feel seen, supported, and welcomed, they're more likely to engage and return for more. With that in mind, start building accessibility into your planning process instead of squeezing it in later:

- **Closed Captioning** - This is an absolute necessity, not only for attendees who are Deaf or hard of hearing, but also for those in noisy environments or who may simply prefer to read along.

- **Content in Multiple Languages** - Offer content and captioning in multiple languages when your audience is global.

- **Screen-Reader Friendly Materials** - Have all slide decks, documents, and webpages follow accessibility standards.

- **Bonus Tip:** Make materials available for download prior to the event, and offer on-demand recordings and downloadable transcripts afterwards.

These practices all build equity into your content and give attendees control over how and when they engage.

ACCESSIBILITY & INCLUSION

Build a Culture of Belonging

An inclusive experience goes beyond technology - it's also about culture and communication. Consider:

- **Code of Conduct** – state your company values, commitment to equity, and specifics as to what constitutes a violation of your code of conduct. Requiring an opt-in agreement at the time of registration is one possible strategy to ensure compliance.

- **Pronouns Matter** - Adding preferred pronouns to the display names of presenters and other staff.

- **Sensory Considerations** - Preparing disclosures/warnings of media elements in your content that may be difficult for individuals with sensory issues (e.g., flashing lights, etc.)

- **Ease Fatigue** - Build in short breaks during transitions to ease digital fatigue – that's good for everyone!

Thoughtful, inclusive design isn't just good practice; it's a powerful statement about your brand's values. It says, "You belong here. And we built this event with you in mind."

MARKETING & COMMUNICATIONS

Create a marketing and communication plan, including a timeline for deployment. A clear marketing and promotion strategy is second only to content when it comes to successful virtual events.

Key elements to a successful virtual event marketing plan:

- Consider co-branding or adding sponsors as a strategy for expanding potential audiences

- Assemble your invitation email lists and analyze them for validity and possible segmentation, and account for any data privacy laws you may need to work with, such as GDPR and CCPA.

- Build an eye-catching registration page with a colorful banner, title, and essential information, a brief overview of the event, as well as your presenter's headshot and bio

- Embed your registration form into your website's home page.

- Create posts and share them on your social media channels. Source tracking is a fantastic way to assess which channels are giving you the most traction.

- Leverage your influencers — reach out to highly engaged customers to share your registration link to help generate word of mouth.

- Analyze your efforts in the weeks and days leading up to your event and adjust your marketing efforts accordingly.

- Schedule automatic email reminders to send to registrants.

POST-EVENT ASSESSMENT AND ANALYSIS

Collecting feedback and reviewing analytics isn't just a nice-to-have - it's a key part of your event strategy. Post-event surveys give you valuable qualitative insights straight from your attendees, while analytics reports offer you the quantitative data that helps you understand what worked and what didn't.

Together, these insights provide a clear roadmap for improvement, which is the key to long-term virtual event success.

Post-Event Survey Best Practices

- **Keep It Short and Focused** - Aim for 5-7 questions max. Limiting the number of questions communicates respect for your attendee's time, yet still captures the insights you need.
- **Ask a Mix of Question Types** -Combine multiple choice, satisfaction ratings (e.g., "On a scale of 1-5.."), and open-ended questions to gather both measurable data and meaningful comments.
- **Time the Delivery Thoughtfully** - Send the survey within 24 hours of the event while it's still fresh in attendees' minds. Include a quick thank you message and disclose how their feedback will be used.
- **Make It Mobile-Friendly** - Increasingly, attendees are completing surveys on their mobile devices. Make sure your survey's formatting is compatible.
- **Close the Feedback Loop** - Share a quick summary of what you learned and what you're improve on next time. This demonstrates to your attendees that their input matters, building trust for future events.

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THE CHECKLIST PART OF THIS CHECKLIST!

✓ **Audit your tech and streamline**

- Find what's working, what's not working, and what you need to match your tech to your events programming.

✓ **Make sure you have adequate staffing or consider outsourcing**

- Plan for staffing on a per-event basis, based on event type.
- Designate clear roles for your team.
- Prepare documentation for training, best practices, and disaster recovery.
- Refresh your training materials to include any new features or platform updates.
- Perform full event rehearsals, and additional technical walk-throughs with your event staff ahead of time.
- Outsource to a professional services provider if in-house resources aren't available.

✓ **Shape your content around storytelling**

- Attendees have raised their expectations, so a polished, interactive experience that adds value for them is key
- Invest in production value, including media-rich content and audience interaction/participation
- Prioritize interactivity to keep attendee attention
- Choose speakers who are knowledgeable, relevant, and comfortable presenting. Focus on quality vs. quantity
- Align every segment with your core message and audience value

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THE CHECKLIST PART OF THIS CHECKLIST!

✓ **Build for accessibility from the start**
- Be ready with your tech to include closed captioning, multiple languages, and screen reader-friendly assets.
- Make supporting materials available before the event.
- Add an accessibility/accommodation question to your event registration and follow up!
- Design for inclusion with a code of conduct, short breaks, and warnings for sensory-sensitive media.

✓ **Marketing and promotion plan**
- Create a marketing and communication plan, including a timeline
- Build an eye-catching, informative, but brief registration page
- Embed the registration form on your website
- Email segmented, compliant invitations to your vetted email lists
- Share the registration page on your social media channels and include source tracking
- Engage the help of influencers
- Assess how efforts are going and adjust based on information from email segments and source tracking data

✓ **Post-event surveys and analysis**
- Send short, focused post-event surveys within 24 hours after the event
- Mix up the questions to gather qualitative and quantitative data
- Make sure it's mobile-friendly
- Shape future events around the feedback received and communicate with respondents what you learned and plan to improve upon

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EYES TO THE FUTURE

Virtual and hybrid events continue to evolve, driven by new technology, changing audience expectations, and the growing demand for flexibility and inclusivity. With the right planning, tools, and human-centered approach, your events can stand out—not just for being seamless, but for being genuinely meaningful.

Keep refining your process, listening to your audience, and experimenting with new ways to connect. The effort you put in is worth it—because when done well, virtual events don't just inform— they inspire.

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