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ULTIMATE VIRTUAL EVENTS CHECKLIST

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INTRODUCTION

Virtual and hybrid events are now as vital a part of the events landscape as any traditional in-person conference or trade show. As a core part of B2B growth strategy, 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 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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MAKE THE MOST OF YOUR VIRTUAL EVENTS WITH OUR ULTIMATE CHECKLIST GUIDE

We've created this guide for you to read top to bottom, jump to the sections that you need, and even hop down to the last page to print the new Virtual Event Readiness Audit. Ready?

THE ULTIMATE VIRTUAL EVENT CHECKLIST TABLE OF CONTENTS

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QUICK START CHECKLIST

Use these pages as your “don’t-forget-anything” checklist. If you’re short on time, start here. For deeper, step-by-step guidance and best practices, [jump to page 8: From Checklist to Execution.](#)

Best for: Webinars, customer events, internal events, and multi-session virtual conferences

When to use: 6–8 weeks before your event (and again during rehearsal week)

How to use: Check the box, assign an owner, add a due date

STRATEGY AND SUCCESS CRITERIA

- Define your primary goal (pipeline, retention, education, community, recruiting)
- Identify your target audience segments and the one “must-attend” persona
- Choose your event format (single session, series, multi-track, hybrid)
- Choose your event length and agenda shape (keynote, panel, demo, workshop)
- Set 3-5 success metrics (registrations, attendance rate, engagement, MQLs, meetings, revenue)
- Align on your follow-up plan before you launch (who gets what, when)



QUICK START: THE CHECKLIST

PROGRAM AND CONTENT

- Lock your theme and session titles (clear outcomes)
- Confirm speakers and backups (including internal host/moderator coverage)
- Build a run of show (minute-by-minute, including transitions and Q&A)
Create audience engagement moments at least every 7-10 minutes (poll, Q&A, chat prompt)
- Draft your slide standards (font size, contrast, fewer words, more visuals)
- Finalize pre-reads, resources, and any post-event takeaway assets

TECH STACK AND SETUP

- Confirm your event platform and streaming approach (native, RTMP, webinar tool)
- Decide on registration management tools (approval flows, verification method, waitlist)
- Connect tracking and integrations (Source tracking/UTM, CRM, marketing automation, analytics)
- Configure engagement features (Q&A, polls, chat, downloadable resources)
- Setup branded templates (virtual background, lower thirds, holding slides)
- Test across devices/browsers and network conditions (incl. VPN)



QUICK START: THE CHECKLIST

STAFFING AND ROLES

- Assign an event owner (single accountable lead)
- Assign a producer (platform operator and show caller)
- Assign a host/moderator (live facilitation and Q&A)
- Assign speaker support (green room, coaching, tech checks)
- Assign chat/Q&A support (moderation, escalation, and routing)
- Assign technical support coverage (attendee help, device/browser guidance)
- Confirm coverage for both rehearsal and live day (including break monitoring and handoff cues)

ACCESSIBILITY AND INCLUSION

- Configure captions and confirm accuracy expectations (live vs AI vs CART)
- Confirm your accessibility plan (ASL, transcripts, audio descriptions if needed)
- Validate slides for readability (contrast, font size, minimal text)
- Provide accessible assets (alt text, accessible PDFs, readable links)
- Add a question to your registration form: “What accommodations would help you participate fully?”
- Share accessibility info on the registration page and in reminders



QUICK START: THE CHECKLIST

REGISTRATION AND PROMOTION

- Write a value-first event description (problem, promise, outcomes, who it's for)
- Publish speaker and agenda assets (bio, headshots, session summaries)
- Add calendar holds and "add to calendar" links
- Configure event reminder emails for registrants
- Create a promotion plan (email, social, partners, internal amplification)
- Confirm your plan to drive attendance (not just registration)

REHEARSAL AND RISK MANAGEMENT

- Create a backup plan (backup host, backup slides, backup internet, dial-in option)
- Create a "what if" escalation plan (chat issues, speaker drops, platform outage)
- Set a live-day communications plan (back channel, producer cues, emergency contact list)
- Run a full tech rehearsal with every speaker (audio, video, lighting, screen share)
- Rehearse transitions (who speaks when, how Q&A works, how demos are handed off)



QUICK START: THE CHECKLIST

LIVE DAY EXECUTION

- Open the platform early (30-45 minutes before start)
- Confirm all speakers are in the green room and audio levels are clean
- Open event with an orientation “how-to” announcement (audio and chat)
- Track timing and engagement (producer calls adjustments as needed)
- Route questions to the right person (typically moderator to speaker)
- Record sessions and confirm files are saved and accessible

POST-EVENT FOLLOW-UP AND MEASUREMENT

- Send the follow-up email within 24 hours (recording, resources, next step)
- Share a short survey (3-5 questions max) and invite open feedback
- Score leads based on intent (attendance, engagement, questions, downloads)
- Route high-intent leads to sales and book meetings quickly
- Repurpose content (clips, blog, newsletter, sales snippets, social posts)
- Debrief internally; what worked, what didn't, what changes next time

Assign Ownership Now!

Add an owner and due date next to any item you check.
A checklist without ownership is just a wish list.



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FROM CHECKLIST TO EXECUTION

If you've already checked most of the boxes on the Quick Start page, congrats! You're ahead of the game.

Now comes the part that separates “we pulled it off” from “that went great!” The sections head break the checklist into the foundations that drive great virtual events: strategy and goals, your staffing plan, your content and engagement, accessibility and inclusion, marketing and communications, and post-event measurement.



Use this next portion like a guided walkthrough. Each section is designed to help you spot gaps early, make smarter choices faster, and build an experience your audience will actually want to show up for.



STRATEGY & SUCCESS CRITERIA

Successful virtual events don't happen by accident! They're the result of thoughtful planning, starting with clarity on what you're trying to accomplish and how you'll measure it. Before you finalize your agenda or hit publish on your registration page, lock in on these four decisions:

- **Your Event Goal** - Pipeline, retention, education, community, recruiting. Match the event's format to the goal (e.g., single session webinar, workshop, panel, etc.)
- **Your Audience** - Who this event is for and what they need to walk away with feeling that their time was well-spent
- **Your Success Metrics** - Registrations, attendance rate, engagement, meetings booked, MQLs, influenced revenue
- **Your Follow-Up Plan** - What attendees get next, when they get it, and who owns each step

When you define success up front, your content, staffing, tech, and promotion all get easier to prioritize.

Quick Prompt

If you can't summarize your goal in one sentence, your audience will have a harder time understanding why they should attend.

Answer this question to help you clarify exactly what you're going for:

"This event is for ____ who want to ____ so they can ____."



PROGRAM AND CONTENT: BUILD AROUND STORYTELLING & VALUE

STORYTELLING FOR CONNECTION 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. The combination of attention-sustaining, interesting content and a dynamic speaker means you're delivering value. Attendees remember that long after the event is over.

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 feel connected 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 ENGAGEMENT AROUND YOUR STORY

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.



EVENT STAFFING: PLANNING YOUR PEOPLE POWER

Successful virtual events are 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.

Important: Don't wait until you're a week out to nail down who's doing what. At a *minimum* you need three people per event for the best chances at a smooth delivery:

- **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 as well as 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.



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:

- **A 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.



REHEARSAL AND RISK MANAGEMENT

A GO-TO REHEARSAL PLAN

1-2 weeks before: Tech checks (15-30 mins per presenter)

- Confirm audio, video, lighting, camera angle, background
- Test screen share and any demos (including backups)
- Verify presenters can access the platform and know where to go on event day

5-7 days before: Full team walkthrough (45-60 minutes)

- Review roles and run of show start to finish
- Practice transitions, handoffs, and the Q&A process
- Confirm engagement moments
- Identify risks and finalize your contingency plan and escalation path

24-48 hours before: Dress rehearsal (60-90 minutes)

- Run event in real time, exactly as it will happen live
- Start recording, test captions/accessibility support, and confirm where files save
- Practice opening, one “speed bump” scenario, and the closing CTA
- Lock final slides, links, and copy-paste support messages for chat



LIVE DAY EXECUTION

THE BIG DAY

Live day is where planning becomes reality. The goal is simple: make “live” feel effortless for your audience, even if you’re managing a lot behind the scenes. (Chances are good that you are!) Use these points to stay on top of things:

- Open early (30-45 minutes before start time)
- Confirm speakers are present
- Verify recording is on and saving correctly
- Confirm any resources or links are ready to share (and tested)
- Follow the run of show exactly
- Help keep your host focused on audience experience
- Help keep your producer focused on timing, cues, and transitions
- Use a back-channel communication plan for staff and speakers
- Warm up participation with a quick “hello” and participation guide - paste prepared troubleshooting instructions into the chat
- Use polls early to help boost interaction
- Keep backup and escalation path documentation nearby
- At the end, thank the speaker(s) acknowledge your audience and share what next steps they can take, end on time.

Congrats on a smooth delivery!



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.



BONUS: AUDIT YOUR EVENT TECH STACK

Even with the right strategy, content, staffing, and promotion, your event platform can quietly make or break the experience. It's also an under-the-radar area where money may be leaking out of your event budget. A quick review and audit helps you protect event success by confirming your tech can actually support what you're planning, at the scale you need, without unnecessary spend. Assess:

- **Current Capabilities** - Evaluate your software's current capabilities 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 (and paying for!) different platforms concurrently? Consider consolidating your event technologies to save on licensing fees and administrative load.



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EYES TO THE FUTURE

Remember, when your event tech stack is aligned, everything else gets easier: rehearsals run smoother, engagement goes up, data is cleaner, and your teams spend less time training across multiple event platforms and more time delivering a great experience.

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.

WE'VE GOT YOU



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From webinars to global conferences, EventBuilder seamlessly integrates secure, scalable event software, expert event management, and live support to your existing Teams and Teams Town Hall setup. Deliver your content with confidence. [Get in touch and let us show you what we can do!](#)

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READINESS AUDIT

How ready are you to run a seamless, high-performing virtual event?

Print this page and check off your tasks!

	Not In Place	In Progress	Complete
STRATEGY AND SUCCESS CRITERIA			
We have one primary event goal (and it's written down)			
We've defined our target audience and "must-attend" persona			
Our format matches our goal (webinar, workshop, series, multi-session)			
PROGRAM AND CONTENT			
We have a clear theme and session titles with outcome-driven messaging.			
We have a run of show (minute-by-minute) including transitions and Q&A			
We've planned engagement every 5–7 minutes (polls, chat prompts, Q&A)			
STAFFING AND ROLES			
We've assigned an event owner, host/moderator, and technical producer			
We've assigned chat/Q&A moderation and attendee support coverage			
We have rehearsal coverage and backup coverage for key roles.			
MARKETING AND COMMUNICATIONS			
We have a promotion plan and reminder cadence to drive attendance			
We're tracking sources (UTMs or channel tracking) to measure what's working			
REHEARSAL, RISK, AND POST-EVENT			
We have a contingency plan (escalation path, backups, what-if scenarios)			

READY TO PUT IT ALL TOGETHER?

Items you marked as 'Not In Place' or 'In Progress' are a signal to tighten up your plan before you promote, rehearse, or go live. This is a great tool to share internally to align your team quickly on priorities, ownership, and what "ready" actually means.