Administration for Community Living Office of Healthcare Information and Counseling

Managing Through COVID-19 Work grouP - September 2020

Virtual Event Production Checklist

Preparing for Remote Medicare Open Enrollment Toolkit

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Contents

[Step 1: Get ready to host virtual events (planning and setup logistics) 1](#_Toc49939001)

[Step 2: Schedule and announce an event 5](#_Toc49939002)

[Step 3: Prepare for the event 6](#_Toc49939003)

[Step 4: Host the event and share resources 10](#_Toc49939004)

[Step 5: Follow up after the event 11](#_Toc49939005)

[Appendix A: Panelist Reminder Email 11](#_Toc49939006)

[Appendix B: Sample Communication to Attendees 13](#_Toc49939007)

## Introduction

This resource was provided by the Senior Medicare Patrol (SMP) National Resource Center ([www.smpresource.org](http://www.smpresource.org)). It contains suggested checklists for producing virtual events (such as webinars) in five main steps:

1. Get ready to host virtual events
2. Schedule and announce an event
3. Prepare for the event
4. Host the event and share resources
5. Follow up after the event

**Note:** This checklist is not intended to be all-inclusive. Update as needed for your program. For example, the processes outlined in this checklist include the possibility that multiple presenters may be involved with the virtual event. If you are doing it all yourself, simplify as needed.

# **Step 1: Get ready to host virtual events (planning and setup logistics)**

1. **Set up your technology and learn how to use it!** 
   * **Virtual event conferencing platform: questions to consider**
     + Does your agency already have a platform available? Do they have any guidance, requirements, or restrictions?
     + Do you want to record your events, and if so, is recording available?
     + How much does the service cost?
       - Virtual platform costs
       - Conference call costs: dial-in vs. call-back vs. computer audio
       - Recording storage fees
       - Other costs?
     + How many attendees will you have at each event? If needed, can you offer the same event more than once to keep numbers below the maximum?
     + Is the technology compatible with your computer? Will it be compatible with your presenters’ and attendees’ computers? Will regular software updates be required? How easy will it be for attendees to access your events?
     + Is the technology accessible with closed captioning options, etc.?
     + Is technical support provided for hosts, presenters, and/or attendees? Is support provided by phone, email, and/or through an online form?
     + Is training provided for hosts and presenters?
     + What other questions do you need to ask based on your specific needs?
   * **Related software/programs: questions to consider**
     + Will you use a post-event survey? If so, which program will you use?
     + Will you use any special software to send your event invitations? e.g. distribution list, email formatting software, etc.
     + What other technology may be needed by your program?
   * **Physical setup: suggested best practices**
     + Internet: Use a high-speed, grounded internet connection instead of wi-fi if possible.
     + Computer: Make sure your computer is compatible with your virtual event platform. If possible, have a backup computer (e.g. a team-mate nearby who will attend the event with you, or a laptop computer you can use to join the event as an attendee in addition to your main host computer).
     + Phone: Use a landline phone instead of a cell phone if possible. Avoid using speakerphone unless you have tested thoroughly, and the sound is loud and clear.
     + Headset: If using a headset, test the sound quality prior to the event and adjust settings as needed.
     + Video camera: The use of cameras can add a personal touch during this era of social distancing, particularly if your virtual event is a replacement for an event that would otherwise have been held in-person. See the etiquette checklist for tips about presenting while on camera.
     + Testing: Test all your technology, including your video camera, well in advance of your first event and prior to each event.
2. **Set up your team! Determine who will fill the following roles, including staff, volunteers, and/or partners:**
   * Virtual event host(s)
   * Presenter(s)
   * Virtual event coordinator
   * Backup/tech support for attendees
   * Communications specialist
   * PowerPoint developer/editor
   * Quality review/second set of eyes

**Tip:** If possible, each step of the process that involves content development or data entry (e.g. event setup in your virtual event platform, communications to attendees, and the PowerPoint presentation) should be reviewed at least twice. Two sets of eyes are best, but if you are the only one, do the work one day and perform your own review the next day, with fresh eyes.

1. **Practice** **using your technology**
   * Create practice sessions using the same account and setup as the event.
   * Make sure you are comfortable using any virtual event tools as needed:
     + Share/upload PowerPoint files (PPTs) and other documents.
     + Advance the PPT slides.
     + Share additional documents or desktop if needed.
     + Use interactive features, e.g. polling.
     + Monitor and address Chat and Q&A.
     + Pass control back and forth with other presenters as needed.
     + Be prepared to resolve and / or work around any technical difficulties.
   * Practice joining an event as the host/presenter and as an attendee. The views may be different!
     + Log in as an attendee using a second computer, as mentioned on page 2, or find a buddy to take turns as presenter and attendee.
   * If you will be sharing your screen/desktop, consider these additional tips:
     + Prior to sharing, close out of your email program to prevent email pop-up messages.
     + Avoid desktop clutter and inappropriate background pictures.
     + Avoid any unnecessary mouse movements.
     + If showing a website or computer system, “clear the screen” by providing a brief overview of the various sections of the screen before going into detail on any one area.
2. **Practice your presentation skills!**
   * Review these other resources from the Preparing for a Remote Open Enrollment Toolkit for tips:
     + Virtual Event Presenter Guide (Template)
     + Virtual Event Production 101 (PowerPoint)
     + Virtual Event Production 201 (PowerPoint)
     + Etiquette checklist

Step 2: Schedule and announce an event

1. **Identify the need for a specific event.**
2. **Determine the event basics**.
   * What is the topic?
   * What is the goal?
   * Who is the intended audience?
   * How much time is needed, including the presentation, audience interaction, Q&A, and housekeeping details? For example, in a one-hour event:
     + 5 minutes: introductory housekeeping details
     + 30 minutes: presentation
     + 5 – 10 minutes: interactive activities throughout the presentation
     + 5 minutes: wrap-up housekeeping details
     + 10 – 15 minutes: Q&A session
   * How many participants do you anticipate will attend?
   * Who will present the information?
   * Who will host the event?
   * Will you record the event?
3. **Prepare to announce the event**
   * Announce the event at least 30 days in advance whenever possible.
   * Work with the presenter(s) to develop the event name, description, date, and time.
     + See the Virtual Event Presenter Guide for questions to ask, e.g. will you be allowed to record their presentation?
     + Watch out for holidays and previously scheduled events.
     + Confirm the event with leadership as needed prior to announcing.
   * Set up the event in your virtual event platform.
     + Use an Excel file to keep track of all pertinent event details.
     + Have your quality control reviewer confirm your data entry, especially the first few times you set up events.
   * Send a calendar meeting request to presenters and panelists.
4. **Announce the event.**
   * Prepare the announcement.
   * Have your quality control team member review your announcement invitation, and make updates as needed.
   * Send the invitation to participants.

# Step 3: Prepare for the event

1. **Follow up with presenters.**
   * Schedule a walkthrough meeting.
     + The walkthrough is typically held 1 day to 1 week prior to the event.
     + Once scheduled, set up the walkthrough in your virtual event platform using the same license and setup that will be used for the live event. Send a calendar meeting request to the presenters.
   * Email the presenters to request the PPT and other materials prior to the walkthrough.
     + Provide presenters with the Virtual Event Presenter Guide.
     + Request a brief biography (3-5 sentences) and a photo so that you can introduce each presenter at the beginning of the event.
     + Set the expectation up front of how much time each presenter will have for their presentation.
     + Set expectations about when the PPT will be needed.
     + Provide tips and guidance for PPT development, e.g.:
       - If a specific PPT template is to be used, make sure to provide it to the presenters when you send your request for their slides. If you have specific PPT design standards, let them know.
       - Encourage presenters to use the notes section of the PPT for their detailed talking points and keep the information on the slide basic and brief.
       - **Tip:** Do not just read the slides!
       - Encourage presenters to include interaction in their presentation, as allowed by your virtual event conferencing technology.
       - Ensure all documents are cleared for copyright and licensing considerations.
       - **Tip:** Make sure the PPT content can realistically be covered in the amount of time allotted for the presentation!
   * Suggested PPT outline:
     + Title slide
     + Introduce speakers with photos and bios
     + Agenda
       - Use introductory scripting for housekeeping details, e.g. set expectations upfront for Q&A and let participants know if questions will be addressed during the call or at the end, via chat or only over the phone. Mention upfront how to access resources.
     + Content slides
     + Interaction slides, including instructions/screenshots about how to use the virtual event technology
     + Resources
     + Q&A
   * Get the PPT.
     + Prior to the walkthrough meeting, ensure that you have the PPT slides and any other resources needed for the event, so that you can practice using them during the walkthrough.
     + Develop your own slides, as needed. For example, if following the suggested PPT outline provided above, the host and/or production team will probably be the ones to develop all the slides except the content slides. If the host is also the presenter, also develop content slides as needed.
     + Ask if the presenter(s) will have any other files, websites, etc. to share during the event.
       - **Tip:** Ask if the presenter has a video camera so that the audience can see them. Provide them with your etiquette handout, which is particularly important for virtual events that use cameras.
     + Have your quality control team member review the PPT and related resources and make updates as needed. This may be done before or after the walkthrough, depending on how close the walkthrough is to the event date.
2. **Hold a walkthrough meeting**
   * Review the “Questions to Consider” in the Virtual Event Presenter Guide and finalize materials as needed.
   * Practice the virtual event technology that will be used, i.e. advancing PowerPoint slides, using camera, muting/unmuting.
   * Any technology used in the event should be tested using the same phone and computer setup which will be used during the actual event (by the host and any presenters or backup support). Make sure your phone and other presenters’ phones sound clear and all technology is working as expected.
   * If interaction is not already including in the PPT provided, discuss opportunities for interaction, work together to create polling questions and other interaction.
   * Tip for multiple presenters: discuss timing during the walkthrough and offer to send a “3-minute warning” in the chat to help keep the event on schedule.
   * Review and confirm Q&A session procedures. Suggested procedures and tips:
     + It may be necessary to hold questions until the end of the event, to ensure that all material is presented in the timeframe allowed. It depends upon the type of event and how formal or informal it is, however.
     + Mute all participants’ lines until the Q&A session. During Q&A, participants can raise their hand to ask a question and the host can un-mute each individual line as needed.
     + Encourage participants to ask questions over the phone instead of using chat, since it is easier to manage and easier to confirm that the question was heard and answered properly.
     + If long questions are sent in the chat, copy them and send them to all participants so everyone can read the question.
     + When managing Q&A, if multiple questions are received, copy them to a Word document to keep track of questions and answers more easily.
3. **Complete final event setup.**
   * Finalize the PPT and complete follow-up from the walkthrough as needed.
   * Prepare any interactions, e.g. polling questions.
   * If desired, create a PPT with tips for attendees who join early.
   * Preview the number of participants registered and make adjustments if needed.
4. **Send reminder emails.**
   * Send attendee reminder email(s) a week before the event, a day before the event, and/or a few hours before the event.
   * Send a panelist reminder email the day before the event.
     + Include an outline of slides and interactions, with timing if multiple presenters. A sample/template is provided in Appendix A, which follows the step-by-step checklists.

# Step 4: Host the event and share resources

1. **Share resources before and/or after the event**
   * A suggested best practice is to share a copy of the presentation (and/or a PDF handout version of the presentation) with attendees prior to the event.
2. **Host the event**
   * Start the event 30 minutes early.
   * Change event settings as needed.
   * Share/upload the PPT and any other files, polls, etc.
   * Greet attendees as they join and provide technical assistance as needed.
   * At call start time (if needed and available): mute all lines and start the recording.
   * Start on schedule and stay on schedule!
   * Follow the outline provided to presenters in the reminder email (see the Appendix), managing interactions and Q&A as needed.
   * See the Virtual Event Presenter Guide for additional tips.

# Step 5: Follow up after the event

1. **Hold an event post-conference.**
   * Immediately following the event, hold a post-conference with panelists to share thoughts regarding the event and wrap up final details.
     + Ask presenters in advance to stay on the line when the call ends.
     + Wait until all participants have left the conference before beginning the post-conference conversation.
     + As needed/if available, remove attendees who have not disconnected.
2. **Perform additional post-event follow-up.**
   * Attendance lists
   * Survey results
   * Follow-up on unanswered questions
   * Grant reporting about the event
   * Post recording and additional resources
   * Delete announcement templates posted on website

# Appendix A: Panelist Reminder Email

The following is an example/template of a panelist reminder. This example is of a 60-minute interactive event with a host and two presenters. Fill in all items in (parenthesis) and update any information as needed for your event.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Hello, (panelist names)!

I am looking forward to our (event name) tomorrow at (time). We have (#) people registered! Please see attached for the final PPT for the event. As a reminder, please keep each of your presentations to (#) minutes. I will send a (#)-minute warning in chat when your time is almost up. See below for an outline of the slides.

Please join the event 10-15 minutes early by clicking this **panelist link** and following the prompts on your screen to join the event and dial into the call. (panelist link).

We (will/will not) be using cameras for this event.

*If you have technical issues using the panelist link above, (insert instructions, based upon your system/platform).*

Here is an outline of the slides:

* Slides 1 – 5: (Host name)
  + Slide 5: Poll
  + Slide 6: (Host) to (Presenter 1) – (Host) passes the presenter ball to (Presenter 1)
* Slides 6 – 20: (Presenter 1) / 15-20-minute presentation – (Presenter 1) advances the slides
  + (Host) will send a (3-minute warning) in chat if needed.
  + Slide 10: (Host) helps with interactive check-in question.
  + Slide 20: (Presenter 1) to (Host) – (Presenter 1) passes the ball to (Host) or (Host) takes it
* Slide 21: (Host) – Poll
* Slide 22: (Host) to (Presenter 2) – (Host) passes the ball to (Presenter 2)
* Slides 22 – 31: (Presenter 2) / 15-20-minute presentation (Presenter 2) advances the slides
  + (Host) will send a (3-minute warning) in chat if needed.
  + Slide 25: (Host) helps with interactive check-in question.
  + Slide 31: (Presenter 2) to (Host) – (Presenter 2) passes the ball to (Host) or (Host) takes it
* Slide 32: (Host) – Poll
* Slides 33 – 35: (Host) / Resources & wrap-up
* Slide 36: Q&A, facilitated by (Host); (Host) makes presentation available for download

I look forward to seeing you all tomorrow at around (15 minutes before start time)!

(Name)

(Agency Name)

(Program Name)

(Website address)

(Physical location, email address, logo, etc.)

# Appendix B: Sample Communication to Attendees

The following is an example/template of the email for your attendees/registrants. It may be built into your virtual event platform (such as Webex), or you may send your invitations manually. Text in parenthesis should be updated as needed for your event.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Hello, (attendees)!

This is a reminder that you are registered for the following event: (Title of Event)   
  
Please join 5-10 minutes before start time so that you do not miss any important information. This virtual event is available online, with audio, or you can participate by audio only. The event details and instructions for joining are below.   
  
**Topic:** (Title of Event)  
**Date:** (Include day of the week, date, time, and time zone)

**Length:** (how many minutes, hours?)  
**Event Number:** (if applicable; created automatically by your event platform)  
**Password:** (usually created automatically by your event platform)

**Phone number**, if you are calling in by telephone and not joining from a computer headset: (insert phone number and explain that they should use the password/event number when prompted, if applicable.)  
  
*Tip: To add this event to your calendar program (e.g., Outlook), see attached and/or click the “Accept” option.*   
  
**1. To join the online event, click here** or copy and paste the following link into a web browser: (insert URL.) (Add any additional instructions specific to your virtual event platform.)  
  
**2. To join the audio for this event,** (insert the instructions that apply to your virtual event platform.)   
  
**3. Event presentation Materials:** (Insert an explanation of when and how they will receive the educational materials, agenda, etc. that are part of your event. For example, reference the materials if they are attached/linked to the email. Explain where they can be accessed online, if applicable. Explain that they will be available for download within the event, if applicable.)

**4. Important Tips!**

* (insert tip 1)
* (insert tip 2)
* (if applicable and available through your virtual event platform, say: To avoid issues when joining your next live event, click here to test your system in advance.
* For additional assistance, call: (insert appropriate phone number, such as someone from your agency or the customer service number for your virtual event platform)

Thank you! We look forward to your participation in our event.