



## Determining your virtual conference team and their roles

### Who are your team players?

**Yes, someone can have multiple roles.**

*Overall producer:* Coordinates with all the players. Sets expectations. Driving force behind the virtual conference

*Virtual conference platform/specialist:* The tool used to create on-demand sessions and live events. The provider may also have a tech help person that works the platform and runs the tech rehearsals along with the day of event. Troubleshoots technical issues for both speakers and attendees.

It's not uncommon to use more than one platform depending on your needs.

*Marketing:* Creates all the communication content used to promote the event. Produces outreach schedule and frequency. Works with web designer on the look and feel of website. Set up networking channels and the rules with these channels (using Slack or virtual platform)

*Web and Creative Producer:* Brings the theme and why of the virtual conference to life. Updates all session information. Incorporates the virtual platform(s) technology into the website. Creates any backdrops and materials for the presenters. Add pages for on-demand sessions. Set up VC sessions on the VC platform and communicate this information to registration specialist.

### *Moderators and monitors:*

*Network moderators:* Used to watch over networking channels and enforce any rules. Assist the marketing person in setting up channels. Help with sponsor rooms

*Session moderators* - Acts as MC for the session. Provides information about Q&A and how the session will run. Tests the visual and audio component of the session and works with platform and speakers if there are issues. Introduces speakers (if applicable). Turns on and off microphones for speakers if they forget. Manages Q&A.

*Attendee monitors* - Ensures those attending the session are registered. Troubleshoots technical issues and works with VS platform on fixing issues. (This person may be your registration specialist).



*Speaker manager*- Provides the logistical information to the speakers on tech rehearsals and day of event. Coordinates tech rehearsals with VS platform, speakers and session monitors. Ensures all teams are in place for tech rehearsal and day of event. Communicates any adjustments with schedules

*Registration specialist* - Creates registration systems and the different registration types. Ensures attendees are registered correctly and handles any refunds or changes. Sends out attendee updates and information. Handles integration with VC platform.

*Sponsor manager* - Strategize on ways to offer sponsorship and value. Create sponsorship packages. Promote sponsorship offerings and finalize contracts.

**Let's dive deeper into each area. Not all these areas may be applicable to you and there's likely to be additional tasks to add on. This is a living document so feel free to add to it.**

### **Overall Producer**

- What's the intent of the conference - education, networking, showcasing?
- Create an overall strategy for the event
- Determine the flow of the event, the amount of content and timing
  - Don't treat this as an in-person event
  - Consider shorter sessions
  - How will you make it interactive
  - Do you need breakout rooms and if so, how are they being used
  - How do you create a sense of community
- Envision the attendee experience
  - Creating a sense of community
  - Production value that you're at something that's more than a meeting
- Speaker and topic selection
- Pricing strategy - one fee entire event, fee per day, fee per session
- Determine VC partner - what features and capabilities you need from them, how can they deliver on your why, the intent of the conference and the flow of event, negotiate pricing
- Role sponsors play

### **Virtual Conference Provider**

- Do they have the features that you need - handling of multiple speakers, sharing content, ability to do polling, questions, surveys
- They should act as the stage manager for the day
- Work with someone to create minute by minute script for session

# Turn-Key

## EVENTS

- Provide requirements on the tech side with bandwidth, speaker needs, video and audio
- Determine how video is incorporated into the presentations
- Quickly handle any tech issues with speakers and attendees

### **Marketing and Communication**

- How is this being promoted and what's the frequency
- Works with conference producer on agenda
  - Number of live sessions/on-demand sessions
  - Consider time zones and where your audience is located
- Create session descriptions
- Collect speaker bios and photos
- Work with speaker manager providing any assets speakers need
- Determine networking strategy and tools to execute it
- Give guidance to network moderators on rules and checklists
- Develop all email content for attendees (updates, logistics, confirmations etc).  
Registration specialist to send these emails out
- Provide all content for the web designer and registration system
- Determine accessibility options needed (transcripts, live captioning etc)
- Create scripts for session monitors to use
- Feedback gathering
- Strategize on post-conference follow up and sharing of sessions
- Determine back up plan with VC platform
- Figures out swag if any

### **Web and creative producer**

- Work with conference producer on incorporating concepts into the website
- Website acts as the venue with the various pages being parts of the events. What's the look and feel of the virtual room. Incorporate other tools into the website (Slack, VC platform, registration, sponsor host rooms)
- Create backgrounds for speakers so it looks like there's one overall look for the conference
- Ties in the theme and look into VC sessions from the waiting room, during the session and the end.
- Consider a content portal
- Produces branding videos or running slides to be used on VC platform. Work with VC platform specialist on recommended resolutions
- Selects music to be used during event
- Determines the transitions from one session to the next
- Sets up session room template on VC platform



**Moderators and monitors**

*Network moderators*

- Plan out networking times and discussion groups
- Based on the tool used for networking/groups, create rooms and invite people to participate
- Understand the intent of the networking room. How do you keep people engaged
- Produce conversation starters
- Monitor discussion and ensure it's appropriateness. Deal with people not following rules
- Suggest ways to bring traffic to sponsor rooms (gamify, lead discussion groups)

*Session moderators*

- Works with marketing person on script for the session
- Explains to speakers how the session will run during the tech rehearsal. Introduces various players.
- Acts as MC for the session outlining to attendees features of the VC platform, how Q&A works and if there's tech difficulty
- Advises the speakers on their volume and video
- Controls presenter options
- Hosts the session and invites VC platform producer and attendee monitor to be co-host
- Moderates Q&A and provides questions or opens up microphone for that person to ask question. May look at up voting options from VC tool
- Introduces speakers (if applicable)

*Attendee monitors*

- Check in attendees as they enter the session room
- Handle attendee tech issues with the VC platform producer
- Communicates with session monitor any attendee issues

**Speaker manager**

- Works with speaker on session information to share with marketing manager
- Handles speaker contracts
- Delivers speaker assets the speakers will need
- Coordinates tech rehearsal schedule with speaker, VC platform specialist and session monitor
- Ensures all parties are at appropriate locations and specific times
- Share guidelines with speakers including length, sentence structure, and tone. Advises them on camera, audio, lighting and clothing



- Provides the logistical information to the speakers on tech rehearsals and day of event  
Communicates any adjustments with schedules

### **Registration specialist**

- Determine registration system to use- Is the VC platform reg system enough (mostly likely yes if it's a free event). If you're charging a fee does the reg system you select integrate with your VC platform?
  - Unique VC URLs may be needed to ensure links aren't being shared. If this is the case, you'll need to incorporate the VC platform reg system.
- Work with conference producer on registration types and pricing
- Create confirmation emails, substitution email, instruction emails, reminder emails, and follow up emails.
- Work with attendee monitor on checking in attendees on day of event
- Provide reporting on who attended sessions or visited breakout/discussion rooms (not all platforms have this feature)
- Handle refunds, substitutions and other changes
- Create promotion codes
- Load in list of speakers and staff

### **Sponsor Manager**

- Outline clear role for sponsors and the benefits they'll get
- Create offering for sponsors
  - Sponsor slide at beginning and end of sessions
  - 90-second interviews with sponsors as segue between sessions
  - Gamification
  - Host discussion topics
- Find and book sponsors
- Create sponsorship contracts