

Tasks Template Details

Turn-Key

EVENTS

Role assignments

Role

Overall producer

See individual tabs for details on the tasks

Task

Defining intent of conference
Overall strategy
Determine flow of event (all general sessions, are there breakouts, workshops)
Attendee interaction strategy
Topic ideas
Speaker review and selection
Pricing strategy
Virtual conference provider
Sponsor strategy
Create budget
Creates run of show docs

see tab

Marketing and Communications

Promotion strategy
Email frequency and content
Agenda production - live sessions/on demand sessions
Session descriptions
Speaker bios and photos
Attendee networking opportunities
Create monitor guidelines (session, attendee and networking)
Content for web site
Email content for attendees including registration confirmations and updates
Surveys
Post conference strategy and follow up
Determine accessibility needs
Determine backup VC platform plan
Swag if any

done with overall producer

Web and creative producer

Design and incorporate theme into website

Create virtual backgrounds for speakers
Create waiting room look
Creates and manages content portal
Produces branding videos or slides
Creates slide template if applicable
Determines how sessions transitions from each other
Setup VC platform room template
Determine pages for VC
Day of event experience for attendee
Music for event

Tasks Template Details



Network moderator

- Creates networking/discussion group/chat rooms
- Invites people into networking rooms or chats
- Keeps people engaged with the rooms
- Monitors discussion and ensures appropriateness
- Handles attendees not following rules
- Suggest ways to benefit sponsors

Session moderator done with marketing person

- Works on session script
- Runs tech rehearsals
- Runs day of sessions
- Acts as MC for the session instructing attendees
- Monitors speaker presentation, audio and video
- Controls presentation options

- Controls host and presenter capabilities
- Runs Q&A
- Introduces speaker
- Ensures recording starts

Attendee monitors

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

Speaker Manager

- Shares logistical information with speakers
- Handles speaker contracts
- Delivers speaker assets
- Coordinates tech rehearsal with appropriate parties
- Provides guidelines to speakers

Registration specialists

- Find registration system
- Determine if dual reg system needed (one for event and one for the VC platform)
- work with web design on reg fields for work with conference producer on the Determine registration types
- Setup attendee emails (confirmation, cancellation, substitution, reminders)
- Manage registration changes with attendees
- Create promo codes
- Load in speakers and staff
- Run regular reports
- Handle check in for day of event

Tasks Template Details

Sponsor manager

- Create sponsorship strategy
- Outline benefits for sponsors
- Determine packages
- Find and book sponsors
- Create sponsorship contracts



Tasks Template Details



Overall producer items to think about

Defining intent of conference

Purpose: networking, educational, trade show
What is the value to your attendees things attendees will get from event
What are you trying to accomplish for your company
Topic ideas - content vision
Oversee all other roles to involved

Flow of event

Number of days
How many general sessions, break outs, workshops
What's the networking components
What sessions are streamed live versus ondemand

Attendee interaction strategy

How do you build a sense of community
Are there discussion groups/chat groups
Is there a conference app

Speaker review and selection

Do you bring in headline speakers
Call for proposals
Criteria for session selection
What do you pay the speakers

Pricing strategy

Registration types individual/group/non-profit
Day rates versus conference rate
Add on fees for workshops
Extra items like recordings to previous conferences

Virtual Conference Platform

(see virtual conference provider tab)

What are the features you need how does that tie into the why and intent of conference
polling, Q&A, attendee networking, content portal, surveys
Process of executing the session
How does it work with a panel
Consulting assistance from platform
Tech help prior and day of to ensure success
Ease of use by attendee - do they have to download an app or just go to a site?
Video and audio guidelines
Recording capabilities
Integrates with database platforms (i.e. Salesforce)
Integrates with registration platforms
Negotiate pricing

Sponsor strategy

What role do sponsors play
Who are your ideal sponsors
What are the benefits to the sponsor? To the attendee?

Run of show

Outline each day minute by minute
Coordinates everyone within show flow
Is the director/producer day of

Tasks Template Details



Overall items to think about with a virtual conference platform

Features offered

Multiple presenters/panel capabilities

Polling

Q&A capabilities

Voting up questions

Allowing participant to ask

Questions going to just hosts

Day of help tech and nontech with both presenters and attendees

Templates for session setup

Video capability and restrictions

Audio capability and restrictions

Creation of minute by minute script

Green screen or virtual background capabilities

Segue options between sessions

Does the tool provide guidance for the user (how to ask questions, chat etc)

Survey capability

How is live streaming different from on-demand

What are the recording capabilities

How you does it integrate with database platforms like Salesforce

How you does it integrate with registration platforms

How are presentations handled especially if it's multiple people presenting

How does the host work and who can they elevate

Tasks Template Details



Marketing items to think about

Promotion strategy

Social media being used
Email campaign including topics and frequency.
Who are you emailing
Meet ups
Live presentations including meet ups/speaking at other conferences

Content for website

Purpose of event, why you should come
FAQs
Cancellation and substitution clauses
Pricing information and what's included with it
Speaker bios and photos
Content for attendee emails - confirmation, cancellation, updates
Determine accessibility needs for both site and during VC

Agenda

Length of sessions
Number of general session to breakouts
Themed tracks or not
Do you define an experience level on the sessions
Order of sessions
Balance of sessions to breaks
Which sessions are live and which are recorded
Session descriptions

Attendee networking

How are you building a community
Are there discussion groups - can attendees create their own
What tools are you using for networking (Slack, VC platform etc)
Conference app use

Monitor guidelines

Rules for networking monitor
Rules for attendee monitor during a live virtual session and recorded one
Rules for session monitors during a recording or live session

Swag

Do you offer any swag
Is it sponsored or branded
Is it sent to a person's house or is there an online store
Do speakers get anything
Is there a swag store?

Backup plans day off

What happens if system goes down
How are you communicating with attendees the day of
What does each role do if something happens

Post conference strategy

How long are the sessions available
If you had chat rooms, how long do they live
How will you use the new content for future marketing
How are recorded sessions being sold

Tasks Template Details



Web and creative items to think about

Website

- Are you using a standalone or is it part of the registration system
- What's the flow of the site; how is it being organized
- What's the attendee experience when visiting
- What image elements do you need
- What's the color palate and font
- Logo use and banners
- Are there content portals? How are they being used
- Does the site have different stages - pre agenda, agenda, during the event, post event
- How does the site work with social media
- What pages need to be added for the virtual conference component
- What's the end to end experience as people come to the event

Creative

- Design of logo and banners
- Create slide template
- Create look for vc room and waiting room
- Produce videos or self running slides for interstitial purposes
- Is the look for live stream different than recorded sessions
- Virtual backgrounds for speakers
- Music - DJs, bands, background

Tasks Template Details

Turn-Key

EVENTS

Network moderator items to think about

Discussion groups

- What tool do you use for the discussions
- How do people get invited to these groups
- Is there a theme to the group- what do you call the group
- Do you create a protocol within the group
- How long do the groups stay alive
- When do you promote these groups
- How do you keep people engaged
- Does a sponsor lead the group
- Are sponsored allowed to be part of the group
- Is the group closed
- Review guidelines

Appropriateness

- What to do if someone is inappropriate in the group
- Do you post a code of conduct

Tasks Template Details

Turn-Key

EVENTS

Session monitor items to think about

Script

Housekeeping items
Platform info (how to ask questions, chat etc)
Introductions
Keep time for session

Acts as MC for the session

Works on session script
Runs tech rehearsals
runs day of sessions
Acts as MC for the session instructing attendees
Monitors speaker presentation, audio and video
Controls presentation options
Controls host and presenter capabilities
Runs Q&A
Introduces speaker

Speakers

Monitors audio and video controls

Gives access to speakers and ensures presentations are up
Runs tech rehearsal

Q&A

Monitors Q&A and funnels the question to the right person
Decides if upvoting is included and if questions are seen by audience

Other

Communicate with tech person with any issues
Communicates with attendee monitor updates and issues
Ensure recording has started

Tasks Template Details



Session monitor items to think about

- Ensure attendee is registered for session
- Provides guidance to attendees if they are having issues
- Works with tech person if attendee is having technical issues
- Communicates updates with session monitor

Tasks Template Details



Speaker Manager items to think about

Planning

- Creates contract for speaker including compensation
- Shares logistical information on when they speak (date and time)
- Set up rehearsal schedule with speakers
- Provide assets needed for the conference (presentation templates, graphics etc)
- Provides speaker guidelines document
- Advises on equipment needed (microphone, camera, lighting)

Tasks Template Details



Registration items to think about

Website

- Do you need a full website with the registration site
- How does the registration site integrate with website if you're using your own website
- Does reg system integrate with database apps like Salesforce and Marketo
- How long can you access the site after the conference
- How does the registration and website system integrate with virtual conference platforms
- How do we provide access into the virtual conference

Registration

- Is it limited on registration types
- Can you do group registration
- What types of discounts and promo codes can be incorporated (i.e. reg 3 and each gets 10% off)
- How are credit card payments handled
- What automated emails are offered
- Can you bulk load in agendas, speakers and attendees
- What type of customization does it have for collecting information
- How are refunds handled
- Is there conditional logic
- How easy is it to setup on the back end

work with web person on this

- What's the attendee experience the day of the event
- Day of check in and trouble shooting

Pricing structure

- Flat fees versus individual registration fees
- Is there a contractual commitment
- Is a percentage taken from the registration fee

Reports to run

- Weekly attendee report
- Snap shot report
- Year of year comparison weekly
- Who attendee sessions

Tasks Template Details

Turn-Key

EVENTS

Sponsorship items to think about

Create sponsorship strategy

What products or services does the sponsor offer that is attractive to the attendee

How many sponsors do you want

What opportunities are you offering the sponsor

Outline benefits for sponsors

Determine packages

Are there different levels

Track sponsorships

Individual on-demand or live stream sponsorships

Slide in the presentations

Introducing the session and speakers

Virtual sponsor room and what you do to drive traffic there

Offer speaking slot

Day package versus full event

Hosting a virtual happy hour (maybe the sponsor will send out gifts)

Swag

Find and book sponsors

Current sponsors of event

Previous sponsors

Look at similar conferences and see who is sponsoring those events

Ask attendees what tools and services they are currently using

Ask attendees about pain points and what would help them with the pain point

Create sponsorship contracts

Pricing

Deposits

Refund policy

Driving traffic to sponsors

Gamiification

Swag

Tie in sponsor offering with in session - examples using the sponsors tools or services