

VIRTUAL EVENT  
**CHECKLIST**



# THE REFORMAT



When deciding to convert an in-person event to a virtual experience, it is committing to change most of the event characteristics.

A conversion to a virtual format is not simply “copy and paste.” You will need to revisit all aspects ranging from dates and registration fees to how best to engage and showcase presenters, and sponsors.

## PHASES OF VIRTUAL EVENT CREATION

**PLANNING** - Establish event goals, expense budget, and revenue opportunities

**PLATFORM** - Review capabilities to make sure it will meet your event needs

**PROMOTION** - Create and place advertising that entices your target audience

**PRODUCTION** - Assemble technology, talent, and content, then conduct the virtual event

**PACKAGING** - After the event, organize content and continue audience engagement

**PLAYBOOK** - Collect learnings and organize documentation for future events

# PLANNING



## LEADERSHIP

- Identify stakeholders
- Schedule meeting(s)
- Select a single event manager devoted to coordination

## STRATEGY

- Select event name
- Review past event data (topic, time of year, attendance #'s)
- Determine target audience
- Develop event value proposition

## CALENDARS

- Review competitive/complimentary dates
- Select event dates
- Select times-of-day with consideration of time zones

## GOALS

- Establish registration goals
- Establish "takeaway" goals (learning, networking, etc.)
- Establish membership conversion goal
- Establish sponsor goals

## FINANCES

- Project revenues (e.g. sponsorships, registrations)
- Project expenses (e.g. speakers, promotion)
- Establish registration fees, discounts & early-bird pricing

## SPONSORS

- Identify sponsorship opportunities
- Create sponsorship pitch materials
- Pivot sponsors already contracted for in-person events
- Identify new sponsors
- Solicit, negotiate and contract sponsors
- Collect sponsor assets

## EDUCATION

- Determine if the content qualifies for Designation Maintenance credit(s)
- Request approval for Designation Maintenance credit(s)

## PROJECT PLAN

- Establish registration open, close, and early bird dates
- Establish last date for cancelation
- Create a plan for the remainder of event tasks

# PLATFORM



## IMPLEMENTATION

- Complete Event Setup Form and indicate it will be a virtual event
- Let staff know if a personal Zoom account is associated with the email of the host (e.g. person running the meeting)
- Let staff know what time zone the event is taking place in
- Let staff know if this is a reoccurring meeting
- Let staff know if you will be using the breakout room functionality
- Let staff know if you will be using the polling feature
- Let staff know if you want the meeting to be recorded
- Provide staff with graphics and/or logos for the registration page
- Test platform to familiarize yourself and make sure you're comfortable

# PROMOTION



## CAMPAIGN

- Segment audiences (members or non-members)
- Define messaging
- Collect images to include in promotional materials
- Create promotional collateral (e.g. emails, social posts)

## COMMUNITIES

- Identify and engage with existing forums (e.g. state and local association, brokerages, real estate related organizations)

## VIDEO PROMOTION

- Plan live broadcast on FacebookLive
- Send an email invitation with a link to the video announcing the event.

## COMMUNICATIONS

- Plan and execute communication plan (e.g. newsletters, save the dates, invites, social posts)
- Request updates to your state webpage
- Add event to your state Facebook page
- Plan and execute social posts (organic and/or paid)

# PRODUCTION



## **SPEAKER SELECTION**

- Discuss speaker options based on the event topic
- Reach out to speakers for availability and cost
- Review options and select a speaker

## **SPEAKER PREPARTION**

- Review speaker content and provide feedback
- Plan and conduct platform overview and presentation walkthrough

## **ENTERTAINERS/FACILITATORS**

- Select facilitator or entertainer
- Plan and conduct platform overview and presentation walkthrough

## **SPONSORS**

- Review sponsor agreement and identify opportunities to incorporate the agreed upon terms
- If the sponsor is addressing the audience - Plan and conduct a presentation walkthrough

# PACKAGING



## REGISTRATIONS

- Confirm all registrations are closed
- Request final registration report

## OBLIGATIONS

- Request payment for speaker/facilitator if needed

## COMMUNICATIONS

- Plan and deliver post-event registrant communications (e.g. thank and invite them to the next event)
- Plan and deliver post-event speaker/facilitator communications
- Plan and deliver post-event sponsor communications (e.g. thank your sponsor(s))

# PLAYBOOK



## APPRAISAL

- Convene debrief with stakeholders
- Review performance against goals
- Review participant evaluations
- Summarize lessons learned
- Identify and record opportunities for future events
- Summarize financial performance

## ARCHIVING

- Document event steps and timelines
- Record event lessons learned
- Collect photos, templates and forms for reuse