LIVE WEBCAST PLANNING TOOLKIT 2021

TABLE OF CONTENTS

PRE-EVENT CHARTER AND SCOPE TEMPLATE

WEBCAST OVERVIEW

Webcast Title:

Webcast Date: **Webcast Time:**

Webcast Location(s):

Recurring Webcast?   ◯ Yes   ◯ No

Webcast Description:

WEBCAST COORDINATOR INFORMATION

Coordinator Name:

Coordinator Org:

Mailing Address: **Contact Info:**

Address 1:   **Email:**

Address 2:   **Main Phone:**

City: **"Day of" Phone:**

State: **Postal Code:**   **Fax:**

ADDITIONAL COORDINATOR INFORMATION

Name: **Email:**

Phone 1:   **Phone 2:**

WEBCAST SCOPE

Target Audience:

Key Messaging:

Objectives:

Presenter(s) Details:

Type (CEO / Executive Webcast, Internal Communication, Training, Virtual Event, etc.):

Potential End User Devices Supported:

Optimal Viewing Resolution (720p, 1080p, 1420p, etc.):

Will this Event Be Recorded?	◯ Yes	◯ No
Will the Presenter Use Slides?	◯ Yes	◯ No
Will the Presenter Use File Attachments?	◯ Yes	◯ No
Will Links Be Provided During the Webcast?	◯ Yes	◯ No
Will Polling Be Used During the Webcast?	◯ Yes	◯ No
Will this Webcast Support Live Q&A?	◯ Yes	◯ No
Will this Webcast Support Live Chat?	◯ Yes	◯ No

PROJECT PLANNING CHECKLIST

TASKS & MILESTONES	PARTY RESPONSIBLE	DATE COMPLETED
Webcast Pre-Event Charter and Scope Form Drafted		
Webcast Pre-Event Charter and Scope Form Completed		
Webcast Pre-Event Charter and Scope Form Approved		
Webcast Delivery Team Selected		
Kickoff Meeting Held		
Production Requirements Reviewed		
Webcast Added to the Organizational Comms Schedule		
Sponsorship Obtained (If Applicable)		
Webcast Project Team Meeting Cadence Established		
Location Secured		
Location Connectivity Arranged		
All Needed Permissions Requested		
Permits Requested / Issued		
IT "Heads Up" Communications Sent		
Webcast Speakers / Entertainment Confirmed		
AV Equipment Ordered / Secured		
Webcast Rehearsals Scheduled		
Registration Process Documented		
Webcast Delivery Risk Analysis Completed		
Invitee List Compiled		
Marketing / Advertising Created		
Marketing / Advertising Approved		
Marketing / Advertising Deployed		
Attendee Invitations Sent		
Webcast Platform & Features Tested		
Webcast Audience Feedback System Developed		

QUMU

TASKS & MILESTONES	PARTY RESPONSIBLE	DATE COMPLETED
Webcast Content Checklist Completed		
Test Webcast Content Uploaded		
Final Webcast Content Approved		
Moderator Trained		
Onsite Setup & Connectivity Confirmed		
Equipment Ordered / Reserved		
Stream Test Conducted		
Equipment Logistics Confirmed		
Go Live Day Program Guide Created		
Roles Reviewed with All Parties		
Plan B Documented & Tested		
All Needed Equipment Delivered to Location		
Webcast Rehearsals Executed		
Delivery Team Walkthrough Completed		
Go Live Day Equipment Tested		
Day of Event Setup Completed		
Test Webcast #1 Completed		
Test Webcast #2 Completed		
Webcast Go Live		
Live Event Monitoring		
Provide Post-Event Reporting		
Registration Site for VOD Completed		
Post-Event Meeting / Debrief Held		
Organizer Feedback Survey Conducted		
Webcast Audience Feedback Survey Conducted		

Event Manager Preparation Guide
An 11-Point Checklist

BEFORE

1 Promote the Agenda

Getting the attention of your audience can be challenging, even when the event in question is mandatory. Putting a little extra time into the invitation—including clearly explaining what will be discussed and why—conveys a sense of importance to your audience. Some of the more innovative companies actually send video invitations directly from the speaker, with a preview of what will be discussed. The more attention you pay to promoting your event, the more importance your viewers will assign it.

2 Make Time for a Practice Session

While not everyone has the time or feels the need to practice, don't underestimate the value of a walkthrough or dry run. Not only are walkthroughs critical for making certain everything is working from a technology perspective, but they are essential for verifying the proposed content can be covered in the allotted time. Dry runs are also a great way to discuss the "meeting-killer" questions, especially the ones everyone is thinking but you may not feel comfortable answering on the fly. Every webcast should feature a well-prepared presenter, armed with a diligently crafted message.

3 Consider Security and Audience

Webcasts can be a paradox, with a goal of maximizing reach to target audiences but eliminating reach to unintended parties. Prior to going live, be sure to review the company's content viewing and retention policies, then compare them to the settings within your enterprise video platform. Two hours before broadcast is not the time to debate whether contractors and vendors should be allowed attendance.

4 Document a Backup Plan

Even with thorough preparation and testing, any well-planned event can still be impacted by emergencies. Pre-webcast planning should always include a clear set of fallback plans covering worst-case scenarios. Can you effectively broadcast using a mobile device if stuck at an airport? Should you reschedule if you are ill, or hand off to a backup presenter? These are the types of decisions that should be discussed—and documented—before your event goes live.

DURING

5

Strive for Authenticity

The reason casual, unscripted meetings—such as town halls or fireside-chats—are so appealing is that they establish an atmosphere of authenticity in which the presenter speaks frankly and naturally about what's going on. A great webcast creates that same opportunity for open, sincere dialog whatever the staging. Authenticity, in fact, trumps production flair—some of the best events are the simplest. Choose a casual backdrop, avoid scripts and teleprompters, and don't be afraid to display emotion when warranted.

6

Encourage Interactivity

Another critical element of in-person events is the ability for participants to submit questions in real time, and receive live responses from the presenter after the prepared portion of the presentation. Leading enterprise video platforms offer robust Q&A functionality, including audience polling and screen sharing to make the meeting as interactive as possible. Putting a question on your "Thank you for Waiting" slide can also increase participation and help break the ice. And if your audience tends to be reluctant when it comes to asking questions, have the moderator prepare a few in advance to get things going.

7

Go for Maximum Reach

A live streaming webcasts that reaches only a fraction of an audience is no longer acceptable or necessary. If your current webcasting system can't reach everyone, consider conducting more than one live event to compensate for time zone differences. Or better yet, invest in a live streaming platform that leverages intelligent delivery, and can ensure delivery of your webcast to any device—including mobile devices and virtual desktops.

8

Leverage Reliable Technology

It's never a good idea to walk into a live event hoping (but not knowing) your webcasting technology will perform reliably. An industry survey says that 51 percent of streaming video viewers cited buffering issues as the number one technical problem, but these are also the easiest ones to avoid. Some enterprise video vendors will gladly assist in performing a load test or simulation to identify potential bottlenecks before going live. Combine this with an intelligent video delivery network that adjusts to real-time network conditions, and your next live event will go off without a hitch.

AFTER

9

Anticipate Demand for On Demand Viewing

It's nearly impossible to plan an event that is ideally suited for everyone's schedule, so providing on-demand viewing options is the most effective way to push your event reach toward the goal of 100%. Wrapping your live event recording in metadata, then making it accessible through your company's internal repository, is a critical step in the post-event engagement process. So is regularly promoting the on-demand asset via email, and through whatever tools your company leverages—Slack, Workplace by Facebook, SharePoint or the dozens of other tools organizations are using to drive engagement.

10

Collect Post-Event Feedback

The right enterprise video platform will tell you a great deal about the engagement of your event—such as global reach, how long attendees participated and who engaged in Q&A. But a basic post-event survey can add a great deal of color around effectiveness of message as well. A simple post-event questionnaire can help your team drill down to the key question "did the audience understand the message?" And if executed correctly, we have seen companies achieve understanding of the message in the 69% to 83% range following a live video event.

11

Send a Follow-Up Message to Attendees

Silence after a webcast can leave a vacuum. That's why a follow-up note—or better yet, a video—is crucial for driving continued engagement. Underscore the main message, share positive feedback and acknowledge what you, as presenter, also learned in the exchange. The follow-up message is a great opportunity to provide answers to questions that you were not able to address during the live event. Also consider reiterating action items and sharing positive outcomes, to demonstrate the event made a true difference in the work environment.

Presenter Tips and Tricks

1 Respond to all communication from the event manager in a timely manner. We're all on a tight deadline.

2 Submit a description of your topic by the requested date. Rough ideas are fine, Marketing will help you refine it.

3 Let the event manager know in advance if you will be using guest speakers; not all surprises are good ones.

4 Plan to finish and turn in your slides no less than five (5) working days prior to the live event.

5 Take the dry run seriously. You will be delivering the entire presentation from beginning to end.

6 Deliver the dry run in the exact same environment as the live event—location, lighting, audio setup, etc.

7 The event manager will record the dry run. Be sure to review it prior to the live event for improvments and corrections.

8 Market the event to your business network, and encourage your colleagues to do the same.

9 Keep a target length of 20 to 25 minutes in mind for your presentation, not counting Q&A.

10 Expect at least 10 minutes of Q&A, with no limit on the back end—the more questions, the better.

11 Marketing will create seed questions for the Q&A. Be sure to review them prior to the event.

12 Dress professionally but comfortably for the event. If you're comfortable, the presentation will reflect it.

13 If at all possible, avoid wireless internet in favor of a hard-wired connection.

14 Plan deliberate pauses for questions throughout the presentation. We suggest every five minutes or so.

15 Please do NOT display slides, images or live feeds containing customer logos, employees or data without permission.

16 If you have the written permission mentioned in #15, you must provide it to the event manager prior to the event. No exceptions.

17 Don't worry about making mistakes. Prior to releasing your event as a VOD, most of them will be edited out.

18 Relax, have fun, and remember: you're creating an extremely important marketing asset that will be used to help the Marketing and Sales teams grow the company. And we very much appreciate your help!

METRICS TRACKING FORM

ATTENDEES

Number of Registered Attendees *(total number of unique individuals who registered for the live webcast)*

Goal:

Result:

Takeaways:

Number of Unique Live Attendees *(total number of unique individuals who attended the live webcast)*

Goal:

Result:

Takeaways:

Number of Peak Live Viewers *(highest number of individuals viewing the live webcast at any one time)*

Goal:

Result:

Takeaways:

Audience Retention Rate *(percentage of individuals who watched the event it in its entirety)*

Goal:

Result:

Takeaways:

Feedback Ratings *(positive and negative ratings provided by attendees once the live webcast was completed)*

Goal:

Result:

Takeaways:

ENGAGEMENT

Number of Questions Submitted *(total number of questions submitted during the Q&A portion of the webcast)*

Goal:

Result:

Takeaways:

Number of Chat Items *(total number of chat interactions between attendees—applicable if live chat is enabled)*

Goal:

Result:

Takeaways:

Number of Poll Responses *(total number of poll responses from attendees—applicable if a poll is conducted)*

Goal:

Result:

Takeaways:

Conversion Rate *(percentage of attendees that clicked on any links provided in the live webcast)*

Goal:

Result:

Takeaways:

WEBCAST EXPERIENCE

Target Length *(the actual length of the live webcast, compared to the target length)*

Goal:

Result:

Takeaways:

Start Time *(whether the live webcast began at the designated start time)*

Goal:

Result:

Takeaways:

Stream Quality *(assessment of the quality of the live webcast stream)*

Goal:

Result:

Takeaways:

Number of Outages *(total number of stream outages during the live webcast)*

Goal:

Result:

Takeaways:

Number of Buffering Experiences *(number of times, and the time codes, that the live webcast buffered)*

Goal:

Result:

Takeaways:

POST-EVENT LESSONS LEARNED FORM

Was the presenter given adequate time to rehearse?

How did the presenter feel the webcast was executed?

How did the staff feel the webcast was executed?

What were the key pieces of feedback submitted by attendees?

How was the audio / video quality on the different viewer devices that were used?

What issues, if any, were reported to the technical support team?

Are there any process changes to discuss for next time?
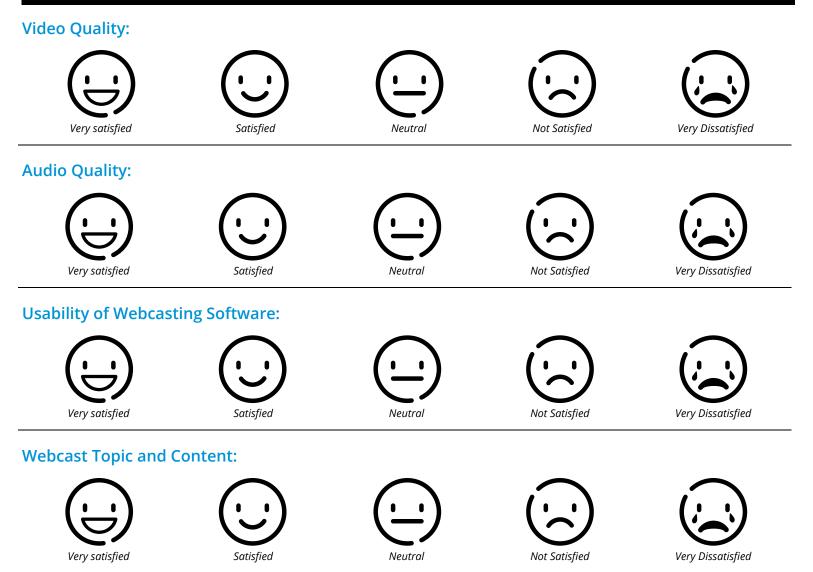

POST-EVENT ATTENDEE SURVEY

WEBCAST DETAILS

Event Title / Name:

Date: **Time:**

Webcast Description:

SURVEY QUESTIONS

Video Quality:

Very satisfied   *Satisfied*   *Neutral*   *Not Satisfied*   *Very Dissatisfied*

Audio Quality:

Very satisfied   *Satisfied*   *Neutral*   *Not Satisfied*   *Very Dissatisfied*

Usability of Webcasting Software:

Very satisfied   *Satisfied*   *Neutral*   *Not Satisfied*   *Very Dissatisfied*

Webcast Topic and Content:

Very satisfied   *Satisfied*   *Neutral*   *Not Satisfied*   *Very Dissatisfied*

Presenter Messaging and Delivery:

| Very satisfied | Satisfied | Neutral | Not Satisfied | Very Dissatisfied |

Content Organization:

| Very satisfied | Satisfied | Neutral | Not Satisfied | Very Dissatisfied |

Presenter Confidence and Credibility:

| Very satisfied | Satisfied | Neutral | Not Satisfied | Very Dissatisfied |

Presenter Delivery of Content:

| Very satisfied | Satisfied | Neutral | Not Satisfied | Very Dissatisfied |

Interactive Technology Elements—Live Chat, Q&A and Polling:

| Very satisfied | Satisfied | Neutral | Not Satisfied | Very Dissatisfied |

Additional Comments—Suggestions and Comments Welcome!