



# VIRTUAL EVENT PLANNING GUIDE

A SERIES OF BEST PRACTICES AND PRACTICAL TIPS TO HELP YOU  
PLAN AND EXECUTE A SUCCESSFUL VIRTUAL EVENT

**Note:** We have aimed to create a comprehensive guide intended for mid-sized events with 20-100 attendees, however every event is unique and will have different processes. This guide was created to be used as a helpful reference that can be adapted to suit your specific event's time frame and purpose.

## 1 DESIGN YOUR EVENT

It's helpful to think through your event goals and objectives in the initial planning stages, as the answers to these questions will help inform the rest of your logistical decisions.

### THINK ABOUT:

- What is the purpose or goal of the event?
- Who is the target audience?
- How many attendees do you expect?
- How will your event provide value to your attendee?
- What is the best format and length of the event?
- Fill in the blank: This event will be successful if \_\_\_\_\_

## 2 CONFIRM YOUR DATE AND SPEAKERS

- Make sure your event date and time doesn't conflict with other events by checking our [Campus Calendar](#).
- Consider whether your attendees are coming from various time zones when deciding on an event time.

### SPEAKERS & AGENDA:

- Who will talk and in what order?
- Who will host your event, deliver housekeeping details, introduce your speaker, thank your speaker, etc.?

Looking for an alumni speaker to address a particular topic or industry in your class or event? Contact Huron's Alumni Relations Coordinator, Kate Macdonald at [kmacd72@huron.uwo.ca](mailto:kmacd72@huron.uwo.ca).

### REQUESTING SENIOR LEADERSHIP AS SPEAKERS:

- To request Dr. Barry Craig, President of Huron to speak at your event please complete the [President's Event Request Form](#) and email it to Anne Turvey at [aturvey3@huron.uwo.ca](mailto:aturvey3@huron.uwo.ca).
- If you are requesting any other member of the executive to speak at your event, please fill out a [General Event Brief Template](#) and send it to the executive's assistant.

## 3 CREATE YOUR EVENT BRIEF, CHECKLIST AND BUDGET

- Create an Event Brief that outlines your agenda and distribute it to everyone involved in planning your event. Here's our [General Event Brief Template](#) that you can use as a starting point.
- Use our [Virtual Event Planning Checklist & Budget Template](#) to get all your event details in one place and organize your next steps going forward.

## 4 SELECT YOUR EVENT PLATFORM AND FORMAT YOUR SETTINGS

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- Not sure what platform to use? Check out our [Virtual Event Platform List](#). If none of these platforms fit your event needs, reach out to the events team and we will help create a tailored solution for your specific event.
- If you're using Zoom please consult our [Zoom Best Practices Guide](#) for some tips in setting up and running your virtual event.

### When choosing a platform and selecting your settings here are some things to consider:

- What platform best suits your expected attendance number?
- Do your attendees need to be able to interact with your speaker/host?
- Do your attendees need to be able to see/interact with other attendees?
- Will you be using a screen share, polling option, chat function and will you be uploading files for attendees?
- Would you like to record your event to share afterwards?

## 5 SET UP YOUR REGISTRATION FORM

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- To increase your event security we recommend you ask guests to register in advance for your event with their name and email, and only send the event link out to those people who register.
- Zoom and GotoWebinar both have their own registration forms that you can setup . Alternatively, Qualtrics is a platform we recommend you use to set up your registration form. Everyone with a staff UWO email has a free account that you can set up [here](#).

**Event Tip:** If you will be recording the event you can add the following disclaimer to your registration form  
"Please note that this event will be recorded and may be sent to parties who may or may not have registered for this event."

**Note:** The average attrition rate for a virtual event that is promoted publicly is 45%, so you can generally expect 65% of those who register in advance to attend your virtual event.

## 6 PROMOTE YOUR EVENT

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- Create your invitation message and send out your invitations through email and social media.

### Information to include:

- Date and Time
- Event Title and Speakers
- Event Description
- Location/Platform
- Registration Form Link
- Event Graphic/Poster
- Event Contact and Contact Information

\*Once you've finished writing your invitation message, re-read it before sending and check for any spelling errors or factual errors in the date, time, etc.

**Event Tip:** Frame your event description so that it's clear to the reader what they will learn or take away from the event. Whether it be how wellness tips can help you develop resiliency in these difficult times, how a discussion of diversity can make us better allies, or how a few laughs and a recipe for a delicious chocolate cake can bring some levity to our stressful lives, what will your attendees receive from your event? Online events rely on content so it's important to put it front and centre and keep your attendee in mind when you're creating your messaging.

- Fill out the [Events Request Form](#) on JIRA to have your event added to our Events Calendar and featured on social media if applicable.

## 7 CONFIRM YOUR EVENT DETAILS

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- Confirm your speakers and create any slideshows, polls or welcome slides that you will be using.
- Submit a merchandise mailing request on JIRA if you would like to send Huron merchandise as a thank you gift to your speakers.

- Event collateral you may need to prepare:

- Welcome Slide (This slide can be displayed at the beginning of your event as guests enter the call)
- Housekeeping Details
- Speaking Notes
- Slideshow

- Monitor your registration page and send out the event link to everyone who registered.

## 8 DO A TEST RUN OF YOUR EVENT

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- Schedule for at least 30 minutes with your presenters and stakeholders a few days prior to your event to review the technology, discuss roles and tasks and finalize your content to make sure that your event is as stress free as possible.

## 9 PRODUCE YOUR EVENT

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- Send out an event reminder with the link to your event either 1 hour or 1 day before to all those who have registered.
- Login 30 mins early to test your internet connection, greet your guests and set up your presentation.

## 10 WRAP-UP YOUR EVENT

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- Reconcile your budget and pay for any remaining invoices.
- Email your event attendees thanking them for attending including more information about your upcoming programming and ways that they can get involved.
- Complete an internal debrief using the [Event Debrief Template](#) with your planning team to celebrate your event successes and identify opportunities for improvement.
- Looking for more feedback? Send a follow-up survey to your attendees to get their opinions and thoughts on your event.

# VIRTUAL EVENT PLANNING QUESTIONS TO CONSIDER

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Here are some questions that can help you as you're planning and reflecting on your event:

## PURPOSE CENTERED PROGRAMMING

- Who is the attendee?
- What does the attendee want usually and how has that changed given the current circumstances?
- What is valuable to them?
- Are there any opportunities to address those needs through creative solutions?

## EVENT EXPERIENCE DESIGN

- How do people hear about your event?
- What is the process of registering for your event?
- From registration to post event, is the experience smooth?
- Are there any missing communication points?
- How is your brand and messaging expressed?
- How are you maintaining and cultivating the relationships with your event attendee following the event?
- How are you collecting and implementing feedback?

## HURON'S EVENTS TEAM

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The Events Team is here as a service unit to you! Please reach out for assistance if you would like to review/clarify anything from this document. We are happy to meet with you to ensure all settings are correct, host a practice session with you, and support you in any other way we can!