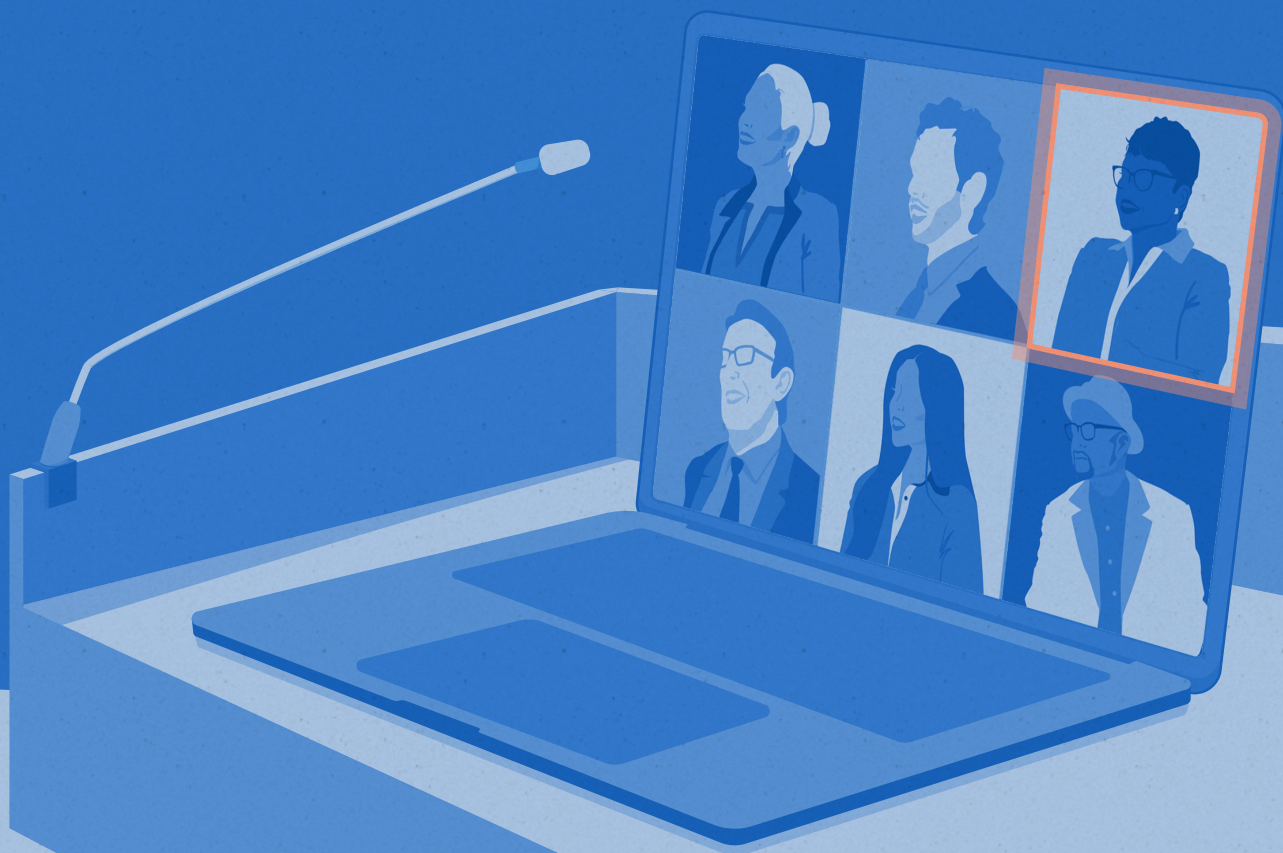✔ smartsheet

# 3 Questions to Guide Your Pivot to Virtual Events

Event planners' jobs are demanding enough – brainstorming memorable experiences, delivering against tremendous revenue goals, overseeing a mountain of logistics, crafting content worthy of a mainstage, and much more. Even before COVID-19 disrupted the event industry, "event coordinator" had the dubious distinction of regularly occupying one of the top 10 spots on the "most stressful jobs" lists. In 2019, CareerCast placed it at number 6, and it's not hard to see why.[1]

Fast forward to today, and event planners are facing a wholly new challenge: how to pivot to virtual events — successfully. This is new territory for event planners – a study from EventMB shows that 60% of planning professionals have never planned a virtual event.[2] Virtual events have been part of the marketing landscape for years, it's the sudden and required shift toward an all-virtual events model that's unprecedented.

The pressure is on for event planners to deliver a virtual event that achieves many of the same business objectives of an in-person program. Attendee satisfaction is a key performance metric to measure — a whopping 91% of event planners use it as a measure of event success according to EventMB — and a high bar for virtual events to meet.[3]

Private concerts and jam-packed keynote theaters are no longer moments that event planners can use to craft unique, differentiated experiences that drive satisfaction. These experiences and interactions must be reimagined. And event planners also need to deliver both customers and prospects relevant and personalized reasons to attend virtually.

To successfully navigate the road ahead and ensure your event stands out amidst the noise, these are the three key questions to ask.

60%
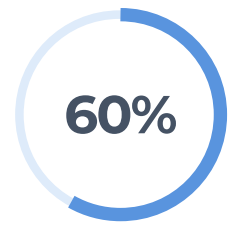
60% of planning professionals have never planned a virtual event.

1. *CareerCast, 2019, Most Stressful Jobs*
2. *EventMB, 2020, Pivot to Virtual*
3. *EventMB, 2019, Event Budget: 60 Tips, Templates and Calculator for 2019*

www.smartsheet.com

1.

What form should your virtual event take?

Just as with in-person events, a successful pivot to virtual must be rooted in strategy. Figuring out the how, when, and why of your virtual event as the first step will help to shape a clear planning framework with which to move forward. Once that's solidified, then you can outline the logistical details. Map out your big picture and then dive down into the details.

What to do:
Define your scope

While a multi-day, in-person event can fulfill multiple objectives, it's important to narrow the scope of a virtual event. Define the top business objective by asking:

- What is the overarching goal we want to achieve?

- Will we use this event to highlight a new product?

- Is it going to target a niche customer segment for a specific reason?

- Will registrants meaningfully add to our sales pipeline?

The answers to these questions will shape the content and experiences event planners create. Involve your leadership and sales teams early in the process. Not only can they help answer some of the questions to arrive at a clearer picture of the scope, they can also provide feedback and insights to help inform your plan.

Survey past in-person attendees

Stick with this tried-and-true best practice as foundational feedback for your pivot to virtual. Poll your past attendees to see what kinds of session formats they would prefer, what their ideal virtual conference would look like, and their reasons for attending a virtual experience with you.

A successful pivot to virtual must be rooted in strategy.

Obsess over the details

Event planners know better than anyone that the devil is in the details, large and small. As you build your virtual event strategy, make sure to account for the new details in this form factor and account for new metrics and data.

Here are a few points to think about:

- Will it be a one-day or multiple-day event? What will be the most engaging for your audience now that they won't be with you in person?

- Should it be free to expand your reach to prospects and new audiences or will you charge a registration fee?

- Should sessions be broadcast in real-time or pre-recorded? Or perhaps a mix of both?

- How can we still meaningfully involve sponsors and deliver ROI?

- What KPIs should we measure to determine if the event was a success?

Understanding how the moving parts work together will help flesh the outline for the form the event can take.

2.

What kind of content and experiences should your event deliver to maintain engagement?

The event industry pivot to virtual is a marathon, not a sprint. Prior to the COVID-19 pandemic, more than eight out of 10 executives said they prefer in-person meetings over virtual contact.[4] A whopping 85% of survey respondents said they liked in-person events more than virtual ones and 92% found in-person events to be better at generating leads, so the time is now to rethink virtual event form factor.[5] In order to successfully pivot, you'll need a different approach than directly mapping your in-person event strategy into a virtual form factor.

85%
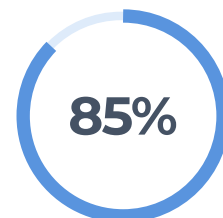
85% of 2019 event attendees prefer in-person events; it's never been more important to reassess how virtual events come to life.[6]

4. The Washington Post, April 2020, _The Science of Being There: Why Face-To-Face Meetings Are So Important_
5, 6. EventMB, 2019, _100 Event Statistics_

Virtual events need to be more than just a series of Zoom calls patched together to continue to delight attendees and draw them back year after year. Given the growing popularity of experiential events — more than half the event planners in an EventMB survey said they're seeing an increased focus on experiential marketing — you'll need to figure out what constitutes an immersive experience in the virtual world.[7]

As you dive further into what makes a successful virtual event, a little creativity and advance planning can deliver huge returns to your attendees – and your KPIs.

What to do:
Align content with virtual form factor

As you map out content for your event, make sure to consider the toll of back-to-back digital sessions, even if it is riveting for your audience.

Variety and breaks are still key to a successful event. Consider new session lengths and content types. Break content into easily digestible pieces. Carry on with themes and tracks just like you would for in-person events so attendees can cluster their time accordingly. Integrating themes this way and measuring analytics about who logs in to which session (and for how long) will also help you map the effectiveness of content for future event intelligence.

All of this planning will likely require many content creators from across your organization. One of the most effective ways to keep all of your content developers and producers aligned is by deploying a collaborative work management (CWM) platform. With one central platform for your team to work from, you can attach updated decks, assign session ownership, automate deadline reminders and approval processes, and much more.

Break it up with the unexpected

Get creative with ways to recreate digital versions of your early morning fun run or hallway latte cart. Livestream a workout and advertise it as part of the lineup. Hire a DJ to pump out music during transitions so attendees can get psyched to attend the next session. Invite a barista to walk through the steps of a perfect pour over so attendees can follow along.

A sponsored code for takeout lunch from a nearby Doordash or Postmates-enabled restaurant can go a long way in currying favor with your attendees and, equally important, keep them attending the event instead of taking extended lunch breaks and skipping sessions altogether.

> **"**
>
> **Everybody has great content. Everybody has great stories. Think about the standout: what is it that you have that creates the FOMO so that people don't want to miss your event.**
> – Janna Erickson, Director of Events, Drift

---

7. EventMB, 2019, *100 Event Statistics*

www.smartsheet.com

Live polling during sessions is another way to break up the sameness of the content delivery and engage attendees. Develop fun games: Enter attendees who share on social in raffles and pick a winner every hour.

Drum up excitement for the event

Keeping your registrants engaged and building excitement prior to your virtual event is key.

If you have an active community forum already, create separate channels for the event and offer sneak peeks into your new strategy. Direct new attendees to the forum so they can learn and share best practices. Set up a specific hashtag and recruit colleagues to create excitement on social media channels both before, during, and after the event.

Set up structured groups for networking

Create breakout rooms and virtual happy hours — sponsors can set up a virtual banner for such social engagement — for networking. Offer platforms for mentoring opportunities or "mastermind" sessions where experts can speak in-depth about the "how-tos" of a particular topic.

Collaborative coaching sessions, where attendees with similar challenges help each other, are a great way to structure groups and increase networking opportunities. Keep attendees engaged after the event through the community forums and "Follow Up Fridays" for a few weeks after.

3.

What technology do you need to make your virtual event shine?

You're going to need technology at scale to not only ensure that things go as planned but that the event as a whole delivers a memorable "Wow!" factor in the right way.

What to do:
Do your homework

Attend other virtual events to understand what different platforms offer. Identify your must-haves and nice-to-haves so you can prioritize your technology needs accordingly. Compile a shortlist of 3-5 vendors as part of an RFP.

> "
> Audiences will screen stack during the event. They will use their phone to answer emails or explore the internet while your content is streaming. Messages from your event need to be deployed across multiple channels and platforms to ensure ongoing engagement.
> – Leigh Doyle, Partner & VP, Digital Journal Group

Don't forget to optimize the event for mobile. Given that [nearly three-quarters of people](#) use only their mobile devices to access the internet, make sure your event unfolds as designed on all kinds of mobile devices.[8]

Test drive the audio-visual equipment

If speakers are going to pre-record their sessions, send them a complete recording kit for consistent sound quality that your team can control. Since speakers have to conduct sessions without attendee feedback, engage a prompter who can provide visual feedback especially for pre-recorded sessions. Help your speakers optimize their recording locations – a good set of headphones and microphone will boost audio quality, and diffuse lighting directed at the speaker's face will help them look their best on the virtual stage.

Prep should extend to your audience, too. Encourage attendees to test their passcode and connectivity systems before the event so you're not putting out too many fires the day-of. Share clear guidance for how to join on the day(s)-of event. Just like with in-person events, attendees may not know where to go, the technology they may need (camera? headset? microphone?), or which link(s) to click. Be abundantly clear in the communications, because if virtual event attendees get frustrated, they'll just close their laptop and walk away.

Prepare for contingencies

Event organizers know that even with intricate planning, things don't always go as designed. The contingencies that you make room for might be different for a virtual event:

- What if attendees and speakers can't log in?

- What happens if there are connectivity issues?

- How will you pivot if a speaker's audio system is not working at a live event?

- Can your website support a surge of traffic?

- How will you engage with your audience if your survey or polling tools go down?

Recruit your technology team to be on standby to troubleshoot as needed and your communications team to make sure customers aren't left in the dark should your tech go sideways. Good planning can blunt some of the edge of unexpected technology challenges.

> "
> **We tried to make the experience better for our speakers by sending them speaker packages with backdrops and microphones, and all the right equipment to make sure that they got the best recording possible.**
> – Janna Erickson, Director of Events, Drift

8. CNBC, 2019, *Nearly three quarters of the world will use just their smartphones to access the internet by 2025.*

www.smartsheet.com

Use technology to your advantage

One of the advantages of virtual events: attendance metrics are much easier to measure. Take advantage of the rich engagement picture you can paint – measure when attendees log in and out of meetings and how often they interact with content. These metrics deliver invaluable intelligence with which to shape your future event strategy.

Pivot successfully to virtual

Virtual events are challenging to execute but understanding the basic framework and fleshing out the details makes them less so. The biggest takeaway for event professionals is to rethink the approach to virtual events and keep sight of the tremendous opportunity to build community and engagement.

With a lot of planning and attention to the details, event planners can make virtual events stand out and make it a permanent part of their marketing portfolio.

Achieve more with a platform that lets you work your way

As your role develops within your organization, you'll want a flexible platform that evolves with your organization and the business landscape. But most importantly, you'll want a flexible platform that adapts with you, keeping up with your work and your ambitions. Ideally, you no longer need to juggle too many chat apps, sort through emails to find important files or conversations, yawn through unnecessary status meetings, burn out from manual data entry, or wonder if the document you're working from is the most recent version.

With the right platform, you can focus on the work that engages, fulfills, and motivates you to innovate — wherever that may be. Once you get back the time you lose to these costly processes, you can improve work-life balance (and take a real lunch break), and make it easier for leaders within your company to recognize the great work you do every day.

Smartsheet is the work execution platform that gives you the building blocks to drive achievement, no matter the scale of your ambition. Our flexible, no-code platform empowers any user to easily design a solution that meets their unique needs. Learn more at smartsheet.com.

> ❝
>
> **With virtual events, we're able to measure the engagement factor more. When you think about in-person events, you don't know who's in the room, you don't know if they're necessarily engaging in a session or where they are throughout the event during the day. Now we're able to watch how long people are on the sessions when they drop off when they come back.**
> – Janna Erickson, Director of Events, Drift