

# Running Engaging Online Events

Your ebook to success!



Moving your in-person event to an online event may seem like uncharted territory. But, with the right technology and preparation, you can make online events informative, interactive, and engaging.

**This guide will help you through the process.**





## Prepare for Your Event

Before you dive in, it's important to establish your goals, set expectations with stakeholders, and make sure everyone is aligned on the key objectives.

Understand who your target audience is, why they are attending, and the experience that you want them to have at the event. Once your team is aligned on the objectives for your online event, you can start to work on logistics.

### **Determine a timeline**

If it's your first time planning an online event, we recommend no less than a 4 to 6 week timeline for most events and at least 12 weeks for large multi-day online events with concurrent tracks.

### **Add buffer time to your event preparation**

Build in time to get all the speakers trained and rehearsed. As we all know, delays tend to happen at inconvenient times, so try to account for them in advance when scheduling these practice sessions.

### **Keep tech support by your side**

Plan to include a tech expert in all your meetings to identify technology limitations as well as test and fix any guest access issues.

### **Calculate resource expenses**

Depending on your type of event, you may need to allocate budget for attendee acquisition, content development, speaker fees, attendee gifts, and video and audio equipment.

### **Utilize Zoom Chat to communicate with your event teams**

Use Zoom Chat to create chat channels for ongoing communication and alignment with project teams.

### **Define success metrics**

Metrics will vary across different types of events. A few to consider are: registrations, sessions watched, resources accessed, survey results, number of demos, meetings held, mentions on social media, online reviews, leads, closed deals, and revenue. Decide which metrics you will measure to assess event success.

# Use the Right Tools

The type of event you are hosting will determine whether you need a Zoom Meeting, Zoom Video Webinar, or a combination of both to provide the ideal online experience.

Meeting	Webinar	Meeting or Webinar - based on attendee interaction
<ul style="list-style-type: none"> <li>• Customer roundtables</li> <li>• Board meetings</li> <li>• User focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• All hands</li> <li>• Town halls</li> <li>• Earnings calls</li> </ul>	<ul style="list-style-type: none"> <li>• Training/onboarding, how-to's, product introduction</li> <li>• Marketing events</li> </ul>

Here are some considerations to review to determine if you should use Zoom Meetings (Large Meetings) or Zoom Video Webinars for your online event:

**Capacity** - How many people are you expecting? If it's a large crowd, consider Zoom Video Webinars which allows for up to 50,000 attendees.

**Special features** - If you intend to use features like breakout rooms, participants on gallery view, and waiting rooms, you will need Zoom Meetings.

**Audience interaction** - Do you want the event to be view-only, or do you want attendees to interact with speakers and other attendees? If you want the audience to be on video, speak, or share their screen, then go with Meetings. If you want attendees in view-only mode, where the host controls which attendees are seen or heard, then go with Webinars.

**Internal or external audience** - Audiences internal to your organization often pose less risk and may want more interaction, so even if it's a large group, you may want to go with Meetings.

The chart on the right indicates Meeting and Webinar features to consider when selecting a tool for your event.

Feature	Meeting	Webinar
	Up to 1,000 Participants	Up to 50,000 Attendees (by request)
Registration	✓	✓
Chat	✓	✓
Polling	✓	✓
Raise Hand	✓	✓
Live Streaming	✓	✓
Reporting	✓	✓
Reactions	✓	
Breakout Rooms	✓	
Practice Session Room		✓
Q&A		✓

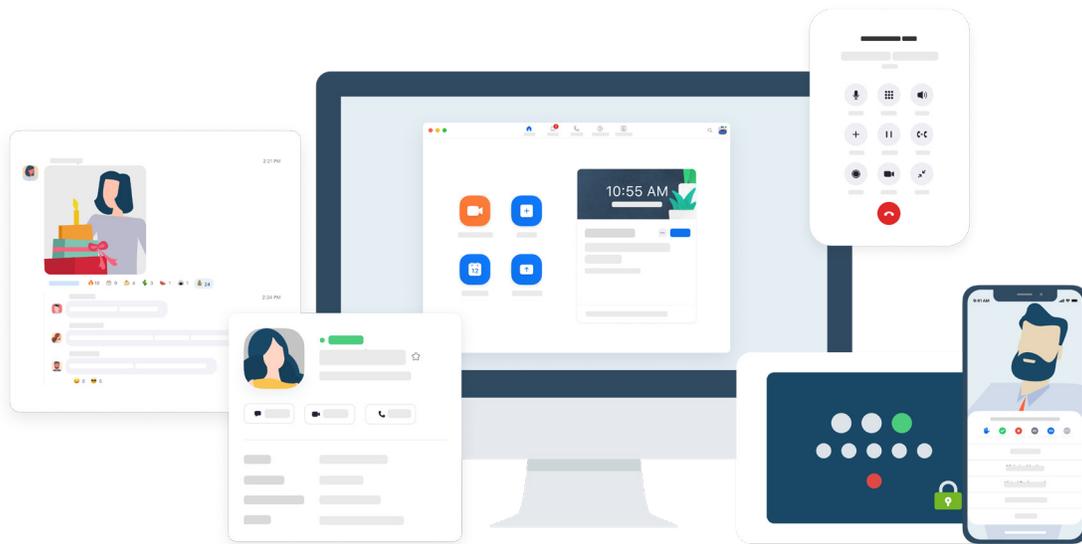


# Leverage Zoom Integrations

Integrating Zoom with your existing tech stack will help you run an efficient online event.

- **Marketing Automation** - By integrating with marketing platforms like [Marketo](#), [Pardot](#), and [HubSpot](#), you can automatically capture Zoom Webinar participants as leads.
- **Content Distribution** - Our [Kaltura](#) and [Panopto](#) integrations allow you to transfer Zoom recordings and share them with a larger audience.
- **Monetization** - Want to monetize your session? Connect Zoom with [PayPal](#) directly, and [Eventbrite](#) or [Cvent](#) through Zapier, to charge for your event.





## Build an Interactive Experience

**It's time to get organized by designing and building the attendee experience.**

An online event experience can be much more than your attendees viewing a live feed or video. Think about the attendee experiences you would have created before, during, or after the in-person event. When going online, be creative and thoughtful in bringing some of the elements of a live event into your online event.

### What would they have received at the in-person event?

Send it in the mail or with a delivery service.

- **Send gift bags** - Include branded swag, gourmet snacks, and a personalized keepsake. Consider letting partners include giveaways too.
- **Lunch on us** - Send food delivery gift cards and have a virtual lunch.

### Enable topic discussions with Zoom Chat

Set up and promote channels with all participants 2 weeks before the event to start a dialogue among registrants. Create chat channels on session topics during the event.

### Simplify the agenda

Highlight key themes and important points to remember. Delivering multiple sessions? The program outline should have a quick pace. Reduce session time to 30 or 40 minutes to achieve optimal attention and increase time for Q&A to maintain engagement. Don't forget to schedule breaks so attendees can address other tasks at their locations. You may also include networking sessions where your attendees can interact with one another.

### Boost event engagement

#### Enable Q&A

Designating panelists or other hosts to help answer questions that come in during the event helps if you anticipate a large audience. It's also a good idea to have at least one person on the panelist team that can answer technical questions. If you have people dedicated to

managing the Q&A, but are not participating in the audio or video, you can hide their video feed via the [Hide Non-Video Participants](#) feature.

On Zoom, there are multiple options for Q&A setup that you can select during the scheduling process. Your Q&A can be public or private; attendees can view, comment, and upvote questions; or you can restrict the responses to private questions and answers. It's also a good idea to create a few pre-planned high-quality questions in case attendee questions are not submitted quickly. Set your team up for [Q&A success](#) with question management, host capabilities, and more. Here are some Q&A tips:

- **Click 'answer live'** - When you want to answer a question out loud during the event. The question will be marked as answered in the host controls and in the Q&A reports.
- **Click 'type answer'** - When you or your panelists wish to type a written answer to a question and response will be public.
- **Ensure attendee privacy** - Click 'type answer' and check the 'send privately' box when typing an answer so only the attendee who asked the question will see the answer.
- **Anonymous questions** - You can allow anonymous questions when setting up the webinar, and nobody will see who submitted the question, not even in the Q&A reports.

## Polling

Create 3 to 4 [polling](#) questions that can be set up before the event. This is a great opportunity to gauge what information your audience is interested in, their level of expertise, and their current understanding or opinions on the content you are sharing.

## Additional interaction tools

You can provide more interaction tools like a "Wheel of Names" to pick people in the session to answer a question

or win a prize. You may also use [Slido](#) and [Kahoot](#) to enhance interactivity and learning.

## Regulate your participants' engagement

Allow [hand raising](#) in the webinar. You can enable or disable hand raising as a host in the "manage attendees" panel. Your host controls will indicate who raised their hand first.

## Promote attendees to panelists

Leverage the expertise of your audience by [promoting attendees to panelists](#) so they can talk and answer questions.

## Ask for feedback

With Zoom Video Webinars, you can send a [post-event survey](#) to collect feedback on the presenters, content, and audience satisfaction. All you need is the URL for your favorite survey tool. As attendees leave the webinar, the survey will launch automatically.

## Breakout Rooms for Meetings

[Breakout Rooms](#) are a great way to have attendees discuss topics in groups or share different content to specific attendees for a short period of time during your event sessions. You can [assign attendees](#) to breakout rooms in real-time, or you can [pre-assign attendees](#).

# Prepare Your Team

Running a successful online event is a team effort! You'll need to prepare your speakers and have your event team aligned to make sure everything runs smoothly.

Depending on the size of your event, you may want to organize your event team into three online event sub teams for successful execution:

- Production Team
- Technical Team
- Presentation Team

## Production Team

### Streamline your production team

It's ideal to have one producer or one production team for each event. This provides the team real-time decision making authority and eliminates event management confusion.

It's important for the production team members to remain in regular contact and to stay aligned on the current action items. Create a private Zoom Chat channel for each event so that teams can collaborate easily.

Your production team should work in tandem with your technical team to determine and implement the appropriate security requirements. You can view our latest [security guide](#) to learn how you optimize these measures in Zoom for your virtual event.

### Create a production schedule

A production schedule serves as the master plan for your event. It includes a timeline of all of the sessions, presenter information, transitions, procedures, or milestones to hit over the course of the event. The production schedule breaks the event up into segments and lists which guests will appear when, for how long, and when breaks will take place. The schedule should be shared with all teams.

### Create a panelist schedule

If you have a panelist presentation, consider creating a panelist schedule for the Q&A section. Craft your questions in advance and include time allotted per answer. Providing this Q&A schedule will ensure that panelists have meaningful responses, don't run over time allotted, and the panel content stays on track with the theme of the presentation. The moderator is then able to drive the panel forward without major disruptions.



## Whiteboard Event Workflows

Clearly define and visualize your online event experience. Below is a workflow diagram of a common event setup. Creating this type of diagram in advance helps align the presentation, production, and technical teams.

### Production Schedule

11:15 - 11:30 AM: Practice Session Room

11:30 - 12:00 PM: Panelists Discussion

12:00 PM - 12:15 PM: Panel Q&A

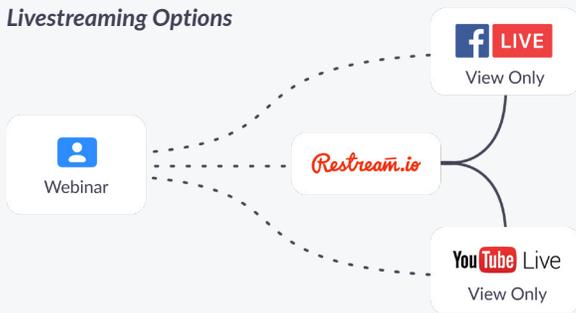
### Technical Checklist

Moderator: 1

Panelists: 5                      Q&A: Yes

Est. Attendees: 500              Chat: No

### Livestreaming Options



## Technical Team

### Technical readiness

Set up and verify account settings, equipment setup, check audio/video quality, and content hosting.

### Practice with the technology

Encourage every speaker to join a practice session. Review the [meeting](#) / [webinar](#) setup and have presenters practice with managing host controls. Do a test tech runthrough to ensure everyone has the camera and microphone that they will use the day of the event. Be ready with backup equipment in case there is a hardware malfunction on event day. Ideally, have presenters join from where they



are going to present from on the day of the event. If they don't have the right setup, consider sending them a tech pack with a camera, mic, or lighting.

### Provide clear instructions for participant audio

Zoom computer audio has superior voice quality over telephone (aka PSTN or telephony) or other providers' computer audio because it:

- Uses higher clarity broadband audio (HD voice), whereas telephone audio uses narrow-band audio, usually resulting in muffled sound.
- Leverages advanced audio processing technologies to suppress all types of noise – it cancels echos for full duplex conversation and removes room reverberation.
- Has user-friendly features such as audio feedback detection and automatic mute reminder.

### Have panelists join on the day of the event using the email address specified on the production schedule

You can [invite panelists](#) to join a webinar via a Zoom Webinar link, a Zoom Room, or an email.

**Demo what your attendees see** - Test the Gallery View, Active Speaker View, [Spotlight Video](#), and Follow Host.

**Livestreaming** - With Zoom, you can livestream to [Facebook Live](#), [YouTube Live](#), or another [custom service](#).

Be sure to consult with an external company's engineering team to ensure a smooth live broadcast. To stream to multiple platforms at once, use [restream.io](#), a service that our customers love.

**Prep for recording** - Decide who is responsible for this process and how it will be done. You may wish to record to the [cloud](#) or [locally](#).

## Presentation Team

### The event host and panelists set the tone for the event

Practice and preparation beforehand will ensure your audience has the very best experience. Here are some pro tips:

**Presenter prep** - When rehearsing with speakers, make sure they're able to see how their performance comes across online. Share tips on engaging the audience and planning for seamless transitions throughout the agenda. Don't be afraid to provide feedback. Send presenters Zoom how-to resources ahead of time, so they come to the tech run fully prepared.

- **How-to videos** - Presenters can view [videos](#) on how to manage Zoom Meeting and Video Webinar functionality. They can host like a pro with skills for [Meeting controls](#).
- **Hosting roles** - Be sure to understand hosting roles. Leverage teammates to help your hosting efforts by mastering [host and co-host controls in a meeting](#), [roles in a webinar](#), and [alternate hosts](#).

**Minimize background noise** - Try to host your event in a quiet place. Use a wired headset with a mic; it is a general best practice for higher-quality audio as it often reduces background noise better than other built-in options.

**Provide a broadcast-quality experience** - This may involve rearranging your existing setup and finding a space where you can still present the look and feel of a main stage.

**Hardwire your internet connection** - This will help you avoid any tech issues with an unstable wifi connection, which can affect your audio quality and the overall attendee experience.

**Select and set up your background** - Use a [virtual background](#) for all presenters with consistent branding, design, or with your company slogan.

**Dress to impress** - You'll be on video, so be sure to wear business attire. We recommend solid colors as opposed to patterns. Be mindful of any accessories or jewelry if you are expressive with your hands as the noise and movement can be distracting. If you have a green screen to display a virtual background, make sure that you wear

colors that are different from your background.

**Set proper expectations** - Make sure you deliver on the content that was promised in the promotions leading up to the digital event.

**Start on time** - We recommend you start your event 5 to 10 minutes early to allow your panelists to join [the practice session room](#) before the content kicks off.

**Screen names** - Adjust screen names to include company names as well.

## Sample opening script

### Welcome statement

*Good afternoon everyone, and welcome to today's general member webinar from XXX. Today's webinar is focused on XXX.*

### Housekeeping details

*Before we get started, I'd like to go over a few housekeeping items, so you know how to participate in today's event.*

*At any time during the webinar, you'll have the opportunity to submit your questions to today's presenters. To do so, just type your question into Q&A at the bottom of the control panel.*

*As time allows, the presenters will address as many questions as they can during the Q&A session at the end of the presentation.*

*We will be recording this webinar and will share the link after the event.*

### Introduce Presenter(s)

*Without further ado, I'd now like to introduce XXX, the CEO of XXX, or the presentation team. Enjoy the presentation.*

# Promote Your Event

When promoting your event, you will need to combine compelling messaging with visual assets that persuade target prospects to attend the event. Here is a list of marketing tactics to consider.

## Create a landing page/event website

Your landing page or event website should clearly communicate why visitors should attend the event and promote your brand. Your landing page/website should include the event schedule, sessions, speakers, and other important event information. You should also link Zoom Meetings or Webinars to sessions on the agenda.

Some components to consider for an effective landing page/website include:

- Persuasive headline
- A brief event overview
- Video trailer
- Speakers section
- Agenda
- Exhibitors and sponsors
- Resources
- FAQ
- Imagery that supports your message
- Registration page

## Optimize your registration page

Ensure your [registration page](#) is easy to access and customized with your company's logo, color scheme, title, banner, and speaker information. Create custom questions on your registration page to capture valuable information about your registrants so that you may tailor the event for your target audiences' interests.

## Market at the right time

Timing your marketing efforts prior to the event is important to drive the highest attendance. Typically marketers start promoting a minimum of 2 to 3 weeks before the online event.

## Website promotion

Link to your landing page from your main website, and call out the event with banners or hero images. Don't forget to optimize your landing page for SEO.

## Live chat

Some landing pages use live chat to help sell large-ticket events. If you already have live chat on your website, consider adding event pop-ups to the chat window.

## Email marketing

Send marketing emails and reminders. A/B test your subject lines and consider 2 to 3 mailers prior to the event to maintain awareness. Consider using video content in emails to get prospects and registrants excited about the event.

## Press release

A press release can help build awareness for a large customer conference. Select the best industry publications to reach your target audience. Write a compelling event value proposition and highlight notable speakers so readers and journalists will share the event on social media.

## Content marketing

Write blogs and articles on the event topics. Share educational content with your target audience and use the right keywords to increase your organic traffic.

## Leverage social media

Create a Twitter hashtag, create Facebook ads, post on LinkedIn, and share pictures on Instagram to get your social media followers buzzing. And don't forget to encourage social sharing from their own accounts and Zoom Webinar registration pages.

## Leverage your partners and speakers

It's important to tap into your partners' and guest speakers' networks as well. When promoting an event, be sure to include stakeholders in your strategy meetings

so they can help in brainstorming a promotion plan and executing it across their personal and professional networks.

### **Turn on webinar registration source tracking**

Discover what promotion efforts are most effective with [source tracking](#).

### **Test and optimize for mobile**

Ensure your event landing page or microsite is user-friendly on mobile devices.

## **Post-Event Follow-Up**

After the event is over, gather attendee satisfaction, and make sure your next event is even better by performing the activities below.

**Send out a wrap-up/post-event survey** - Capture feedback from attendees on what worked well and areas for improvement.

**Review recorded content** - Review recordings and edit the transcripts for obvious mistakes. You may also edit out the beginning or end of the recording.

**Make recordings available for on-demand** - Collect registration data from people that did not make it to the live event by making the webinar available [on-demand](#).

**Email recordings** - Send an email to attendees/registrants with a link to the event recordings and additional resources.

**Assess reports** - [Meeting reports](#) provide data on registration and polling. [Webinar reports](#) provide data on registration, attendees, Q&A, polling, and event performance. Generate reports to gain insights from questions and answers, identify your registrant/attendee ratio, and review engagement statistics.

**Qualify leads** - Leverage the insights from reports to qualify leads and utilize the key integrations listed above to funnel leads to sales.

**Identify learnings to improve execution on future online events** - An online conference allows you to track how people engaged with the speakers and content in much more detail. Once the event is over, make sure you assess what worked. Did a particular topic spark more questions and comments than others? Were your attendees engaged? Leverage these insights to make your next online event even better than the last.

Hosting an online event might be uncharted territory for you - but if you've got the right plan, technology, and talent in place, it's sure to be a huge success.

Learn how companies like [Complyport](#) and [Dynatrace](#) have been using Zoom to run live events.

If you would like professional assistance in planning, preparing, and executing your online event, contact Zoom's [Online Event Consulting Services](#). You can also register for a Zoom [webinar](#), read our blog post on [Best Practices for Hosting Digital Events](#), or contact Zoom to learn more.