



INDIANA UNIVERSITY

VIRTUAL EVENT GUIDE

STEP BY STEP PLANNING GUIDE FOR VIRTUAL EVENTS

OFFICE OF UNIVERSITY EVENTS

JANUARY 2022

Step 1: Design Your Event

It can be helpful to approach the design of a virtual event in the same way you would a live event. Ask yourself questions such as:

- What is the purpose or goal of this event?
- Who is the target audience?
- How many attendees do you expect?
- What is your event agenda or program?
- What will be the format and length of the event?
***Best practice alert:** Keep virtual events to no more than 1 hour and consider spreading longer events over multiple days.*
- Will there be a 30-minute presentation from a single speaker, followed by a 30-minute Q&A?
- Could it be an hour-long panel discussion based on pre-submitted questions?
- Would breakout sessions be helpful for further discussion?
- How will you engage your attendees?
***Best practice alert:** You might consider a few different options to keep your audience engaged.*
- Will you encourage audience participation through the hand raise, chat, poll, or Q&A features or shared screen features?

These decisions will inform your next steps.

Step 2: Choose Your Date(s) Carefully

Do your dates conflict with a major University event? Not Sure? Visit the [IU Events Calendar](#) and your campus and/or department official academic calendar for dates to avoid.

Step 3: Build Your Team

Who are the key players producing your virtual event?

Best practice alert: Besides the speaker or panelists, it is advisable to have a “supporting cast” of two or more non-participating assistants for any virtual event.

The primary person will have full Zoom “host” controls and will be responsible for any behind the scenes technical aspects of your event.

A backup to person(s) with Zoom “co-host” controls is helpful to:

- Moderates chat, polls, Q&A
- Removes disruptive attendees, if needed

Breakout Room Moderators – If including Breakout Rooms in your event (only available for Zoom meetings, not webinar), these moderators will facilitate a productive discussion. This may or may not be your event speakers/panelists.

Panelists and Speakers – By building a skilled event production team, speakers & panelists will be empowered to give their full attention to engaging attendees with content.

Step 4: Determine Technology Needs

Start by consulting this [Zoom Guide](#) from UITS for general Zoom documentation. Then, determine whether a meeting, webinar or livestream is most appropriate for your event using this [Meetings vs. Webinar Guide](#).

All Indiana University staff, faculty, and student Zoom accounts support independent hosting of Zoom meetings as an event platform.

If your organization would like to host an event using a Zoom Webinar license, it can be requested by contacting [UITS Videoconferencing Support](#).

Remote CART is a real-time text service that allows event attendees to read what is being said on a laptop, tablet or smartphone. Some people may refer to Remote CART as live captioning. For more details on providing ADA accommodation, you may contact the [Office of Institutional Equity](#).

Step 5: Adjust Zoom Settings & Controls to Protect Your Event

Careful consideration of Zoom settings is critical to a successful event.

Best practice alert: *Understanding Zoom settings helps to assure a smooth-operating virtual event. Without the proper settings, your event could be compromised by the sharing of inappropriate content by a rogue attendee, also known as “Zoom bombing.”*

For help navigating Zoom security settings and controls for your event, consult the [UITS “Prevent Zoombombing using Zoom privacy and security features.”](#)

It is important to ensure that the most current version of Zoom is being used prior to starting a meeting. Zoom requires you to update your software if it’s more than nine months behind the current version. If your version of Zoom software is older than nine months, you will be blocked from joining meetings until you upgrade. For help, see [Upgrading Zoom to the latest version.](#)

Note: Not all settings can be adjusted through the Zoom Chrome extension. To review and change your account’s settings, access Zoom through the zoom.iu.edu portal.

Step 6: Choose a Registration Platform

To further enhance the security of your event and reduce the risk of Zoom “bombing”, only provide Zoom access links directly to registered or invited participants, not publicly posting links.

If your event is being recorded, it is important to notify all participants prior to the event that their images and/or names will be recorded and potentially broadcast and provide them with opt-out instructions if they do not want their identities captured. Zoom also offers a free registration feature with options to manually approve registrants and pre-assign attendees to Breakout Rooms (in Zoom meetings only, not webinars). However, opportunities to brand your registration page and communications are limited.

Step 7: Promote Your Event

Share event details according to your audience. [Register](#) your event with the University Events Calendar and [submit](#) to be published in your [IU Today](#) campus newsletter.

Consider scheduling reminder emails as your event approaches. If you are using visual components like slides and polls, or facilitating Q&A, make sure to encourage attendees to join by computer and not by telephone in your pre-event communication. Otherwise, attendees may be disappointed by missing out on key content.

Best practice alert: *For Zoom webinars and live streams that are intended to be publicly available, include a Zoom URL in the invitation. Otherwise, it's best not to share the meeting URL publicly.*

Step 8: Prepare Your Speakers

When inviting panelists and speakers to participate, obtain permission to use images – this will help you promote the event to attendees and share event content when the event is over.

If applicable, gather and organize content for a presentation, creating slides with the University or department logo when appropriate. (Consult the University's [branding](#) policies and approved [digital resources](#).)

Best practice alert:

- *Consider including a welcome slide that will be posted for attendees that join before the event begins. This can be a PowerPoint slide shared as a [screen share](#).*
- *Schedule a practice session with speakers and panelists to test software, applications, and your Zoom settings and controls. This can be done as a separate Zoom meeting link for Zoom meetings, or within the settings for a [Zoom Webinar practice session](#).*
- *Have each participant practice muting/unmuting, turning their video on/off and sharing their screen if presenting material.*

Step 9: Produce Your Event

Just as in an in-person event, a little preparation goes a long way. Key players should receive a briefing and agenda at least 24 hours in advance. On the day of your event, consider having the host (the person responsible for the technical components of your event) login in advance to confirm settings*, controls, and the video/audio connection. Speakers, panelists, and co-hosts should connect at least 20 minutes prior to test their connection, find the best lighting and review the agenda.

*If your Zoom settings have been set to mute participants upon entry, disable screen sharing or video – don't forget to give your presenters back their permissions. Many of these settings are accessible through [host controls](#).

Step 10: Follow-up With Attendees

After the event, use Zoom to generate an [attendee report](#) and follow up to share recordings or resources that were discussed, conduct a survey to collect feedback from attendees that may help you plan future virtual events, and/or market future events.

Note: If a meeting is setup to record video, that video will available both in the host's [zoom.iu.edu account](#) and [Kaltura](#) account. It may take up to a few hours for the video to finish processing.

If your event is highly complicated or a signature Event, you may contact IU Event Pro for consultation at eventpro@iu.edu.

Sources:

"Step by Step Planning Guide for Virtual Events." Virtual Events Planning Guide | University Event and Conference Services | Brown University. Brown University. <https://www.brown.edu/offices/events/events-toolkit/virtual-events-planning-guide>.

"Virtual Recognition Event Toolkit." University Events. Indiana University. Accessed January 7, 2022. <https://universityevents.iu.edu/doc/Virtual-Recognition-Event-Toolkit.pdf>.

"Indiana University EventPro." University Events. Indiana University. Accessed January 7, 2022. <https://universityevents.iu.edu/images/Indiana-University-EventPro-v3.pdf>.

INDIANA UNIVERSITY
OFFICE OF UNIVERSITY EVENTS

DeVault Alumni Center
1000 E. 17th Street, Bloomington, IN 47408
(812) 855-3762 | virtueco@iu.edu



INDIANA UNIVERSITY