



**sidecar**

**Virtual Event  
Planning Checklist**



# Virtual Event Planning Checklist

Virtual events aren't going away anytime soon. Virtual event planning has become a new frontier that marketers, association leaders, and event planners are navigating together.

In many ways, executing a fun and engaging virtual event can be even more challenging than doing the same thing for an in-person event. Instead of working with caterers, AV technicians, and venue staff, you're juggling multiple tech platforms to get the exact features you want your event to have.

To make sure you cross all your t's and dot your i's during the process, we've created a helpful virtual event planning checklist to use for your next event.

## Virtual Event Planning Checklist

### 1. SET GOALS AND KEY PERFORMANCE INDICATORS.

Before planning even begins, the first thing you need to do is take a step back and assess whether a virtual event is the right solution for the goals you're working toward, and identify the reason for your event. Ask:

- Why are you planning an event?
- What do you want to achieve?
- Who is the event for?
- How will you measure success?
- What KPIs are most important?

Write down your goals and KPIs. This should be the driving force of your event decision-making moving forward.

### 2. VISUALIZE THE EXPERIENCE YOU WANT TO CREATE.

What do you want your virtual event to be like? What do you want your attendees to feel and walk away with? How will it overcome the Zoom fatigue your attendees and guests are plagued with? How will this event be different from a typical webinar? Consider the types of features you want your technology platform to have, and if there will be any hybrid or physical elements incorporated into the show.

The same level of energy, thoughtfulness, and attention to detail in planning an in-person event should go into planning your virtual event.

By the end of this step in the virtual event planning checklist, you should have a wishlist full of your desired features and event experience.

### **3. CREATE A ROUGH BUDGET.**

The costs of a virtual event add up quickly. Your virtual event budget should be comparable to the budget you would dedicate toward a traditional in-person event. Here's an example of a few important costs to include in your virtual event budget:

- Pre-production marketing, design, video footage and editing, etc.
- Platform and technology infrastructure
- Equipment for speakers (microphones, webcams, ring lights)
- Team support

Download our ebook for expert insights on the costs of virtual events.

### **4. ASSEMBLE THE RIGHT TEAMS.**

You'll need to decide which parts of the event planning and production you're keeping in-house, and which parts you'll outsource. Some examples of roles you will need to fill are: event manager, event producer, technical support, content support, marketing support, host/emcee, and coordinators to help with sponsorships, day-of audience engagement, registration, and speaker coordination.

### **5. DECIDE YOUR EVENT DATE AND TIME.**

Consider whether your event will take place over one day or multiple days. Keep Zoom fatigue and at-home distractions in mind while making your decision.

### **6. CREATE A MARKETING PLAN.**

Just like an in-person event, no virtual event will be successful without strong marketing. Work on your event name and branding, and hash out a plan with a timeline detailing how you will approach marketing. Determine if you are creating a new website for your event, and map out a development and launch schedule.

### **7. SELECT SPEAKERS AND REACH OUT TO SPONSORS.**

A wonderful benefit of virtual events is the ability to invite speakers from all over the world to present, as you don't have to worry about geographic constraints. This broadens your pool of potential speakers to choose from!

If you are soliciting sponsorships for your virtual event, now is the time to create packages and start reaching out to potential sponsors. You can find a list of interesting ways to bring value to sponsors in our new ebook!

### **8. RESEARCH AND SELECT TECH VENDORS AND PLATFORMS.**

Approach your event platform selection the same way you'd approach selecting a physical venue. Think about your must-have features and nice-to-have features for attendees, as well as the necessary logistics required like managing registration and live streams. Keep in mind you'll likely need to involve multiple tech platforms to secure all of the features you're looking for.

## **9. PREP SPEAKERS.**

Introduce your speakers to the event platform so they know how it works and how to use it prior to their presentation. This helps the event go smoother and quells their anxieties.

## **10. PREP ATTENDEES.**

Leading up to the event, stay connected with your attendees to let them know what to expect and how to log into the platform. Explain how the conference will work, and educate them on how to navigate their way through the experience.

## **11. ORGANIZE AN ENGAGING AGENDA.**

Make sure your agenda is Zoom fatigue-friendly. Keep keynote sessions around 20 minutes long, and work engaging elements like Q&As, trivia, and live polling into the event to keep the audience involved.

## **12. ENABLE NETWORKING.**

Include networking capabilities in your event platform so attendees can enjoy more of the real-world event attendee experience.

## **13. GO LIVE!**

Remind attendees when and where to log into the event, keep them engaged during sessions, have support teams ready to troubleshoot tech issues. Enjoy the show!

## **14. ANALYZE DATA.**

A major benefit of virtual events is the ability to collect insightful, detailed data that's not possible to do in in-person events. Review your data to see if your KPIs were met, how the audience reacted to specific sessions, and what you'll want to ditch or replicate in your next virtual event.

Thank you for reading our ebook on event management lessons from the pandemic! We wish you the best of luck in creating meaningful experiences to engage with your audiences.

Have you implemented any novel approaches in your virtual events? What event management lessons have you learned from the pandemic? We want to hear from you!



## About Sidecar

At Sidecar, we create the professional development tools a leader needs to grow their career and their purpose-driven membership organization. From interactive workshops to step-by-step courses, being a part of our community drives innovation and empowers you to be a change-maker wherever your career takes you.



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If you want to go, go. But if you want to go far, go with Sidecar.



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