



# Virtual Event Planning Checklist

Event name: \_\_\_\_\_

Date(s) of the event:

Main event planner:

Start time:

Name:

End time:

Phone:

URL:

Email:

**Note:** because every event is different and mainly because many tasks need to be started simultaneously, this checklist is organized according to project workflows. Within each project workflow, the tasks are organized chronologically.

## Strategy

**Determine the goals and objectives (KPIs) for your event:**

Monetization, conversion, or brand awareness?  
How many attendees are you planning to reach?  
Other success indicators

**Choose a date and time:**

Check that it doesn't clash with holidays or other major events. Try to go with what would be most convenient for most people in your target audience.  
If your audience spans different time zones, take that into consideration. Can you find a time and date that suits all your time zones, or should you plan several streams? Consider using Simulive and the "Follow the Sun" model in this case.

- Work out a budget to cover all the items in your event playbook, including:**
  - Virtual Event Platform
  - Equipment
  - Speaker fees
  - A/V
  - Support team
  - Sponsor enablement
  - Production companies
  - Other vendors (freelance writers and graphic designers, entertainment acts, ...)
  
- set up your event dream team and reach out to them straightaways.** Make sure to select team members who can "carry" tech conversations and understand tech solutions. Get everyone aligned and ready to act, from the marketing team to sales agents, film crew, call center agents, executives, contact people, etc.
  
- Create a spreadsheet listing all the tasks and deadlines pertaining to marketing, tech, speaker details, social media, graphics, etc.**
  
- Determine registration fees**
  
- Have your income and expense report**
  
- Debrief with key people**
  
- Wrap up your income and expense report**
  
- Process event data and analytics:** assess your ROI, follow up with sponsors and speakers with performance reports, collaborate with your Sales team to follow up on leads.

## Content and production

- Set up an event playbook that covers your event in detail**
  
- Identify and confirm speakers, hosts, and entertainment acts**
  
- Book A/V contractors and freelance photographers and start planning the shooting** (live/Simulive vs on-demand, in a central studio or at the speakers' homes, ...). Think about behind-the-scenes, interstitials, event branding videos, and shots of your team and the organization, if they fit your storytelling strategy.
  
- Update your event website with the latest schedule, speakers, special guests, etc.**
  
- Follow up with your speakers, hosts, moderators, and entertainment acts:**
  - Work on presentation topics
  - Agree on interactive features for your speakers' sessions
  - Request speaker bios and photos (update these on your event landing page and share in social media posts)
  - Finalize contracts

- Schedule prep meetings with speakers to discuss talking points.** Share speaker prep kits with important event details and virtual event best practices
- Start planning and recording keynotes and presentations you plan on streaming Simulive** (pre-recorded content that is live streamed with live audience interaction features)
- Review roles and responsibilities with event team**
- Distribute final scripts and event timeline**
- Create and distribute contact list of all staff and vendors**
- Speaker/entertainer rehearsals**
- Make all your event content available on-demand and send word about it to anyone who's signed up**, even if they didn't register. Make the content available on your website or use it as marketing collateral in upcoming campaigns.

## Tech

- Choose your virtual event platform.**

Consider all the features and specs you'll need for this (and future) event(s). For instance:

  - Strong streaming capabilities
  - Localization - Multiple languages, follow-the-sun broadcasting options
  - Branding - Fully branded platform
  - Hyper-personalization. You'll have executives, press, analysts, VIPs, sponsors, employees, and other groups in your events. Not all should have the same experience and journey.
  - Make sure to choose a platform that offers analytics - Unlike in-person events, the virtual experience allows you to track and capture all types of users' behaviors and engagement levels and integrate them into your databases.
  - Choose a platform that might take on additional services you'd like to outsource (white-glove production support, design, planning, ...)

We can't be objective here, sorry. We recommend Kaltura virtual events. [Click here to see what we love about it](#)
- Assess the technical needs of your speakers and hosts during the event** (cameras, microphones, lighting, backgrounds, etc.) and sync with your A/V contractor
- Make sure your tech stack is ready and do a dry run.**
- Pre-event dry run and tech check with all speakers (at least one hour ahead)**
- Complete and double-check all virtual event settings on your virtual even platform.**

## Creative/Design

- Brand your event:**
  - Build a landing describing your event, add some teaser videos, the agenda (even a preliminary one), speaker bios, etc. Your goal is to get people to sign up, so have a clear CTA just for that. Keep your landing page and schedule updated as you progress with more speakers and acts
  - Create event graphics and copy for email blasts and social media
- Place orders:** branded studio backgrounds, keynotes, and main video assets, branded shirts, swag bag items, ...
- Request logos from corporate sponsors and partners to include on the event landing page,** as well as other design assets you'll need as per the sponsor agreement
- Develop an online social media action kit to promote your event.**
  - Include design assets, suggested posts, handles and hashtags. Involve employees, speakers, entertainment acts, sponsors and partners, family, and friends.
  - Consider a contest as a way for attendees to spread the word to their social following. If so, it should happen a few days before the event or on the big day
- Create all event slides and graphics**

## Sponsors

- Make a list of prospective sponsors and partners**
- Finalize sponsor levels and benefits**
- Build sponsor packages**
- Sponsorship and partner follow-up:**
  - Confirm and finalize sponsorships
  - Confirm that sponsors/partners have all necessary event details
  - Make sure sponsors/partners post about the event on social media

## Experience

- Draft event scripts and a timeline**
- Draft event sitemap**
- Think about ways to add interactivity to your virtual event** – don't let your attendees sit passively and isolated in front of their screens
- Assign staff duties during the event**

## Demand Generation

- Compile email lists and VIP lists**
- Prepare your initial 'Save the Date' announcement of the event with design and copy** (tagline, description, initial agenda) and mail it to your lists.
- Build your promotional plan.** Make it a blend of articles and guest posts, paid ads on Google and social media, press releases, and design assets on your website
- Set up and enable online registration**
- Think about your online presence and opportunities** (hashtags on social media, live polls and Q&A, contests, ice breakers, etc.)
- Send another email blast with updates about the event**
- Increase the visibility of your event on social media with organic and sponsored posts**
- Send event confirmation/reminder email to attendees**
- Personally contact key attendees (VIPs)**
- Confirm media interest**
- Create an event survey and share it with attendees**
- Send thank you emails to event participants** including speakers, attendees, sponsors, and partners. Include any final call-to-action, such as discounts on products or membership, registration
- Share event highlights on social media**

**Note:** *This checklist might not include everything you need. It is intended to help and guide you in developing your own play-book, strategy, and checklist. Each event is unique, and not all items will be relevant to your event. You can hire a [virtual event management company](#) for A-to-Z support of your event. Kaltura Virtual Events also offers planning and design event services and full white-glove operations support to deliver a smooth and professional experience to your audience.*

Ready to tick a major item off your list?  
**Check out Kaltura Virtual Events!**

[Learn More](#)