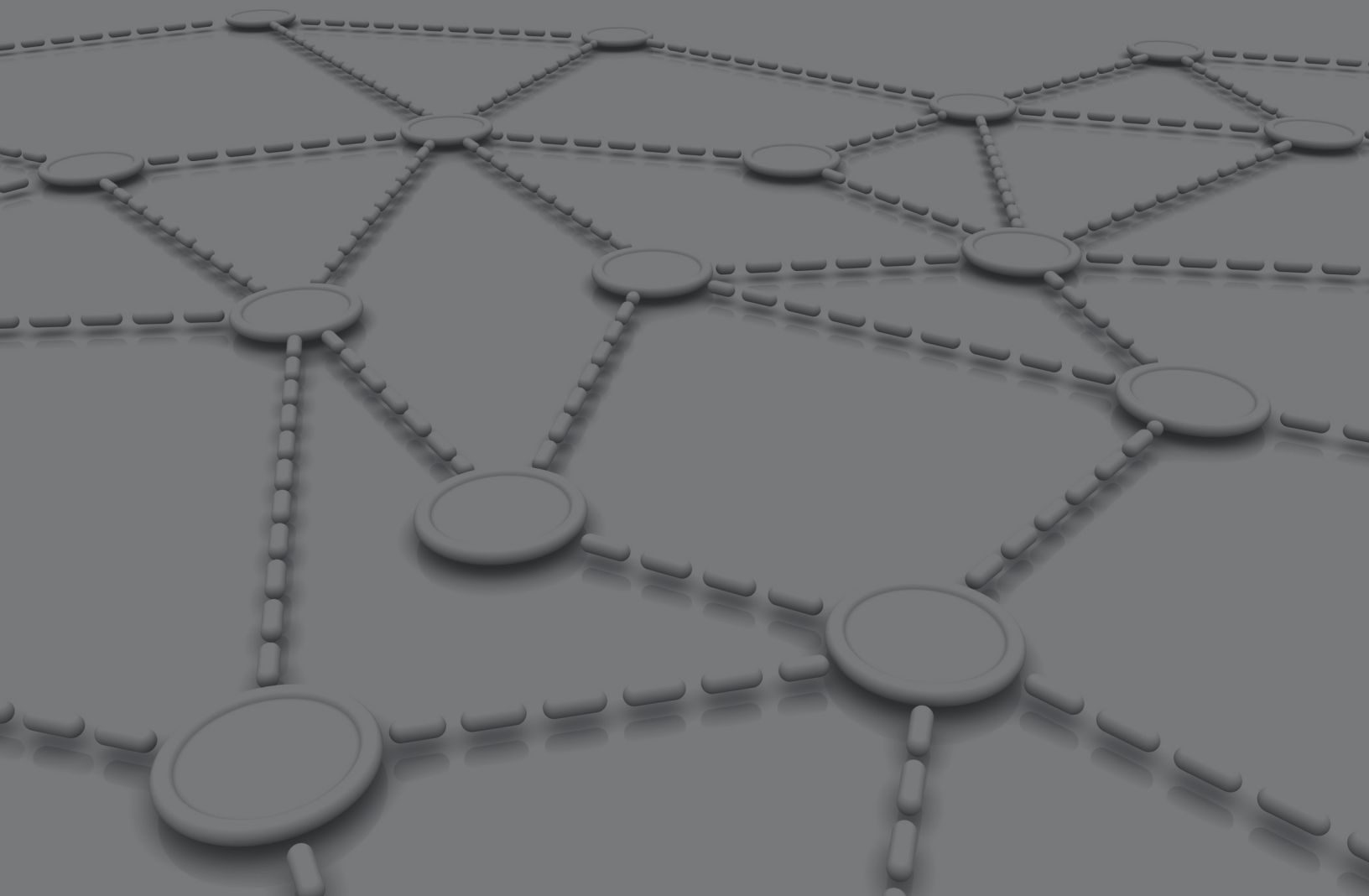


GO VIRTUAL:

# BRING INFORMATION SHARING TO LIFE

By marrying the best aspects of traditional event delivery with unique tools, techniques and practices, **virtual events** offer a compelling alternative to in-person events.



# INTRODUCTION

**For most government, commercial, and non-profit organizations, bringing together people is an essential part of their mission. Events provide a venue for people to:**

- Build career and technical expertise
- Enhance professional development
- Form connections and relationships
- Foster knowledge sharing

Over the past decade, a number of factors, such as shrinking budgets and limited travel, have increasingly led organizations to scrutinize in-person events. Further, tracking and justifying the return on investment (ROI) for these activities can be difficult. While there are recognized benefits to holding events, it can be difficult to quantify these benefits or capture the necessary metrics to measure the impact.

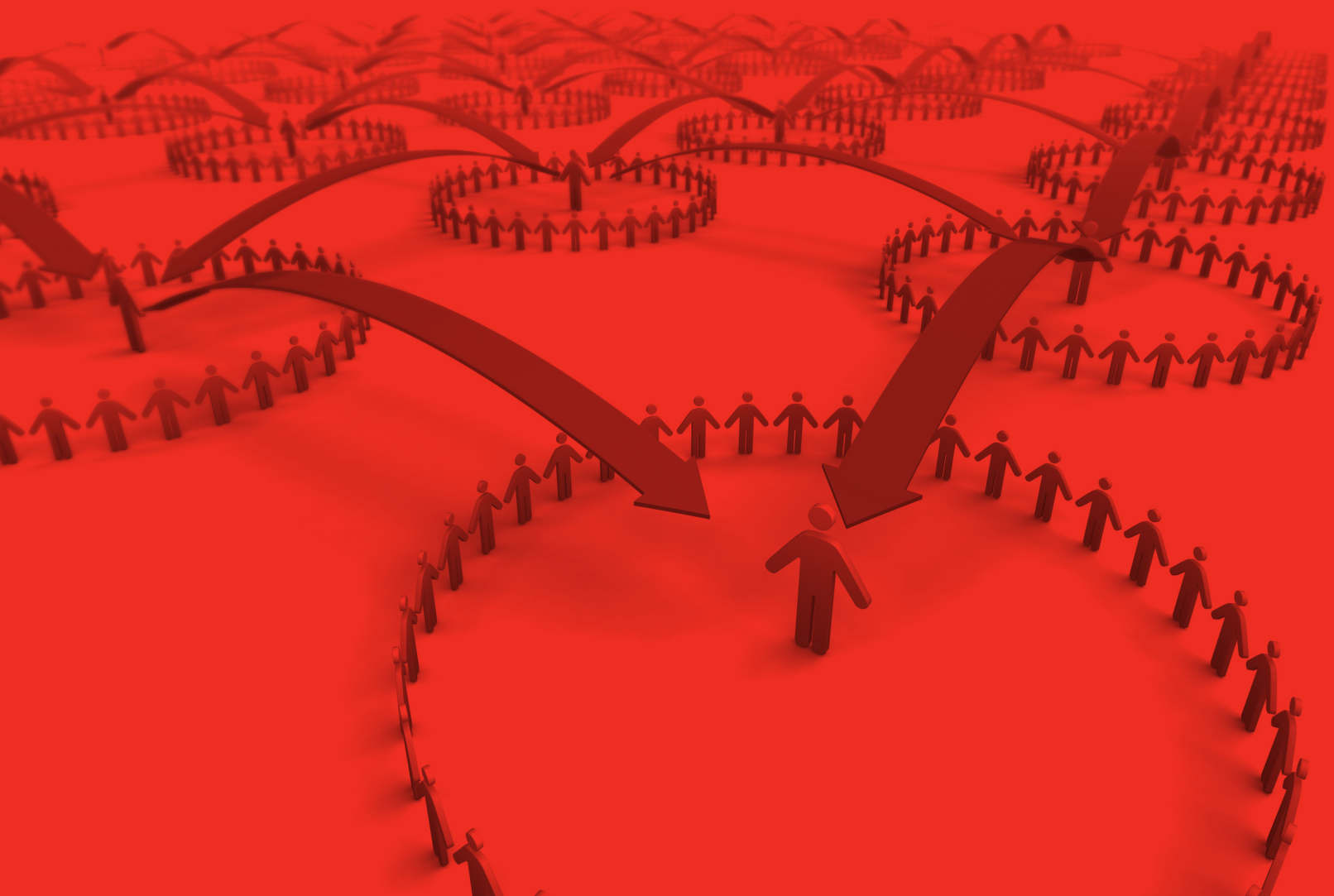
So how do organizations advance their missions in this restrictive environment? Go virtual. As access to the Internet becomes more universal, taking the event out of the conference room or classroom and into virtual space is a viable option. Hosting an online event eliminates travel and facility costs while maintaining the core purpose and adding enhanced features and functions that are only available virtually.

Improvements in technology—the proliferation of mobile devices and high-speed internet—have led to new solutions for conducting conferences and events in virtual environments. Through robust hosting platforms with simple user interfaces, the benefits and value of in-person events can be achieved for lower monetary and time costs. Add in the convenience of mobile devices and virtual events become possible anytime, anywhere.

Going virtual is more than just replacing the brick and mortar with bits and bytes. Virtual events offer advantages over in-person events like expanded access, up-to-the-minute metrics, integrated multimedia (like animation or simulation), and online archives for playback and reuse. By marrying the best aspects of traditional event delivery with unique tools, techniques and practices, virtual events offer a compelling alternative to in-person events.

Keep in mind that transitioning from in-person to virtual events requires more than choosing a platform and pushing a few buttons. Event planners, managers, training coordinators and content developers must be prepared to take extra planning measures to help audiences and stakeholders adapt to the new approach.

A successful transition needs  
**buy-in from leadership** and  
acceptance by stakeholders  
and target audiences.



# GETTING STARTED

**Shifting to virtual events requires more than simply accounting for new technology. A successful transition needs buy-in from leadership and acceptance by stakeholders and target audiences. By creating a comprehensive business plan that addresses the key concerns of each group, the move to virtual events becomes much easier. Planning is crucial. Building the case for adopting virtual events requires a thorough examination of current practices:**

- Has the organization ever sponsored a live event?
- What did that event look like?
- Where was it held?
- How was it structured?
- Who attended?
- What kind of feedback did participants provide about what they liked most and least about the event?

Any aspects especially valued by participants should be preserved and incorporated into the virtual business case and requirements. The organization must define parameters for the audience's understanding of technology so that the appropriate platform is deployed. Participant surveys and interviews can clarify their capacity for new and different technology. Finally, the business case needs to demonstrate the value of online events by proving that critical in-person event activities can be re-created, replicated or replaced virtually.

# CHOOSING A PLATFORM

**When adopting a virtual delivery model, the hosting platform accounts for the largest upfront investment. Choosing the right platform can make the difference between a successful virtual transition and a complete disaster. Virtual event technology has improved at a rapid pace and come a long way from simple screen-sharing applications available just a few years ago. Today's virtual event platforms provide robust environments that support an array of features and services like streaming audio and video, breakout rooms, avatars and 3D environments, desktop sharing and collaboration, chat pods, multiple virtual meeting rooms, closed captioning and interactive polling. Each platform has specific strengths and weaknesses—meaning there is not a perfect "one-size-fits-all" solution.**

Selecting a platform starts with identifying key requirements. Which features are essential? Are there technical requirements critical to success or widespread integration and participant adoption? Gathering a full range of requirements will make it far easier to winnow the field of platforms before making a selection. At this stage, it is also important to have a clear understanding of how the platform will be used.

For instance, some virtual delivery platforms are "generalists"—meaning they easily support a wide range of functions. These general purpose platforms are not necessarily "best in class" (i.e., very strong at supporting a specific kind of event or function); but they are strong, multi-purpose utility platforms that can host a wide range of virtual events from small conferences to meetings to training.

Other platforms are far more specialized and excel at supporting specific types of events. They may be designed from the ground up to support large-scale online conferences or may be specialized platforms tailored for training delivery.

Matching platform capabilities with an organization's requirements is the first measure of success. For example, if the organization is primarily hosting training events, it would be more beneficial to select a platform designed specifically for online training.

Rather than bearing the burden of supporting multiple, specialized platforms, an organization may be better off with a single general purpose platform when the plan is to offer a mix of virtual events. This decision should be based on trade-offs between required features, cost and administrative complexity.



Choosing the wrong platform, even one considered “best in class,” may doom the project before it even gets off the ground. A platform designed for supporting virtual hiring fairs, for instance, would not be a good choice if the organization needs to support town hall-style events. The platform’s “best in class” strength supporting virtual hiring fairs is irrelevant to its utility as a virtual town hall platform.

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## CHOOSING THE RIGHT PLATFORM CAN MAKE THE DIFFERENCE BETWEEN A SUCCESSFUL VIRTUAL TRANSITION AND A COMPLETE DISASTER.

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A trusted, third-party partner familiar with the landscape of options can help an organization navigate through vendor demonstrations and feature lists. Using the requirements developed with the business case, the

organization needs to determine how a platform measures against those requirements, which vendors can support the organizations needs and what future needs can be reasonably anticipated.

Properly sizing the platform requires understanding current and potential future uses and audiences. It is possible to “over-engineer” the solution, selecting a platform too large or complex for current needs in the off chance that additional features may become useful to support unspecified future requirements. Making these types of determinations goes back to having clear requirements and expectations for platform use and growth. An experienced partner can help clarify requirements and map different solutions in order to make the selection process easier.

# PREPARING FOR THE EVENT

**Once a platform is selected, event preparation begins. Preparation will have three components: technology, content and communications. Throughout preparation, there should be a focus on helping people adapt to virtual delivery from in-person events.**

## TECHNOLOGY

The virtual platform will need to be configured and customized to meet the event's specific needs and goals. This step may include branding the virtual event space—the online environment in which the event takes place. Some platforms allow for virtual event halls, auditoriums, small meeting rooms and social spaces that encourage participants to engage in activities like keynote addresses, small-group session, informal socializing, one-on-one interviews and online training. The more “at home” participants feel in the virtual environment, the more readily they will take full advantage of the event's activities and resources.

Consider the specific equipment that audiences, presenters and speakers may need to participate, like computers, cameras, headsets and other hardware. What kind of Internet connection is needed? Will participants need to download and install new software? In some organizations, any new software (including browser

plug-ins) must be reviewed, approved and installed by the IT department.

Platforms that work with mobile devices may require installation of mobile apps. Because virtual platforms do require more bandwidth for streaming audio, video and

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**FAMILIARIZING PRESENTERS AND SPEAKERS WITH THE VIRTUAL EVENT PLATFORM AND OFFERING COACHING AND TRAINING WILL ALLEVIATE THEIR FEARS AND PROVIDE THEM WITH THE CONFIDENCE THEY NEED.**

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other multimedia components, network infrastructure may need to be upgraded or improved. Integration with other systems (email, content management servers, authentication, etc.) requires additional planning. For example, to support virtual training, the virtual event platform may need to be integrated with the organization's learning management system (LMS). While these considerations should be factored into the platform selection, adequate lead time and planning is necessary to put any required upgrades into place.

Preparing presenters and speakers for virtual delivery is essential to the meeting expectations. Even seasoned presenters may find the prospect of virtual delivery daunting. Familiarizing presenters and speakers with the virtual event platform and offering coaching and training will alleviate their fears and provide them with the confidence they need.

## **COMMUNICATION**

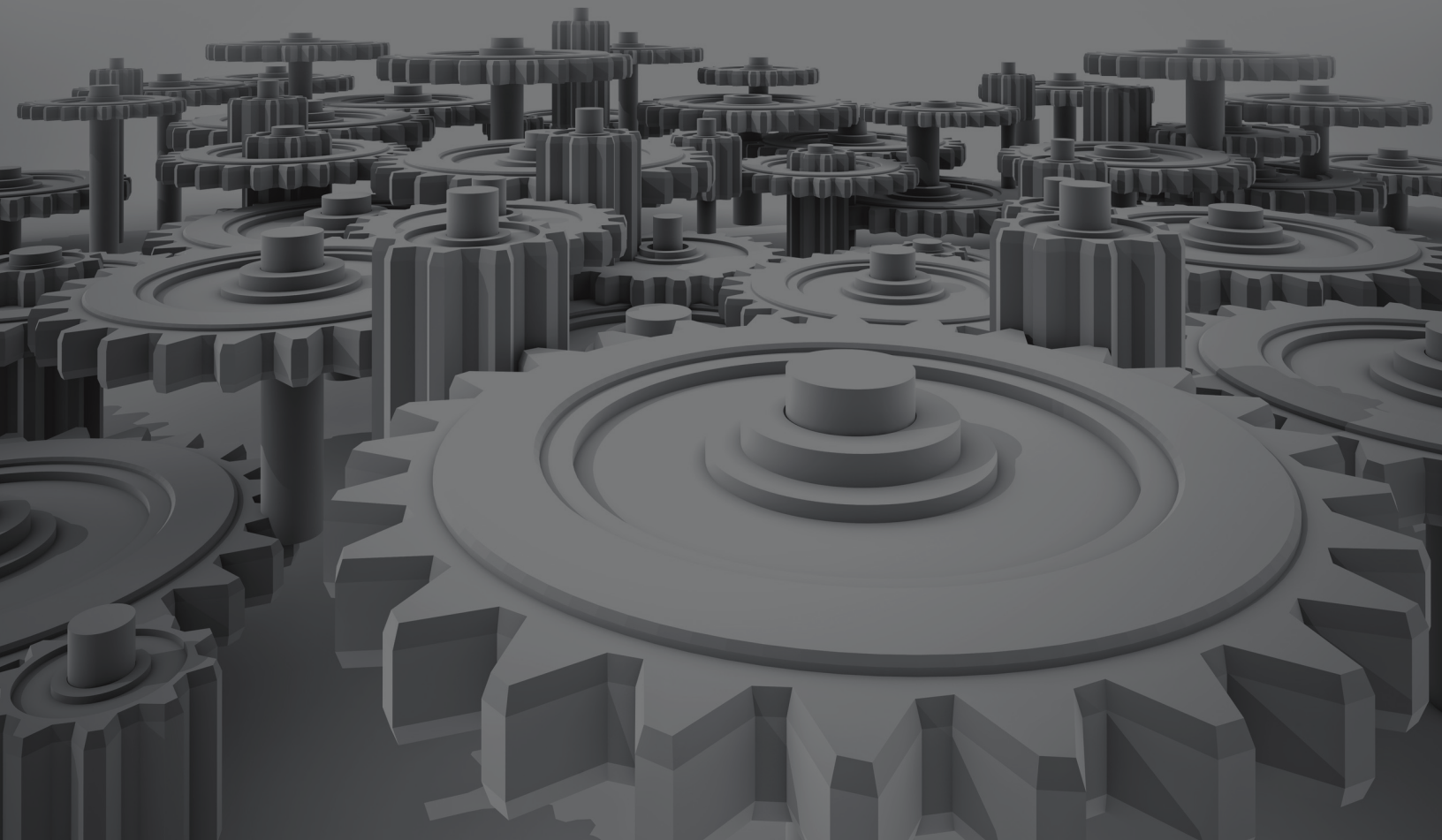
Like a live event, communication leading up to a virtual event is critical. Communication encompasses marketing and publicizing the event as well as getting crucial information to participants, presenters, speakers and other stakeholders. Pre-event communications need to be clear, concise and timely with easy-to-follow

instructions about technology requirements and event preparation. Consider multi-channel communication, including telephone support or online chat, to additionally support participants. A full communications plan including a schedule and content will further reinforce event outreach and ensure maximum participation.

## **CONTENT**

The content, its structure and delivery, should be optimized for the virtual event platform. While live events focus on the person at the front of the room, virtual events emphasize a presentation's visual and audio components. Often presenters are heard rather than seen. Presentations, video, animation, and other media serve as the critical connection point between participants and the content. Graphics, color palettes and format will enhance the message. Video and animation should be optimized for Internet streaming, which may require decreasing resolution or compressing files. Finally, all content should be produced for full accessibility by people with disabilities, including the visually and hearing impaired.

Rather than coordinating people and locations, **virtual event management** hinges on technology support and troubleshooting technical issues.



# RUNNING THE EVENT

**Managing a virtual event is quite different from running an in-person event. Rather than coordinating people and locations, virtual event management hinges on technology support and troubleshooting technical issues.**

For large events, a help desk may be needed to provide live, real-time assistance to participants and presenters. The help desk needs to be accessible through the virtual event platform as well as through alternative means such as a toll-free telephone line, a help desk ticketing system or online chat outside of the virtual event platform.

Technical producers should be on-hand to assist presenters in their virtual presentation rooms. These producers manage the room, allowing the presenters to focus on the content rather than technology issues. They also provide in-room coaching and support.

## DISPELLING THE MYTHS

*The Myth:* People attend in-person events to network. You can't do that at a virtual event.

*The Reality:* Actually, "networking" usually ranks toward the bottom of the list when people are asked why they attend in-person events. What's almost always at the top? Content. People attend conferences and training events first and foremost for the content presented. If content is what drives participation, then networking is not a barrier to virtual solutions.

But let's look at the networking aspect. Most virtual event platforms allow communication between participants through chat and other interactions. Some even set up virtual meeting spaces to allow participants to interact with each other outside the confines of the formal lecture or meeting space.

*The Myth:* Virtual events are really better suited for technical topics and tech-savvy audiences.

*The Reality:* That may have been the case as recently as a few years ago when virtual event platforms were still in their early stages of maturity. Today's platforms, however, are designed with the average person in mind and provide simple, easy-to-use navigation. For many platforms, the only technical ability needed is following a Web link to the meeting.

*The Myth:* Anyone can run a virtual event. You just set up the meeting, tell everyone where to go, and you're off.

*The Reality:* While many virtual event platforms are simple to use and easy to set up, that doesn't mean you can pull off a successful virtual event by the seat of your pants. Even small events require upfront planning and coordination to be successful.

One key benefit of virtual events is the ability to capture and record a myriad of metrics that can be used to evaluate the event **return on investment**.



# MANAGING DATA

**One key benefit of virtual events is the ability to capture and record a myriad of metrics that can be used to evaluate the event ROI. In the planning process, identify the type of data needed, how that data will be gathered and how it should be reported. Most virtual platforms will capture a standard set of data (e.g. number of connections, length of participation). Some platforms may offer options for capturing even more refined data such as:**

- How long the virtual platform was the foreground application on the participant's desktop (to indicate whether the participant pushed the event to the background to do other tasks)
- Which features of the event were most/least popular
- Which programs or sessions were the highest attended
- Which archived sessions are the most requested

If an event utilizes assessments or polling functions, the platform should be able to report individual and aggregated results. Defining the data and reporting needs up front as well as any integration needs, such as reporting to an LMS, is necessary to ensure that required metrics are available and in an appropriate format. By analyzing these measurements, data-driven calculations can be made to determine the ROI for the event.



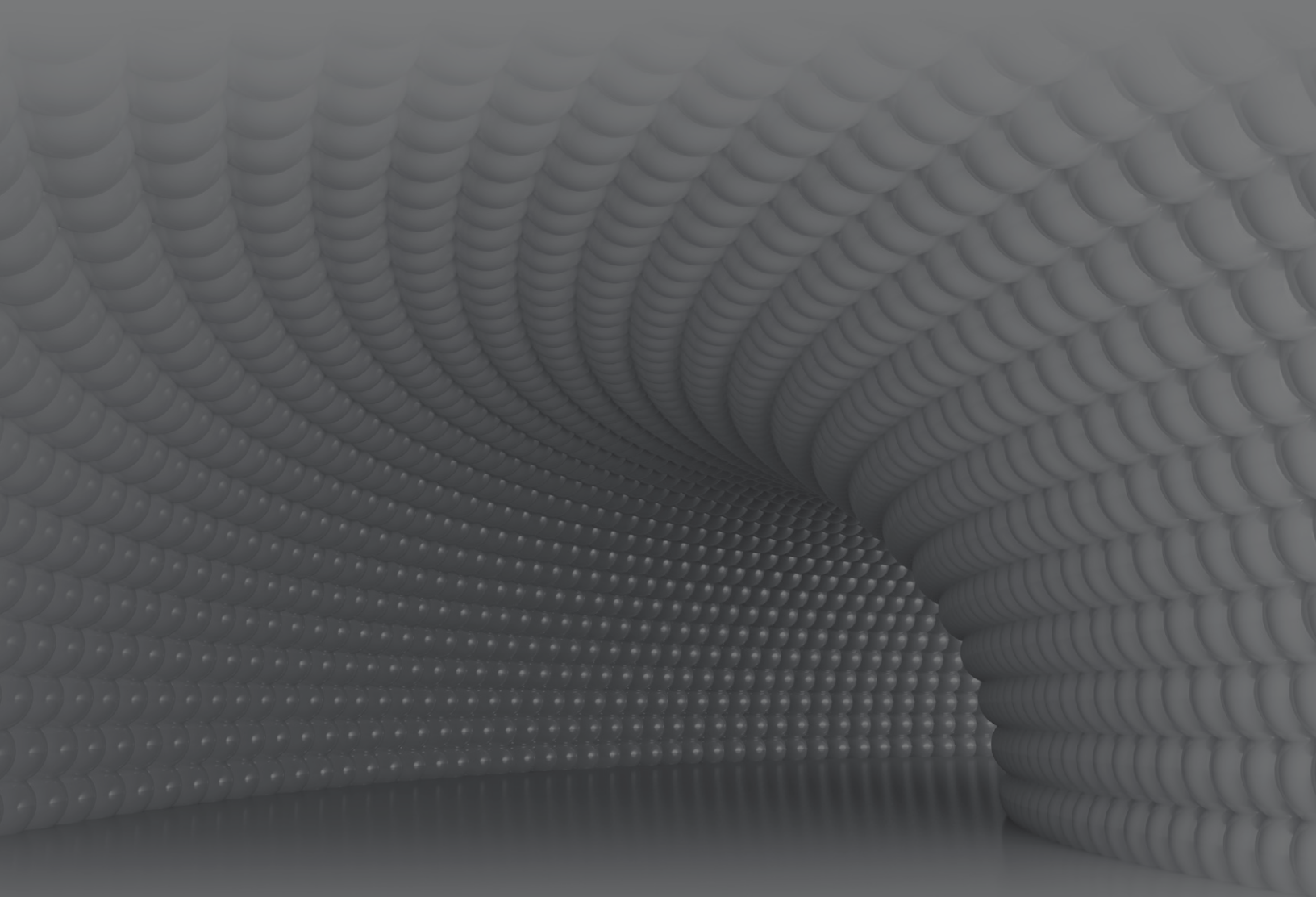


# POST-EVENT

**Unlike in-person events, virtual events can persist after the real-time interaction is over. Most virtual event platforms allow for recording and playback of event sessions. This feature allows an organization to leverage its investment in the virtual event over time. By allowing post-event access, participants can review sessions they attended or watch recordings of sessions they may have missed. This content can be shared “just in time” with those who were unable to attend the sessions.**

Post-event analysis of session evaluations, metrics and overall program feedback can be used to further refine future virtual events. The ease of capturing feedback and evaluation data (no paper to collate or survey sheets to scan) make it more likely that participants will take the time to complete and submit evaluations.

Virtual events offer a **valuable solution** to meet today's business needs and promise to become even more critical tools in the future.



# LOOKING AHEAD

**Virtual events have advanced to become a viable alternative to in-person events, and new advances are on the horizon. The rapid adoption and widespread use of mobile devices are driving the next generation of virtual access, built with mobile connectivity in mind. Improvements in streaming media are making it possible to create richer, more immersive experiences that allow for new types of interactions not possible in physical environments.**

The push and focus to move away from in-person events should not be feared or seen as the death of events and training. Rather, the possibilities open tremendous potential to try new and innovative approaches to fulfilling organization goals. Virtual events offer a valuable solution to meet today's business needs and promise to become even more critical tools in the future.

## WE CAN HELP

**TO LEARN MORE, PLEASE:**

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