AMERICAN EXPRESS
MEETINGS & EVENTS

Virtual Meeting Planning Guide

WHEN TO CONSIDER VIRTUAL MEETINGS

When it's not possible to have a live event due to travel or budget restrictions, virtual meetings can be an effective way to maximize your investment, reach a broad audience, and engage attendees.

Every meeting and event has a lot of moving parts and, like an orchestra, each piece needs to work in concert to produce beautiful music (or in your case, a successful event). Let this guide be your sheet music for producing highly interactive experiences for your virtual attendees. These tips and best practices can help you stay organized and gain peace of mind during what can be a stressful process.

Meeting Types

Most meetings can be designed or adapted into virtual meetings when:

- Presenters and virtual attendees have a stable internet connection
- Your content can be delivered within a four-hour or less timeframe

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The easiest meeting types to transition to virtual are internal meetings, general business meetings, training programs, ongoing client meetings, and supplier meetings. Less common, but still achievable meeting types for virtual include client meetings, training programs, and award ceremonies. For high touch events, like incentive travel and retreats, consider a hybrid meeting approach where some people attend in person while others attend virtually.

Easy to transition to virtual

- Executive briefings
- All hands meetings
- Press conferences
- Board meetings
- Company announcements
- Keynote presentations
- Earnings calls
- Supplier meetings
- Product launches

Consider in-person or hybrid meetings

- Prospective client meetings
- Training programs
- Award ceremony
- Internal meetings
- General business meetings
- Program/project management meetings

More challenging, though achievable, to transition to virtual

- Retreats
- Incentive Meetings
- Celebratory events
- Trade show floor activity
- Conferences and conventions in their entirety

Meeting Purposes

A virtual meeting is a good option when the meeting sponsor or planner wants to share information, communicate, demonstrate, motivate, offer subject matter expertise, sell, present, and educate.

In contrast, face-to-face only meetings may be better if the meeting sponsor or planner wants to discuss sensitive issues and view the attendees' body language or reactions, build team camaraderie at the beginning of a project, or manage multiple cultural norms with some countries that may not be receptive to virtual meetings.

More challenging to transition to virtual

- Convey sensitive information and gauge body language and reactions
- Build team camaraderie
- Achieve 100% engagement
- Complex and numerous breakout sessions
- Celebrate achievements

Easier to transition to virtual

- Share information
- Communicate/discuss
- Demonstrate
- Motivate
- Provide subject matter expertise
- Present
- Educate

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STEPS TO THINK ABOUT WHEN PLANNING A VIRTUAL MEETING

Just like planning a face-to-face meeting, virtual event design requires thoughtful consideration. The tips below will help you think through the steps before, during, and after the event.

Creating Engaging Content

- A meeting's content and messaging are always the most important component regardless of in-person or virtual events. All the creativity that meeting planners bring to a face-to-face meeting can be repackaged in a virtual environment, albeit, in different ways.
- It is important to think about how to add the human touch to virtual meetings by consciously creating an interactive environment where attendees can participate and hear from other attendees as they would at a live event. Here are some best practices that eliminate the distance and create engagement among attendees.

- Webcast/screen sharing – Slides can provide a visual guide to keep virtual attendees on track during the meeting. They also help you emphasize key messages to ensure understanding.
- Personalize with video – Video enhances authenticity, spotlights the personality of your presenters, and keeps your virtual audience engaged in the content.
- Create interaction – Infusing interactive features like Q&A, polling, and surveys help your attendees feel like participants in the meeting. A mobile event app can take interaction and attendee networking to the next level.

Measuring Success

Proving a return on investment is just as important for a virtual meeting as it is for in-person ones. Before planning the meeting, identify the expected benefits and measurements that will prove that the meeting achieved its goals. Here are some common objectives of virtual meetings along with ideas on how to measure them.

Communicate	Motivate / Generate Revenue	Educate	Participate	Satisfaction	Financial
Survey for comprehension; number of attendees who received communication	Evaluate if behavior was improved (e.g. increased sales)	Survey or test for competency	Count virtual and on demand viewers. Measure length of engagement, leads generated, questions asked, number of downloads	Evaluate attendee and meeting sponsor satisfaction; measure number of complaints/issues	Measure cost of delivery vs. cost of alternative method if virtual not used; measure cost per attendee

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CHECKLIST FOR YOUR VIRTUAL MEETING

BEFORE THE EVENT

SELECT A TOPIC AND SUMMARIZE OBJECTIVES

Take time to think through the key learnings you want your audience to take away from your face-to-face event and how this translates to a digital event. This not only helps you focus the content but sets expectations for prospective speakers and viewers.

IDENTIFY SPEAKER(S)

Since virtual meetings are usually less expensive than in-person ones, you might be able to invest more in a phenomenal speaker. Your content will inform the format of your event and if it will be best for a solo presenter, one-on-one interview, or a panel, for example. A best-practices webinar may benefit from a discussion involving multiple voices while a crisis communication could be best delivered by the CEO. Whomever you choose to present, confirm their participation as soon as possible.

CHOOSE A FORMAT

Perhaps the largest consideration is deciding between audio-only webcasting or video streaming. Though video typically offers the greatest impact, your content, timeline, network infrastructure, and budget all play into your choice.

CREATE A REGISTRATION PAGE

The landing page should be clutter-free and clearly state the title, date and time, speaker(s), and purpose of your event. It's probable many prospective attendees will visit this page directly so don't assume they've read up on your event in an email or blog post. Take care in considering which data fields to require users to complete as they will feed your analytics report.

CRAFT A CONFIRMATION EMAIL

Once someone registers for your meeting, they should receive an automated notice confirming their registration. Not only that, the email should also include all the event details, any FAQs and system requirements for the platform you're using, and a way for them to get in touch with someone at your company with questions.

CREATE A CALENDAR FILE

One more thing to include on that confirmation email is a link to a downloadable calendar file (.ics) so your registrants can save the date in Outlook or their platform of choice. Include all the event details and be sure to include a link to access the live event.

BRAND THE EXPERIENCE

Whether you're using a webcasting or video streaming platform, there will be opportunities to create a brand-centric user experience. For example, if you're delivering a video webcast you may opt to increase the size of the media window while reducing the size of slides. If you're using interactive tools such as Q&A, polls, and social media integration, ensure they are easy to access without cluttering the player.

SCHEDULE PROMOTIONAL EMAILS

We suggest sending your first invitation two to three weeks prior to the live event, then following with another invitation the week before (excluding those contacts who already registered). This schedule allows you to provide ample notice without inundating your attendees.

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DRAFT REMINDER EMAILS

Your registrants' schedules will undoubtedly fill up as your event nears so it's critical to send a reminder email to stay top of mind. We recommend an email the day before and one the morning of the live event.

PRODUCE FOLLOW-UP EMAILS

It's important to finalize the follow-up email content so that you can quickly deploy them after the event. You may consider different versions for those who attended and those registered but did not attend. It's standard to include a link to the on-demand replay if available and complementary content such as a guide, FAQ, etc. Don't forget your call to action – what you'd like attendees to do after the event.

UPLOAD SPEAKER PHOTO(S)

Personalize an audio-only webcast with high quality portraits of your speaker(s). You can also use these on the registration page.

CREATE YOUR PRESENTATION SLIDES

Consider that some portion of your audience may be viewing you video stream on mobile devices. Keep slides focused on one point, minimize text, and use clear, large graphics. If you are using animations, confirm that the webcast platform you are using can accommodate them.

CREATE A POLL

Poll questions are not only effective in keeping your audience leaning forward during your virtual event, they can also give you valuable real-time feedback. Consider posting a poll question about 15 minutes before the start of your event to capture information as attendees arrive. We recommend utilizing polling at least three to four times throughout the event to keep attendee engagement up.

MAKE AN EXIT SURVEY

An exit survey offers similar benefits to a poll in that you can collect valuable insight from your audience. By delivering the survey within the webcast player (if applicable) you'll see a greater response rate than alternatives that need to be emailed separately after the event. Keep your survey brief and only include questions with actionable responses.

TRAIN SPEAKER(S) ON PLATFORM

At least a week before virtual event, schedule a training with your speaker(s) on the platform to review controls for slide transitions and monitoring incoming questions. We also recommend discussing day-of logistics such as dial-in information for the speaker line and making sure the speaker uses a handset rather than a speaker phone (if audio-only). If you're hosting a live video stream, consider a dry-run so your speaker can get acclimated to the studio environment.

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DAY OF THE EVENT

PROMOTE YOUR MEETING THROUGH EMAIL AND SOCIAL

Send your reminder email at least a few hours before the live event and increase the frequency of posts on your social and internal channels.

MONITOR INBOUND QUESTIONS

It's not uncommon to receive inquiries from some registrants looking for the URL or troubleshooting a technical issue on their end. Be sure someone is monitoring an email box and social channels leading up to and during your video streaming.

TEST SPEAKER LINE(S)

Thirty minutes before your start time, make sure all speakers are dialed into the conference call line and sound clear. We recommend that speakers use a handset and sit in a quiet room away from office distractions and traffic noise.

GO LIVE!

Keep introductions brief and point out each of the interactive features of the technology you're using up front (e.g., poll, Q&A, survey, mobile app). It's particularly important to encourage attendees to submit questions throughout the meeting to avoid a delay at the end of the presentation.

PUBLISH AND PROMOTE ON-DEMAND RECORDING

Your event is over and it's time to relax, right? Hang on, there's still work to do. Spread the word that the on-demand recording is available. It's likely more people will watch the archive than your live event.

UPDATE REGISTRATION PAGE AND WEBSITE

Remove the date and time of the live event from materials and update any necessary language to reflect the availability of the on-demand replay.

DEACTIVATE CONFIRMATION EMAIL

Since users will now proceed directly to the replay after registering, there is no need to send them a confirmation email.

AFTER THE EVENT

SEND FOLLOW-UP EMAILS

We recommend deploying follow-up emails as soon as possible after the live event, definitely within two days of the live event, while the content is still fresh in the minds of your audience.

PROMOTE THE ON-DEMAND REPLAY

Does your digital event have a shelf life beyond one day? If so, continue to promote it aggressively. There are many reasons why someone who may be interested in your content couldn't tune in to the live event, from schedule conflicts to time zone differences. Continue to spread the word and you'll pick up many more on demand attendees.

RESPOND TO UNANSWERED USER QUESTIONS

Did you get through all the inbound questions during your Q&A? If not, direct unanswered inquiries to the speakers and/or an appropriate person at your company. It also could be worthwhile to follow up directly with everyone who asked a question—you may uncover insight that could lead to opportunities for additional education or new business.

REVIEW SURVEY RESPONSES

Depending on what you asked in your survey, feedback can help inform how you can improve future webcasts and help you identity follow-up opportunities.

ANALYZE AND SHARE EVENT ANALYTICS

You have a lot of data at your fingertips—where do you start? Take a look at your registration-to-attendee ratio and then review reports from your polls, surveys, and inbound questions to see how well viewers were engaged. There are many directions to go from there but think back to the KPIs you identified that would make this virtual meeting a success. Mine the data to find those answers first. Then you can dive deeper to learn interesting things, like how many viewers are watching on mobile devices or which contacts from Company ABC attended the live event.

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