Virtual Event Plan (Zoom)
NAME OF EVENT GOES HERE!

Friday, April 10, 2020
11:00 a.m. - 12:00 p.m. PST
Zoom: 

Overview

Purpose/Objectives:

Learning Outcomes and/or Call to Action:

Style

Webinar/Presentation (Presenters and hosts only, participants muted throughout-communicate through q+a or chat functions)
Meeting (Presenters and participants on video and audio)

Roles
(See roles section for additional information)
- Virtual Stage Manager: Name
- MC/Host: Name
- Chat/Q+A Moderator: Name
- Spotter: Name
- Presenters/Panelists: Name
- Breakout Room Hosts: Name

Estimated Attendees

Number:
Audience Makeup:
## Schedule/Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Dur.</th>
<th>What/Who</th>
<th>Screenshare/Visuals/Video</th>
<th>Audio</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRESHOW</strong></td>
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<tr>
<td>10:00 am</td>
<td>-30m</td>
<td>Start group text backup channel (MC/Stage Mgr)</td>
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<tr>
<td>10:00 am</td>
<td></td>
<td>Start Zoom (Stage Mgr)</td>
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<td></td>
<td></td>
<td>● MC and presenters connect, troubleshoot</td>
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<td></td>
<td></td>
<td>● Make all presenters and room hosts “co-hosts”</td>
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<td></td>
<td></td>
<td>● Share cell numbers for group text</td>
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<td></td>
<td></td>
<td>● Stage Mgr assigns co-host roles if needed, checks meeting settings</td>
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<tr>
<td></td>
<td></td>
<td>● Test graphics and slides</td>
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<td></td>
<td></td>
<td>● Stage mgr start individual chat window with presenters</td>
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<tr>
<td></td>
<td></td>
<td>● Set up breakout rooms (if not done previously)</td>
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</tr>
<tr>
<td>10:30 am</td>
<td>10m</td>
<td>Breakout hosts join call</td>
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<tr>
<td></td>
<td></td>
<td>● Test breakout room assignments and functions.</td>
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<td></td>
<td></td>
<td>● Assign breakout room hosts at this time</td>
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<tr>
<td></td>
<td>-10m</td>
<td>“Preshow” Mode</td>
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<tr>
<td></td>
<td></td>
<td>● “We will begin in _____ min VOGS (MC) As needed</td>
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<tr>
<td></td>
<td></td>
<td><strong>Stage Mgr screenhare</strong></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Event title slide (share screen2 with comp audio enabled for bg music)</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Mute all participants</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Uncheck allow participants to unmute themselves</td>
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<tr>
<td></td>
<td></td>
<td>-Background music</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Unmute Host/MC as needed</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td><strong>End of introduction, Stage Mgr stop screen share</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>PROGRAM BEGINS (In case of presenter or MC drop, see vamping plan)</strong></td>
<td></td>
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<tr>
<td><strong>WELCOME / OPENING</strong></td>
<td></td>
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</tr>
<tr>
<td>11:00 am</td>
<td>2m</td>
<td>Welcome (MC via audio only)</td>
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<tr>
<td></td>
<td></td>
<td>● Begin recording (stage mgr)</td>
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<td></td>
<td></td>
<td>● Brief overview of agenda and presenters</td>
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<tr>
<td></td>
<td></td>
<td><strong>Stage Mgr screenhare</strong></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Stay on event title slide</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-mute bg music</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Housekeeping Notes (MC)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Housekeeping slide</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Introduction of First Presenter (MC)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>● Presenter bio read</td>
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<tr>
<td></td>
<td></td>
<td>● Hands off to presenter</td>
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<tr>
<td></td>
<td></td>
<td><strong>End of introduction, Stage Mgr stop screen share</strong></td>
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<tr>
<td><strong>PRESENTATIONS</strong></td>
<td></td>
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<tr>
<td>11:02 am</td>
<td>7m</td>
<td>Presenter 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● notes</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td><strong>Presenter control screen</strong></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Presenter starts their video or shares their screen</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>-Mute host</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:08 am</td>
<td>1m</td>
<td>Introduction of Second Presenter (MC)</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>● Presenter bio read</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Hands off to presenter</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>MC starts their video</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>MC stops their video</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>-Unmute host</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>Duration</td>
<td>Notes</td>
<td>Presenter</td>
<td>Details</td>
</tr>
<tr>
<td>----------</td>
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</tr>
</tbody>
</table>
| 11:09 am| 5m       | **Presenter control screen** | Presenter 2  
• notes | -Presenter starts their video or shares their screen  
-Unmute presenter  
-Mute host |
| 11:12 am| 1m       | Introduction of Third Presenter (MC)  
• Presenter bio read  
• Hands off to presenter | MC starts their video  
MC stops their video | -Unmute host |
| 11:18 am| 5m       | **Presenter control screen** | Presenter 3  
• notes | -Presenter starts their video or shares their screen  
-Unmute presenter  
-Mute host |
| 11:22 am| 1m       | Introduction of Fourth Presenter (MC)  
• Presenter bio read  
• Hands off to presenter | MC starts their video  
MC stops their video | -Unmute host |
| 11:23 am| 5m       | **Presenter control screen** | Presenter4  
• notes | -Presenter starts their video or shares their screen  
-Unmute presenter  
-Mute host |
| 11:27 am| 1m       | Introduction of Fifth Presenter (MC)  
• Presenter bio read  
• Hands off to presenter | MC starts their video  
MC stops their video | -Unmute host |

### Presenter 5
- Transition to additional campuses
  - Announce 10 min time frame, additional time after breakouts
  - Share only additional or different ideas to what was previously presented
  - Use raise hand function - Phyllis or clif will unmute their mic and allow their video

<table>
<thead>
<tr>
<th>Time</th>
<th>Duration</th>
<th>Notes</th>
<th>Presenter</th>
<th>Details</th>
</tr>
</thead>
</table>
| 10m      |          | Allow participant to share video  
Unmute individual | Additional campuses | |
| 11:38 am| 1m       | Transition to breakouts (MC, CLIF)  
• Housekeeping reminders for breakouts  
• Hand raise by room, meeting host will assign participants to the rooms.  
• Follow notes in presentation and script | MC starts their video  
MC stops their video | -Unmute host |

### Breakout Discussions

| Time     | Duration | Notes | Room 1: Topic (Host)  
Room 2: Topic (Host)  
Room 3: Topic (Host) |
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>11:39 am</td>
<td>20m</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 pm</td>
<td>1m</td>
<td>End breakout sessions, return to main event</td>
<td></td>
</tr>
</tbody>
</table>

### Q+A SEGMENT

| Time     | Duration | Notes | Room 1: Topic (Host)  
Room 2: Topic (Host)  
Room 3: Topic (Host) |
|----------|----------|-------|----------------------|
| 12:00 pm| 30m      | **Stage mgr control screen** | Q+A/Roundtable (MC)  
• MC thanks presenter  
• MC turn to chat moderator  
-Q+A slide  
-presenter on video | -Unmute host |
<table>
<thead>
<tr>
<th>Time</th>
<th>Duration</th>
<th>Activity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:30 pm</td>
<td>2m</td>
<td>Closing remarks (MC)</td>
<td>- Next event slide</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Social media CTA slide</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- CTAs, thank participants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Richard begin questions</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ See <a href="#">q+a method</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>MC announce add’l q+a follow up via email</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:45 pm</td>
<td>15m</td>
<td>Allow chat to continue</td>
<td>- Mute all, bg music</td>
</tr>
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</tr>
</tbody>
</table>

**END PROGRAM**

**END ZOOM**
Logistics

Zoom Info
Paste call info here
### Host Roles

Note: give several staff members host or co-host capabilities. This way, the meeting won’t “end” if the official host drops off.

<table>
<thead>
<tr>
<th>Who:</th>
<th>Virtual Stage Manager</th>
<th>Host/MC</th>
<th>Chat/Q+A Moderator</th>
<th>Spotter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Responsibilities:</td>
<td>Zoom host</td>
<td>Zoom co-host</td>
<td>Zoom co-host</td>
<td>Registers and attends as participant</td>
</tr>
<tr>
<td></td>
<td>Controls main screen graphics and screenshare</td>
<td>Covers welcome announcements, housekeeping rules, panelist introductions and vamping</td>
<td>Oversees chat or q+a room, makes list of pertinent questions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Controls mute and unmute of participants</td>
<td>Has backup of basic event graphics in case stage manager cuts out</td>
<td>Sends messages in chat if experiencing technical difficulties</td>
<td></td>
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<tr>
<td></td>
<td>Keep eye on time, use 1:1 chat function to notify panelists</td>
<td>Keep eye on chat for inappropriate comments</td>
<td>Keep eye on chat for inappropriate comments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sends messages in chat to participants if experiencing technical difficulties</td>
<td>Has backup of presenter’s slides ready to share</td>
<td>Stage mgr or Host/MC can add spotter as co-host if they need to step away or exit call</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has backup of presenter’s slides ready to share</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Device:</th>
<th>Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio Setup:</td>
<td>External mic, laptop speakers or headphones with inline mic</td>
</tr>
<tr>
<td>Backdrop</td>
<td>None, studio bg if needed on camera</td>
</tr>
<tr>
<td>Backup Device:</td>
<td>Tablet</td>
</tr>
</tbody>
</table>

(Additional roles, if needed: co-hosts/mcs, chat moderator, green room host)
## Panelists/Presenter Roles

<table>
<thead>
<tr>
<th></th>
<th>Presenter 1</th>
<th>Presenter 2</th>
<th>Presenter 3</th>
<th>Presenter 4</th>
<th>Presenter 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who:</strong></td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
</tr>
</tbody>
</table>
| **Responsibilities:**| ● Set as meeting co-host  
                           ● Controls screen share during presentation  
                                 ● Set as meeting co-host  
                           ● Controls screen share during presentation  
                                 ● Set as meeting co-host  
                           ● Controls screen share during presentation  
                                 ● Set as meeting co-host  
                           ● Controls screen share during presentation | Name        | Name        | Name        | Name        |
| **Primary Device:** | **laptop**  |             |             |             |             |
| **Audio Setup:**    | **Headphones with inline mic** |             |             |             |             |
| **Backdrop**        | **Room**    |             |             |             |             |
| **Backup Device:**  | **Phone**   |             |             |             |             |
| **Slides Screenshare:** | Share any presentation graphics with stage mgr prior to event as backup. |             |             |             |             |

## Chat Rooms (Breakout Rooms)

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Who:</strong></td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
</tr>
</tbody>
</table>
| **Responsibilities:**| ● Set as meeting co-host  
                           ● Leads breakout room discussion  
                                 ● Set as meeting co-host  
                           ● Leads breakout room discussion  
                                 ● Set as meeting co-host  
                           ● Leads breakout room discussion  
                                 ● Set as meeting co-host  
                           ● Leads breakout room discussion  | Name     | Name     | Name     | Name     |
| **Primary Device:** | **laptop**  |          |          |          |
| **Audio Setup:**    | **Headphones with inline mic** |          |          |          |
| **Backdrop**        | **Room**  |          |          |          |
| **Backup Device:**  | **Phone** |          |          |          |
**Q&A Method**
- Participants will ask questions in the chat room
- During q+a we will alternate between Richard reading a question from the chat, asking those who wish to answer that question will be asked to raise their hand. We will call on someone with a raised hand, unmute them.
- MC will help keep time

**Vamping Plan**
- Trivia game - slides to be prepared

**Backup Communication Between Hosts/Panelists**
- Group text

**Visuals**

**Event Graphics**
- Title Slide
- Housekeeping Slide
- Standby Slide
- Vamping content

**Presentations/Panelists**
- Presenter to screen share, stage mgr will have backup copy ready to share

**Interactive Functions**
- none

**Special Meeting Settings**
- Mute all participants except hosts/co-hosts
- ***check recording and screen sharing settings***
  - Disable screen share and video for general participants
Pre-Event Checklist

2+ Weeks Before

- Confirm the date, time, title, and description for your webinar
- Assign webinar roles: host, co-hosts, panelists, participants, etc.
- Schedule the webinar/Zoom meeting
- Meet with panelists to confirm the webinar's structure and content
- Create and share Virtual Event Plan
- Decide whether your webinar will require attendees to register
- Request any necessary permissions from IT
- Create and send email invitations
- Arrange plans for closed captioning as needed

1 Week Before

- Review the webinar and account settings to confirm they're to your liking
- Finalize your presentations; add poll questions as needed
- Check your list of attendees
- Encourage attendees to download the desktop client or app before the meeting
- Host a tech rehearsal to review the event plan and run through any screen shares, presentations, video and interactive features.
  - Have presenters/panelists do this rehearsal with the setup they will use for the event.
  - Double check camera placement, background, lighting, audio, distractions, etc.
- Prepare post-events surveys and follow up email messages
- Send event reminder email to attendees
- Finalize screen graphics and presentations
- Share backup copies of screen graphics and presentations with stage managers, hosts and moderators

Day Of

- Send attendees a reminder email with the call login information
- Follow schedule/run of show and host tips
Post Event Checklist

- Trim the webinar recording if needed. Add captioning. Publish to video sharing site or get Zoom recording links
- Thank you, follow up emails
  - Share recording (Zoom public link) and slides (pdf or Google slides) with audience
  - Audience and panelist surveys
  - Remind audience of any calls to action and promotion of next event(s)
- Download video/save to Google Drive archive
- Download chats
- Follow up with any unanswered q&a questions (presenter and host)
Tips for Presenters and Panelists

Internet Connection and Computer Tips

- Have a backup device available, preferably on a different internet connection (i.e. phone).
- Use a wired ethernet connection when possible.
- If using wifi, disconnect as many unused devices from your network as possible (smart tvs, ipads, google home/echo type devices)
- Ask household members to not use wifi during the event.
- Position yourself 4-5 feet away from your wifi router if possible.
- If calling via phone for your audio, disconnect wifi-calling from your phone.
- Close unused apps, browser windows or programs on your device.
- Shut down and restart your device earlier in the day so your machine is not “tired”.
- Use dual monitors when possible.
- Prior to event, make sure zoom software/plugins are up to date.

Audio

- Wired headphones with an in-line microphone are preferred (make sure the cord is in good condition).
- If possible, use a quality external mic (like a podcast mic or lavalier) and separate headphones.
- Use laptop mic as a last resort, as they are designed to pick up extra noise.

Camera Placement and Framing

- Place laptop camera or webcam iris at eye level (or just above).
- Clean the camera lens.
- Place yourself centered horizontally on the screen, and line up your eyes at the top third of the screen.
- Avoid cutting off the top of your head or the bottom of your chin.
- When speaking, look at the iris of the camera. If needed, put a small happy face or picture just above your webcam and present to it. It will look like you are talking to the participants through the camera.

Lighting

- Make sure that your face is nicely illuminated as even as possible
- If you don't have video lighting, use natural light from a window in front of you (indirect daylight is best) or set up a lamp (or two) in front of you with a soft “daylight” balanced bulb (~5000k color temperature)
- Avoid mixing light temperatures when possible (i.e. your video light is “daylight” but your background room is “warm” (3000k)
Backgrounds

● Natural/Room Backgrounds
  ○ Use an environment where you are lit brighter than your background.
  ○ Avoid harsh light and shadows in the background.
  ○ Avoid lighting “hotspots” from windows with direct sunlight in your background.
  ○ Avoid a background where household members or pets can walk behind you.
  ○ Some furniture or decorative items in the background will add interest, depth and personality… however, avoid inappropriate, distracting items and cluttered surfaces.
  ○ See “limiting distractions”

● Virtual Backgrounds
  ○ Zoom offer the ability to use a custom virtual backgrounds (on some devices).
  ○ For instructions and tips, visit the Zoom website.
  ○ Only use a virtual background if you are well lit.
  ○ Avoid green clothing and warm lighting with a green tint.
  ○ Preferably, use a physical green screen or wall behind you in your “studio” that is well lit evenly.
  ○ Use a background image that shows your personality, or branded to the event/organization... however, make sure the image is appropriate and not too distracting to the participants.
  ○ Test your virtual background ahead of time or during our pre-event rehearsal meeting.
  ○ Discontinue using the virtual background if there is too much “noise” surrounding you on camera or if your body parts are disappearing.

Clothing

● Wear clothing that will contrast with your background so that you don’t blend into it.
● Avoid small prints, stripes or busy patterns.
● Avoid green clothing if using a virtual background.

Screen Sharing

● Have your screenshare content open and ready to present before the program begins.
● When possible share only the app window, pdf document or image.
● If sharing your desktop, make sure the background is appropriate (or event branded).
● Close or hide email windows, anything with sensitive information, extra applications or browser tabs.
● Turn off on screen notifications and messenger services (or keep them to a second monitor that is not shared).

Limiting Distractions

● Turn off notification noises on your device and devices that will be used around your setup.
● Avoid ambient noise where possible (typing, bumping the microphone, crumpling paper, fans, appliances, beeping devices)
● Keep pets, children, etc. out of the room to avoid interruption
Tips for Stage Manager and Hosts

General

● Prepare a vamping plan (activity, conversation or chatter to keep participants entertained during any technical issues)
● Prepare and test any interaction features, q+a methodology
● Host a pre-rehearsal: run through event plan, test features, graphics and presentations
● Green room: use breakout room feature to bring any panelists or presenters into a separate room if you need to prepare without early attendees seeing.
● Have multiple co-hosts so that the meeting doesn’t close/end if main host drops off

30 Minutes Before

● Start the Zoom meeting
● Greet panelists and review everyone’s roles
● As panelists join, confirm that their audio and video are running smoothly
● Double check special settings are configured correctly for you meeting.
  ○ Allow or disable attendee chat
  ○ Allow/disallow participants to start video and mute on entry
  ○ Allow/disable participants ability to screenshare
  ○ Allow/disallow multiple screen shares at the same time
  ○ Q&A/chat functionalities
  ○ Breakout rooms and breakout room hosts or preassignments
  ○ Polls

15 Minutes Before

● Run a final audio, webcam video, and content sharing test
● Review your host controls

5 Minutes Before

● Mute all panelists/presenter; they will remain muted until the presentation starts
● Attendees will join muted; they will be able to see and hear panelists
● Moderator: welcome the attendees and let them know you’ll be getting started soon

Webinar Start Time

● Start recording (unless you have enabled automatic recording)
● Unmute yourself and start the video
● Begin the presentation with welcome and housekeeping items
● Confirm that other presenters are ready to be unmuted and video is on
● Monitor Q&A or chat for technical concerns from attendees (chat moderator)
● Use the “spotlight video” feature during panel sessions to lock the speaker view video on the current speaker