CREATING SUCCESSFUL VIRTUAL ENGAGEMENT

By Abby Ferri and Wyatt Bradbury

It seems everyone is doing virtual events now, and while this has been a must since March 2020, it may not be "real" to you until you find yourself on the planning committee for such an event.

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Both authors have planned and executed virtual events since March 2020 (and before) and are frequently asked to share their secrets.

The bottom-line advice is to keep it simple and within the capabilities and interests of your specific group. A well-executed virtual event will appear easy and effortless to the attendee or observer, but it is just the opposite.

The authors encourage all event planners to start with the following equation:

(purpose x platform x setup) + (content x engagement) = successful virtual programs

This article details each element that leads to successful virtual engagement.

Purpose

Just as educational sessions need to identify learning objectives, the purpose of virtual engagement must be identified to be successful. The purpose is the end goal, at a high level, that the organization hopes to achieve. Each type of virtual event has a unique approach to setup, marketing and development that can only begin once the end goal is identified. A virtual meeting is not a webinar, a virtual happy hour is not a meeting, and networking is not necessarily accomplished by a virtual happy hour. The group must specifically define the purpose of the event to contemplate the rest of the equation. It is also important to consider whether purposes can be combined effectively or if they should be separated. Identify the audience or subset of the audience that each element might try to reach, and do not be afraid to separate various elements when looking at virtual engagement. Simplicity can be a great ally. Just because a traditional event includes networking, a meal, a speaker and a happy hour does not mean that virtual engagement must mirror that exactly.

Platform

Once event planners have identified the purpose, they can better evaluate various platforms and ways to make them available to the group. Remember, the purpose is the cornerstone of the equation. Therefore, the platform must support that identified objective. Is this a virtual meeting that requires the ability for attendees to collaborate? Some sort of symposium where attendees will break out into smaller groups? Is there a need for webcams, participant microphones or a recording of the event? Based on the identified purpose, a platform's features must be scrutinized and the best choice selected.

Cost is also an important factor to consider. Some free platforms may require payment if the attendee count is over a certain number. This number varies by platform, and often the free version of a platform may suffice depending on the purpose. Can the group utilize a corporate system or can a group of chapters, an area or a region share the cost? Think about all potential event purposes the group might need a platform to serve before using resources to lock one in. It is also a good idea to reach out to users of the identified platforms to discuss pros and cons with those who use them regularly. The day of a virtual event with registration costs and guest speakers is not the time to experiment with platforms or wonder whether the selected solution will work.

Setup

Once purpose and platform are determined, the next consideration is how potential attendees will learn about the event and how to access it. It is not as simple as posting a registration link and hoping for enthusiastic turnout. In fact, this could open the event up to security concerns and nefarious actors accessing the professional event.

Ensure that the registration process is simple and easy to follow, especially if charging a fee. Links, social media, emails and all other communications should go back to a single hub or source. If there is an event website, the links should lead there and contain all further details, information and registration for the event. The goal is for all communication to bring participants to a single place where they can obtain more information and register. Having several points of registration only leads to confusion, misinformation and missed opportunities for all parties.

Once attendees are registered, they will expect further details about how to access the event. In some cases, it may be necessary to provide training to registered attendees so that they can use all features of the chosen platform. This can be as simple as sending out a "Platform 101" guide in advance of the event. There will likely be several touch points for potential and registered attendees in the marketing and communication of the virtual event. The key is to plan ahead and test things out so that communication is as simple and concise as possible, giving participants the information they need to successfully engage.

Content

Notice that the equation does not begin with content, which is where many planners might want events to begin their life cycle. The authors take

their cue from the ADDIE model, which is one of the premier methodologies for learning development. This model's phased approach begins with a comprehensive analysis and understanding of the needs before moving to a design phase in which objectives are written, available resources are evaluated, and a road map is generated. The model then moves into the development of the material, implementation of the learning program and evaluation (McMichael, 2019). Content can only be developed when the need and purpose are identified and the structure defined.

With virtual events, the purpose and user interface are so important that content can come later in the process. When evaluating content, involve any guest speakers. Some prefer to use slide decks while others may have a traditional keynote delivery style with just them on screen. An interesting virtual event will offer several ways for attendees to view content. With so many virtual events sourcing speakers, it is important to differentiate your event from others.

Planners must also understand that content should not simply mirror what attendees might be used to. Virtual engagement presents inherent limitations and opportunities with regard to the content, so be open to approaches that are unique and different from what might be considered normal. Additionally, virtual engagement does not require the same investment of time and resources as an in-person event. This could allow for specific engagement sessions to be aligned to a more singular purpose and increased opportunities for engagement made available over time. Instead of one monthly meeting or a one-day conference that must accomplish everything, breaking down content to meet a specific purpose can increase engagement without necessarily leading to increased resources.

Here are a few content ideas:

•Provide opportunities for group members and leaders to showcase their ideas.

•Vary the length of presentations by assembling speaker panels representing different perspectives.

•Invite and mentor students and emerging professionals to speak, whether to deliver a presentation or participate as a panelist on emerging issues.

•Highlight group members, spotlight successes of the group and its members, and share challenges and solutions.

•Partner with other organizations and associations, such as common interest groups.

•Leadership seminars, symposiums and speed networking create opportunities to engage on a more personal or deeper level.

•Consider a series of sessions surrounding a certain topic.

•Host a virtual tabletop exercise focused on an applicable current event.

Engagement

Engagement is where the heavy lifting occurs. Unlike in-person events, a virtual event requires strong leadership to ensure that attendees understand the flow of the event, what comes next and how they can be ready to engage. Consider appointing an emcee, moderator or other champion to keep the event moving. Starting the event with a "Technology 360°" session is a great way to help participants become familiar with the specific tool used for the event. If there are expectations regarding the chat, session question and answer period, webcams, microphones or breakout rooms, help participants prepare for those specific aspects of the engagement in advance.

Remember that engagement begins before the virtual event starts; think about how attendees will be welcomed to the event and invited to provide feedback, chat and questions. It is also important to engage attendees after the event concludes and solicit feedback to help guide future events. Each audience will have a completely different attitude and the experience may vary drastically from one participant to another. Work to capture these diverse perspectives and consider lessons learned for future events.

Now What?

After the event, follow up with attendees to get feedback and make sure their questions are answered. The event may have provided CEUs and instructions or follow-up should be provided to make sure attendees receive their certificate promptly. There may be online content that could be shared for all attendees' benefit, or session summaries or recordings to direct them to. Follow-up will help differentiate your event from others and help create additional touch points with the organization.

Use social media to talk up and share or solicit feedback during the days, weeks and months after the virtual event. Utilize people's natural tendency to feel FOMO (fear of missing out) so they look forward to future virtual events; always link back to the organization's website where further engagement opportunities are available.

Conclusion

Generating successful virtual engagement takes careful planning. It is not as simple as moving what might have been done in person to a virtual format. Those organizing virtual engagement events must evaluate the purpose of their event and understand their audience and ultimate end goal. From there, they should evaluate platforms and begin to think about how they will set up the framework for the engagement itself. Only after this is complete should they begin to dive into content and craft learning that meets the objectives, audience and framework identified. Finally, virtual engagement organizers should create touch points before, during and after the event. Following this process will support organizations of all types in creating successful virtual engagement. **PSJ**

References

McMichael, R. (2019). *The Safety Training Ninja.* ASSP.

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