Wharton
UNIVERSITY of PENNSYLVANIA

Virtual Events at Wharton – Planning Timeline

The below timeline outlines resources and best practices for planning a Virtual Event at Wharton. Before committing to an event strategy, we recommend **students** review first with their **student life office**, and **faculty and staff** consult with consult with **Wharton Events** [whartonevents@wharton.upenn.edu] and **Wharton Computing** [pt-schedule@wharton.upenn.edu] for up-to-date information on new resources, tools and technology.

2-3 Months Out

➤ Determine the goal of your virtual event -- use the Wharton Events – Getting Started page to assist with your brainstorming. Review the Wharton Event Toolkit steps for additional tips and documents to guide your decision making process.

➤ Review general staffing needs and assign areas of responsibility to your team (Tech Lead, Event Management Lead, Speaker Liaison/Content Lead)

➤ Submit Speaker Request Form (first step -- submit for approval before inviting any speakers)

➤ Invite and confirm interest with speakers/hosts

➤ Set the date
  o Check in with appropriate stakeholders that there are no major conflicts
    ▪ **Speakers/Hosts/Moderators** all available in the appropriate time zone.
    ▪ **Students** should review event dates with their student life office.
    ▪ **Faculty and staff** should touch base with **Wharton Events** for other potential event conflicts, **Wharton Computing** for ability to support. Make sure the event is not conflicting with a national or religious holiday that may impact your audience
  o Review Wharton and Penn calendars for important dates that may conflict
    ▪ Review **MyWharton** and WhartonHQ for other conflicting events, check that the date works with academic deadlines, reading days, **Wharton Dean's** schedule if attending

➤ Review technology options to determine the best platform for your virtual event
  o View Wharton Computing tips for "When to Use Virtual Events"

➤ Submit Operations/Tech Requests as appropriate for your group.
  *__Student groups should work directly with student life program offices for all virtual event needs.__

1-2 Months Out

➤ Finalize Event Format
  o Live, pre-recorded, semi-live; 1:1 Conversation, Panel Conversation, Interactive with audience

➤ Select Video Conferencing platform and confirm with Wharton Computing any support needed *
  o *Student groups should work with student life office to determine their tech needs and support level

- ➢ Determine Event Management Platform if needed. Choose the Event Website platform, Invitation Method, RSVP System that are available to your group.
  - o Examples: Events HQ, Direct registration on video conferencing platform, third-party registration system (such as Eventbrite, Qualtrics, Google Forms)
    - ▪ Read more from Wharton Computing about Virtual Meetings and Events
    - ▪ Contact Wharton Events or your Program Office for consultation on options

- ➢ Gather assets
  - o Confirm speaker full name, title and organization
  - o Request short bio and high-resolution headshot
  - o Confirm Media Release
  - o View the Wharton Identity Kit for Virtual Event Templates such as backing screens and holding slides, as well as University branding and logos.

3 Weeks Out

- ➢ Create event in Video Conference Platform
  - o See Wharton Computing Virtual Meetings and Events guides for general tech information on system setup that may be adapted for any available platforms
- ➢ Determine Q&A format
- ➢ Design and review any event marketing materials: event website, registration, confirmation emails
  - o Include information on how to access the event, when login information will be sent, proper time zone
    - ▪ Invitation (1 week prior to event)
    - ▪ Confirmation (automatically receive with registration is preference, includes event access details)
    - ▪ Reminder (1 day prior to event, reminder of access details)
    - ▪ Event is live in 30 (sent 30 minutes prior to start time, reminder with access)
- ➢ Add to MyWharton Calendar
- ➢ Add to Life@Wharton screens for additional advertisement to the Wharton community (Should select display date 2 weeks before event date)

2 Weeks Out

- ➢ Connect speakers and moderators via phone/email to review content of conversation; share via email basic technology requirements and plan for your event
- ➢ Finalize any graphics and branding – holding slide, lower thirds
- ➢ Final invitation review

7 days Out

- ➢ Event Tech Run-through with your team members assigned to oversee IT and Event Management **(complete the following before sending any invitations)**

- o Review different roles of each team member, any technology roles in your video platform that require specific instructions
- o Test graphics and branding – holding slide, lower thirds within the platform
- o Review Wharton Computing articles on [Virtual Meetings and Events](#) for additional advice on technology and event roles while hosting a virtual event
- ➢ Send invitation to audience
- ➢ Send separate email invitations to any speaker, including relevant presenter-specific event links from the video conferencing system.

2-3 Days Out

- ➢ Tech run through with event staff, speakers, all on-video participants
  - o Review technical run of show
  - o Discuss contingencies if technical failures (dial-in numbers, swapping speaker order, alternate screen-share options)
  - o Speakers review content of conversation, q&a

1 day Out

- ➢ Event Reminder Email

Day of Event

- ➢ Ensure all your devices are fully charged and plugged in (laptop/desktop, backup device for audio, such as a mobile phone)
- ➢ Final connection test, run-of-show review with tech and support teams (1 HOUR OUT)
- ➢ Greenroom review with speakers (15-30 MINUTES OUT).
  - o Tech lead final run of show, reminder of contingencies
- ➢ Schedule Event is Live email/final reminder email for 30 minutes prior

Post Event Follow Up

- ➢ Update Event Page with video information if the event was recorded for further distribution.
- ➢ Work with Production to prepare video recording.
- ➢ Post video on appropriate website, email to registered attendees.