Freeman

Hybrid event checklist

This checklist was created as a helpful guide to planning a hybrid event.

Because events can vary greatly in size and complexity, it's quite possible that you may need more or less time — and more or less effort — than what's indicated here. However, for many events, this should offer a solid set of guidelines and a good foundation from which to start.

At least 4–6 months before the hybrid event (depending on size and complexity), begin with foundational elements:

- ☑ Establish your hybrid event goals and objectives — why hybrid, and why this event? What can you offer both audiences?

- ☑ Define and develop target audience(s) profiles — primary and secondary target audience information, roles, demographics, needs and care abouts, think/feel/do attributes, etc.

- ☑ Determine the hybrid event format and experience — what elements will be in person and what formats will be used for virtual (e.g., all live, simulive, or pre-recorded)?

- ☑ Develop a messaging matrix with event description, key takeaways, primary call to action, and any guiding principles and/or content strategies.

- ☑ Create preliminary agenda and continue to update/revise as details are adjusted/confirmed.

- ☑ Determine your event pricing structure (free, registration fee, or gating).

- ☑ Determine your sponsorship/ exhibitor plan for both virtual and live (identify sponsorships).

Create a preliminary budget that is updated and adjusted as more details are available.

Select the event date(s) and time(s), and venue if that is not already contracted.

Create an audience acquisition/marketing plan and timeline.

Begin concept development for event brand/look and feel (e.g., logo, tagline, visual environment, physical environment design, signage, graphics package, etc.).

Identify your event support team — including both internal and external members — based on the initial goals, strategy, agenda, and scope.

Begin outreach to local authorities to obtain the most up-to-date information on COVID operating status and restrictions; begin to build out your COVID-safe on-site plan accordingly.

Begin to evaluate technology vendors with the goal of selecting and implementing platforms at least 4 months in advance of your event. Includes registration/ticketing, virtual event platform, mobile app, audience engagement tools, content management, lead retrieval, attendee tracking (RFID/NFC), etc.

3-4 months before the hybrid event

☑ Create your content narrative within the overall attendee journey/run of show (remember quality over quantity, especially in the virtual medium, and don't forget variety).

☑ Develop on-site experience design (e.g., space planning for general session, breakouts, lounge and networking areas, dedicated hybrid spaces, sponsor areas, etc.). Allow enough time for detailed COVID compliance planning and review, ensuring your space planning and experience design adequately integrates social distancing.

☑ Establish your hybrid event goals and objectives — why hybrid, and why this event? What can you offer both audiences? What can you offer both clients?

☑ Identify and begin to confirm hosts, speakers, presenters, and/or other entertainers.

☑ Develop sponsor/exhibitor opportunities and begin identifying and soliciting relevant partners.

☑ Define and assign support team roles for pre-production and run-of-show activities such as content and speaker support, technical support, customer service, marketing and communications, A/V, sponsor/exhibitor, overall event operations, etc.

☑ Begin content outlines for scripting.

☑ Develop speaker briefing documents and other resources.

☑ Make your event platform selection and begin to configure all technology.

☑ Develop pre-event surveys to be fielded in registration process.

☑ Create and approve program agenda.

☑ Complete technical design for scenic, lighting, video, etc.

☑ Finalize event branding and any associated style guides.

☑ Launch save-the-date website landing page with option to sign up for updates.

2 months before the event

- ☑ Finalize on-site experience designs and scenic design, and prep for fabrication.

- ☑ Create your onsite signage grid and finalize creative for production.

- ☑ Launch promotional plan, including hybrid event website and/or landing page with registration/ticket sales. You'll need a variety of email reminders, confirmations, and other outreach, such as press releases, social posts, influencers, and more, to keep your audience engaged. Be sure to communicate how you will keep attendees safe during COVID restrictions, if applicable.

- ☑ If applicable, create dedicated social media profiles for your event. Don't forget the unique hashtag.

- ☑ Coordinate and place orders with other support suppliers (real and virtual swag providers, on-site electrical, AV and connectivity needs, food and beverage for in-person attendees and at-home food delivery for virtual, etc.).

- ☑ Create a holistic health and safety plan for all aspects of the on-site experience for both attendees and staff. Coordinate and place orders for PPE and other COVID-related supplies (extra wastebaskets, sanitizing wipes, etc.).

- ☑ Create a preliminary rehearsal and production schedule for pre-recorded elements.

- ☑ Create a detailed on-site production schedule inclusive of all event partners.

- ☑ Confirm session content descriptions, gather bios and photos from all speakers/presenters, and have contracts signed (if applicable).

- ☑ Request logos from sponsors and work with them on any co-presented content development.

- ☑ If applicable, provide speakers with branded presentation templates or on-screen guidelines (when using text/graphic overlays) to use when creating their content.

- ☑ Review and budget for any speaker/entertainment requirements and riders.

- ☑ Provide sponsor/exhibitors with promotional toolkits and ask them to promote to their customers; if they have an onsite presence, provide detailed instructions on how to ship materials.

- ☑ Ship remote speaker kits for anyone prerecording with heavy post-production needs.

One month before

- Monitor registration numbers for both in-person and virtual; offload in-person to virtual, if needed.

- Finalize all registration and analytics reporting (ensure access for all clients, including whitelisting of email and websites).

- Continue the marketing and promotion plan to encourage registrations.

- Remind speakers/presenters to continue promoting the event to their networks; provide additional resources if needed (e.g., "behind the scenes" posts).

- Draft and finalize any outstanding content scripts — keynote presentations, host welcome, transitions, housekeeping, VOG, etc.

- Update speakers and presenters with plan for table reads, rehearsals, and recording schedules.

- Develop contingency plans for various scenarios (speaker difficulties, technology or internet outage, schedule change, change in COVID restrictions or protocol, etc.).

- Identify and order speaker gifts.

- Ship remote speaker kits for anyone prerecording with light post-production need.

- Approve all onscreen graphics: lower thirds, slates, bumpers, etc.

- Confirm backup staff for all positions including AV; develop plan in case staff members become ill.

- Confirm loading dock plan, routes, meeting points, and safety concerns.

- Get fire marshal approval on all floor plans (if needed).

- Get overall health and safety plan approved internally, by venue(s) and any overarching government entities.

- Obtain health and safety permitting for all F&B (if needed).

- Provide speaker coaching and speaker management comms.

2-3 weeks before

- Draft and send press releases and social posts about important event details, including keynote or celebrity speakers, new product information, honorees, etc.

- Remind sponsors/exhibitors to finalize setup of their virtual marketing spaces.

- Test the platforms and technology that will be used.

- Ship remote speaker kits for live speakers.

- Start mailing out swag boxes/emailing virtual swag.

- Review speaker presentations/final scripts and finalize any edits.

- Set up any audience polls or Q&A used during the event.

- Conduct table reads.

- Finalize food and beverage order.

- Finalize and share production schedule.

- Train staff on technology that will be used.

- Train speakers on technology that will be used (including any recording equipment).

- Begin quality checking all content both prior to and after loading it onto virtual platform and speaker management comms.

3-7 days before

- ☑ Begin briefing all support staff about the schedule and their roles during the event.

- ☑ Crew letter shared with on-site team — all event details for staff (in advance of crew travel).

- ☑ Conduct rehearsals for all speakers, including testing individual audio and lighting setups.

- ☑ Create an FAQ document for attendees, including instructions to access the event, troubleshooting tips, and how to contact support, to be shared in reminder email.

- ☑ Prepare and set up real-time and post-event surveys for attendees, speakers, and sponsors.

- ☑ Send out speaker gifts/thank-you notes.

- ☑ Pre-con with venue and all on-site partners.

- ☑ Conduct table reads.

- ☑ Venue load in and setup of all areas on-site.

- ☑ Review health and safety plan in on-site walk-through with all staff.

- ☑ Deep cleaning and setup of PPE stations.

- ☑ All final content and presentation files due to AV control — for testing and ingest.

- ☑ Do a dry run of the entire event — cue to cue — on the event platform, including motion graphics, transitions, video rolls, audience interaction, etc.

- ☑ Pre-con meeting/final review with full event and client team.

One day before the event

☑ Send a reminder email to registrants, including login instructions and the event schedule/program.

☑ Do another technical cue-to-cue content run through and verify everyone is ready to go.

☑ Prepare on-site rooms, including green rooms; ensure adequate PPE supplies are staged.

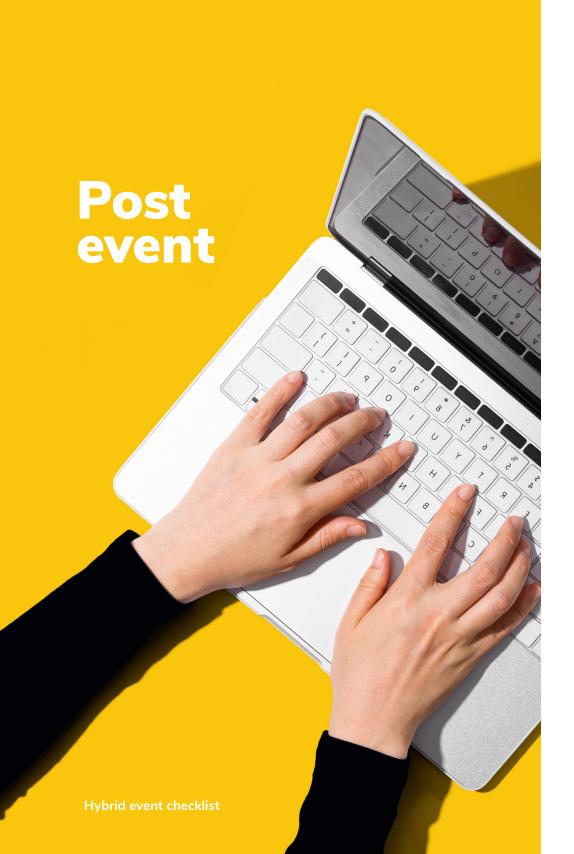☑ Share live production checklist with support staff.

Day(s) of the hybrid event

☑ Send a final reminder/join now email to registrants.

☑ Have dedicated staff to escort speakers to onsite green room(s) and stage, recording, or broadcast area.

☑ Have dedicated staff monitoring all technical aspects of event to address any challenges.

☑ Share and post real-time takeaways or news on social media channels.

☑ Thank everyone on your team for their hard work getting to this point!

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Post event

☑ Send recap with key learnings and takeaways to attendees; share links to any resources, downloads, or recorded sessions.

☑ Share a separate recap with links to video on demand recordings to those who did not attend.

☑ Conduct a debrief to gather feedback from internal team members — what worked well, and what to improve for the next virtual event.

☑ Send thank-you emails, including post-event surveys and links to any recordings if applicable, to internal stakeholders, speakers, partners, and sponsors.

☑ Create a post-event report with a summary of insights outlining performance against objectives, feedback, and lessons learned.

☑ Prepare a video highlights reel to share via email to participants, or to post on social media or your event website.

☑ Update the event website to announce the date for the next event, if known.

☑ Update budget with all final invoices and costs.

☑ Continue to engage with your audience.

Need a hybrid partner?

Don't go it alone — let us help you build an event maximized for both in-person and virtual audiences.

Contact us