Engagez provides a digital event platform that handles all your meeting, event and learning programs so your team can become pros at building and deploying engaging digital experiences.

We make our clients more successful whether that's by helping them run an online event, hybrid event, learning program or perpetual community. We help organizations engage customers, launch products, generate leads, train customers, employees and partners and more.

Engagez is a cloud-based software as a service solution that is highly reliable, cost-effective and easy to operate across all devices.
INTRODUCTION TO DIGITAL EVENTS

In today’s business climate, rapid change is common and occurring at an ever increasing and unparalleled pace. Most businesses are global, and maintaining an educated eco system of leads, customers, partners, and staff is no longer a competitive advantage but an existential necessity.

The adoption of digital events to maintain and educate the eco-system is fast accelerating, due to the amazing reach, ease of use, steadily lowering costs and better engagement of the enabling technologies, resulting in high ROI.

From customer conferences, to job fairs, large meetings, learning and training programs to virtual trade shows—organizations are seeking easy to deploy, easy to integrate and cost-effective ways to reach and engage more people. They are turning to today’s digital event platforms.
Today, the category of digital events encompasses multiple technology solutions including webinars, webcasts, e-learning, virtual conferences, virtual tradeshows, and persistent destinations.

These digital event solutions offer a combination of content and interaction features that include webcasts, simulated-live sessions (simulive), on-demand presentations, curated resources, private and group chat, video chat, Q&A forums, polling, virtual booths, virtual classrooms, social media, personalization, online community functionality and analytics. These capabilities are then packaged with registration, email confirmations, email reminders, surveys, support and branding options.

As you move up in this continuum, the solutions offer broader range of programming and engagement options for attendees and organizers. Wider range of engagement options results in higher ROI for both the attendee and the organizer.

Webinars and webcasts tend to be more of a one-dimensional experience with speakers using audio with slides as graphic aides. Though many options do provide for audience interaction, it tends to be fairly limited with speakers reading messages typed in by listeners.

Virtual events usually offer multiple sessions and speakers, agendas with starting times, and concurrent tracks, spanning a few hours to multiple days. They function just like in-person events.

Hybrid event is the combination of an in-person, live event and a virtual event, whose programming extension of that event. Hybrid Events extend the reach of a physical event, to a much larger audience.

Perpetual Communities are ideal for long term engagement, education and community building initiatives. They usually offer rich set of content, networking and discussion options for members. To keep the site fresh, the organizers host sporadic live educational programming within the community and establish “office hours” for members to have access to key staff and industry experts. These sites are also ideal location to host live training and certification-based classrooms.
The Virtual Events Report of 2018 by Tagoras noted that almost 44% of marketers they surveyed use or have used virtual events to achieve their marketing, training, communication or sales objectives. Further, almost 25% were planning to add virtual events to their mix in the coming business cycle.

The biggest reason cited for people not using virtual events was fear of the complexity of the technology (76%) followed by cost and uncertainty of being able to attract an audience. This playbook is written for the people who are planning to use an online event platform as well as those that have concerns holding them back.

Today, fear of the complexity of the technology should not be an issue. Even though Engagez offers professional services for clients who require additional resources or prefer turnkey implementations, they are not required. Engagez provides training, enabling clients to become self-sufficient conducting their own events.

Cost was a concern with almost half of the Tagoras study’s respondents. Our packages are based on subscription model that scale up depending upon the number of actual users you have and is quite cost-efficient. Our solution is priced to encourage frequent use instead of a single large use. Our philosophy is simple: these engagements should not cost you money but make you money!

Engagez offering is free until you scale beyond a certain number of attendees. This provides you unlimited time to explore the capabilities, evaluate and setup your site before you incur any changes. No risk enables you to use this powerful lead nurturing, employee engagement and training/educational solution.
The infographics below lays out the key steps in executing on your virtual programs:

**PLAN**
- Strategy
- Timeline & Resources
- Measurement & Metrics

**EXECUTE**
- Technology Selection
- Event Microsite
- Marketing & Sponsor Campaign

**BUILD**
- Registration
- Content Creation
- Venue Setup

**ENGAGE**
- Personal Welcome
- Live Q&A and Chats
- Announcement & Promotions

**ON-DEMAND**
- Content Preparation
- Engagement & Staffing
- Marketing Campaign

**LAUNCH**
- Training Reminders
- Go Live

**REPORT**
- Lead Reports for sponsors
- Event Reports for Internal
- Suggested Changes Next Event

**REUSE**
- Repurpose Session Videos
- Repurpose Event Resources
- Reuse the Venue (copy)

**MEASURE**
- Attendance
- Engagement
- Leads

**REPEAT**
- Lead Reports for sponsors
- Event Reports for Internal
- Suggested Changes Next Event
1. PLAN

STRATEGY

The first step in your journey is to create your plan outlining where you want to go, how long it will take and what resources you’ll need to be successful. Here are the key areas to consider and include in your plan:

| Define what you want to get from this program and why. | Identify the various target audiences you want to involve. | Decide what your objectives are for each audience segment. |
| Outline the most compelling content that will help you attract each segment. | Describe the ideal outcome for each segment. What do you want them to learn, think and feel about the experience, as well as what you want them to do as a result of participating? | Identify what features and capabilities you will need to have available in your event platform. |

TIMELINE & RESOURCES

Create a timeline for the various activities that are needed to execute on the program. You can find a sample or template timeline here.

Online events are still events and take various resources to execute successfully. Funding and budgets will need to be created to cover marketing for audience acquisition, content or talent acquisition (guest speaker fees, video recording or live streaming, etc.), technology or platform costs, as well as staff support or outside support costs.

MEASUREMENT & METRICS

As part of your plan, identify the activities you want to measure and how you are going to assess the information. There are many areas you can look at including: registrations, conversions to attendance, sessions watched, resources viewed, new leads generated, deals closed, sales conversations had, social media mentions, survey results, attendee satisfaction, demos given, meeting held, net promoter scoring, etc. These are a sampling and not an indication that you need to measure everything but at least identify those key metrics that align with the objectives of the program.
2. EXECUTE

TECHNOLOGY

Now that you have your plan worked out, you know the event flow, content strategy, sponsor programs and overall engagement goals, it’s time to start looking at platforms that provide the features and functions you’ll need to execute your event. In order to make your virtual event a success you must also make sure the venue is as easy and accessible as possible for your attendees to participate.

Here is a pretty comprehensive list of the likely options you’ll be focusing on:

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<th>Venue Locations</th>
<th>Registration &amp; Messaging</th>
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<th>Communication &amp; Engagement</th>
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<th>Access Control &amp; Security</th>
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<td>Roles Based Access Control – Domain Based Access Control – Location Based Access Restriction – Content Control – Multiple Security Levels</td>
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<th>Monetization</th>
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<th>Native and integrated webcasting solutions</th>
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You may want to issue an RFP for your platform requirements but will certainly want to have demos of any platform solutions that meet your needs and budget considerations. You can find a sample RFP document here.

Engagez is one of the few platforms that will allow you full access to the platform for evaluation prior to making a purchase decision.
Your event microsite is the area where you will be posting information about the event (agenda, registration, sponsorships, pricing, speakers, sessions and all related promotional information. This can be a section on your existing website, or a standalone site devoted to just the event. You’ll want to get this built out as soon as possible so that you can open registration.

Execution of your audience acquisition plan is critical to your event’s success. Online events are great for using every marketing channel and social network you have as attendees have no travel costs to participate and can attend from anywhere there is an Internet connection including on their mobile phone.

3. BUILD

Branding and graphics are important to get done early, as you’ll need them for all communications, the microsite and the venue. Be sure to have the graphics people crank out multiple versions of graphics and sizes for email banners, social media sites, ads, and venue branding and in-venue messages.

The Engagez platform has registration included for any type of registration you might need, paid or free. We also integrate with most registration systems through our APIs. Setting up the registration form is the key activity no matter where you are hosting registration.

Getting registration set up on the event platform should happen before you start the audience acquisition campaign, but you can also use a system of uploading registration lists to the platform if for some reason you aren’t ready on the platform.

Keep in mind that you will also need to have the email confirmation set up before launching the registration campaign.
With your theme and branding assets, you are ready to start your build out of the venue. The key graphic elements are the background graphics you want to use to set the look and feel of the venue for your attendees.

Engagez uses two event approaches, a traditional virtual event paradigm which looks like a conference center and a contemporary style which is more like a website user experience but still graphically themed to an event.

The priority is to get the venue landing page called the Entrance set up because that is the only public accessible area that will be available to people prior to the actual start of the event. This should be simple as it will take some copy, branding and perhaps a custom background if you don’t want to use the templates available.

All the other locations you choose to use such as the main page after login called the Lobby, the session viewing area called Auditorium, downloadable resource area called Resource Center, sponsor area called Exhibit Hall, chat and forum discussion area called Networking Lounge and all other chosen locations, are configurable during the period from when you launch the registration campaign and a few weeks before the actual start of the event.

Content, surveys, messages, resources, speaker and sponsor information can all be uploaded and configured next and then you are ready to test everything.

4. LAUNCH

TRAINING:

Speakers, moderators, sponsor representatives and internal support staff need to be trained on the completed venue as well as best practices related to their role during the event. These are best done on conference calls with screen sharing ability as well as recording so you can share with anyone who couldn’t make the training or last-minute staff changes.

REMINDEERS

Email reminders (as well as amazing content!) are critical to converting your registrants to actual attendees. You may vary your timing and number of messages but a reminder 1 week out, the day before, 1 hour before followed by a “starting now” message cadence is standard. Many events also send another message about 1 hour into the event to only those people who registered but didn’t log in yet.
To go live you will need to change the Entrance copy to reflect that the event is now open and to log in.

Still, competition for people’s attention and time has never been greater so a robust, omnichannel marketing campaign should start as early as registration and basic event information is available.

Launching your sponsorship outreach plan early is also a very smart move as people tend to budget months in advance and you want to have your marketing and sales activity in front of them as quickly as you can. Also, you don’t need registration open, the venue open or even your microsite live (though it is helpful) to begin your sponsor outreach.

5. ENGAGE

Speakers, moderators, sponsor representatives and internal support staff need to be trained on the completed venue as well as best practices related to their role during the event. These are best done on conference calls with screen sharing ability as well as recording so you can share with anyone who couldn’t make the training or last-minute staff changes.

Session Q&A is always a popular tactic to engage audiences and just like in physical events, you’ll need to be ready with people jumping in to start the conversation. You’ll also need to have presenters and session moderators remind people that the option to ask questions is available.

Chat can be used Ask the Experts rooms, networking lounges, interview rooms and for private one-on-one conversations. Engagez offers text as well as video-based chat.

Announcements are messages that are sent to participants at certain times with messages that are used to announce programs starting, remind people of opportunities to get more information and downloadable resources as well as special promotions and contests or giveaways.
6. ON-DEMAND

**CONTENT PREPARATION**

When switching over from a live or simulated live (simulive) event to on-demand access there are changes that need to be made to the venue such as removing a date and time for all the sessions. Content on the entrance page will need to be changed to reflect on-demand availability.

Registration procedures may need to be reset, and email registration confirmation copy will need to be changed from visit the venue on the date and time of the live event to view now.

**ENGAGEMENT STAFFING**

Participants coming to the venue for the on-demand portion of the event should be encouraged to utilize many of the same techniques for engaging with speakers, sponsors and subject matter experts as the live event.

With the Engagez platform this is quite easy to accomplish. As the program producer you can have one or multiple people assigned to receive notifications or any chats that are initiated in the platform and as long as they are logged into the platform, they will receive notifications on their screen. They do not have to have the platform open in their current tab to get the notifications and when they click on the notification, they will be taken right to the location and the specific chat.

Email notification will also be sent as backup and or for when moderators are not online.

**MARKETING CAMPAIGN**

A robust marketing campaign announcing the availability of the on-demand program and content is a great way to boost the exposure of the event again to attendees who can but want to see sessions they may have missed and it is also a way to get those who registered but missed the live event to come and participate.

Additionally, a strong marketing campaign across all marketing channels can drive up registration and participation for people who never registered. A strong on-demand focus can dramatically improve results and drive ROI of the program because all the investment except for marketing has already been done.
7. MEASURE

**ATTENDANCE**

Measuring attendance is the most basic measurement but can be powerful when looking at attendance across all locations in the venue and time spent in each area. With the Engagez platform you can not only see the cumulative numbers but drill down on any number in the analytics dashboard and see exactly who, what and when people were participation.

**ENGAGEMENT**

Every action an attendee takes in the platform is tracked and reported in the analytics dashboard so that you can understand who engaged with each piece of content (documents, videos, sessions, etc.) as well as any questions asked, chats participated in, meeting with sponsors or staff and much more.

**OUTCOMES**

Depending on the objectives of your program that you need to measure, there are multiple options available to collect the data you need. As mentioned above, the analytics dashboard has a tremendous ability to track outcomes. The Engagez platform also includes surveys that can be set up in advance and triggered upon a specific action like someone leaving the venue or sent out via email after the event.

If there is an ecommerce aspect of the program sales can be tracked within the platform or by using a special code in other transactional locations.

8. REPORT

**LEAD REPORTS FOR SPONSORS**

Sponsors and exhibitors will want to get their leads as soon as possible Engagez makes it easy to download and share lead reports with your sponsors and allows you to decide what information you will share.
There are many internal stakeholders for most events and differing levels of detail and access you may want to provide. Marketing may be more interested in tracking opens and click throughs of registration or reminder emails, sales may be more interested in lead contacts or requests for follow up meetings, demos or sales questions.

The engagez platform will allow you to generate custom reports or download all data in spreadsheets for custom analysis.

An important aspect of any program is the analysis of what was great and what needs to be looked at for improvement. It’s important that this review happen as soon as the event is finished and encompasses all the stakeholders involved (speakers, attendees, sponsors, salespeople, etc.). This will help you in planning changes for the next program you run.

Now that your event is over its time to look for more ways to make that valuable content work more for you. Individual sessions might be posted on your website, video sharing site like Youtube and Vimeo, social media channels, etc.

Another way to get maximum value out of your event is to run it again! Pick a new date and look for new ways to promote the event to people who didn’t register before. This is also a great technique for targeting other regions like EMEA or ASIAPAC where the original time zone may not have been ideal for those attendees. You can also easily localize the venue for the new regional events.
Maintain all the assets you used for the event like speaker’s bios, headshots as you may use those again in another event. The same holds true for all your sponsor assets as it makes it so much easier to attract sponsors for another event if you can show them how little work they need to do to participate again.

With Engagez you can copy an entire venue (excluding anything you don’t want) so that you can reuse it without having to rebuild everything.

10. REPEAT

Using the same platform and simply copying an existing venue to create a new one allows you to keep continuity for your attendees, speakers and sponsors. Another big benefit is that you can build up your analytics across all types of programs (events, launches, webinars, partner events, etc.) and never lose access to the data.

FOR MORE

Use this link to get a deeper dive into these topics at engagez.com/resources or go to engagez.com. Contact us at (415) 763-8660 contact@engagez.com.