



THE ULTIMATE HYBRID EVENT PLANNING CHECKLIST



BEFORE THE EVENT

Primary Objective: Plan all aspects of the event.
Define action items for pre, during, and post event.

A. EVENT PLAN

Laying the Foundation

Define event goals and objectives.

Identify target audience.

Decide event type: conference, trade show, seminar, job fair, etc.

Decide on the event format.
Know your reasons for choosing hybrid.

Create an event strategy brief.

Outline your event budget.
Include all costs such as speaker fees, costs associated with entertainment or artist management, venue charges, hybrid event platform cost, F&B, AV and production costs, marketing, etc.

Figure out all online and offline revenue streams.

- Finalize ticket pricing by defining different types of tickets. (in-person or virtual, all area access or limited access, etc.)
- Brainstorm potential sponsorship opportunities for sponsors and exhibitors.



A. EVENT PLAN *(cont'd)*

Laying the Foundation *(cont'd)*

Establish an acceptable margin of error.
How much deviation from the planned schedule is acceptable?
How much budget leakage is acceptable?
What is the approximate disaster recovery time?

Create event branding and style guidelines.
Finalize your event name, define an event theme, and design the event logo, signage, and creatives.

Determine engagement strategy for your event to converge both in-person and remote attendees.

Project Team and Event Support Staff

Get your project team in place.

Identify your event partners and vendors including:

- Content and speaker support.
- Marketing and communications partners.
- Support staff for sponsors and exhibitors.
- Vendors for photography, videography, decorations, entertainment etc.
- Partners for in-person and virtual swag.
- In-person catering and remote F&B delivery.



A. EVENT PLAN *(cont'd)*

Project Team and Event Support Staff *(cont'd)*

Get to know your event support team that will enable you to execute a smooth event:

- Customer service team members for the hybrid platform.
- Technical support staff at the venue and for the hybrid event platform.
- AV, event streaming, and event production partners.
- Internet provider at the venue.

Find a videographer or an entire production crew for the live streaming, depending on your event scope and complexity.

Assign production managers to monitor different stages (in case your event has multiple tracks) and for live broadcasting the sessions.

Have dedicated virtual representatives to ensure a seamless experience for virtual attendees.

Have on-site medical staff and staff for catering and security.

Recruit volunteers and interns needed.

Hold a kick-off meeting to assign roles and responsibilities to each team member.



A. EVENT PLAN *(cont'd)*

Agenda

Finalize event dates and time.

Consider relevant time zone(s) from where your speakers and attendees will be joining.

Build your agenda.

Identify which agenda items will be live streamed and which won't.

Plan if there will be any exclusive sessions for online attendees.

Incorporate sufficient breaks for smooth transition between sessions, for networking, and for segments specifically scheduled for audience engagement.

Plan for filler virtual sessions to cover for any delay in the physical event.

Plan each agenda item's content and flow.

Draft scripts for general announcements, housekeeping rules, welcome note, session transition fillers, etc.

Location and Logistics

Find a reliable hybrid event platform.



A. EVENT PLAN *(cont'd)*

Location and Logistics *(cont'd)*

Review whether the hybrid event platform has capabilities to support:

- Native event app
- Registration and ticketing
- Session hosting
- Content management
- Audience engagement
- Networking and AI-Matchmaking
- Gamification
- Virtual booths
- Badge scanning
- Lead retrieval
- Real-time and advanced analytics
- Accessibility

Choose the location(s) of the physical event.

Book a physical venue and review whether it has the following:

- Support for the hybrid setup
- Enhanced AV equipment
- Reliable WiFi and bandwidth to match on-site requirements
- Streaming capabilities
- Projector screens
- Multiple charging stations
- Technologically equipped private rooms and/or kiosks for hosting in-person/hybrid 1-1 and group meetings
- Meets the accessibility requirements
- Large space to allow social distancing
- Heating/cooling facility
- Green certification and sustainable architecture (if needed)

Finalize other logistics items such as:

- Rentals
- Accommodation
- Travel
- Parking and valet service

A. EVENT PLAN *(cont'd)*

Location and Logistics *(cont'd)*

Figure out your detailed AV and event production requirements along with the specific location on venue where they are required:

- Mics
- Lights
- Stage(s)
- Cameras
- Recording devices
- Screens
- Streaming provider

Source and confirm catering services. Finalize the menu.

Obtain required insurances and permits for the event.

Attendees

Plan different audience segments for ticketing (for ex - VIP, students, online, offline) and what each ticket allows access to.

Prepare in-person swag kits. Consider including items such as event merchandize, social distancing wristbands, masks, gloves, sanitizer, etc.

Email virtual swag kits to remote attendees. You can send online vouchers, coupon codes, Amazon gift cards, virtual lunch cards, etc.

Create and share an FAQ document, including instructions on how to access the event, troubleshooting tips, and how to contact support.



A. EVENT PLAN *(cont'd)*

Hosts, Moderators, and Speakers

Select the event host(s) and moderators.

Determine who will be hosting offline and who will be hosting online before planning the event structure.

Brief moderators on duties and assign who will cater to the on-site audience/speakers and who will look after the virtual attendees/speakers.

Confirm all the online and offline speakers.

Get signed contracts, bios, headshots, social media links, etc. for all the speakers.

Provide your hosts and moderators with cue cards and information on sessions and speakers.

Prepare and share an onboarding guide for virtual speakers.

*Familiarize them with the hybrid event platform they will use on the event day.
Summarize the program, timelines, and agenda.*

Provide speakers with branded templates to use for their presentations.

Ask speakers to share their final presentations and any additional downloadables by a certain date.

Provide speakers with promotional toolkits and request them to promote the event in their network.



SPONSORING



A. EVENT PLAN *(cont'd)*

Hosts, Moderators, and Speakers *(cont'd)*

Create a shared folder where speakers can upload their content.

Use these folders to share information relevant to the hybrid format.

Add all instructions and content templates.

Upload FAQs about your hybrid event platform as well as handy tips and tricks about the platform that speakers will find useful while presenting.

Ship hardware kits to remote speakers to enable them to deliver top quality sessions.

Pre-record a few sessions, if needed. Include backdrop, lighting, microphone, webcam, and a tech checklist.

Provide speaker coaching and share best practices to deliver sessions to a hybrid audience.

Arrange a demo of the event platform for remote speakers.

Inform them how they can join the live sessions, how to share screens, how to engage audiences, etc.

Designate a technical support person to answer virtual speakers' platform setup questions.

Line up a video editor to edit raw pre-recorded videos.

And get virtual session transitions created.

Send speaker gifts to remote speakers and prepare swag kits to be given to in-person speakers.

Keep them informed about the plan for dry runs, rehearsals, and recording schedules.

A. EVENT PLAN *(cont'd)*

Exhibitors, Sponsors, and Partners

Identify business goals of different exhibitors and sponsors.
Understand their expected ROI from the event.

Create sponsor/exhibitor opportunities and curate packages for partners
opting for online, offline, and mixed options.

Solicit sponsors and exhibitors for your online and offline event components.

Get signed contracts, company info, logo, product images/videos,
banners, social links, and downloadable assets from all partners.

Provide them access to their virtual booths.

Share partner briefing documents, kits, and other resources.

- Share onboarding deck and video (for remote stakeholders).
- Share the exhibitor hall map (for in-person stakeholders).
- Share copy of agenda, list of best practices, helpline number, link to support chat, and support email (for both in-person and remote stakeholders).

Brief on-site partners about purchasing (or accessing) booth furniture, electricity, WiFi etc.

Collect swag and other promotional material from on-site partners
that need to be a part of the in-person attendee swag bags.

Select your online and/or offline affiliate partners.

Provide all the partners with promotional toolkits.
Ask them to promote the event in their network and on social media.

A. EVENT PLAN *(cont'd)*

Health, Security, and Privacy

Develop a COVID-safe on-site plan.

Arrange for rapid testing, PPE kits, and other COVID-related supplies such as masks, shields, wastebaskets, sanitizers, sanitizing wipes, color coded wristbands, etc.

Prepare safety and cleanliness guidelines.

Arrange for on-site security.

Define the privacy policy of your event and communicate it to all stakeholders. Include information about how you will be storing attendee data, how you will share attendee contact information with exhibitors or sponsors, what data the hybrid event platform stores, etc.

Check for GDPR compliance.

Review your event cybersecurity plan for online security.



B. EVENT SET UP

Virtual Setup: Event Website

Create the landing page.

Upload the agenda.

Showcase speakers, exhibitors, and sponsors.

Add a countdown timer.

Include an FAQ page.

Link the event website to the registration site and include a tracking code (e.g. UTM, Facebook pixel) to determine the sign-up source.

Showcase the sponsor packages and set up the payments system for exhibitors

and sponsors.

Virtual Setup: Hybrid Event Platform

Add the event description, date, and time.

Integrate the platform with your CRM and marketing automation software such as Salesforce, Marketo, and HubSpot.

Create stakeholder groups and define access permissions - who can chat/meet with whom, who can use what functionality, etc.

Groups can be segmented as follows:

- Attendee – Virtual
- Speaker – Virtual
- Booth Member – Virtual
- Attendee – In-person
- Speaker – In-person
- Booth Member – In-person



B. EVENT SET UP *(cont'd)*

Virtual Setup: Hybrid Event Platform *(cont'd)*

Either manually upload the lists of attendees, speakers, sponsors, and exhibitors or through the integrated marketing automation platform you use.

Enable SSO if required.

Set up ticketing and payments for event attendees by adding a multi-tiered ticketing system to differentiate access levels. For example:

- Ticket 1: Virtual Attendees – FREE
- Ticket 2: In-person Attendees – EARLY BIRD
- Ticket 3: In-person Attendees – PREMIUM

Add the virtual booths for exhibitors and sponsors. Give them access to manage it so they can upload their logos, product images, banners, company description, contact details, social links, downloadable material, etc.

Brand your event platform with your color theme, logo, customized URL, etc.

Upload sponsored ads and banners.

Configure the event app to:

- Showcase branding.
- Enable session engagement.
- Enable badge scanning to track on-site registration and check-ins and for exhibitors/ sponsors to collect in-person leads.
- Send push notifications.
- Enable matchmaking i.e. tailored attendee profile suggestions to other attendees and sponsors/ exhibitors via chat and meetings.
- Allow attendees to view an interactive floor plan with on-site exhibitor booths and venue details.

Integrate live chat support on the hybrid event platform.

B. EVENT SET UP *(cont'd)*

Virtual Setup: Agenda and Sessions

Add all the agenda tracks to the event platform.

Add all sessions and respective session details such as speakers, moderators, sponsors, and session banners.

Add pre-recorded videos and/or generate RTMP native live stream as necessary.

Choose the streaming options to play live videos - Zoom, Vimeo, YouTube or the hybrid event platform's in-house broadcast studio.

Control visibility of sessions depending on attendee's ticket type.

Set up multilingual interpretation and live captioning to make the event accessible.

Enable live chat, Q&A, and polls options.

Virtual/Hybrid Setup: Networking and Engagement

Configure the networking and engagement touchpoints on your hybrid event platform.

Enable 1-1 chat and 1-1 scheduled meeting options for virtual and hybrid interactions.

Create dedicated networking lounges for attendees, booth members, and speakers. Set these up for virtual to virtual interactions as well as for virtual to in-person interactions.

Set up online meeting rooms to connect in-person and virtual attendees, booth members, and speakers.



B. EVENT SET UP *(cont'd)*

Virtual/Hybrid Setup: Networking and Engagement *(cont'd)*

- Plan posts for the event feed.
- Prepare poll questions for live sessions.
- Set up different types of contests and add audience engagement activities.
- Set up the leaderboard.
- Finalize various prizes and allocate them to different contests and leaderboard winners.
- Create online surveys to collect feedback for the event and for individual sessions.
- Schedule push notifications.
- Send attendees a reminder email to complete their profiles.
- Send exhibitors and sponsors a reminder email to set up their virtual booths.

Physical Event Setup and On-site Tasks

- Conduct a site inspection.
- Determine room capacity, layout, and attendee flow.
- Design the on-site experience.
- Plan seating layout to accommodate social distancing and attendee category.



B. EVENT SET UP *(cont'd)*

Physical Event Setup and On-site Tasks *(cont'd)*

Set up spaces for physical booths and banners.

Ensure there are green rooms for all speakers and moderators.

Plan spaces for sessions, networking, catering, hybrid interactions, sponsors, and exhibitors. Consider all COVID-19 related aspects and plan for proper social distancing at all spaces.

Prepare isolated spaces for any attendee showing signs of COVID-19.

Finalize the floor plan. Include areas for all stages, booths, green rooms, F&B, networking, etc.

Plan the ground staff allocation and their responsibilities.

Share the on-site production schedule with your team and partners.

Finalize all things catering on-site.

Finalize all the on-site vendors and ensure all their venue requirements are met.

Conduct a final site inspection.

Plan the on-site branding.

Prepare and ensure directional signage is in place.

Place floor markings and wall markings to ensure social distancing.

Ensure there is sufficient lighting and AV setup is in place.

Set up the equipment for recording and live broadcasting.

B. EVENT SET UP *(cont'd)*

Physical Event Setup and On-site Tasks *(cont'd)*

Set up cameras for hybrid meetings in meeting rooms and lounges or install kiosks around the venue for the same.

Ready the registration tables with the registration list, agenda copies, brochures, feedback forms, in-person swag bags, badge scanners, thermometers, etc.

Have general and technical helpdesks.

Place multiple sanitization booths across the venue.

Design and print scannable print badges.

Set up multiple badge scanning booths.

Create delegate name cards.

Plan contests and prizes for on-site attendees.

Send RFPs to hotels located around the event venue and arrange accomodation for speakers, delegates, and team members.

Finalize all travel bookings and pickup & drop arrangements.



C. EVENT MARKETING

Event Marketing

Formalize all aspects of your marketing strategy pre, during, and post event, along with the timelines.

Ensure all your marketing collateral is ready before your campaign go-live dates.

Launch the event landing page and registration page.

Showcase the event on your website.

Choose an event hashtag and promote the event on social media.

Consider creating a dedicated social media profile/group for your event.

Leverage email marketing for promotions, invites, reminders, and follow-ups.

Roll out press releases about the event.

Consider print mediums like newspaper and magazines for advertising.

Create templates for speakers, sponsors, and exhibitors and ask them to promote the event.

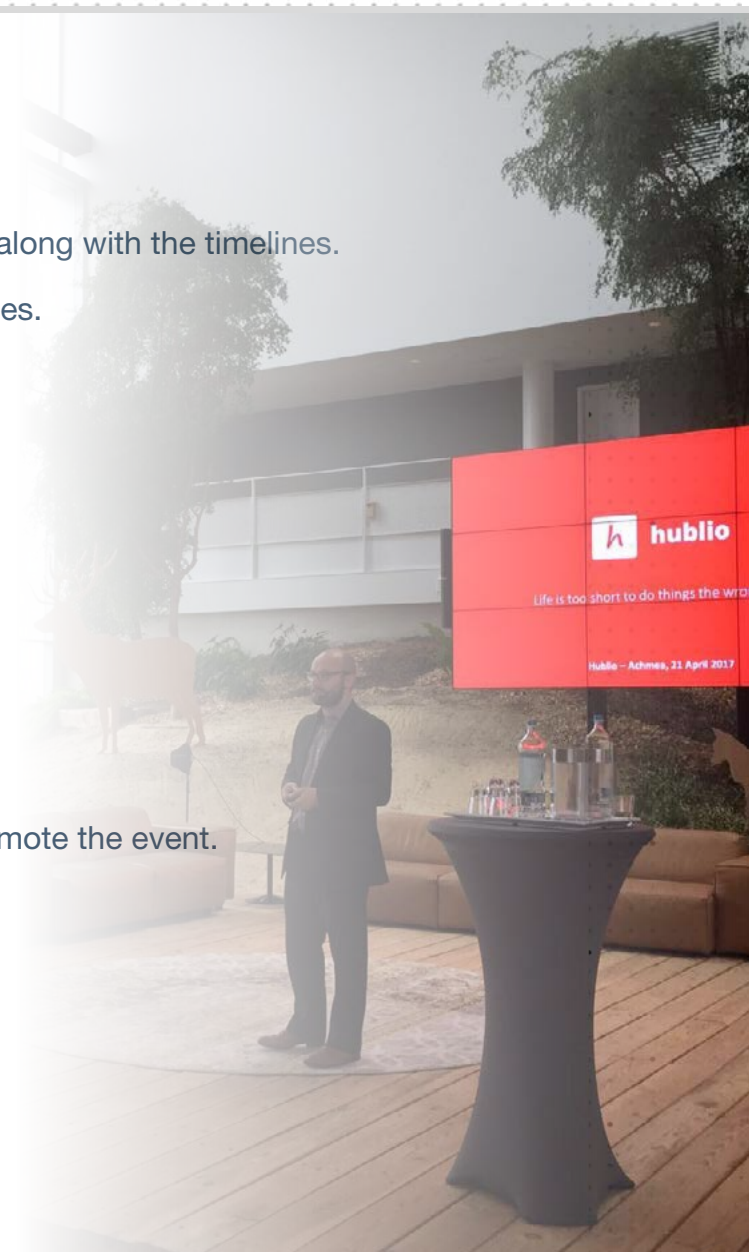
Utilize influencer marketing.

Implement affiliate marketing.

Calculate 'Potential \$ Value of Your Event'.

Potential Value = Average value of a prospect X No. of target leads registered

If the potential value is below target revenue goal proposed for the event, focus on accelerating registrations via event marketing.



D. FINAL CHECKS

Ensure virtual speakers and moderators are trained to use the hybrid event platform.

Ensure they have excellent digital access and are well versed with best practices.

Check all material such as survey forms, brochures, agenda copies, checklists, production schedule, etc. has been printed.

Ensure a detailed itinerary has been shared with speakers, sponsors, exhibitors, partners, and VIP guests.

Ensure agenda/link to agenda has been shared with both offline and online attendees.

Double check all content and proofread submitted presentations, along with information uploaded on the hybrid event platform.

Test the hybrid event platform usability from different stakeholders' perspective.

Make sure everything is set up and tested at the physical venue, especially audio, video, lighting, music, networking lounges, breakout rooms, etc.

Confirm event day reporting time with all staff and vendors.

Schedule a dry run and rehearsal with all remote and on-site team members, speakers and moderators. Include motion graphics, transitions, video rolls, speaker presentations, audience interaction, etc. in the dry run.

Make sure you have a contingency plan in place for various scenarios like speaker difficulties, technology or internet outage, schedule change, change in COVID-19 restrictions or protocol. Have a few pre-recorded sessions, additional equipment, internet service providers, etc. as backup.

Review this checklist and ensure nothing is missed.



DURING THE EVENT

Primary Objective: Execute the event successfully.

E. BASIC CHECKS ON D-DAY

Ensure that all tech equipment at the venue is functional and fully charged or plugged in.

Test the audio, video, and broadcasting settings before the start of the day.

Check that you have lined up the pre-recorded backups to play for virtual attendees in case of any delays in the on-site sessions.

Check audio and video of remote speakers 15 mins before their session starts.

Ensure all sessions are being recorded.

F. COMMUNICATION WITH STAKEHOLDERS

Set up a Slack/Whatsapp channel for coordination between your on-site and virtual team and use it to be in sync.

Set up a private chat channel for in-person and remote speakers, hosts, and moderators.

Send a final event reminder email to attendees who have registered to attend virtually.

Resend key event details and virtual studio access details to remote speakers.

Keep in touch with your exhibitors, sponsors, and partners for any issues they face.

Keep asking attendees to share their event moments on social media using the event hashtag.



G. FEEDBACK AND SUPPORT

Share regular physical and virtual surveys to collect real-time attendee feedback.

Keep a tab on support email and chat for SOS messages.

Coordinate with speakers to ensure they join in on time.

Have dedicated staff to escort speakers to on-site green rooms, stage, recording, and/or broadcast areas.

Have the tech team, operations team, and AV team on standby to handle any on-site or virtual platform issues.

Constantly checkin with your partners and be proactive in resolving any issues they face.

H. ON-SITE REGISTRATION

Make sure the registration desk is ready with necessary collateral and equipment for in-person attendees.

Scan badges of attendees at different check points.

Check attendees' temperature and vaccine status.

Hand over swag kits to in-person attendees and speakers.



I. EVENT ENGAGEMENT

Ensure session polls go live and end in a timely manner.

Make sure the virtual moderator is empowered to manage polls, Q&A, chat, screen share, control mute/unmute options, and can monitor the session timing closely.

Manage the virtual contests' timings and submissions.

Manage on-site gamification activities, winner announcements, and prize distributions.

Manage the push-notifications on the app and the event platform.

Post regularly on the event feed.

J. MARKETING DURING THE EVENT

Send daily emails with the day's recap to all stakeholders. Include your remote attendees who did not turn up at the event in your mailing list too.

Ensure the designated social media manager is regularly posting event updates on social media.





AFTER THE EVENT

Primary Objective: Understand your ROI from the event and gather insights for future events.

K. POST-EVENT FEEDBACK

Email post-event surveys.
Collect and review stakeholder feedback.

Debrief with your entire team.
Gather feedback on what went well and what can be improved.

L. REVIEW ANALYTICS FROM THE VENUE

View on-site check-in/check-out data.

View offline session attendance and attendee movement data.

Review the surveys filled on-site, covering different aspects such as session and speaker feedback.

Check venue feedback.

Check the feedback and expenditure on manpower and hardware equipment.

Check analytics for F&B, accommodation, and transportation.
Look out for feedback, attendee preferences, and costs incurred.



M. REVIEW ANALYTICS ON THE HYBRID EVENT PLATFORM

Check attendee analytics:

- Total attendee registration count (in-person and virtual)
- Total attendee check-ins (in-person)
- Total attendee logged-in data (virtual and hybrid)

Check ticketing analytics:

- No. of tickets sold per ticket type
- Total revenue from ticketing
- Ticketing revenue segregated by attendee type and ticket type (e.g. virtual vs in-person)

Check lead analytics:

- Count of leads generated (virtual, in-person, hybrid)
- Lead scoring (virtual, in-person, hybrid)

Check the sponsor and exhibitor analytics:

- No. of booth visits (virtual, in-person, hybrid) and bookmarks (virtual, hybrid)
- No. of business cards shared (virtual, in-person, hybrid)
- Average booth rating (virtual, in-person, hybrid)
- Attendee-booth engagement metrics such as product image views, product video views, files downloaded, etc. (virtual, hybrid)
- No. of lounge table meetings (virtual, in-person, hybrid)
- Clicks and impressions on virtual sponsored branding for sponsor logos in sessions, banners, display ads, UTM links, etc. (virtual and hybrid)

M. REVIEW ANALYTICS ON THE HYBRID EVENT PLATFORM *(cont'd)*

Check networking analytics:

- Profile views (virtual, in-person, hybrid)
- Profile bookmarks (virtual, in-person, hybrid)
- No. of business cards shared (virtual, in-person, hybrid)
- No. of messages exchanged (virtual, in-person, hybrid)
- 1-1 meetings data (virtual, in-person, hybrid)
- Breakout rooms data (virtual, in-person, hybrid)
- Lounge meetings data (virtual, in-person, hybrid)

Check engagement analytics:

- Feed activity analytics such as no. of event feed posts, types of posts, no. of comments and likes (virtual, in-person, hybrid)
- Contests data (virtual, in-person, hybrid)
- Leaderboard data (virtual, hybrid)
- Survey and polling data (virtual, hybrid)

Check online and offline speaker analytics:

- Average rating
- Profile views
- Profile bookmarks

Check online and offline session analytics:

- Session registrations
- Session likes
- Average rating of each session
- Session views and replays
- Session engagement data e.g. chats, Q&A, notes, files downloaded

N. FINANCIAL ANALYSIS, ROI, AND FORECASTING

Prepare the book of accounts to derive budget deficit or surplus.

- Consolidate all invoices.
- Identify vendor payout in accordance with payout terms.
- Update the actual amount spent against line items.
- Identify any planned expenditure difference.
- Identify the revenue and income generated from ticketing, sponsorship, any other revenue streams.

Review your profit and map key results against KPIs established before the event.

Calculate the ROI:

$ROI = \text{Returns from investment}^* - \text{Cost of investment}^{**}$

* *Returns from investment: value of new business and leads generated from the event*

** *Cost of investment: value of all expenses incurred to plan and organize the event*

Make notes for future planning.

Include insights for forecasting and trend analysis.

Write an internal event report.

Compare insights on virtual vs in-person vs hybrid event format.

Write an external event report for your sponsors, exhibitors, partners, press etc.

Compare insights on virtual vs in-person vs hybrid event format.



0. POST-EVENT COMMUNICATION AND MARKETING

Export attendee details into your CRM.

Send thank you emails to speakers, exhibitors, sponsors, affiliates, and attendees.

Collate and send the analytics collected at the venue and on the hybrid event platform to sponsors and exhibitors, along with lead generation data, such as:

- Attendee engagement report for their booths
- Bifurcated lead status of attendees (hot, warm, cold)
- Business cards dropped
- Meetings report
- Chat report
- Scanned badges data for in-person leads

Share the session survey results with speakers.

Share a recap of the entire event including key takeaways and links to any additional resources with attendees via email.

Edit and upload session recordings on your hybrid event platform and let attendees and other stakeholders know how to access them on-demand.

Change homepage and banners of your hybrid event platform to promote on-demand content.

Upload photos and videos from the event on the platform event feed and social media.

Announce online and offline contests' winners on the hybrid event platform's event feed and on social media.

0. POST-EVENT COMMUNICATION AND MARKETING *(cont'd)*

Further promote the on-demand content to generate more leads post-event.

Create different marketing assets from the entire event and promote them.

- Write blogs with key takeaways from the overall event and from different sessions.
- Repurpose the event content into video snippets, video collages, infographics, etc.
- Create a shareable case study on the event.

Communicate dates and information about your next event to all your event stakeholders.

Create a year-round event community management strategy to reap long-term benefits from your hybrid event.

Define event KPIs.

Demarcate KPIs as per their applicability to the in-person component, virtual component, or both.

WANT TO REIMAGINE YOUR HYBRID EVENT?

Hubilo is the only all in one hybrid event platform built to drive engagement and we do this with the industry's largest suite of engagement and gamification features.

Our white glove support involves a designated customer success manager who's with you at your event.

There's no need to text, email, or call separately. Our live support is available for you throughout the event (as well as before and after the event) to help address any issues you, your partners, or attendees might face.

Engagement on your fully branded event, backed by your 24/7 customer success team, assures every event run on the Hubilo platform perfectly executes every time. All the enterprise security, integrations, and analytics you need with the engagement and white glove support you want.

Visit [Hubilo.com](https://hubilo.com) to learn more. You can also reach out to your customer success manager or book a demo with us.



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