Organizer
Before your event

Transitioning to virtual events

Event Team

Essential

Organizer
Event host. Create the event, set permissions, invite event team, curate event links.

Producer
Responsible for starting and stopping the Live Event, queuing content, back channel chat. This could also be the Organizer.

Presenters
Responsible for content and commentary. They can present audio, video, and share their screen with the attendees. May moderate Q&A.

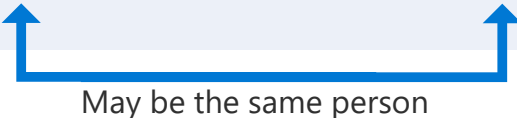**May be the same person**

Recommended

Moderators
Moderator to help facilitate Teams Q&A or Yammer Conversation in the Live Event.*

IT Administrator
Ensures network and service health in advance of your event. Policy configuration and monitoring. Manages technical support requests.

Tip: Event sponsors

In a larger organization you may additionally have an event sponsor with an interest in the education of audience or accountability for delivering the message. These executives are often non-technical and most engaged about the outcome of your event rather than the technical details.

*In Teams should be a person in the meeting Organizer or Presenter role, in Yammer should be a Group Admin.

Microsoft 365

Your attendees

Your attendees may be participating in your event from unique locations. Consider who they are, what they are using and where they are joining from to mitigate common event issues.

Identity

Are attendees full members of your Microsoft 365 tenant?

Will you support guest attendees?

Will you support anonymous attendees?

Configure these items in your service policies and meeting options. Proactively decide the scope of your viewing audience.

Devices & Clients

Windows and Mac devices

Browsers and desktop clients

Mobile & tablet devices (Android, iOS)

Room devices

Text & screen readers

Device type dictates certain elements of the experience. Microsoft Teams minimizes that impact by prioritizing quality, allowing for meeting controls and focus modes.

Location

Hard wired or wireless?

Mobile networks?

Cellular service only?

Bandwidth considerations can impact your event. Include an on-demand viewing strategy to ensure content can be accessed when attendees return to a good signal location.

Accessibility

Strive to have an accessible event and content. Utilize features like closed captions in broadcasts, alt-text for images and the Accessibility Checker for PowerPoint.
Learn more at https://aka.ms/PowerPointAccessibility.

Avoiding common issues

Creating a quality event can feel daunting. Follow these recommended steps from our experts to avoid common issues.

❑ **Time to Prepare**: Even a simple one-person webcast needs production time. Schedule events in advance and avoid last minute productions when possible. Once you've done a few, you can reduce this time.

❑ **Service & Network Health**: Work with your IT department to ensure your network, service and devices are healthy.

❑ **Content Quality**: Smooth delivery will not make up for poor content. Is the message clear? Will someone new to the topic understand the intention?

❑ **Presentation Skills**: Your speakers are the heart of your event quality. Ensure they have ample time to prepare and understand the presentation process.

❑ **Event Support**: The longer and more complex your event is, the more you will need event support staff just like in a physical event. Train them early. Provide clear ways for attendees and speakers to request assistance.

Every event producer knows that things can and will go wrong, but your planning and rehearsals will mitigate your audience being aware. Keep your team morale high and relaxed for success.

Event scenarios

Webinars

- Destination learning events.
- Individual or series. Funnel to conferences and communities.
- Pre-recorded or live.
- 2-way engagement with attendees (open or moderated).
- Includes hands on learning scenarios.

Virtual conferences

- Single or multi-day experience.
- Multi-track and varying content types.
- Funnel to online communities for ongoing engagement.
- Moderated Q&A.

Online communities

- Managed communities for learning and ongoing engagement. Community management support needed.
- Ongoing schedule of events and meetings.
- Combination of recorded content & live discussion.

Leadership townhall

- 1 to Many with managed Q&A.
- Often moderated destination events.
- Sometimes crafted in a regular rhythm of business or on-demand.

Public broadcasts

- 1 to Many destination broadcast.
- Optional custom streaming configurations.
- May stream to additional platforms.

Tip: Scale and complexity matter

Teams meetings and Live Events can be self-produced. For large scale or multi-day events, a broader event team is recommended.

Evolve your physical events to a digital format

New methods of sharing information are key to delivering a successful virtual event. It is important to embrace new ways of engagement to keep the interest of your audience. Strive to be different in alignment with your brand, context and message. Train team members on new skills to maximize this new event model.

Shorter sessions

Minimize the amount of information you are trying to share. Have a clear topic and follow-up call to action.

In multi-hour and multi-day events, plan breaks in your content delivery. Program short interstitial announcements or allow programming breaks to give time for attendees to stretch, walk the dog or visit their facilities.

Interactive content

Use online polls, trivia games relevant to your content and prepared video to keep the content moving.

Ensure you allow for Q&A time. Pre-seed questions in the chat window to get the ball rolling. Many people are hesitant to come off mute and speak in a virtual forum. Allow enough silence to accommodate for delays in audio transmission/unmuting.

Presenter skills

Rehearse! There is no replacement for preparation.

Online presentation skills are more complex when you are not receiving non-verbal feedback from your audience. Consider making speaker training mandatory as people adapt.

Semi-live model

Consider pre-recording core content. Play back pre-recorded sessions with live Q&A moderators, preferably the speakers. This reduces stress on production staff & speakers, allow for editing in additional on-screen elements and still provides interaction with the audience.

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Use our checklist

Use our checklist to stay on track and prepare for your virtual event. Download it from https://aka.ms/OrganizerChecklist.

Microsoft 365 Virtual Event Sample Checklist

Event Overview
Use in your initial event intake and planning. Delete placeholder text and unused rows.

Event Name	[official event title that will be used everywhere]
Event Description	[2-3 sentence summary of the event]
Event Date	
Event Time	
Event Goals	1. 2. 3.
Target Audience	○ What is the profile of a typical attendee? Has this event ever been digital before? ○ Have we asked them for their expectations? ○ What are the outcomes/next steps we want them to take?
Executive Sponsor	[who has organizational resources/authority to assist]
Action Items	[what actions will attendees take next after the event]
Post-Event Content	[where is content to be posted? How will people access it?]
Event Promotion	[how will we tell people about the event?] [do we need a formal registration] [are there rules/policies on who can attend]
Event Location	[Which app will you use to schedule and host the Live Event? See our decision tree.] Teams - Live Event will be hosted and viewable in Teams Yammer - Live Event will be hosted in a Yammer Group with an event page/conversation Stream - Live Event will be hosted in Stream in embeddable Stream player

Microsoft 365

Organizer

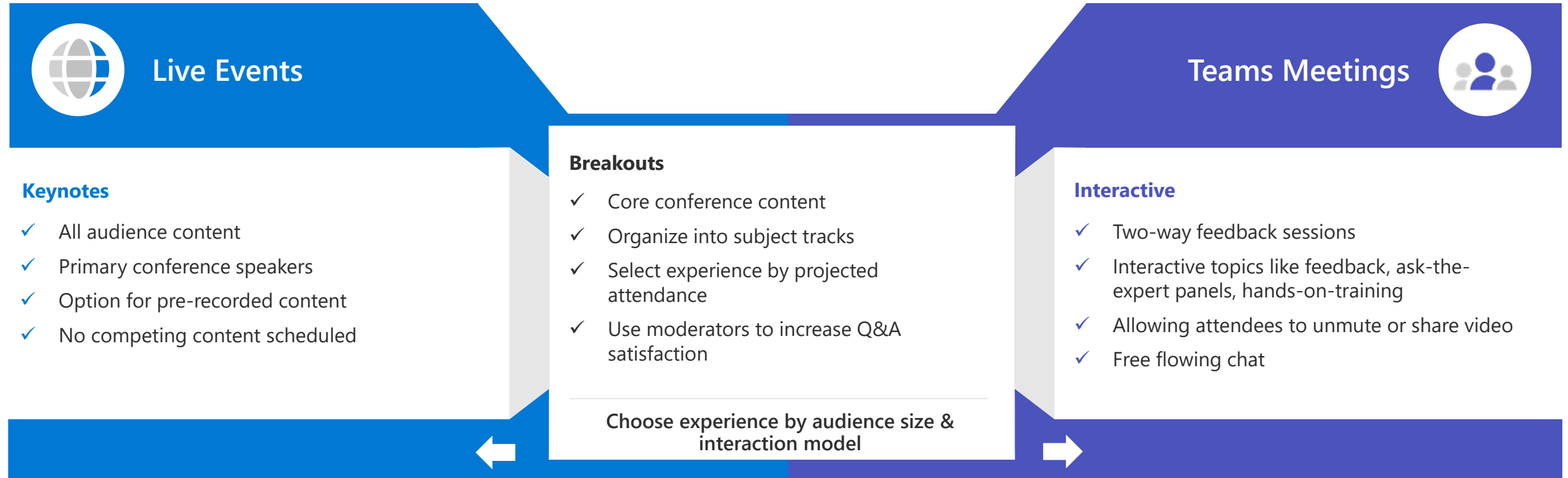Before your event

Selecting your event experience

Microsoft 365

Combination events

Large scale, multi-day events may be a combination of Teams meetings and Live Event experiences. Match the interaction and broadcast method to the audience need.

Live Events

Teams Meetings

Keynotes

- ✓ All audience content
- ✓ Primary conference speakers
- ✓ Option for pre-recorded content
- ✓ No competing content scheduled

Breakouts

- ✓ Core conference content
- ✓ Organize into subject tracks
- ✓ Select experience by projected attendance
- ✓ Use moderators to increase Q&A satisfaction

Choose experience by audience size & interaction model

Interactive

- ✓ Two-way feedback sessions
- ✓ Interactive topics like feedback, ask-the-expert panels, hands-on-training
- ✓ Allowing attendees to unmute or share video
- ✓ Free flowing chat

Tips for a successful event:

- Provide navigation and awareness sign-posts on your primary attendee website or digital brochure.
- Make content available for attendees as soon as possible after event. Use Stream for Microsoft 365, Microsoft Teams or other popular online video portal technology to ensure a content lifecycle.

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Selecting your event experience

	What type of event?	**What type of attendee experience?**	**How many people will watch the event live?***	**What level of video production?**
	I	II	III	IV
	Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
	Event series	Managed Q&A	Up to 20,000	Multiple presenters
	Part of an engagement community	No attendee discussion or Q&A	Up to 100,000	Custom production

Event examples:

Single event: Product launch, organizational changes, town hall

Event series: Training, office hours, employee development

Engagement community: Customer community, company partners, product support

*Are your attendees' members or guests of your Microsoft 365 tenant? Microsoft Stream does not support guest access at this time.

Microsoft 365

Selecting your event experience: Teams meeting

I	II	III	IV
What type of event?	**What type of attendee experience?**	**How many people will watch the event live?**	**What level of video production?**
Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
Event series	Managed Q&A	Up to 20,000	Multiple presenters
Part of an engagement community	No attendee discussion or Q&A	Up to 100,000	Custom production

Recommended: Teams meeting

Build community and authentic connection

- Provides open discussion features via audio and video for attendees
- Provide meetings as a part of a team to provide continuing engagement
- Support interactive chat during & multiple presenters in the meeting
- Familiar content and video sharing controls
- Use Yammer for your Teams produced meeting as a part of a community experience or series with continuing conversation

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Selecting your event experience: Live Events

	I	II	III	IV
	What type of event?	**What type of attendee experience?**	**How many people will watch the event live?**	**What level of video production?**
	Single event	Open 2-way discussion	Up to 300	Simple webcam and screen share
	Event series	Managed Q&A	Up to 20,000*	Multiple presenters
	Part of an engagement community	No attendee discussion or Q&A	Up to 100,000**	Custom production

Recommended: Live Events

Manage the attendee experience
- Multiple Live Event options for maximum flexibility
- Broad scale and highly managed content experience
- Supports self-produced to custom production scenarios
- Live Events can be publicized as a part of an engagement community

Next Step: Follow Live Event selection decision tree ➡

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Which Live Event experience is right for me?

I	II	III	IV	V
How many people will watch the live broadcast?	**Are there external attendees?**	**What type of attendee experience?**	**What level of video production?**	**Type of live event**

Start your live event experience here!

Up to 20,000*

Include people from outside your organization → **Moderated Q&A** → **Simple webcam and screen share or Custom production** → **Live event in Teams**

Only people from inside your organization → **Open discussion** → **Simple webcam and screen share or Custom production** → **Live event in Yammer**

No attendee discussion or Q&A → **Only Custom production** → **Live event in Stream**

Up to 100,000**

Include people from inside and outside your organization → **Custom event experience embed or view in Stream** → **Only Custom production**

*Attendee limit increases over 10,000 are temporarily available until July 1, 2020. Events above 20,000 attendees require Live Events Assistance Program (LEAP) Engagement.

**Stream live events can be delivered outside an organization when planned though the LEAP team. It's a case-by-case, temporary service to help customers communicate at scale outside their organization.

Custom production scenarios including external encoder and multi-camera configurations will be covered in additional documentation

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Microsoft 365

Considerations by meeting types

Putting your attendees at the center of your decisions will often simplify overly complex plans.

Almost every consideration presented by the technology layer of your virtual event can be mitigated through planning, rehearsal, IT support and prioritization of features for the attendee experience.

Teams meetings	Live Events in Teams	Live Events in Yammer	Combination event
• All team members receive channel meeting notifications • Two-step process to export meeting chat for review & repurpose • Chat with large groups can be difficult to follow • Recorded meetings can't be accessed by tenant guests • Recorded meetings can only be downloaded by organizer	• Requires intermediate skills in Live Events and presentation software to self-produce • Once the event is started it cannot be stopped • Any event interruption requires new meeting URL. Use a short URL redirector for simplicity. • Chat is moderated • Attendees cannot unmute or share video/content • Download video and transfer to on-demand viewing system for external guests	Live Event items plus the following: • Content sharing in separate document library • Supports ongoing conversation and hashtags. Have clear post-event messaging for moderation or self-service.	• Increased event management complexity when using different experiences, Live Events and Teams meetings • Must manage schedule changes in conference site experience • Need dual skills for meeting production & moderation

Each organizer must set the priority of meeting size vs engagement

Live Events: Supported platforms by role

	Desktop	Web	Mobile
Producer	Yes	No	No
Presenter	Yes	No	Yes*
Attendee	Yes	Yes	Yes

****Presenter** can join a Live Events meeting via mobile with audio capability and to view shared content, along with video, but they cannot share content from their mobile device.

Microsoft 365

Understanding Guest Attendee Behavior for Virtual Events

A "guest" in the event context means an Attendee who does not have log-in credentials issued from the host tenant. They have a log-in credential from their home domain.

Example: Sally@Contoso.com wants to host a Teams Live Event from contoso.com. She invites Bob@microsoft.com and John@outlook.com to attend the event. Bob and John are both a "guest" of the Contoso.com tenant for this event.

Considerations for Sally*:

Q: Does your tenant allow for external guests? (Guest access configuration) Yes/No
A: If No, discuss with your IT administrator

Q: Have Bob and/or John ever been invited and logged into Contoso.com? (Existing guest user) Yes/No
A: Consider adding the guests to a Team in advance so they can redeem their invitations to the tenant before the event. The tenant switcher will appear in Bob's Teams client to switch to contoso.com. John may also see the tenant switcher if his account has been invited as a guest to more than one organization. This will also allow Bob and/or John to present or produce in the Live Event..

Q: Does Bob's organization use Microsoft Teams? (Licensed user in home tenant) Yes/No
A: If No, Bob will not be able to be authenticated as he joins the event. He can only join anonymously.

Q: Does Bob's home tenant allow their accounts to be guests in other tenants? (Guest access configuration) Yes/No
A: If No, Bob will not be able to be able to accept guest invitations or be authenticated as he joins the event. He can only join anonymously and cannot present or produce.

Q: Has John been added as a guest in Microsoft Teams? (MSA guest) Yes/No
A: If No, John will not be able to be authenticated as he joins the event. He can only join anonymously.

Q: Does Sally require only authenticated users to attend her event? (Meeting options) Yes/No
A: If Yes, users must have either Teams or Stream license depending on the production method.

*For detailed, supplemental information review our product documentation on Planning for Live Events

Teams produced Live Events: For external contacts

Guest users

	Attendee	Presenter/ Producer
People & Groups	Y (CC)	Y (CC)
Org-wide	Y (CC)	Y (CC)
Public	Y	Y (CC)

(CC) = Change organization context via the tenant switcher in desktop client. Attendees can switch context and view via an in-private browsing experience. There is no support for producing from the Teams web experience.

Federated users

	Attendee	Presenter/ Producer
People & Groups	Y*	Y (L)
Org-wide	N	Y (L)
Public	Y	Y (L)

(L) = Wait in the lobby
*If member of selected group/user list

Technical readiness creates a smooth event

Now that you've selected which technology will best serve the needs of your event, take these important steps:

❏ Talk with your IT administrator to ensure you have access to the selected services

❏ Assess the skills of your event team

❏ Review online training or ask for help to fill identified gaps

If you are also filling the role of the IT administrator in your organization review our materials on service health and readiness.

Organizer
Before your event

Scheduling your Live Event

Microsoft 365

Meetings spectrum

Specialized scenarios on top of the collaboration platform

Learning and education

Webinars

Ad-hoc collaborative
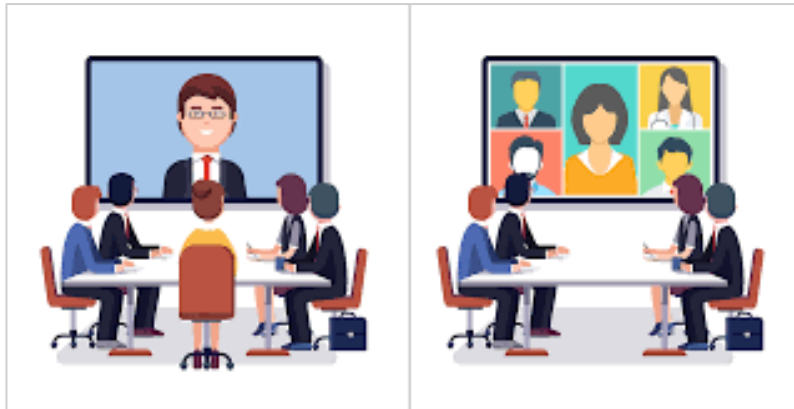
Persona: Eng Manager
Scenario: Daily Scrum

Persona: CEO
Scenario: LT Review

Self produced

Persona: Product Leader
Scenario: Tech Talk

Persona: Director
Scenario: Shiproom

Studio produced

Persona: Studio Producer
Scenario: Town Hall

Persona: Product Marketer
Scenario: Launch Demos

Collaboration platform

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Teams Live Events

The following slides are to provide guidance on how to create a Live Event.

Note that some of the features may not be exactly what an end user will experience due to:

Teams policies set at the admin portal.
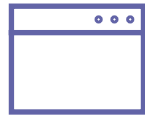
How the end user accesses Teams (e.g. web client vs desktop).

Where the company is at with new features being rolled out from the tenant level.

Ahead of scheduling your virtual event ensure you are coordinating with your IT administrator to be aware of any limitations placed on your meeting by tenant policies.

Schedule a Live Event from Teams

First time scheduling Live Events from Microsoft Teams? With this guide you will learn how to organize a Live Event and determine which roles your team should play in the production and moderation of the event.
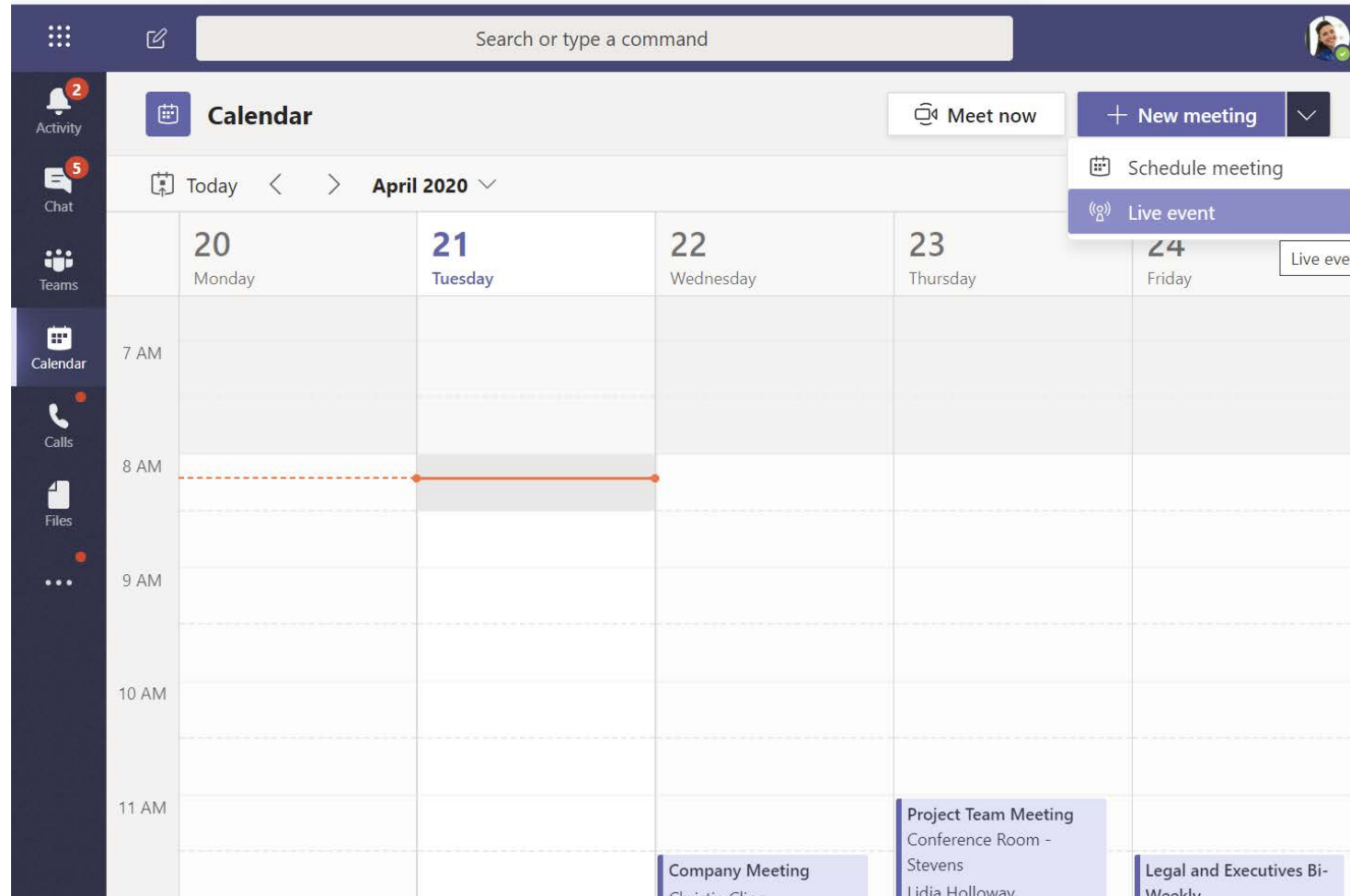
Schedule a Live Event
From your **Calendar** in Teams, click the drop down next to **New meeting** and select **Live event**

Microsoft 365

Setting up a Live Event

The **New live event** screen is where you define the following details about your event:
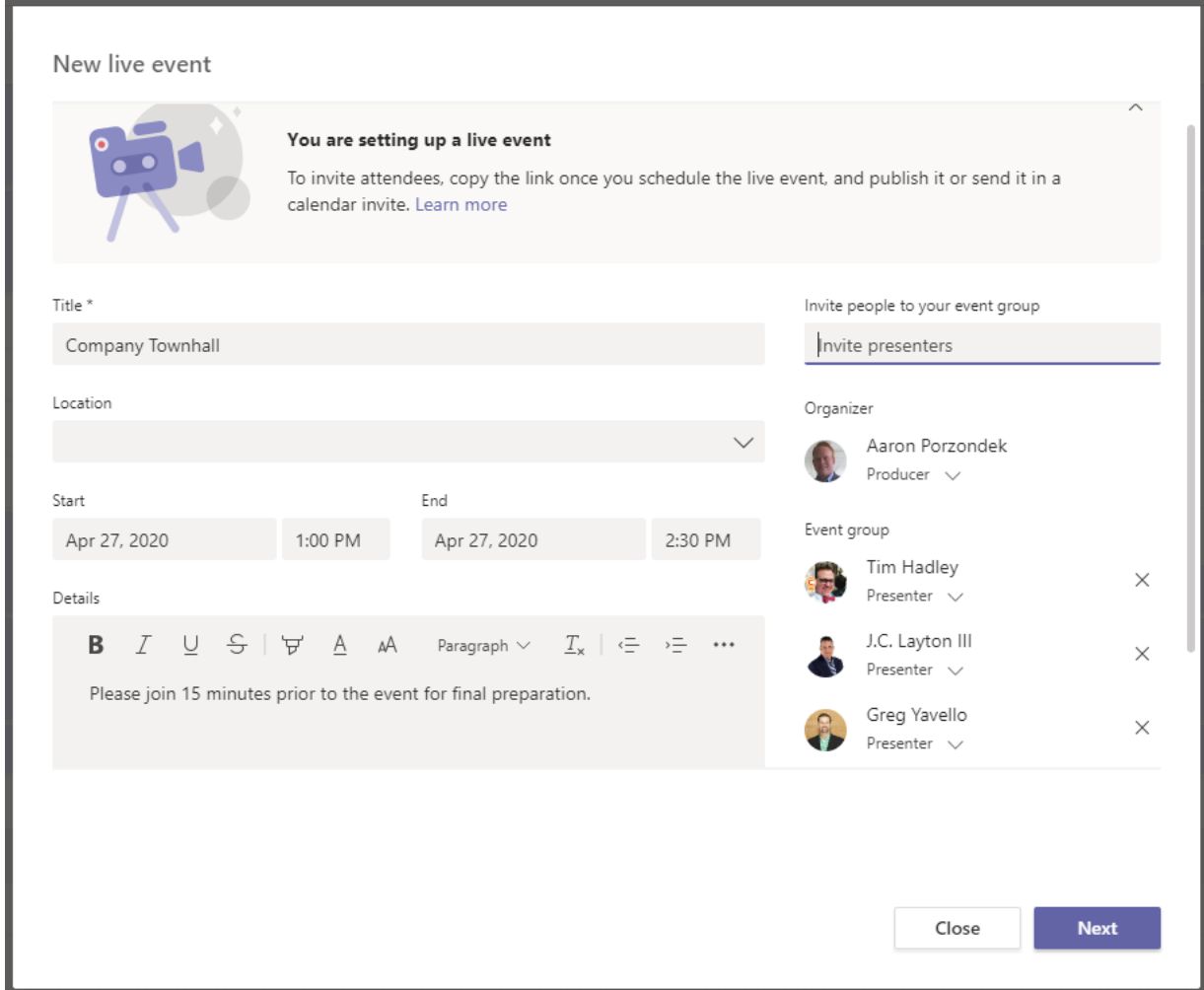
· **Title** of your Live Event
· **Date** and **Start** and **End** times of your event
· Who you will invite as **Producers** and **Presenters** for the event

In the **Invite people to your event group** area is where you define the roles for your event team members. The following roles are available:

· **Producer:** As a host, makes sure attendees have a great viewing experience by controlling the live event stream. There is usually one producer, but you can have multiple for backup of the primary.
    · Starts and stops the live event
    · Shares own video
    · Share participant video
    · Shares active desktop or window
    · Selects layouts

· **Presenter:** Presents audio, video, or a screen to the live event, or moderates Q&A. There are usually multiple presenters, and some may only have the role of moderating the Q&A as an example.

Once you have completed all the fields, click **Next** to continue.

Important Note – We have not defined who will be viewing the Live Event as an attendee. We have simply defined who will be producing and presenting in your Live Event.

New live event

You are setting up a live event
To invite attendees, copy the link once you schedule the live event, and publish it or send it in a calendar invite. Learn more

Title *
Company Townhall

Location

Start
Apr 27, 2020   1:00 PM

End
Apr 27, 2020   2:30 PM

Details

B *I* U S | A AA | Paragraph | Tx | ← →≡ | ...

Please join 15 minutes prior to the event for final preparation.

Invite people to your event group

Invite presenters

Organizer
Aaron Porzondek
Producer ﹀

Event group
Tim Hadley
Presenter ﹀   ✕

J.C. Layton III
Presenter ﹀   ✕

Greg Yavello
Presenter ﹀   ✕

Close   Next

Live Event permissions

Next you will choose who can attend your event based on the following permission types:

- **People and groups** – The event can only be watched by people, contact groups or Microsoft 365 groups you name.
  - This permission type is ideal for confidential Live Events that should only be viewed by the specific people or groups defined here.

- **Org-wide** – Everyone in your org can watch the live event, including guests.
  - This permission type is best for all other Live Events where the content is not confidential.

- **Public** – Anyone can join – both people in your org and those outside of it.
  - This permission type would apply to a scenario where you intend for the general public to attend a Live Event, such as your customers or shareholders.
  - Note – In many organizations, this option is disabled by IT but can be permitted to certain individuals based on a policy.

Before clicking **Schedule**, scroll down to reveal options that pertain to **How will you produce your live event.** These will be covered on the next slide.

New live event

Live event permissions

People and groups
Only the specified people and groups can watch the live event.

Org-wide
Everyone in your org can watch the live event. (Sign-in required)

Public
The live event will be open to anyone. Use when most of the attendees are outside your org. (No sign-in required)

How will you produce your live event?

- Teams
  You plan to use Teams to share content from presenters' webcams and screens.
  - ☑ Recording available to producers and presenters
  - ☑ Recording available to attendees ⓘ

Close   Back   Schedule

TIP: If your public event is supporting anonymous Attendees, do not select "Recording available to attendees" as they will not be able to access it. Follow the post-event guidance and publish in alternate locations.

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How will you produce your Live Event?

Finally you will select a number of available options for how your Live Event will be produced.

- **Teams** or **An external app or device**
  - To produce the event in Teams, keep the default option of **Teams.** The other option **An external app or device** is only if you desire to have your event produced by a formal audio and visual department or outside AV company.
- **Recording available to producers and presenters**
  - A recording is available to producers for download for 180 days after the event is over.
- **Recording available to attendees**
  - Attendees can watch the event on demand using DVR options for 180 days.
- **Captions**
  - Captions are available to event participants.
- **Attendee engagement report**
  - You can download a report that tracks attendee participation
- **Q&A**
  - Attendees can interact with producers and presenters in a moderated Q&A.

Now that you have selected all of the options you desire, you can click **Schedule** to continue.

New live event

🌐 Public
The live event will be open to anyone. Use when most of the attendees are outside your org. (No sign-in required)

How will you produce your live event?

🔘 Teams
You plan to use Teams to share content from presenters' webcams and screens.
☑ Recording available to producers and presenters
☑ Recording available to attendees ⓘ
☑ Captions (preview)
  Spoken language English (United States) ⌄
  Translate to Choose up to 6 languages ⌄
☑ Attendee engagement report
☑ Q&A

⚪ An external app or device
You plan to use another tool to share content. Learn more

Close   Back   Schedule

TIP: If using an external device your video stream cannot be viewed by guests of the tenant.

Microsoft 365
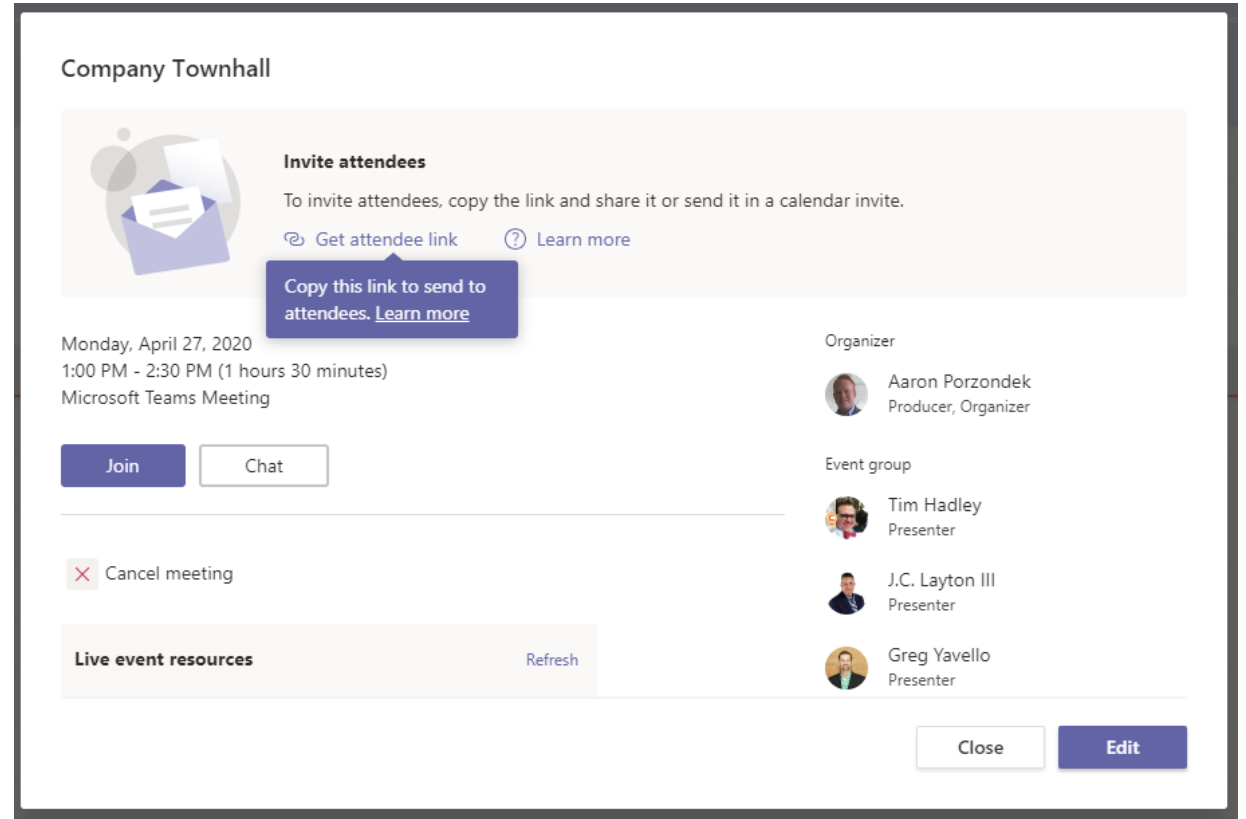
Get the link for Attendees

The next step in finalizing the setup of your Live Event is to copy the attendee link for your event. The attendee link is how your event attendees will attend the event.

Click the **Get attendee link** to copy the link to the clipboard. You can now publish that link however you desire. Common ways of publishing it include:

· Sending an Outlook invite to your intended attendees and pasting the attendee link into that Outlook appointment
· Publishing via a company newsletter
· Publishing to an internal Intranet site

Once you have copied the attendee link, you can now click Close to schedule the event. Producers and Presenters will receive an invitation in their emails with a link only valid for the Producers and Presenters of the event.

TIP: Forwarding invitations does not allow someone to become a producer or presenter. You must edit the event and add them through the Teams experience. Once an event has started you cannot add producers or presenters.

Organizer
Before your event

Scheduling your Teams meeting

Teams meeting options

Quick start

- ❏ Select / provision team where event will be held
- ❏ Create channel structure (see guidance)
- ❏ Create tabs & install additional apps (see guidance)
- ❏ Add production team
- ❏ Create private channel(s) for staff & speakers; add members
- ❏ Create scheduled or channel meetings

NOTE: Channel meetings will send notification to all team members. Consider provisioning a new team and completing ALL scheduling before adding attendee accounts to the team.

Example event

Review MVP Summit in the Microsoft Teams section for overview of how Microsoft delivered a virtual event to 4k attendees using this configuration.

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Teams meeting

The following slides are to provide guidance on how to create a Teams meeting.

Note that some of the features may not be exactly what an end user will experience due to:

Teams policies set at the admin portal.
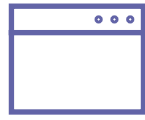
How the end user accesses Teams (e.g. web client vs desktop).

Where the company is at with new features being rolled out from the tenant level.

Ahead of scheduling your virtual event ensure you are coordinating with your IT administrator to be aware of any limitations placed on your meeting by tenant policies.

Creating a meeting invite in Outlook

1. Open your **Outlook Calendar***, click the **Home** tab, and then click the **Teams Meeting** icon (screenshot on the right).

2. Select the **Teams** icon. When you do so, a **Join a Microsoft Teams Meeting** link is created in the body of the invite. If you have an auto conferencing license, a phone number and conference ID will be included.

3. Create a **Title** for your meeting invite.

4. In the **Required** box, enter the email addresses for the people you want to invite to the meeting.

5. Select a **start and end time** for the meeting.

6. If you need the meeting to be recurring, please select the **Make Recurring** icon.

7. Add content to the body of the invite to inform participants of the purpose of the meeting.

8. Double check your information and then click the **Send** button.

*Your calendar in Teams is connected to your Exchange calendar. In other words, when you schedule a meeting in Outlook, it will show up in your Teams calendar, and vice versa.
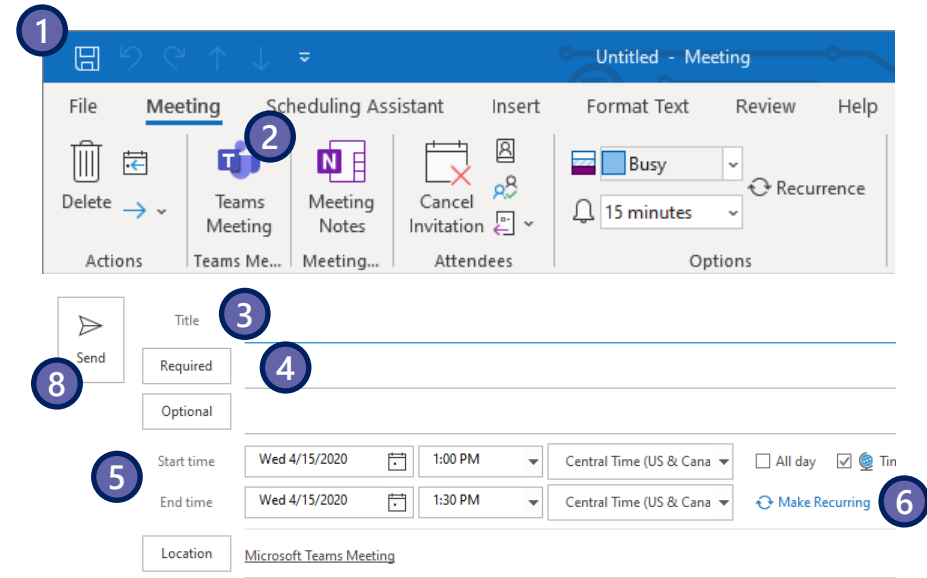
You're invited to join a Microsoft Teams meeting.

Join online now
Video conferencing, screen sharing, and more.

Or join by phone (audio only)

+1 425-616-0754,,210318751#   United States, Seattle

Phone Conference ID: 210 318 751#
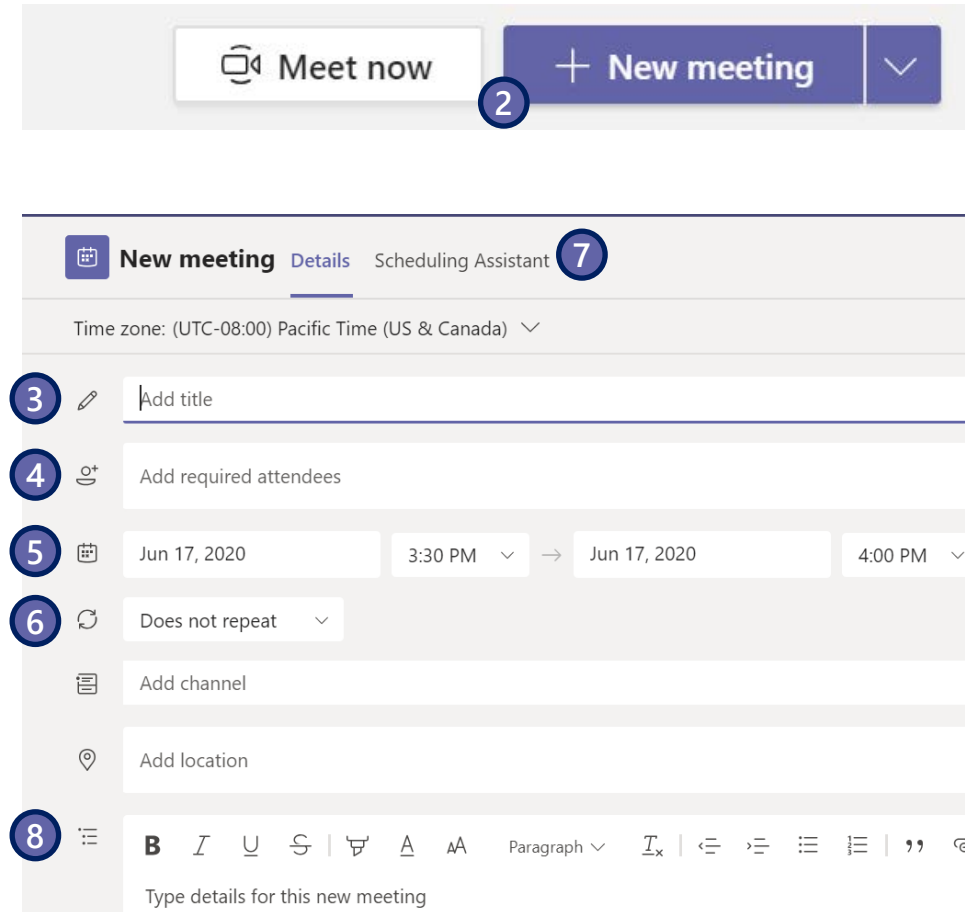
Find a local number | Reset PIN

Help | Meeting options

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Creating a meeting invite in Teams

1. Open the Teams client, select the **Calendar** 📅 icon located on the left side of the navigational side bar.

2. Select the **New Meeting** button located in the top right corner of the screen.

3. Create a **Title** for your meeting invite.

4. In the **Required Attendees** box, enter the email addresses for the people you want to invite to the meeting.

5. Select a **start and end time** for the meeting.

6. If you need the meeting to be recurring, select the **Does Not Repeat** drop down box and a recurring selection(s) drop down box will appear.

7. For internal attendee(s), select the **Scheduling Assistant** tab (top left) to see if the attendee(s) are available at the time you are proposing.

8. Add content to the body of the invite to inform participants on the purpose of the meeting.

9. Double check your information and then click the **Save*** button.

*When you select the **Save** icon, the Microsoft Teams meeting link info is automatically created and sent out in the invite. If you have an auto conferencing license, a phone number and conference ID will be included.

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Microsoft 365

Edit meeting options

1. Once your meeting is scheduled you can edit the meeting options. Return to your Calendar and edit the meeting you just scheduled.

2. Your options will appear in a new browser window.

3. Select which meeting roles can bypass the lobby.

4. Toggle if audio caller can always bypass the lobby.

5. Toggle join/leave announcements.

6. Select which meeting roles can present in this meeting.

7. Select **Save** to save your options. Options can be changed until the meeting begins.

Meeting options

Who can bypass the lobby? — People in my organization

Always let callers bypass the lobby — No

Announce when callers join or leave — Yes

Who can present? — Everyone

Save

People in my organization
Everyone
People in my organization and trusted organizations
People in my organization
Only me

Everyone
Everyone
People in my organization
Specific people
Only me

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Organizer
During your event

Managing your event

Microsoft 365

Managing a successful event

Ensure these planning items have been handled in advance so your day of is successful.

❑ Define production and support communication paths

❑ Validate from rehearsals who is managing visual content

❑ Start early ensuring final tests for Presenters & Producers

❑ Establish sign-off and post event procedures to provide a crisp ending

Breathe, hydrate and enjoy.

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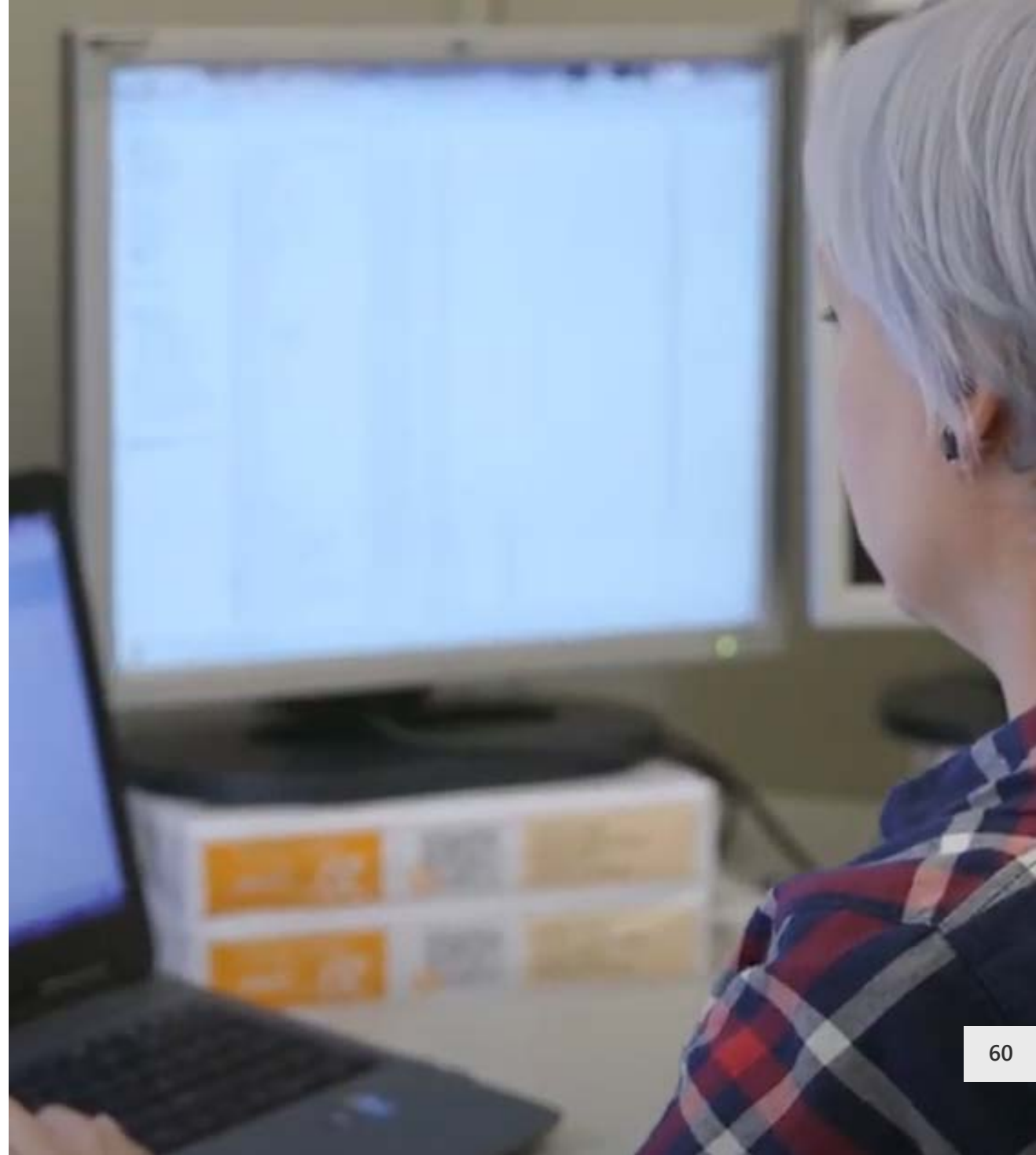
Best practices for managing Live Events

Event team

- ❑ Have more than one person in the event team; ideally one person joining from a different location
- ❑ If you lose internet, the remote person can still control the meeting
- ❑ Know who is responsible for each step such as producing, presenting, moderating Q&A

Consider using a redirection URL service in attendee invites

- ❑ E.g. bit.ly
- ❑ Allows you to share shorter, more readable URLs
- ❑ Allows you to change the URL of the meeting without having to update the invites

Meeting start

- ❑ Join your event 30 minutes ahead of time for final equipment check
- ❑ Have a slide ready with a nice intro ("Event will start soon") and start broadcast 10 minutes ahead of time
- ❑ Have audio source muted during that 10 minutes
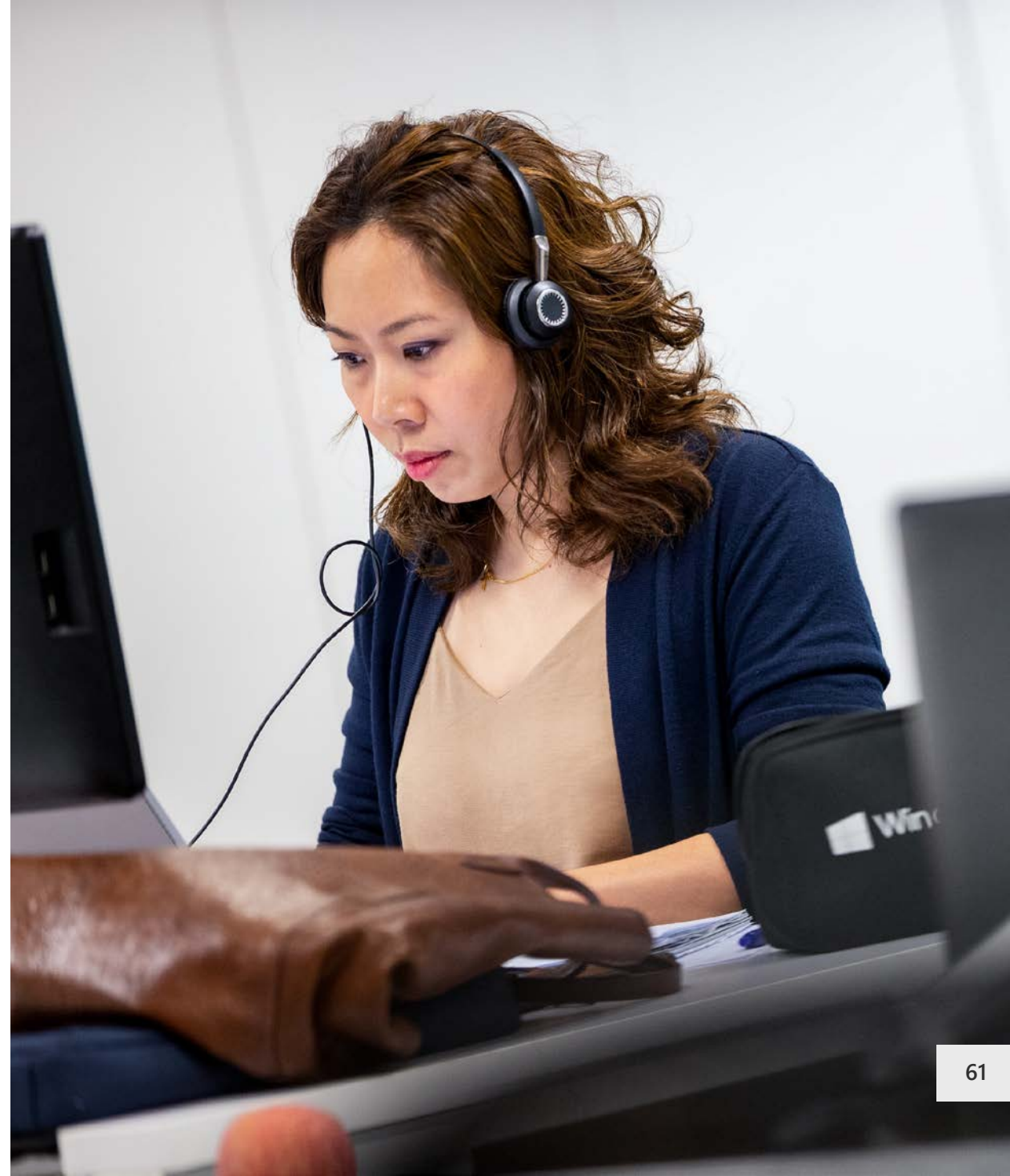
Example event support tiers

Multi-day/presenter/track events

❑ Fill this table in with the key Points of Contact (**POC**) in your organization.
     All roles should be identified for large scale events. Can be simplified for simple webinars.
❑ Review in coordination with existing IT Support Desk processes in your organization.

Level	Accountable group/POC	Tools & notes
Tier 0	Owner: Event organizer/**<POC>** Responsible: Support team Contributor: Technical production & IT teams	Provide self-help tools in Teams, in-event communications and/or via event website Ex: self-help attendee & speaker guides, FAQ documentation Event support email queue, e.g. "EventSupport@yourdomain.com"
Tier 1	Owner: Support team **<POC>** Contributor: Technical teams	Reactive engagement via event experience (Channels, email, chat) Ticketing system of choice that receives emails e.g. SharePoint, HubSpot.com or other tool
Tier 2	Owner: Event producer/**<POC>** Contributor: IT Administrator	Reactive support to escalations from Tier 1 Identify if further service escalation to IT is needed Staff requires intermediate/advanced level Teams & Live Event knowledge to triage issues Access to attendee ticket system not required but recommended
Tier 3	Owner: Event platform service owner (technical) **<POC>** Contributor: Microsoft support	Reactive support to escalation from Tier 2 Identified service health issue or bug Owns initiating support tickets

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Common issues & troubleshooting paths during an event

These questions represent most of the reported issues experienced during a meeting or live event. Though they may seem basic they create dissatisfaction on the part of your audience and speakers. Provide fast & easy ways to resolve these issues quickly by monitoring published support channels, having moderators and/or a dedicated attendee support channel (if using Teams as your event experience).

Category	Question / User Statement	Troubleshooting path
Scheduling	"I can't schedule a Live Event."	**Tenant Policy:** Speak to your IT Admin to have Live Event capabilities enabled for your user identity. Often you will need to be added to a group that is being used to manage how many people can schedule them. It will take 24/48 hours for this to be active after a policy change.
Meeting Join	"I can't join the meeting/Live Event."	**Identity**: Do they need to be/are they logged into the experience? Are they joining as an attendee instead of producer or vice versa? **Information**: Do they have the right link for the right session at the proper time? **Device/Client**: What browser or client are they using? Are they on mobile?
Audio	"I can't hear the presenter audio."	**Client Settings**: Check their audio speaker settings. Are they to the correct device? If yes test from outside of the meeting experience to ensure they are working for other apps. Is the volume adjusted properly?
Video	"I can't turn on my video."	**Client Settings**: Check their audio speaker settings. Are they to the correct device? If yes test from outside of the meeting experience to ensure they are working for other apps. Is the volume adjusted properly? **Device**: Have the video drives been recently updated? Does the device need a restart?
Content	"I can't see any slides." aka "I can't see the presenter's content."	**Speaker Sharing:** Ensure the speaker is sharing their screen or the correct window into the meeting. Have the speaker re-share the content into the meeting.
Chat	"I can't access chat."	**Tenant Policy**: Is chat enabled for this type of user? (Guest, federated?) **Client Settings:** Is the user a member of the team where the channel meeting is being held?

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Organizer

After your event

Post event actions

Post event actions

Capture event feedback from attendees, presenters and organizing team directly after your event.
Be open to suggestions and insights for what can improve. Clarify immediate next steps for your team.
Rest! Let the event experience settle in your mind before making follow up decisions.

Processing Feedback

❑ Provide reminders to complete follow up event surveys.

❑ Extend event surveys to presenters, organizers and core team.

❑ Gather data from survey tools.

❑ Pivot data by type of attendee and session.

❑ Provide attendee feedback to speakers as soon as possible. Within 72 hours after the close of the event is an industry norm.

Content publishing

❑ Prepare presentations and/or recordings for publication.

❑ Release "Thank you for attending" communications.

❑ Release "Thank you for participating" communication to presenters and core team.

❑ Publish recap blog post or other communication broadly.

Ongoing Strategy & Next Steps

How will you continue to engage with your audience?

What follow up engagements will you conduct?

How will you improve your next event?

How will you continue to invest in presenter skills and recruiting new presenters?

Schedule an event review to discuss operational improvements.

Pro Tip: Thank your Team

Build morale within your production team. They are essential to your success. Host a "Wrap Party" to thank them for their hard work. Producing live events can be very taxing on the team involved. Make sure you thank them and invest in their health and well being by ensuring appropriate time off for recuperation, especially after producing a large scale or high profile event. **Do this BEFORE you conduct an event review.**

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Content lifecycle

Your attendees will want to review content after your scheduled live event. Plan for the lifecycle of your content by sharing recordings and presentations in a location you manage. Permissions, extended sharing and rebroadcast decisions should be handled during pre-production.

Content on-demand

Will you publish content internally (Microsoft 365 via Stream) or externally (YouTube or other platform)?

Will you publish video only or presentation assets as well?

Ongoing conversation

Do you have a community forum where your attendees can continue to ask questions and engage?

Consider providing access to ongoing resources and experts.

Accessibility

Strive to have an accessible event and content.

Utilize features like closed captions in broadcasts, alt-text for images and the Accessibility Checker for PowerPoint.

Consider releasing content in Sway or PDF format using the Export to PDF function within PowerPoint to ensure consistency and availability.

Learn more at https://aka.ms/PowerPointAccessibility.

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Manage Live Event resources after the event

At the end of the Live Event, a Producer or Presenter can access the following event resources by going back to the event invitation in your Teams Calendar:

- Event recording

- Q&A report

- Attendee engagement report

- Recording for the Attendees (ability to disable)

- Etc.

If you want to access this option later, open the event invitation from Teams and access this window.

This view is not available to guests.

IT Town Hall

Live event resources ⌄
Recording ⤓
Q&A report ⤓
Attendee engagement report ⤓
Recording for attendees Disable
▸ Transcript
▸ Advanced options

Refresh   Delete all

🅗 Hive Insights

Don't forward this invitation. Go to Microsoft Teams to invite additional people.

Close   Edit
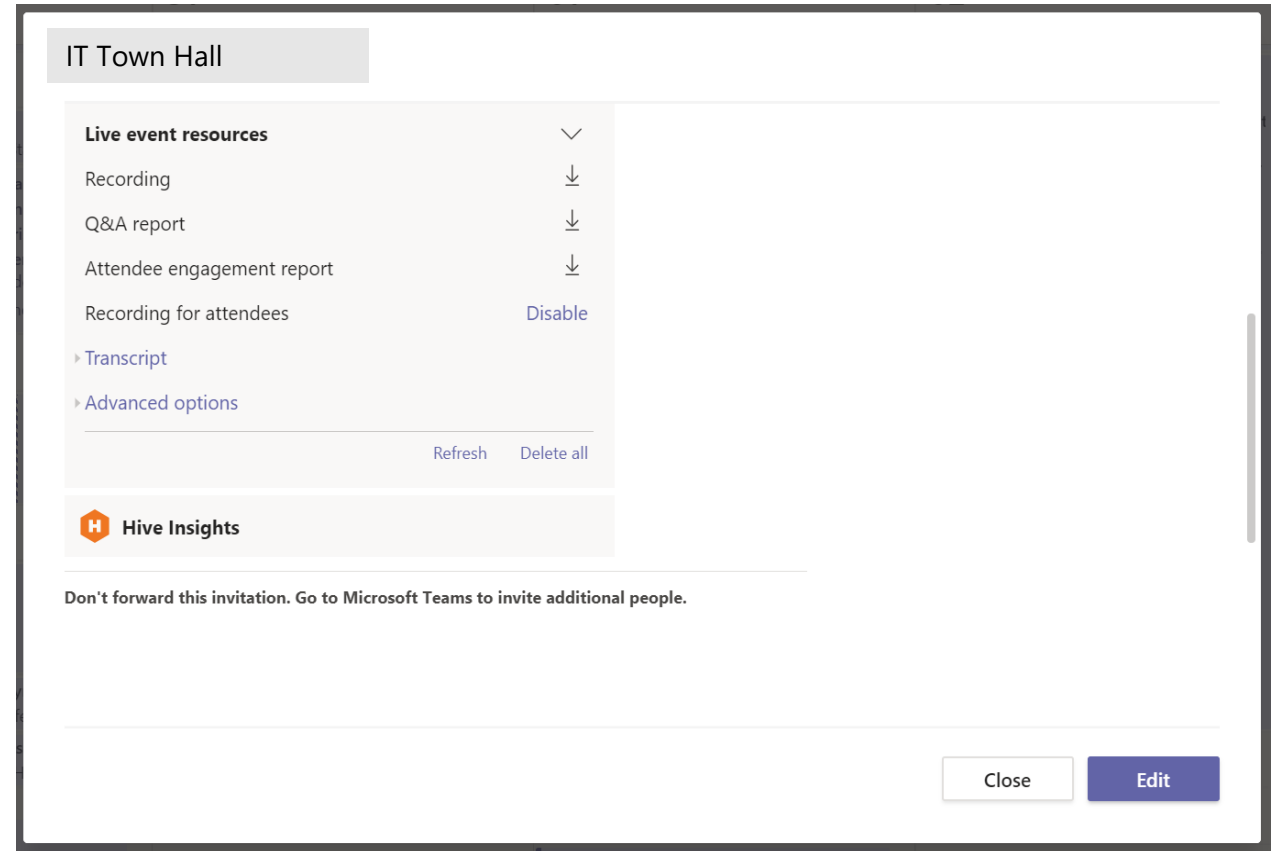
Organizer
Before your event

Appendix:

Channels & announcements in Microsoft Teams for virtual events

Top

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Creating a multi-channel virtual event in Microsoft Teams

Decide what your event will be called, if you are building a community and will be using your events team on a reoccurring basis throughout the year. Here are three samples of potential channels for your event:

Contoso Conference	Contoso Media Summit	Contoso Hackathon
General	General	General
Birds of a Feather Sessions	Career Corner	Code Share
Community Zone	Day 1 Sessions	Day 1 Hack
Event Support	Day 2 Sessions	Demos
Speaker Support	Day 3 Sessions	Event Support
Supplier Comms (Private Channel)	Demos	Logistics Team (Private Channel)
Technical Talks – June 2-4	Event Support	Speaker Support
Technical Talks – June 9-11	Production Team (Private Channel)	
	Speaker Support	

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Creating Microsoft Teams channels for your virtual event

For those that are creating an event team in Microsoft Teams, these are the recommended channels and how to use them. Start with the General channel.

General

The General channel is added when your event team in Microsoft Teams is created and cannot be removed. It is also where attendees will show up when they have been added to your event team.

A document of all your announcements should be created for pre-event, during and post-event.

Additional channel examples are:

Announcements

Attendee Support

Channels by Content Track

Channels for Activities: Meet our Attendees, Lounge

A few ideas on major announcements about your event:

- **Pre-event**
  - Welcome
- **During event**
  - Repeat welcome
  - How to access support
  - Keynote
  - Overall session starting
  - Ancillary events and community moments
  - Information on accessing recordings
  - How to access surveys and evaluations
  - End-of-day messages
    - Polls – ask your attendees questions
- **Post-event**
  - Thank-you message
  - Information on accessing recordings
  - How to access surveys and evaluations

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Announcements for your channels

Writing channel messages pre-event is a best practice, to have at the ready to cut and paste into your General channel, and other channels should be part of your logistics planning.

To create an announcement in Teams:

Go to Posts at the top of the General channel

Click **New conversation** and Format at the bottom left of the post

At the top left click the dropdown at New Conversation and choose **Announcement**
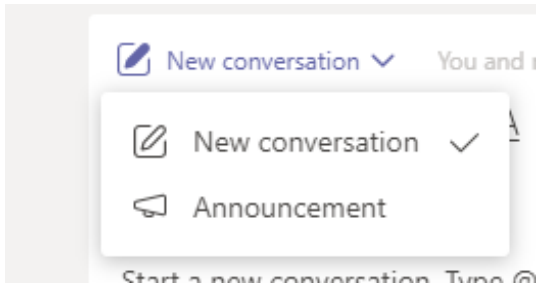
On the right in the **Type a headline** area, you can change the color of the headline and add a graphic. Add your subhead and type your announcement. Currently, you cannot 'pin' an announcement to the top of Posts.

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Create a graphic for your announcements

All announcements have the capability to change the background color of the announcement and you can add a graphic.

Best practices for creating a graphic – the size is 918x120px. A darker background is best for this as the headline color of the announcement text is white. You can also choose to leave out the headline text or use a color with text only. Samples:

How to cross post in multiple channels

You will want to cross-post announcements in multiple channels to share the same content in all your event channels. To cross post choose **Post in multiple channels**.
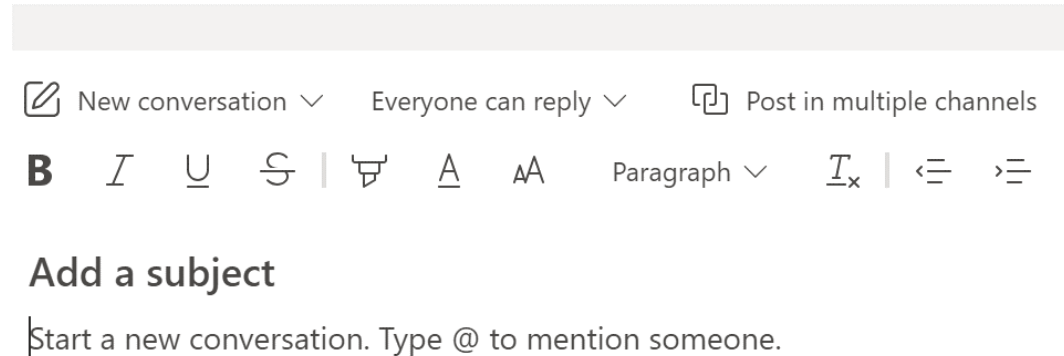
You will see the channel you are posting into on the left (source) and the button **Select channels**.
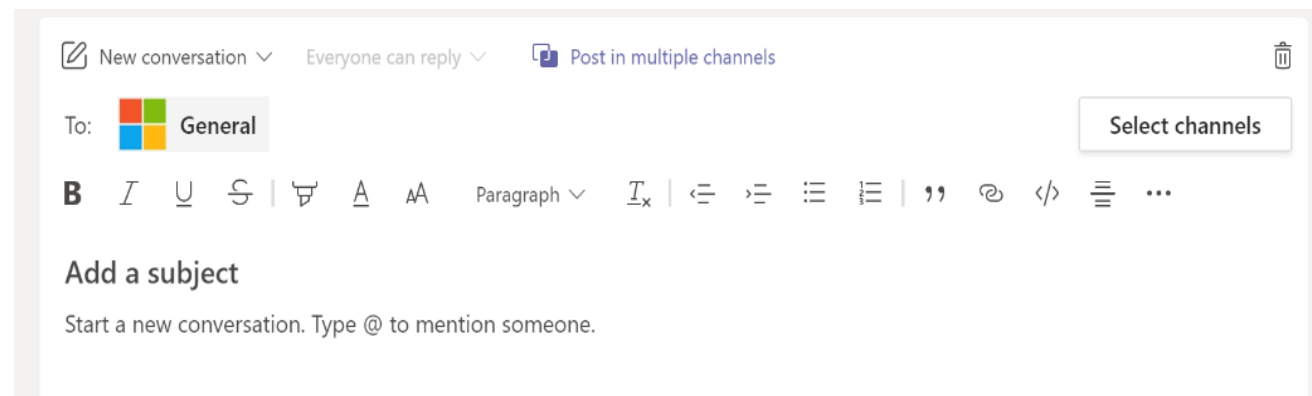
How to cross post in multiple channels – con't.

Choose **Select channels** and choose the channels where you would like to cross post.
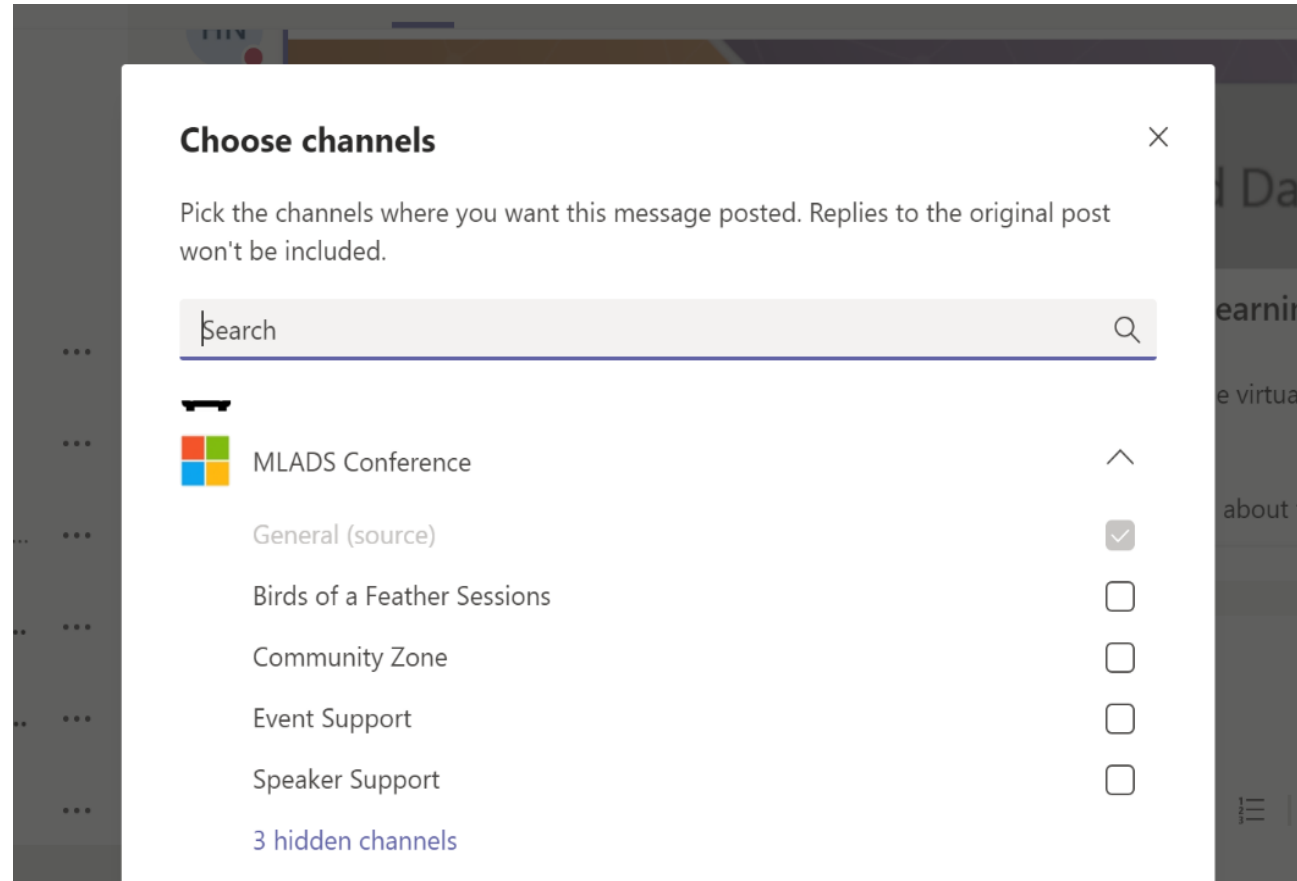
Timing of Announcements in the General channel

As you are building out your event team, you will want to add in announcements at certain times.

After Attendees are added to Teams:

You will want to post a welcome announcement after your attendees are added to Teams if your event team is new.

Pre-event:

You will want to repeat your welcome announcement the day before and the day of the event. You can add more info as you get closer to your start time.

During event:

Use the General channel for keynote and session announcements, how to get to support, and activities in your ancillary channels, like Career Corner, Community Zone, The Lounge, Demos and Product Fair (whichever ones you have for your event).

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General channel announcement sample content

Welcome announcement

· Welcome to *insert event name*

· We are excited to welcome you to our Teams Platform for *insert event name and dates*

· Please explore our *insert event name* team

· Our "FAQ" or "How Do I?" (in the top Tab list) provides effective best practices on how to navigate Teams

Keynote announcement

· Our keynote will begin shortly!

· Join us for our Welcome Keynote | Starting at *insert time and time zone*

· Our keynote will feature *insert speaker names and titles* and any additional sessions inside the keynote section of your event

· Join us (this can be a link to the keynote, a Teams meeting link or Teams Live Event link)

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Welcome to Contoso Conference – announcement example

We are excited to welcome you to our first Virtual Contoso Conference – Tuesday, June 2-Thursday, June 4.

Feel free to explore our Contoso team and join us to participate in this first-time virtual experience for our event hosted on the Microsoft Teams platform.

Please check out our Welcome tab (at the top of the channel) for overall information about the event.

Check out our Session Catalog tab, which take you to the entire Contoso Conference Schedule. From there you will see a high-level view of each session with the ability to filter on sessions and links to view sessions.

Should you need any assistance, select our "Event Support Channel" on the left navigation pane. You can ask for assistance within this channel or email supportemail.

We look forward to having you join us live, starting at 9:00 AM PT/Noon ET for our Opening Keynote.

Thank you,
Contoso Crew

Sessions and content by day or track

Depending on how your event is set up, it will have birds of a feather, tech talks, tracks, sessions, hacks – there are many names for content that we all present in virtual events – and these will either be Teams meetings or Team Live Events, depending on how you are producing your event.

A best practice is to set up channels either by day or by grouping them by what kind of content they are. Some will leverage a third-party content management system.

Having a channel for chat/conversations is a best practice whether you use a CMS or not.

Session announcement example

Our *insert session type* is about to begin!

Join us now for our *insert session name* | Starting at *insert time and time zone*

This session is presented by *insert speaker name and title*

Insert the abstract if you'd like

Or

Join our sessions 10:00 AM – 11:30 AM PT

Learning about Microsoft Teams | Track: 101

Deep noise suppression in Teams | Track: Deep Learning

Chat in Microsoft Teams | Track: Product features & improvements

To access the session content, go to our CMS/Session Catalog tab

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Additional channels

Career Corner (channel)

Welcome to our Career Corner

Please feel free to network here and post who you are, where you work and add a link to your LinkedIn profile. Are you looking for a new job? Have an open position to share? Feel free to post here as well.

Demo and Product Fair (channel)

Welcome to the Demo and Product Fair

Experience hands-on understanding of the latest and greatest Microsoft innovations!

Within our Demo & Product Fair channel, attendees can navigate to the top tab and select Demo & Product Fair. Here, you will find our full list of XX+ demos from our leading Microsoft experts.

Ancillary channels

A best practice for your virtual event is to create a channel for community, networking and fun. Naming can be Community Zone, The Lounge, or a name that is consistent with the theme of your event.

Samples:

Community Zone

Welcome to our Community Zone

The Lounge

Networking Corner

Sample content for your announcement:

We look forward to great conversations, sharing, and some fun here in our Community Zone. We will be posting activities for in-between sessions and feel free to drop-in to participate in trivia and other activities throughout the event.

Community zone announcements ideas

Where are you streaming from?

In case you missed it, check out the Attendees Around the World tab and share where you are streaming from. ou can also comment on other's pins/posts. (Many teams are leveraging the Uebermaps for pinning the locations of attendees.)

Help make a difference – Red Cross Missing Maps

Help make emergency response around the globe more effective! Join us for the Red Cross Missing Maps session in 30 minutes to make a difference for first responders. Information can be found in the Missing Maps tab in the Community Zone.

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Additional announcement/ activity ideas

- Countdown to yoga
- Create a poll: How many sessions did you attend today?
- Feedback requested – a reminder to fill in evaluations
- Ice breaker: share a pic of your pet
- Ice breaker: share a pic of your keyboard
- Invitation to a community organization or group
- Share your favorite movie
- Share your favorite or your podcast
- Social media reminder: please use our official hashtag on your social media posts – *insert hashtag*. Thank you.
- Test your knowledge
- Trivia questions are live

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Organizer
Before your event

Appendix:

Tabs in Microsoft Teams for virtual events

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Top

Best practices for creating tabs

When your event team is created, you will have the following tabs automatically created in your General channel and all additional channels: Posts, Files, Wiki. **Tabs** are **Teams**-aware webpages embedded in **Microsoft Teams**.

In your General channel and additional channels, you will want to "pin" certain information about your event.

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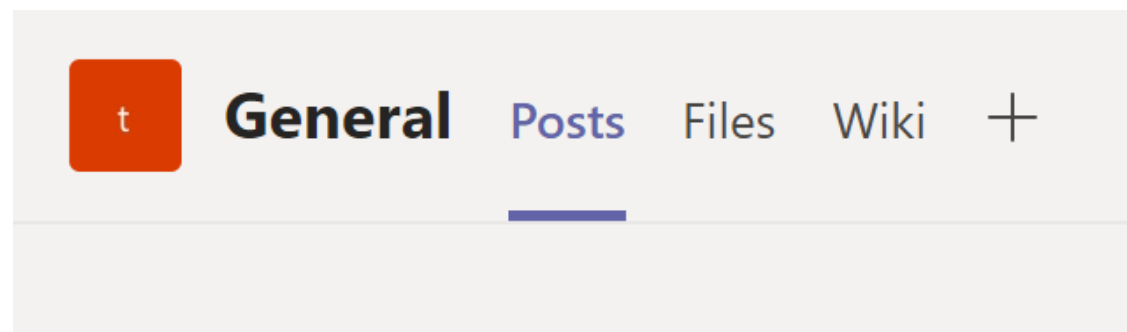
Best practices for creating tabs – con't.

In your **General channel** and additional channels, you will want to "pin" the following information about your event. These are some examples of what you can share with your attendees:

- Master Session List (typically a SharePoint list of your sessions)

- How Do I? (this can be a how to use Microsoft Teams)

- Session Evaluations (typically a link to your survey/Microsoft Forms tool)

- Code of Conduct

- Event Support (as a best practice Event Support should also be a separate channel for attendees to be able to ask for support)

The master session list and survey link should be pinned in all your channels.

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How to create a tab or "pin" something to your channel

How to Add a Tab in Microsoft Teams

Select + on the **tab** bar

Select the type of **tab** you want

Choose what the **tab** will point to and give the **tab** a name
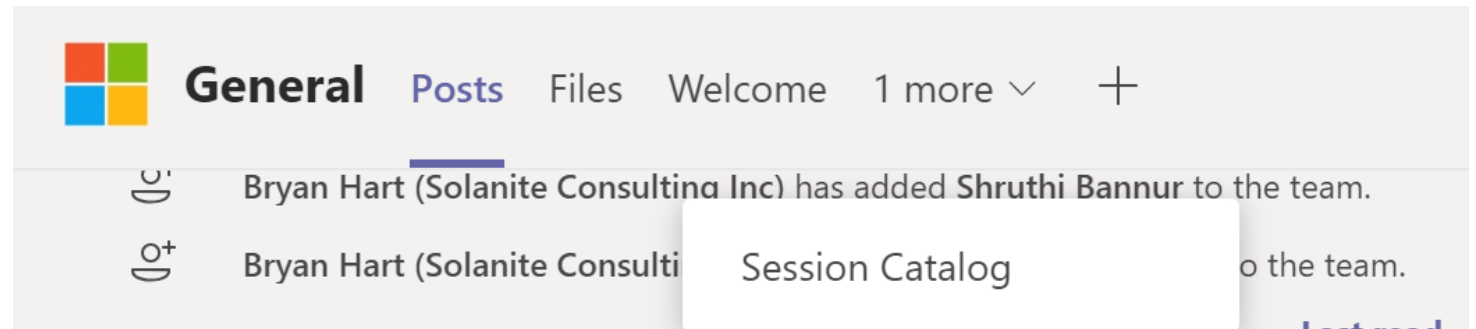
Select Save

Sample – MVP Summit:
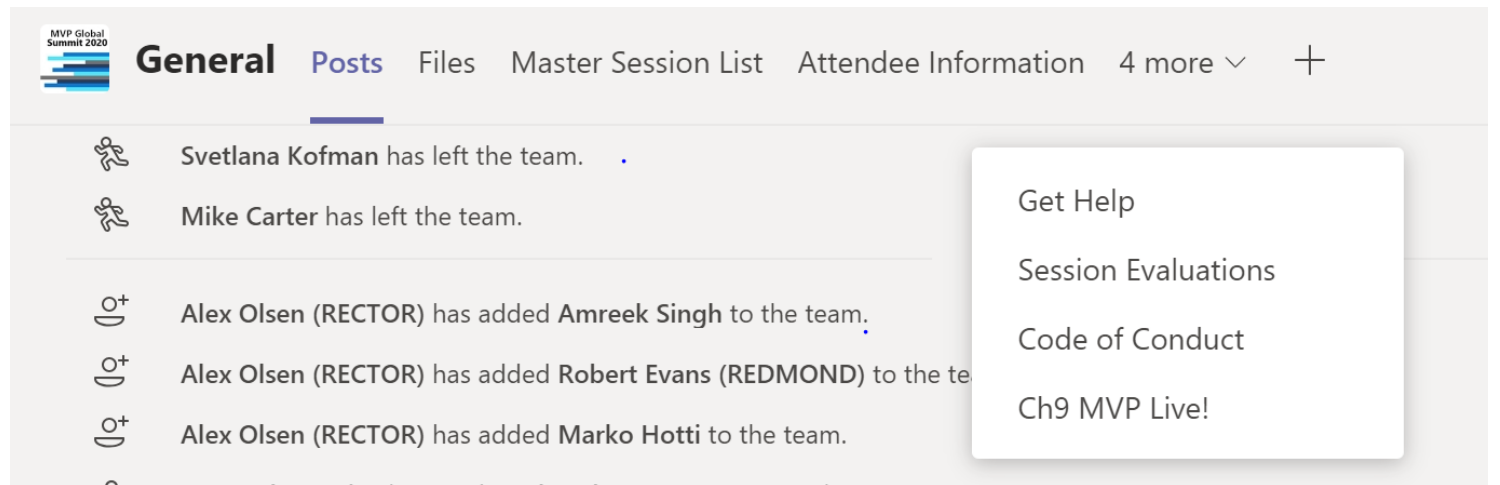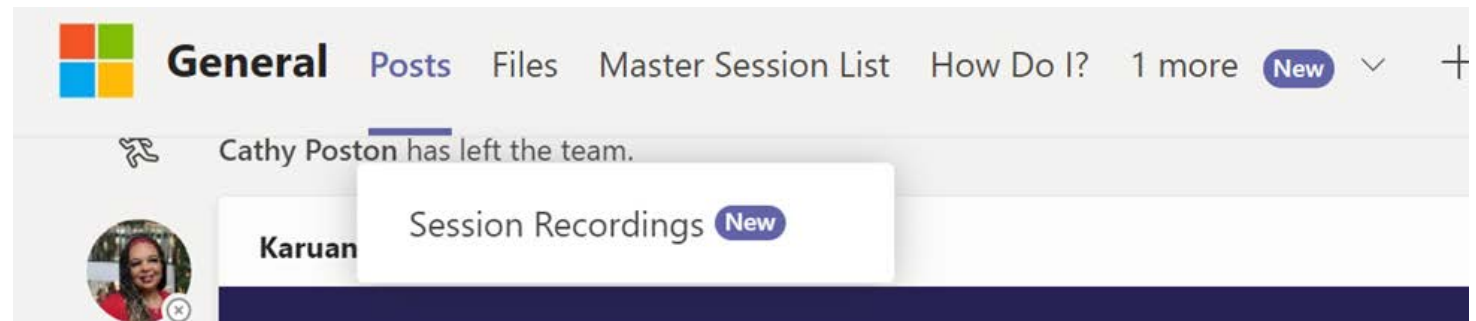
Samples of pinned tabs

Sample

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Building tabs and pins for your virtual event

Best practices are to leverage SharePoint or Sway for sharing information about your event. Every Microsoft Teams has a SharePoint site that can be built out for this purpose.

A welcome letter can be created in a SharePoint page or Sway.
A master session lists can be created in a SharePoint list.
A "How Do I" can be created in a SharePoint page or Sway.

Session recordings can be shared using a Microsoft Stream channel or put in a Teams channel or area that you own for later viewing.

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Tabs for your additional channels

If you have channels for your sessions by day or by track, you can add a tab of the session list created in SharePoint.

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