Microsoft 365 Virtual Event Sample Checklist

**Event Overview**

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

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| --- | --- |
| **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](https://adoption.microsoft.com/virtual-event-playbook/).]  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 |

**Event Production Team**

Your project team for this event. Add rows as needed. Consider creating a Team or Channel to coordinator work.

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| Role | **Person** | **Mobile Phone** | **Email** |
| Executive Sponsor | [A leader with a special and unique interest in the education or insights of the audience] |  |  |
| Organizer | [Event host and team coordinator. Create the event, set permissions, curate event links] |  |  |
| Producer | [Responsible for starting and stopping the live event, queuing content, back channel chat. This could also be the Organizer. ] |  |  |
| Presenter(s) | [Responsible for content and commentary. They can present audio, video, and share their screen with the attendees.] |  |  |
| Moderator | [Moderator to help facilitate Teams Q&A or Yammer Conversation in the Live Event. In Teams should be a person in the meeting Organizer or Presenter role, in Yammer should be a Group Admin.] |  |  |
| IT Contact | [Ensures network and service health in advance of your event. Routes support requests] |  |  |

**Presenters and Moderators**

What room/system account are they using if onsite? Are remote participants gathering centrally?

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| **Room** | **Presenter or Moderator** | **Location** | **Account Used** | **Mobile Phone** |
| [room] | [name] | [room/home office] | [account]@organization.com |  |
| [room] | [name] | [room/home office] | [account]@organization.com |  |
| [room] | [name] | [room/home office] | [account]@organization.com |  |
| [room] | [name] | [room/home office] | [account]@organization.com |  |

**Event Agenda and Content Notes**

Store the final agenda in Office 365 and work from a single source of truth. Check in directly with your presenters and discuss exactly what they plan to present. Do not rely on assistances or intermediaries to accurately relay requirements.

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| **Time** | **Length** | **Topic** | **Presenter(s)** | **A/V Requirements, Other Notes** |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |
| hh:mm | [min] | [topic] | [presenter] | [video, demo, other] |

**Live Event Links**

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| **Resources for Town Hall** | **URL or Link** | **Notes** |
| **Attendee -** Attendee Link | [<https://teams-url-or-short-url>] | [List here so you are not scrambling in Outlook/ Teams to find the link right before the event**. Best Practice**: Use a URL shortener/redirector for the attendee link.] |
| **Presenter -** Teams Meeting | [<https://teams-url-or-short-url>]  Conference: [###.###.####]  Conference ID: [######] | [List here so you are not scrambling to find the link or conference bridge right before the event]  [DO NOT FORWARD - Remind presenters not to forward to anyone not on the event team] |
| **Event Team -** Backchannel | [<https://teams-url-or-short-url>] | Back channel for Event Team to use for discussion during event. Can use the Chat in Teams Live Events. Important to define communications channels in advance. |
| **Ingest URL** | [rtmp://ingest-url-for-encoder] | [RTMP Stream endpoint URL for External Encoder to connect to. Remove this row if not using.] |

**Presenter Confirmation**

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| **Sample Confirmation Communication - Remind your presenters not to forward to attendees** |
| **Town Hall Meeting**  Thank you for presenting at the upcoming Town Hall. If you are presenting from a company office, make sure you coordinate with the site moderator for your location, so they are prepared for you to present. Let us know if you will be presenting from someone else’s computer or a room system.  **Presenter Information Only - DO NOT FORWARD**  Join in Microsoft Teams: [<https://teams-url-or-short-url>]  Conference Number: [###.###.####]  Conference ID: [######]  **Next Steps**   * Complete your Slide Presentation Here by [dd] [hh:mm] [a.m./p.m.] * Let us know if you will be presenting using anything other than your own computer in Microsoft Teams * Attend the Presenter Check-In Call at [dd] [hh:mm] [a.m./p.m.] |

**Attendee Invitation**

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| **Sample Confirmation Communication -Consider using a URL Redirector for the Join Meeting link** |
| **Town Hall Meeting**  Please join us for the upcoming All-Hands meeting.  **Date:** [mmm] [dd] [yyyy]  **Time: [**xx:xx am - xx:xx pm]  **Join the Live Event:** [<https://teams-url-or-short-url>]  **Instructions**: [How to attend a live event in Microsoft Teams](https://support.office.com/en-us/article/attend-a-live-event-in-teams-a1c7b989-ebb1-4479-b750-c86c9bc98d84)  **Office Locations and Site Moderators**  In the office? Please join your local team to watch the Live Event together in the room below.   |  |  |  | | --- | --- | --- | | **City** | **Room** | **Site Moderator** | | [city] | [room] | [moderator] | |

**Teams-Produced Live Event Decision Points**

Settings you will need to make when you schedule a Live Event produced in Microsoft Teams

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| --- | --- |
| **Live Event Permissions** | People and Groups - Specific people, contact groups, or Office 365 groups you name  Org-wide - Everyone in the organization can watch the live event  Public - Attendees outside your org, anonymous join, only for Teams-Produced events |
| **Attendee Recording** | Yes/No (attendees can watch the recording on demand for 180 days) |
| **Closed Captions** | Yes/No (Captions are available to event participants) |
| **Attendee Q&A** | Yes/No (attendees can interact with producers and presenters in a moderated Q&A) |
| **Attendee Report** | Yes/No (You can download a report that tracks attendee participation) |
| **Customer Support URL** | URL if attendees click “help” during event (default is https://support.office.com/) |

**External App or Device Live Event Decision Points**

Settings you will need to make when you schedule a Live Event produced in with an external encoder

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| --- | --- |
| **Attendee Recording** | Events produced with an external encoder are automatically recorded. Attendees can watch the event on demand until the recording is explicitly deleted in Microsoft Stream. |
| **Captions** | Yes/No (captions are available to event participants) |
| **Attendee Q&A** | Yes/No (Teams-hosted only - attendees can interact in a moderated Q&A) |

**Event Planning**

Add or delete tasks as needed. Consider using Planner or Teams Tasks to coordinate across the event team.

| **T-Minus** | **Checklist - Content/Meeting Moderation/AV/Live Event** |
| --- | --- |
| **4 Weeks** | * **All:** Read<https://resources.techcommunity.microsoft.com/live-events> * **All:** Watch <https://youtu.be/8EzIsTaJWb8> (1 minute) * **Business Objectives/Outcomes** Event justification—one or two sentences * **Event Budget –** Graphics, production staff, digital give-away’s or other items * **Event Team Identified -** Consider a Microsoft Team to coordinate * **Event Team Collaboration Space (Teams, SharePoint, Outlook) -** Agree on collaboration tool * **Event Team Meeting Schedule –** Agree on frequency and attendees of key meetings * **Technical Readiness –** Ensure network, services, devices and cameras are prepared * **Event Communications –** Define communications plan for team, stakeholders, presenters and attendees. Define key channels. Consider using SharePoint for key information. * **Presenter Confirmation -** Confirm presenters. Confirm timelines. Confirm content expectations. Encourage use of audience engagement tools to increase attendee satisfaction * **Begin Working on Content -** Use placeholder content, communicate to speakers where it is stored. * **Schedule Live Event -** Schedule using settings determined above * **Secure Short URL -** Consider a URL shortener/redirector, with appropriate branding * **Share Event Links** - Send Join and Attendee links |
| **2 Weeks** | * **Presenter Best Practices Training** - Test/Confirm the Following (Just run down the list with them): * **Video** - Have presenters practice positioning their webcam so they are in frame, well illuminated * **Audio** - Ensure presenters are using high quality audio devices and know how to configure in Teams * **Audio** - Have presenters practice positioning their audio device for optimal clarity * **Audio -** Validate if anyone will be calling in. Remind them to use #6 to mute/unmute * **Audio** - Have presenters practice using mute. Remind them they must unmute themselves * **Connectivity** - Remind presenters to use a wired connection, not wireless, when possible * **Connectivity** - Remind presenters to test bandwidth (e.g. [www.speedtest.net](http://www.speedtest.net)), 1.5 Mbps needed * **Content -** Validate how you’ll share content: Each presenter sharing, or one PC showing slides * **Content** - Have each presenter practice sharing their screen if you will switch back and forth * **Content -**  Have presenter practice advancing slides, using slideshow remote (if in person) * **Q&A** - Confirm presenters understand moderated Q&A is how they will interact with audience * **Q&A** - Confirm presenters understand questions may take 15-20 seconds to come over (ask early) * **Attire** - Confirm presenter will not wear striped or checkered clothing patters that cause aliasing * **Notifications** - Confirm presenter knows Focus Assist in Windows 10/Do Not Disturb on Mac * **Practice Live Event -** See the instructions in the appendix |
| **1 Week** | * **Presenter Checkpoint Call** * Review agenda * Remind of content deadlines, remind to work from content repository (don’t email attachments!) * Discuss event moderation, Q&A procedures, if a presenter will help moderate * **Event Team Checkpoint Call** * Ensure moderators have appropriate event permissions (producer, presenter) * Stage boilerplate announcements, answers, links in a text file (to drop into Q&A as needed) * **Event Communications** – Send reminders to presenters and attendees * **Content Computer** (confirm for each presenter or the “podium computer” in common venue) * Provision “podium computer” (event laptop, venue computer, etc.) if presenters centrally located * Sign in using the Teams credentials to be used during the Live Event (e.g. user or system account) * Run Windows Update, apply any needed updates; pause updates for seven days * Power Plan set to *High Performance*, Turn Off Display set to *Never* * Sync the collaboration repository (Teams, SharePoint) document library * **Encoder Connection** (External App/Device Produced Event) * Connect encoder to the Ingest URLs, verify RTMP settings are correct * **Do not start the event!** |
| **3 Days** | * **Event Team Update -** Check in call, add any final presenters/producers to the Event Team * **Agenda Final -** Update and finalize the agenda * **Content Update -** Confirm status, deadline, submission. Validate if you’ll consolidate slide decks. * **Event Communications** – Send reminders to presenters and attendees * **Presenter Update -** Send/share presenter confirmation. Address questions/concerns. Consider hosting “Office Hours” for presenters and moderators. * **Presenter/Content Computer -** Verify content sync |
| **1 Day** | * **Content Final -** Finalize deck(s), demos. Ensure content is synchronizing to Content Computer. * **Content Test -** Test deck animations, transitions. Check fonts. Embed linked videos. * **Content Consolidated -** Merge into single deck, if appropriate. * **Q & A Moderator -** Pre-stage posts (in OneNote, Notepad, Word, etc.) for Q&A or Yammer   + Icebreakers and Conversation starters   + Links to content after event, Anticipated answers * **Event Communications -** Share event reminder via Intranet, Email, Yammer, Teams etc. * **Presenter/Content Computer -** Pause Updates, enable Focus Assist, check Power Plan, clear Desktop. * **Presenter Update -** Send/share presenter confirmation. Remind to join early. * **Encoder Connection** - (if using) Test external encoder RTMP connection again |
| **1 hour** | * **Event Team Join Live Event**   + Sound checks, video check before presenters arrive on the call   + **Do not start the event!** * **Encoder Connection (External App or Device Produced Event)**   + Connect encoder to the Ingest URLs, verify RTMP settings are correct   + **Do not start the event!** * **Complete Room Preparation -** If Presenting from Central Location e.g. an auditorium * **Room A/V System Powered On, Tested.** Power on A/V, warm up projector, display routing * **Headset/Microphone Setup -** Prep/test mikes, replace batteries, position speaker phones * **Teams Room System -** Join the Live Event (if using a TRS). Do not start the event! * **Content Computer Setup**   + Open PowerPoint deck locally   + Ensure laptop has a wired Ethernet connection and can get to the Internet   + Join Live Event (Do not start the event!)   + Close any unneeded applications and services |
| **30 Minutes** | * **Presenters Join Live Event**   + Sound check, video check   + Remind to come off mute when speaking   + Remind how Q&A will work   + Test content sharing   + Close any unneeded applications and services |
| **Pre-Flight** | **Teams Live Event Pre-Flight**   * **Presenter/Podium Computer.** Click Share > Share desktop if sharing content * **Queue Content.** Set Live event video on opening slide or first speaker’s webcam * **Queue to Live.** Producers send the preview que to the live preview in Teams   **External App or Device Pre-Flight**   * **Title Card**. Stage title card, bumper slide, intro video in the encoder   **Other**   * **Live Event Viewing.** Onsite moderators should set player to *Full Screen* for local audience. * **Final Sound and Webcam Check** - Check webcams. Ask each presenter for a sound check. * **Go/No Go -** Confirm Producers/Moderators/Speakers are ready * **Start** - Click **Start**, go live in Live Event * **Welcome and Intros -** Moderator or first speaker welcome and housekeeping**.** * **Teams Q&A** or **Yammer -** Moderator post a “welcome” message into the discussion * **Everyone** - Contribute/assist moderator with Yammer Conversation or Teams Q&A |
| **Live** | * **Producer** - Stage Video/Content View, Send Live, update as needed * **Producer -** Monitor Live Event call quality status * **Presenters -** Share Desktop if appropriate, ask for questions just prior (15 seconds) to Q&A * **Presenters** - Remember to unmute (Teams-produced event) * **Moderator -** Encourage engagement. Reminder how to participate in Teams Q&A or Yammer. Post links and resources as they are mentioned. Leverage prepared content. |
| **Wrap** | * **Moderator -** Add "Thanks for Joining Us" to Q&A or Yammer. Thank everyone verbally * **Moderator -** Post link to follow-up content. * **Producer -** End Event |
| **Post Event** | * **Moderator -** Escalate any unanswered Q&A to presenters as needed. Coordinate with Organizer. * **Organizer -** Manage event recording and access * **Organizer –** Gather event attendee data. Download attendee and Q&A reports. * **Organizer –** Send post event communications to   + Stakeholder/sponsors with event performance and highlights   + Presenters to thank them for participating   + Attendees with calls to action for further engagement including on-demand content * ***Rest***. |
|  |  |

**Appendix I: Practice Live Event**

You can easily hold a practice Live Event with your event team. It will help you see what each role experiences and will prompt discussion on how you will manage the experience for your users.

**You will need at least four people:**

* **Organizer** - Person who schedules the Teams Live Event. Also has Producer controls.
* **Producer** - Person who manages the Live Event stream, moderates Q&A. Also has Presenter controls.
* **Presenter** - Person who shares their video, audio, and desktop into the Live Event. Also moderates Q&A
* **Attendee** - Person who participates as an Attendee (Producer/Presenter can also Join as Attendee.)

**Live Event Training Videos - Each Person Should Watch (5 min)**

* Video: [Plan and Schedule a Live Event in Teams](https://support.office.com/en-us/article/video-plan-and-schedule-a-live-event-f92363a0-6d98-46d2-bdd9-f2248075e502) (2 min)
* Video: [Produce a Live Event in Teams](https://support.office.com/en-us/article/video-produce-a-live-event-34c89e79-ffd4-4a6a-baf6-77055e0709cb) (1 min)
* Video: [Attend a Live Events in Teams](https://support.office.com/en-us/article/video-attend-a-live-event-d837ad8d-ce34-44d0-9744-9beb50e943ac) (45 secs)
* Video: [Moderating a Q&A](https://support.office.com/en-us/article/video-plan-and-schedule-a-live-event-f92363a0-6d98-46d2-bdd9-f2248075e502) (1.5 min)

**Follow these steps to practice your Live Event**

1. [Getting Started with Teams Live Events](https://support.office.com/en-us/article/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a) - Everyone (read)
2. [Schedule a live event](https://support.microsoft.com/en-us/office/schedule-a-teams-live-event-7a9ce97c-e1cd-470f-acaf-e6dfc179a0e2) - Organizer
3. [Invite attendees](https://support.microsoft.com/en-us/office/invite-attendees-to-a-teams-live-event-99c34ccc-296d-40c5-b06c-b0afbc6674f8) - Organizer
4. [Produce your live event](https://support.office.com/en-us/article/produce-a-live-event-using-teams-591bd694-121d-405c-b26d-730315e45a22) - Producer, Organizer
5. [Present in your live event](https://support.microsoft.com/en-us/office/present-in-a-live-event-in-teams-d58fc9db-ff5b-4633-afb3-b4b2ddef6c0a) - Presenter, Producer
6. [Attend a Live Event](https://support.office.com/en-us/article/attend-a-live-event-in-teams-a1c7b989-ebb1-4479-b750-c86c9bc98d84) - Attendee
7. [Manage the recording and reports](https://support.office.com/en-us/article/manage-a-live-event-recording-and-reports-in-teams-6d1f5da9-74b7-4771-977d-b89eba194578) - Producer, Organizer

**Practice Tips**

* Event Team - the Organize, Producer, and Presenter are the "event team" - when they join the Live Event, they will be in a Teams Meeting where they can talk and prep before the Producers starts the Live Event
* Have people try different roles and share what you are seeing - During the practice, describe what you are seeing to the other people. The UI is different for each role.
* Attendee Limitations - The Attendee person will not be able to talk or share video and can only interact via Q&A if the Organizer enabled it. Discuss how you will moderate Q&A in an actual event.
* Scheduling Dialog - When the Organizer schedules the Live Event in Teams, some of the settings may be hidden in the New Live Event dialog box. Scroll down on each pane to see them all.

**Internal Discussion**

Discuss how the practice event went. Validate that what happened was what you were expecting. Did the Live Event appear automatically on people's calendar? How did the Organizer get the invitation to everyone? Will you record your Live Event? Will you enable Transcription? Will someone need to be dedicated to moderating Q&A? How will you let each presenter know it is time to present? Should you invite your "talent" as Presenters or Producers?

**Appendix II: Office 365 Administrator (Teams Administrator)**

Live events enable anyone to create live and on-demand events that deliver compelling communications to employees, customers, and partners. Events use video and interactive discussion across Teams, Stream, or Yammer and can be as simple, or as sophisticated as needed. Up to 10,000 attendees can participate in real-time from anywhere, on any device, or catch up later with powerful AI features that unlock the content of the event recording.

**NOTE**: To help support our customers, through October 1, 2020, Microsoft will enable custom events for as many as 100,000 attendees though our live events assistance program (below).

**Overview**

* [Live Events Across Microsoft 365 in Yammer, Teams, and Stream](https://docs.microsoft.com/en-us/stream/live-event-m365) (Comparison table)
* [Live Event Assistance](https://resources.techcommunity.microsoft.com/live-events/assistance) (request assistance from Microsoft, free during preview)
* [Teams Academy](https://aka.ms/teamsacademy): Video: <https://aka.ms/teams-live-events-session>, Deck: <https://aka.ms/teams-live-events-deck>
* [Microsoft Ignite 2019: Host Large Scale Town Halls](https://myignite.techcommunity.microsoft.com/sessions/83196) (recorded session)

**Networking**

* [How to quickly optimize Office 365 traffic for remote staff](https://techcommunity.microsoft.com/t5/office-365-blog/how-to-quickly-optimize-office-365-traffic-for-remote-staff-amp/ba-p/1214571) (VPN split tunneling)
* [Prepare your organization's network for Teams](https://docs.microsoft.com/microsoftteams/prepare-network) (general)
* [Make sure all endpoints are reachable in your network](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdocs.microsoft.com%2Fen-us%2Fstream%2Flive-event-troubleshooting%23make-sure-all-endpoints-are-reachable-in-your-network&data=02%7C01%7CBrown.Samantha%40microsoft.com%7Cdbb916291add46320b5508d7e0988c95%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637224818102028341&sdata=BgvD39yB6H9%2FpxImJZ4h5vtSsSH%2BUcx%2FL9SM7S7wFpg%3D&reserved=0) (ensure endpoints are white listed and accessible to viewers)
* [Microsoft Stream video delivery overview](https://docs.microsoft.com/en-us/stream/network-overview) (for events produced with an external app or device)
* [eCDN: Set up a Video Distribution Solution for Teams-Produced Events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/set-up-for-teams-live-events#step-4-set-up-a-video-distribution-solution-for-live-events-in-teams) (eCDN configuration for Teams production)
* [eCDN: Scale Video Deliver and Monitor Network Traffic](https://docs.microsoft.com/en-us/stream/ecdn) (eCDN configuration for external encoder production)

**Configuration - Teams-Live Events**

* [Plan for Teams Live Events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events): [Licenses needed to create/schedule live events,](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events#who-can-create-and-schedule-live-events) [Who can watch live events](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/plan-for-teams-live-events#who-can-watch-live-events)
* [Assign Office 365 Licenses to Users](https://docs.microsoft.com/en-us/office365/enterprise/assign-licenses-to-user-accounts) (Teams license is automatically assigned)
* [Manage End User Access to Teams](https://docs.microsoft.com/en-us/microsoftteams/user-access#manage-teams-through-the-microsoft-365-admin-center) (optional, granular control of Teams license)
* [Set up Live Events policies in Teams](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/set-up-for-teams-live-events#step-3-set-up-live-events-policies) (controls who can hold Live Events and features enabled)
* [Configure Live Events Settings in Teams](https://docs.microsoft.com/en-us/MicrosoftTeams/teams-live-events/configure-teams-live-events) (connect Live Events to SDN/eCDN provider)

**Configuration - Stream Live Events**

* [Enable Microsoft Stream](https://docs.microsoft.com/en-us/stream/assign-user-licenses)
* [Administration controls for Microsoft Stream live events](https://docs.microsoft.com/en-us/stream/live-event-administration)

**Configuration - Yammer Live Events**

* [Enforce Office 365 Identity for Yammer Users](https://docs.microsoft.com/en-us/yammer/configure-your-yammer-network/enforce-office-365-identity) (Office 365 identity must be enabled in Yammer for Live Events)
* [Configure Office 365 Connected Yammer Groups](https://docs.microsoft.com/en-us/yammer/manage-yammer-groups/yammer-and-office-365-groups) (Only O365-connected groups can host a Live Event)
* Manage a Group in Yammer (read to understand the Yammer Group Admin role)

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| Document Contributors  Primary author:  Nick Stillings, Sr. Customer Success Manager  Additional Contributions:  Karuana Gatimu, Principle PM Manager, Microsoft Teams Engineering  For more information on virtual events and driving adoption of Microsoft services visit <https://adoption.microsoft.com> |
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