

VIRTUAL EVENT TASK LIST

An event timeline outlines roles and responsibilities, including tasks to be completed before and after the event. The following template will help you create a timeline for a virtual event. If you are planning an in-person or hybrid event, please refer to the [event task list](#) for in-person events.

PRE-EVENT

3 months to 8 weeks ahead

- Contact [Gloria Chu](#), Director, Ceremonies and Events for an event consultation (if applicable)
- Draft an [event brief](#) outlining the goals and objects of the event
- Schedule an event strategy meeting with event leads to review event brief and begin planning process
- Determine the [platform](#) and format for your virtual event
- Select date and time for your event. Confirm dates with key speakers or staff
- Complete [MECS](#) request if Zoom Webinar license or additional staffing is required
- Complete IT Services request for event recording, if applicable
- Create [event budget](#)
- Plan your program with virtual event platform and staffing limitations in mind – e.g. simplicity, duration, number of speakers, engagement, etc.
- Begin compiling an invitation list

8 weeks to 4 weeks ahead

- Draft program schedule. Consider speaking order and timing
- Determine speakers, emcee and staff [roles](#) for day of event
 - Determine if speakers or presenters will present from home, campus or other space, and if they require additional technology (e.g. laptop, microphone, etc.) to be delivered to their home
 - Consider back-up plan when staffing
- Determine if [participant engagement](#) tools or activities will be included. Thoroughly test for viability. Set-up or prepare materials for these activities in advance

- Finalize invitation list. Circulate to event leads and internal stakeholders for review
- Design [event invitation](#) and registration page (e.g. Eventbrite):
 - Determine registration options
 - Privacy information
 - Technology requirements
- Prepare work orders:
 - Book a closed captioning service (if applicable)
 - Book an external A/V company (if applicable)
- Schedule a tech rehearsal for everybody who is involved in running the event (3-5 days before the event)
- Schedule a dress rehearsal for a day after the tech rehearsal that includes everyone involved in running the event plus speakers (1-3 days before the event)
- Begin preparing the [Book of Words](#) (script, including A/V cues)
- Develop a marketing and communications plan, including social media (if applicable)
- Plan what content and communication pieces are required for event. Set parameters, expectations and timelines for those creating content.
 - PowerPoint presentation (e.g. welcome slides, agenda, housekeeping)
 - Videos
 - Music
 - Moderator script for chat, including relevant links or information for guests

4 weeks to 2 weeks ahead

- If using Zoom, consider setting up a communication channel with A/V team and/or speakers outside of Zoom chat (e.g. WhatsApp or Slack)
- Send event email invitation
 - Include registration details (e.g. Eventbrite link) and all event information
 - For security reasons, do not include the event URL (e.g. Zoom link)
- Circulate [best practices document](#) to speakers/presenters and brief them on their role
- Finalize Book of Words, Program Schedule and all content
- Ensure work orders are confirmed
- Create confirmation email (e.g. see [Zoom Meeting](#) and [Zoom Webinar](#) samples). Consider including:
 - Outlook/Gmail calendar integration options
 - FAQs, troubleshooting, contact information for technical assistance
 - [Privacy and accessibility information](#), including closed captioning, if applicable
 - Notice of recording (if applicable)
 - Technology requirements

- Outline what type of event this is, whether there will be interaction, what type of involvement/participation is required, etiquette/housekeeping
- Link to [Zoom Meeting](#) or [Zoom Webinar](#) tips for participants
- Option to attend a pre-event session to test their internet connection, audio and video and practice using some of the interactive tools.
 - This option is especially helpful for events involving demographics less tech savvy or unfamiliar with Zoom and events that are more complex.
- For security reasons, do not include the event URL (e.g. Zoom link)
- Create [event access email](#). Consider including:
 - URL to access virtual event including password and call-in numbers (as applicable)
 - Privacy information
 - Contact information for technical support and event enquiries
 - Closed captioning instructions and live stream link (if applicable)
 - Consider sending this email to all those on the original invitation list, even if they didn't register
- Create Post-Event email. Consider including:
 - [Post-event survey](#)
 - Thank you message and additional information or resources for attendees
 - A copy of the event recording for on-demand viewing

1 week ahead

- Send event link and day-of documents (e.g. Book of Words, Schedules, etc.) to staff, A/V team and presenters as needed
- Host tech rehearsal and dress rehearsal – make adjustments to the event program/flow as required

2 Days before event

- Send confirmation email to registered guests

1 Day before or day of event

- Send event access details email to registered guests (or all invitees)

DAY-OF

For live events (e.g. Zoom):

- Staff and A/V Team log into event a minimum of 45 minutes before event start for final event set-up and testing
- Presenters arrive 30 min before the event start for a final briefing and set-up
- Closed captioner set-up 15-30 minutes before event start
- Turn off auto notifications/pop ups/computer sounds. Set to “Do Not Disturb” mode
- Size windows and script to ensure everything is visible or can be accessed easily
- Test different views or screen sharing to make sure your view isn’t affected
- Backup A/V Tech on standby with AV materials set-up

For pre-recorded events (e.g. livestreams on YouTube or Facebook):

- Chat moderators ready for event start (if applicable)
- Back-up plan with prepared communications if streaming platform goes down

POST-EVENT

- Send Post-Event email to attendees
- Download and save recorded event
- Edit recording. Consider cutting out irrelevant parts (e.g. housekeeping notes, A/V transitions that were not smooth, etc.)
- Publish recorded event
- Consider including the recording and resource materials in the post-event email to attendees for future reference and/or people who were unable to attend
- Consider sending a short event highlight/recap video to attendees in the post event email
- Download attendance and Q&A reports for follow up
- Request debrief notes from event leads and staff. Schedule a debrief meeting (if necessary)
- Reconcile event budget
- Evaluate event success. Were all goals and objectives achieved?