

GETTING STARTED WITH VIRTUAL ENGAGEMENTS FOR GOVERNMENT

EXECUTIVE SUMMARY

The 2020 global COVID-19 pandemic and associated social distancing guidelines have forced many organizations (both public and private) to shift the way they engage their customers, stakeholders, and colleagues from in-person to virtually or remotely.

The tried and true methods of in-person brainstorming, presenting, and networking are on pause. The need to convene innovators, understand diverse user requirements, and build a coalition of champions, however, is more important than ever before. This is especially true for government organizations with missions to execute and stakeholders to serve. Although it may be tempting to simply cancel your planned event, or postpone it indefinitely, we believe that technology has evolved to the point where you can effectively engage with your stakeholders in a completely virtual environment. There are some major differences to consider, though. From meeting design and platform to content development and resources required, we've helped our clients navigate it all seamlessly.

In this guide, we will cover the five key phases of planning a successful virtual engagement:

1. Virtual Engagement Goal
2. Audience Breakdown
3. Timeline to Execute
4. Magnitude of Content
5. Dedicated Resources

The elements of each phase build upon each other and compound to create your engagement as a whole. Following this guide will help you create a cohesive, well-planned event that will ease your execution and deliver value for your stakeholders.



PHASE 1 VIRTUAL ENGAGEMENT GOAL

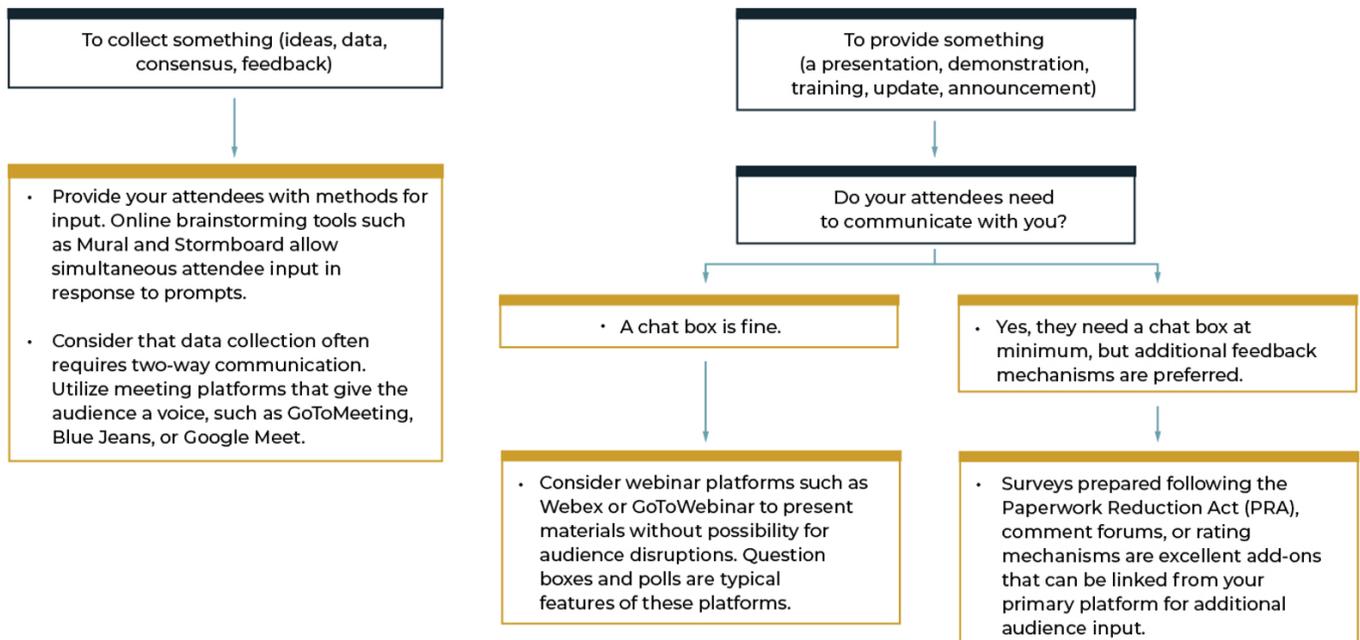
Identifying the core purpose of your engagement will impact what it looks like. After all, form follows function. Events designed to collect information from attendees (like feedback or data) will have platform requirements, communications, and attendee forums that may be very different, for example, from those designed to provide something to attendees (such as presentations, demonstrations, updates or training).

Suggested Reading: [The 12 Questions to Ask Yourself to Measure the Success of Your Virtual Event](#) by Emily Hartmann

ASK YOURSELF THESE QUESTIONS TO IDENTIFY THE CRUX OF YOUR ENGAGEMENT GOAL:

- Are you seeking input or feedback on a recent initiative?
- Do you need data to inform your next steps?
- Are you updating the community on progress, results, or outcomes?
- Are you promoting a current or upcoming opportunity with the government that requires stakeholder outreach?
- Do you need to build brand awareness or demonstrate thought leadership?

What Is Your Primary Goal?



PHASE 2 AUDIENCE BREAKDOWN

Information about the group you are gathering will set key parameters for your engagement. Public engagements might rule out tools you typically rely on for private meetings. For example, maximum capacities or tiered licensing may narrow your platform options. Varying levels of audience familiarity may require educational components not typically required in person. It is important to determine if your event is public or private and the size of your target audience before designing the engagement. Additionally, time zone considerations will come into play if your audience is geographically dispersed. If they are

global, it will be nearly impossible to find a time that works for everyone to be “live” together, so it may be better to consider an “on demand” type of platform. Unique characteristics about your target audience will influence the scope of available tools and strategies. Luckily, there are plenty of options available that work for almost any audience imaginable and virtual events eliminate many geographic or economic barriers to participation.

Suggested Reading: [Virtual Platforms Aren't “One Size Fits All”](#) by Jaimi Welch

Who is Your Engagement For?

<p>Public</p> <ul style="list-style-type: none"> Identify a timeframe that avoids conflicts common to your target audience. Take inventory of your audience preferences for consuming materials. Consider videos, activities, and graphics as novel ways that may stimulate your stakeholders against the increased time they spend online. 	<p>Private</p> <ul style="list-style-type: none"> Consider sending a poll with a few proposed dates, the purpose, and suggested inputs.
<p><30</p> <ul style="list-style-type: none"> If this is a group that you communicate with frequently, use methods to meet familiar to them and maximize your time. Perhaps your small target is at the executive level. Communicate the benefit of your engagement specific to them and package your materials efficiently. 	<p>5-15</p> <ul style="list-style-type: none"> Set clear expectations for your attendees' role in your engagement. Consider personalizing your invitations if invitees are external to your organization.
<p>30-75</p> <ul style="list-style-type: none"> Use your networks to recruit their colleagues. Hitting a large, yet relevant audience can be challenging. Let your known target attendees fill the virtual room for you. 	<p>15-30</p> <ul style="list-style-type: none"> Consider tiers of invitations. As your closed event grows, you may need to backfill the attendee roles of those who decline your engagement.
<p>75-150</p> <ul style="list-style-type: none"> Create a brand for your event that your invited attendees will recognize with each communication. To achieve a moderate number of attendees, your messaging must be clear and enticing. Begin to mind platform capacities. Tools like GoToMeeting, GoToWebinar, BlueJeans, and Webex have more attendee seats. 	<p>50-75</p> <ul style="list-style-type: none"> Consider tiers of invitations. As your closed event grows, you may need to backfill the attendee roles of those who decline your engagement. Utilize a 'journey' approach to communications. With a moderate sized group, it's unlikely that all your attendees will behave similarly from the first communication. Consider two streams of communications dependent on your attendee actions (registering or not).
<p>The more participants, the better</p> <ul style="list-style-type: none"> Use your networks to recruit their colleagues and ask pertinent media to promote your event. Hitting a large, yet relevant audience can be challenging. Let your known target attendees fill the virtual room for you. Consider a fluid event that can be consumed at your attendees' convenience. The more flexible it is or further chances for engagements, the greater reach your engagement will have. Prepare avenues for troubleshooting and virtual help. With a larger number of attendees, there is higher probability that multiple participants will need aid during your engagement. Consider multiple content formats, such as static and dynamic content, to meet different attendees' preferences. 	<p>More than 75</p> <ul style="list-style-type: none"> Consider tiers of invitations. As your closed event grows, you may need to backfill the attendee roles of those who decline your engagement. Utilize a 'journey' approach to communications. With a moderate sized group, it's unlikely that all your attendees will behave similarly from the first communication. Consider two streams of communications dependent on your attendee actions (registering or not). Even with a closed group of targeted invitations, 75+ attendees will require careful management. Identify who you need to invite and why they are being invited. Use this 'why' to inform your communications and directions for their engagement.

PHASE 3 TIMELINE TO EXECUTE

The time available to prepare, promote, and execute your event sets the stage for what is possible and likely correlates with the scale of your engagement. Smaller, fast-approaching engagements such as internal meetings, town halls, or virtual trainings likely contain specific and narrowed content and involve a smaller audience. Large and public conferences require time to design, coordinate, and promote to a broader group of attendees. Confirming your timeline is a critical first step in verifying the possibility of your intended scope, targeted attendees, and available resources. Begin with your timeline and work backwards to confirm there is space to achieve, ready, distribute, and

broadcast your engagement as desired. Refer back to your primary goal for your engagement when determining your timeline. In general, designing an engagement purposed to collect data, information, or feedback will take less time than an event designed to present updates, demonstrations, or training. Think outside the box and consider breaking your engagement into phases, or spreading it out over the course of a week.

Suggested Reading: [How to Maximize Virtual Attendance and Participation](#) by Stacey Trunnell

What Is Your Timeline?

2 weeks or less

- Start with your event goals and prioritize them according to your timeline. If you have a rigid date, realistically assess how many engagement elements can be prepared and deployed.
- Identify a single decision maker for everything. Avoid chain of command approvals.
- Work carefully, but quickly. Without much time to prepare, commit to your plan once designed and leave time for testing.
- Limit the facets of your event to 1-2 (presentation, brainstorm, feedback, prioritization, networking).

3-6 weeks

- You have time to create a multi-faceted event. Consider including more than one element (presentation, demonstration, discussion, networking, feedback). Identify a single decision maker for everything. Avoid chain of command approvals.
- Spend more time in your assessment phase before creating your plan.
- Recruit input from the narrowed team involved in your engagement, then move forward with everyone on-board and aligned.

6 weeks-6 months

- Take your time in the assessment phase. Research into your attendee wants and requirements can greatly improve what you deliver.
- Consider whether the scope of your event requires multiple leads or decision makers. Clearly outline roles and responsibilities.
- Beware of forecasted and possible risks. With moderate time to plan, there is moderate time for change. Stay aware so you can evolve as needed.

6 months-1 year

- Select your date after creating your project plan. This will ensure that your projections are realistic and accurate.
- Start with your event goals and adjust your timeline accordingly. If pushing your date allows you to engage more stakeholders and more successfully, it is worth the later date.
- Employ novel features to engage your attendees in a memorable and newly effective way.
- Build numerous opportunities for feedback to continuously improve your engagements.
- With a considerate amount of lead time, expectations for your event will grow. Utilize resources appropriately to meet and exceed these expectations. Build a team and set up recurring meetings and collaborative tools to align.

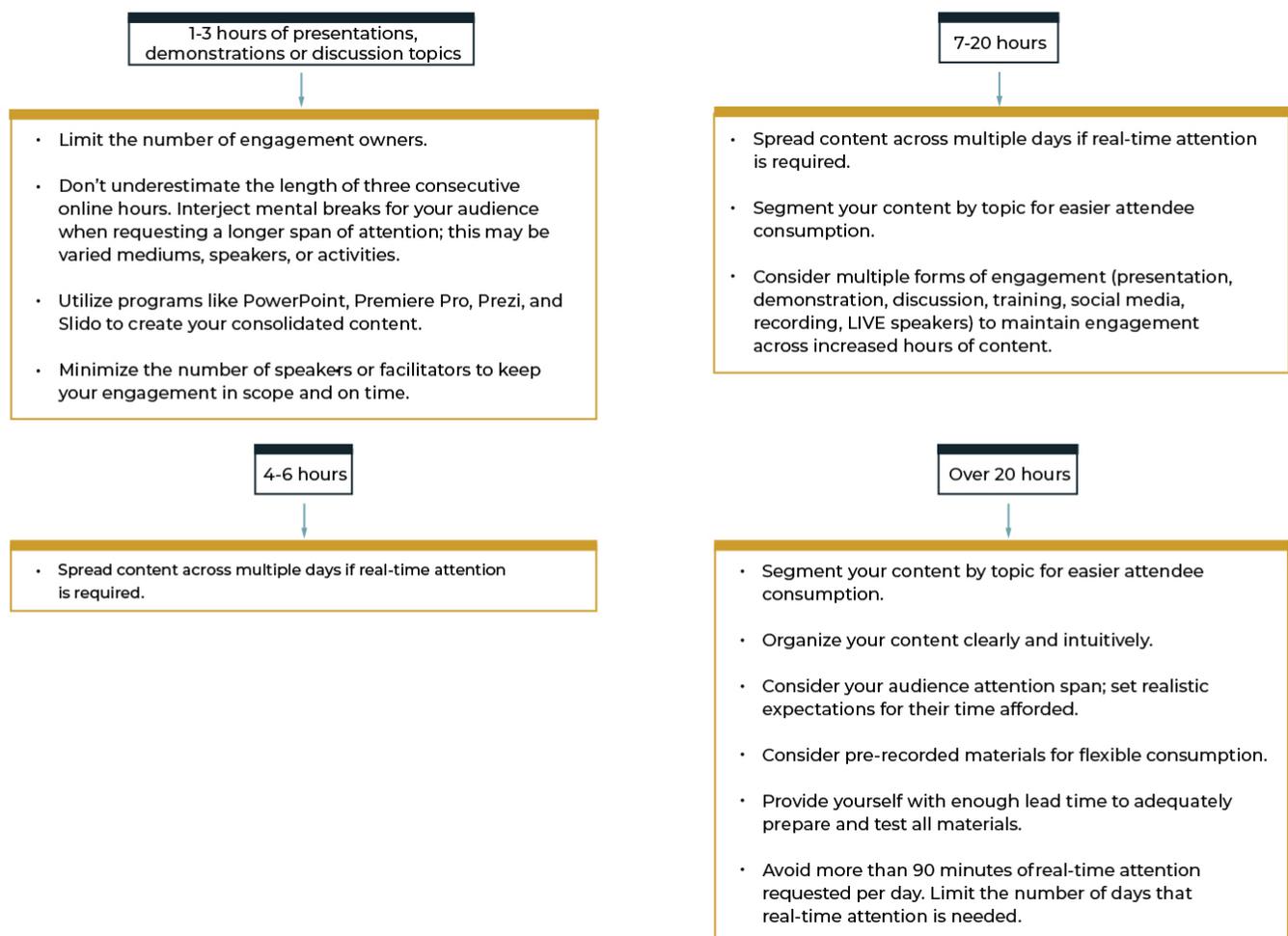
PHASE 4 MAGNITUDE OF CONTENT

Platforms used, time committed, and resources needed all depend on how much content or information your virtual engagement consists of. Careful assessment of what and how much information your engagement will collect or provide will inform the tools you select to share, build, and implement your virtual event. While some presentations are best rendered in a live webinar, others are suited for pre-recorded videos. You may find success in collecting data using real-time brainstorming tools or survey/polling tools. The magnitude of your content should point to your engagement goal. Each content

piece presented should serve that goal in some way and intelligently interact with the remainder of your event. Various activities within a single engagement can support one another if implemented strategically. Prepare creative content, scaled appropriately to meet your goals to keep your audience captivated and achieve your engagement objectives.

Suggested Reading: [The 12 Questions to Ask Yourself to Measure the Success of Your Virtual Event](#) by Emily Hartmann

How Much Content Do You Have?



PHASE 5 DEDICATED RESOURCES

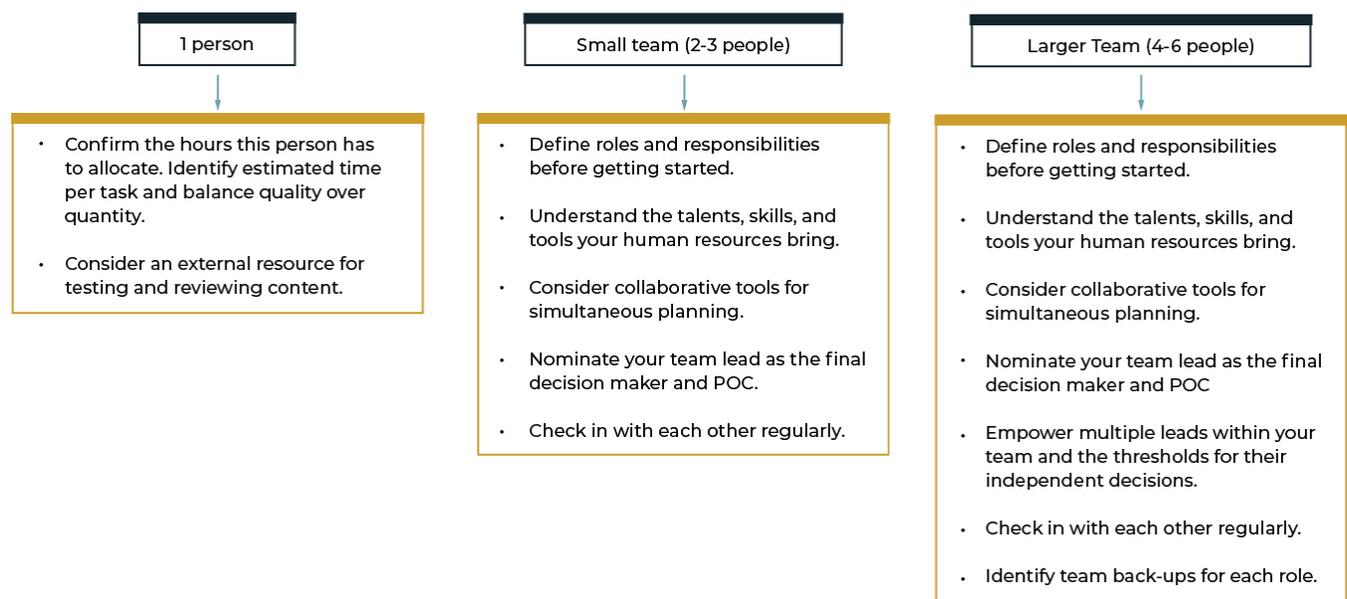
Examining the tools, talents, and outlets you have to build and promote your event will influence the scale, timeline, and complexity of your virtual engagement. Identify the staff or monetary resources you have available before getting started and clearly align your team around roles and responsibilities. There are many collaborative planning tools that your team might employ for simultaneous progress. Though you may have many contributors, consider designating a team lead and single point of contact. This will help streamline decisions and communications. You might also consider adding/designating the following roles and resources:

DEDICATED RESOURCES LIST

- **Project owner** - this person should manage your project plan to a timeline and your team to their deliverables. They may also lead engagement design.
- **Writer/editor** - helpful in a multitude of ways; critical for clearly communicating your virtual engagement's value offering; one or two people who can support blogs, email, and social media at a minimum. Provide them with your brand script so they can adapt it to the best practices per each platform.
- **Brand style guide** - in lieu of having a team of graphic designers, have one designer with talent create a style guide for your brand and your virtual engagement (to include guidance on logos, tone, look and feel, tints, color palettes, typography, and more).
- **Video editor** - our stakeholders will only come to rely on dynamic media more and more.
- **Streaming video conferencing service** - hosting a free webinar has proven extremely effective in whetting the appetites of audiences for the "main event." Zoom is not approved for many Federal clients, but GoToWebinar and Slido are great options.
- **Adobe Creative Suite** - If you have a designer on your team, they'll likely have access and skills to this suite of creative tools. You can also create high-impact digital graphics with Canva.
- **Web designer/editor** - as everything is assumed online, recruit a team-member that can add your engagement details to the world wide web and optimize it's discoverability.
- **Subject Matter Expert (SME)** - if you don't already have a SME presenting information or participating in discussions, consider bringing one on to your team to consult your engagement design and content.

Suggested Reading: [The Dos and Don'ts of Planning Your Virtual Event](#) by Kerianne Gibney

What Resources Have You Dedicated to this Engagement?



READY TO GET STARTED?

Corner Alliance has a proven track record of helping organizations plan and execute virtual engagements for stakeholders. To learn more about how we can help make your next event a success, get connected with a Corner Alliance expert today!

At Corner Alliance, we believe in positively contributing to society by supporting government innovators in their missions to transform the usage of broadband and leading edge technologies in communities nationwide. Being a government ally is at the core of all we do.

Drop by and say hello at our DC location or visit our website to get in touch.

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