Virtual Event Survival Guide: Plan, Build, and Host Successful Online Events (Chappell/Spicer)

PLATFORM CHECKLIST

First, identify the elements that are important to you using the MoSCoW method (mentioned in *Chapter 1, Define Your Event Type*).

General

- ☐ Self-service or full-service platform (who designs/configures/uploads?)
- ☐ If full-service, a la carte pricing options
- ☐ Demo available
- ☐ References available
- ☐ Access to current live events to test drive experience
- ☐ Adaptive/responsive platform
- ☐ Supported number of sessions
- ☐ Supported number of booths
- ☐ Custom rooms (chat lounge, press room, staff room, etc.)
- ☐ Length of event possible/cost
- ☐ Traditional or modern design options
- ☐ Registration maximum count (unlimited?)
- ☐ Attendance maximum count and overage – what happens on overage?
- ☐ Price for full-time support during and within the event
- ☐ Access levels (event admin, booth admin, booth contributor, attendee)
- ☐ Turnaround time/development time needed
- ☐ Navigation features
- ☐ Search features (locate sessions, exhibits, people, resources, etc.)
- ☐ Uptime during events (outage issues experienced in the past?)
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Sessions

- ☐ Track support (single-track/multi-track)
- ☐ Live, simulive, on-demand session types
- ☐ Live process (third-party applications/proprietary for video/audio feed)
- ☐ Auto-transition live/simulive to on-demand
- ☐ Simulive/on-demand player capability
- ☐ Edge-serving of on-demand videos
- ☐ Interactivity options during on-demand AND live sessions (chat/Q&A/notes/comments/surveys/polling)
- ☐ Session tagging/navigation
- ☐ HTML descriptions vs. text-only descriptions
- ☐ Link to booths
- ☐ Favoriting sessions/session reminders
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Booths

- ☐ Interactivity (chats, Q&A, social wall, other)
- ☐ Private chat for event staff
- ☐ Private messaging for booth staff
- ☐ Who's Online for event staff
- ☐ Templates (traditional/modern)
- ☐ Submit an Inquiry feature
- ☐ Social media links/website links
- ☐ Favoriting feature/swag bag
- ☐ Job lists
- ☐ In-booth sessions
- ☐ Resource types/support
- ☐ Staff/contributor rights/abilities
- ☐ Separate background/layouts for each booth
- ☐ Booth analytics
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Resources

- ☐ Resource types supported (file types)
- ☐ Limits on file sizes uploaded to event
- ☐ Edge-serving of content (platform used for edge-serving)
- ☐ Favoriting resources
- ☐ Resource analytics
- ☐ _____
- ☐ _____
- ☐ _____

Interactivity

- ☐ Online Now feature
- ☐ Notes ability
- ☐ Commenting ability
- ☐ Public chat
- ☐ Private chat
- ☐ Messaging
- ☐ Broadcast announcements
- ☐ Geo-mapping
- ☐ Favoriting throughout event
- ☐ Quizzes, treasure hunt, contests
- ☐ _____
- ☐ _____
- ☐ _____

Branding and Marketing

- ☐ Custom event URL
- ☐ Branding options for event host
- ☐ Branding options for sponsors/exhibitors
- ☐ Social media integration
- ☐ Event emails (confirmation, reminders, absentees) – HTML support
- ☐ Session start reminders/session follow-up
- ☐ _____
- ☐ _____
- ☐ _____

Registration and Ticketing

- ☐ Embedded registration system vs. third-party registration system
- ☐ Third-party registration system – how often do they "pull" registrants?
- ☐ Registration form customization (max questions)
- ☐ Types of registration fields
- ☐ Registration approval (manual/automatic)
- ☐ Email domain filters
- ☐ Social media registration/sign-in
- ☐ Calendar function for attendees
- ☐ Time zone setting
- ☐ Payment processor options (e.g., Paypal, Stripe, etc.)
- ☐ Extra fees charged for registration (see *Error! Reference source not found.* starting on page **Error! Bookmark not defined.**)
- ☐ Cancellation policy placeholder
- ☐ "Right to Refuse Service" policy placeholder
- ☐ Ticketing options (tickets for event/tickets for session)
- ☐ Coupon support (apply to, percentage/price, expiration, redemptions, tracking)
- ☐ Dealing with cancellations/refunds
- ☐ CAPTCHA support
- ☐ Welcome prompt (video, HTML-support)
- ☐ Batch import of registrants
- ☐ _____
- ☐ _____
- ☐ _____

Media Management

- ☐ Import from cloud
- ☐ Categorization
- ☐ Download elements
- ☐ _____
- ☐ _____
- ☐ _____

Analytics

- ☐ Surveys (event, session/automatic prompts)
- ☐ Analytics reports (examples)
- ☐ Exported interactivity items (chats, Q&A, polls, comments, activities, etc.)
- ☐ Google analytics
- ☐ _____
- ☐ _____
- ☐ _____

Testing and Support

- ☐ Pre-event testing process
- ☐ Device testing available
- ☐ Method for training event staff/booth staff
- ☐ Support services available for testing
- ☐ Event archive available
- ☐ _____
- ☐ _____
- ☐ _____

Other

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____