Checklist for planning a hybrid event

1. Event objectives

- ☐ **What is the core objective of the event?** (e.g. information/ strategy development/ customer acquisition and retention/ motivation/ decision-making/ personal exchange etc.)
- ☐ **Who should attend the event** (employees/ customers/ partner companies/ managers etc.)
- ☐ **Derived from this: What is the specific aim of the event? (e.g.** company partners should be informed about the new strategic direction, customers should be familiarised with new products)

2. Event concept

- ☐ What budget is available?

- ☐ Conception and organisation on your own or with agency support?

- ☐ Conception and organisation with the help of an event tool?

- ☐ Would partner companies like to participate in the event (as sponsors, exhibitors, presentations, etc.)?

- ☐ How many people will take part?

  Digital:

  Presence:

- ☐ When should the event take place? (Take into account e.g: Trade fairs, holidays, competing events, availability of important personalities, scope of the event (large events are planned more long-term than small ones!)

- ☐ Is the event a one-day or multi-day event?

- ☐ **How can the event be an equally interesting experience for hybrid and face-to-face participants?**

- ☐ How should content be communicated and developed accordingly?

- ☐ Internal and/or external speakers
- ☐ Moderator
- ☐ Workshops
- ☐ Talks
- ☐ Exhibitions
- ☐ Interactive conference formats

☐ What is the structure of the event accordingly?
- ☐ Plenum
- ☐ Number of workshops
- ☐ How many of these workshops should take place in parallel?
- ☐ Seating arrangements for the individual elements
- ☐ Exhibition areas
- ☐ Get-together areas
- ☐ Catering
- ☐ Additional evening event (extra room or conversion?)
- ☐ Technical equipment (e.g. extra control room)

☐ How can digital participants be integrated into the event in the best possible way?
- ☐ Taking questions from digital participants into the presence round
- ☐ Start live surveys
- ☐ Hybrid discussion groups
- ☐ Media wall (digital pinboard)
- ☐ Creating digital networking spaces

☐ What are the exact requirements for the destination?
- ☐ Where do the participants come from?
- ☐ Does an airport have to be nearby?
- ☐ What is the general accessibility of the destination?
- ☐ Does the destination have the necessary infrastructure (hotels, restaurants, locations, public transport network)?

☐ Which destination is ideal? (The objectives of the event should be taken into account)
- ☐ Is there a city/region that is known for its industry focus?
- ☐ Should participants get to know a company location?
- ☐ Should participants get to know a new destination?
- ☐ Where has the event taken place so far?
- ☐ Should it be a rural or urban destination?

☐ Which location should it be?

- ☐ Type of location (hotel or an unusual event location that conveys a message/theme?)
- ☐ Requirements for the location (high-quality or simple, number of stars, specific style e.g. industrial design, historical etc.)
- ☐ Available rooms – are they suitable for the number of participants, the structure, the programme and the requirements of the event (e.g. parallel workshops, can control rooms be set up for digital transmission, are there special technical requirements for digital transmission)?
- ☐ Is additional space required (e.g. for an exhibition, reception, lunch/dinner, coffee breaks)?

- ☐ Do overnight accommodations have to be provided?
  - ☐ Obtaining hotel contingents (fixed or call-off contingent?)
  - ☐ Upgrades for VIPs

- ☐ Are transfers or shuttles required for groups or individuals?
  - ☐ From the airport or railway station
  - ☐ From the hotel

- ☐ How should the entire communication from the invitation to the feedback form and participant management be organised?
  - ☐ Motto / key visual / central idea
  - ☐ Consideration of a corporate design?
  - ☐ What is analogue, what is digital?
  - ☐ Would you like an event website and/or event app with information about the event?
  - ☐ In what form should participant management take place? (e-mail, event tools such as guestoo, analogue)
  - ☐ Which platform should the event be held digitally? (e.g. Zoom, Teams, Salesforce)
    - ☐ Do internal data protection guidelines have to be observed?

3. Event planning & calculation

Note: When researching the initial concept, concentrate on the key elements that are crucial to the success of the event, such as the location, digital components and powerful content. At this stage, certain details such as the menu selection or floral decorations are usually not yet

important.

- ☐ Search for a location (hotel, event location) in the pre-defined destination(s) that matches the profile.
- ☐ Research the content that matches the profile (speakers, programme, other content).
- ☐ If necessary, research the necessary and possible service providers (catering, equipment, technology, streaming, moderation, supporting programmes, etc.).
- ☐ Send enquiries with a detailed briefing on the developed event elements to the researched service providers in order to receive customised answers and offers.
- ☐ Check the incoming offers and compare them.
- ☐ Compile in a concept paper (e.g. a PowerPoint presentation) the elements that fit the structure, date and budget of the event and thus the framework of prerequisites that have been worked out.
- ☐ Preparation of a cost calculation / budget based on the offers received (see next step).

Note: When calculating the costs, take into account the elements that are absolutely necessary for the realisation of the event. Detailed costs for other elements can be added on the basis of experience or a budget and do not have to be planned in terms of content.

Elements that should be included in a cost calculation are

- ☐ Hotel and/or location incl. all additional costs incurred
- ☐ Journey
- ☐ Catering and conference packages
- ☐ Communication (graphics, invitation, all print materials, presentations, website, app, press if applicable)
- ☐ Documentation: Video production & photographer
- ☐ Technology (stage, lighting, sound, projection, camera, streaming service)
- ☐ Speakers, programme, moderation
- ☐ Branding and routing
- ☐ Decoration
- ☐ Staff (hostesses, service, security, set-up and dismantling, paramedics, fire brigade, cloakroom, toilet)
- ☐ Furnishing, decoration
- ☐ Transfers
- ☐ Other: GEMA, artists' social security fund, insurance, travel and travelling expenses
- ☐ Conference material
- ☐ Participant management

☐ Entertainment add-ons (such as online games, virtual city tours, etc.)

Attention: Be sure to include a buffer for any extra costs!

☐ What direct and indirect income do I have from the event?
☐ Permanent budget control

☐ Coordination with the client and the team on the content and costs of the concept: Do the concept and the elements researched for it fit the framework of requirements?

4. Event organisation

☐ Coordination meeting with the potential venue for an on-site inspection to put everything through its paces.

☐ Participation of key stakeholders in the site visit

☐ On-site appointment / location check (The venue for a hybrid event should ideally support the technical infrastructure you need. This is no longer just about suitable seating, accessibility, security and parking facilities. Rather, the hybrid aspect of your event must be considered from the outset)

   ☐ Does the location need to be specially lit?
   ☐ What perspectives does the location offer for the cameras?
   ☐ Is a suitable technical infrastructure already in place?
   ☐ How fast and stable is the internet connection?
   ☐ What are the room acoustics like? Is there any background noise?
   ☐ Is it possible to set up a separate control room?
   ☐ Parking facilities
   ☐ Bus driveways
   ☐ Premises
   ☐ Are there any complaints that could not be seen before (pillars in the room, design, newness of the equipment, cleanliness, etc.)?
   ☐ Safety (fire protection, escape routes, etc.)
   ☐ Accessibility

- What is available (digital equipment, technology, stage)? What needs to be rented according to the requirements?
- Where can what be placed (registration, cloakroom, sessions & presentations, stage, exhibition, catering, etc.)?
- Delivery
- Smoking area
- Sanitary areas

- Plan catering
    - How many people eat?
    - When should café and lunch breaks be scheduled?
    - Do special criteria have to be taken into account when selecting the food (e.g. allergies, intolerances, vegetarian, vegan, halal, etc.)?
    - How should the catering be designed so that it fits perfectly with the conference (brown bag session, small plates for food in the exhibition, finger food, buffet, etc.)?
    - Catering for crew and artists

- Request and plan the technical requirements of the protagonists on stage and inform technical partners

- Create set-up plans per room
    - How will each individual room be equipped and furnished?
    - Technical facilities, lighting and sound?

- Discussing the details of the event with location operators, technical companies, catering, outfitters, etc.

- In which room should the programme items take place
    - How do digital participants access the virtual spaces?
    - How many virtual rooms are needed?
    - Communicate and label the programme clearly for all participants

- Design, layout and send out save the date and invitations, create event page if necessary
    - What information must be included in the invitation?
    - Sending invitations by post, email or event tool?
    - Query who is participating digitally and who is participating in person
    - Different participant approach and event information for digital and face-to-face participants

- Set up participant management

- ☐ Create a registration option for participants
- ☐ If necessary, set up a hotline for questions and changes

- ☐ Create schedules
  - ☐ Listing of each individual programme item according to a schedule with the corresponding information
  - ☐ Production plan (programme point, projections, microphones, music recordings, lighting mood)

- ☐ Create to-do lists for missing elements from the schedule. Schedules make it clear where there are still gaps in the event planning.

- ☐ Create assembly and dismantling plans (these plans must take into account the assembly and dismantling of the trades in such a way that they fit logistically)
  - ☐ Equipment: what comes from whom? What will be delivered when?

- ☐ Creation of a "Branding, signposting, signposting" list
  - ☐ List contains information about the locations, the contents, the sizes, the material, the producer of the materials
  - ☐ Consider stage design
  - ☐ Have graphics and content produced according to the list

- ☐ Plan, create and order conference materials
  - ☐ Layout for the presentations
  - ☐ Produce content to accompany the conference (jingles, films, belly bands, powerpoints)
  - ☐ Printed materials (e.g. badges, conference folder, feedback forms)
  - ☐ Bags
  - ☐ Biros
  - ☐ Pens
  - ☐ Blocks

- ☐ Briefings for all trades, speakers and artists involved
  - ☐ General briefing about the event
  - ☐ Information on travelling and other general conditions
  - ☐ Precise responsibilities
  - ☐ Clock times
  - ☐ Meeting points
  - ☐ Contact person

- ☐ Personnel plans & team planning and briefing of personnel
    - ☐ General briefing about the event
    - ☐ Information on travelling and other general conditions
    - ☐ Who is responsible for what, when and where?
    - ☐ Clothing
    - ☐ Crew catering
    - ☐ Wardrobes
    - ☐ Breaks

- ☐ Create telephone lists with the name, company, function and mobile phone number of each person involved

- ☐ Create an emergency plan

- ☐ Make and obtain registrations and authorisations
    - ☐ Insurances
    - ☐ GEMA
    - ☐ Artists' Social Security Fund
    - ☐ Building authority for special uses, if applicable

5. Event organisation & schedule

Note: The following times are examples and must be adapted to the respective event.

1-2 days before the start of the event:

- ☐ Delivery, assembly and dismantling of all elements according to a detailed schedule, so that all trades build on each other.
    - ☐ Technology
    - ☐ Decoration
    - ☐ Seating
    - ☐ Catering
    - ☐ Wardrobes

- ☐ Establishment of a back office (conference office)
- ☐ Preparation of the artists'/speakers' dressing rooms
- ☐ Use of an intercom system for communication between the director, stage and technical team

On the day of the event, before the start of the event:

- ☐ Check all superstructures again according to the lists and plans drawn up (so-called "acceptance", which should only take place at a realistic time so that all trades can do their work in peace)
    - ☐ Soundcheck
    - ☐ Technology check
    - ☐ Stability of the digital platform
    - ☐ Camera settings (for digital participants)
    - ☐ Microphone position
    - ☐ Run-through rehearsals of the programme items (if necessary, schedule appointments with speakers and artists)

- ☐ Staff deployment – everyone is in their place and knows their exact responsibilities.
    - ☐ Discuss emergency plan

- ☐ Director's meeting together with all trades to go through the course of the actual conference again point by point and to check whether everything has been thought of.

- ☐ Registration of participants

Start of the event:

- ☐ Realisation of the event and its management according to the schedule, e.g:
    - ☐ Greeting
    - ☐ Presentation programme items
    - ☐ Breaks
    - ☐ Networking/ exchange
    - ☐ Farewell

After the end of the event:

- ☐ Dismantling & cleaning

1 day after the event:

- ☐ Acceptance of the location by the operator

6. Follow-up

- ☐ Letter of thanks to all those involved (partners, supporters, speakers, etc.)
    - ☐ Provision of event material (presentations etc.), if applicable
- ☐ Photos / videos on (internal) website
- ☐ Reporting (intranet, company news, trade press, etc.)
- ☐ Control of incoming invoices and their payment
- ☐ Preparation of a final budget
- ☐ Dispatch and evaluation of the feedback forms
- ☐ Evaluation of the event to learn better for the future
    - ☐ What was a success?
    - ☐ What was the feedback from the guests?
    - ☐ Reflection of feedback and potential for improvement
- ☐ Archiving the knowledge gained for subsequent events