

The Hybrid Event Handbook



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EVENTS THAT TRANSFORM

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Why Hybrid?

The components of a hybrid event have evolved over the last decade. What began as broadcasting an in-person event to a passive audience has grown into a connected, intentionally-designed event experience. There are more ways to join audiences and presenters across multiple venues and locations. And there are more ways to use technology – both traditional audiovisual and cloud solutions – to enhance your brand or association, engage your participants, and collect data that offers new insights into the event experience.

The industry is growing stronger and will benefit from this moment in history. What hasn't changed is the importance of gathering your participants and providing the opportunity to network, educate one another, and inspire each other to action. While the public's comfort-level to meet in-person continues to wax and wane, hybrid events are paving new ways of doing business.

The beauty in being able to offer an event in this format, lies in its ability to bridge all of the participants together in unique ways. The act of bridging them together gives you, the meeting or event planner, the opportunity to grow your audience in both the short-term and long-term. When people come together, ideas take shape and inspire action. Hybrid events provide planners, sponsors, presenters, and attendees with the ability to reach more people.



This guide is your roadmap for planning an effective hybrid event.

In its pages, we'll introduce you to 6 key drivers to create a successful hybrid event of any size.

The six drivers – environment, experience, engagement, connectivity, content, and production – work cross-functionally, like joints supporting a structure. Each one supports your hybrid event and each one needs to be firm with no weak links or areas of stress. As we go through each, identify which of the drivers can be supported by your team and which would benefit from outside support. Along the way, you'll learn how to cater to both your remote and in-person audience with content and engagement tools. We'll also show you how the drivers work in concert with one another using different meeting types as examples.

With over a decade of experience producing hybrid events, we're confident that this guide is applicable to meetings of any size and is adaptable to association clients, corporate clients, and other event planning professionals.

In This Guide:

Getting Started

- Hybrid Event Framework

6 Key Drivers

- Environment
- Experience
- Engagement
- Connectivity
- Content
- Production

The Drivers at Work

- Boardroom Meetings
- Small Meetings
- Mid-size Meetings
- Custom-coordinated Events

Hybrid Event Framework – Getting Started

Before jumping into each driver, establish your hybrid meeting objectives. Here's a strategic framework to consider:

Build Event Mission

- What should they (virtual and in-person attendees, presenters, sponsors) gain from participating?
- What do you provide for your participants that no one else can?

Create Attendee Journey

- Think thoughtfully through your attendee journey. Are there any weak spots or areas where you can add extra value? Attendee journey mapping is intended to help you improve the guest experience.

Set Benchmarks for Success

- Objectives – set measurable goals
- KPIs – create ways to measure and meet those goals

Understand your Audience – Virtual & In-Person

- How large will your in-person versus remote audience be?
- Does past event data reveal ways they prefer to engage with one another? And, how can you emulate this for hybrid?
- If you don't already have one, create a customer persona based on your primary audience types
- If you're seeking an event platform, test their engagement tools. Also, keep the following in mind:
 - Analytics will tell you what someone did; not necessarily why they did it. What sort of behavior are you interested in tracking?

Determine storytelling techniques

- Will you need to provide early access to pre-conference or pre-event resources?
- Do you have pre-recorded content you can repurpose?
- How many presenters will you have?
- What needs will your onsite versus remote presenters have?
- How does your audience prefer to take in information?
- Will your content be available on-demand later?

The 6 Key Drivers:



Environment



Experience



Engagement



Connectivity



Content



Production

On the following pages, we'll show you how each of these building blocks work together to create an effective hybrid event. After going into each in more detail, we'll show you different meeting types that show these elements working together at your event.

Environment



A strategically planned environment creates a purposeful experience for in-person and remote attendees

Encore's MeetSAFE™ guidelines define industry best practices for meeting safely in-person



What to consider:

Safety – Hybrid guests will need to be physically distanced and abide by local public health regulations

Seating – Although distanced, be thoughtful about how all your participants will sit, as it can facilitate engagement and influence room layout

Lighting – With cameras capturing and broadcasting your message, production lighting is more important than ever – similar to what you see in television studios or live cable events

Décor / Backdrop – What overall look and feel do you want to convey? Casual? More polished?

Noise Management – Manage as much ambient sound as you can. Focused attention with no distractions is the goal here

Range of Control – Which aspects of your environment are you in control of and which are you not?

Things to think about:

How many remote versus in-person attendees and presenters will I have? Will my audience be global or much smaller?

How will the participant experience change based on their environment? What solutions or design choices can help maximize the various experiences?

Will they see and hear content simultaneously? Or, will I have more than one session occurring at once?

Will my in-person guests need to change seating or rooms at any point?

Will I need to enhance lighting or décor onsite to make the event more impactful on camera?

Are there other places onsite that will display my video content?

Experience



The best meeting experience keeps everyone focused on your content. Wherever they're watching from, give your participants a positive experience that they can revisit in their mind, or later on-demand.

Download the whitepaper, “Purposeful Meetings: How to plan with deeper meaning, innovation, and insight” to further enhance your event experience.

 [Download here](#)

What to consider:

Room Design – from décor and furniture to entertainment areas and stage sets, the design of your room has the aesthetic power to lift the mood and should also be practical in design

Camera Capture – make sure there's a clear line of sight for your in-person guests and consider more than one viewing angle to enrich the online experience

Recording Capture – Extend the life of your event by recording it. Recordings can be used for on-demand viewing, re-purposed content, and in some cases, monetization

Video Displays & Feeds – video displays are viewing windows, connecting locations and participants. Enrich the experience with multiple viewing angles and test your video content onsite, and in your platform

Sound – control as much ambient noise as possible and use microphones and sound reinforcement as needed on-site, encouraging your remote guests to do the same

Expectations of your participants – be up front about what guests can expect. It will help in their decision and comfort level to attend in-person or remotely

Things to think about:

What motivates my organization or association membership to attend our meetings?

What challenges will I have incorporating those motivating factors online?

Do I have any existing content that I can repurpose for my event?

Which vantage points do I want to capture on camera? Are there other places onsite that will display my content feed?

Would multiple displays improve the in-room attendees experience?

What experience methods best help to achieve the intended outcomes both during and after the live event date?

Engagement



Whether you use a basic cloud video solution or leverage a fully customizable platform, keep engagement methods top of mind.

Help your sponsors engage with your remote audience.

[!\[\]\(71ceb62b681518c82e95d615e7265d66_img.jpg\) Download our “Monetize Virtual Events” guide.](#)

What to consider:

Polling, voting, and surveys – capture information that will be helpful to you, your presenters, or your participants. The insight you can receive through analytics is an invaluable feature of hybrid events

Q&A – allow your guests to upvote their favorite questions for presenters

Collaboration Tools – consider how you want participants to interact during and after your event

Gamification – the fun factor incentivizes participation. Sharing results helps unify the in-person and remote experience

Social/Networking – consider virtual downtime to allow people to form new relationships and process information from their day

Moderators – a virtual moderator can help your online participants with any questions as well as with show flow

Swag – consider mailing your attendees sponsored promo items or a unique gift prior to event day or as a way of saying thanks

Things to think about:

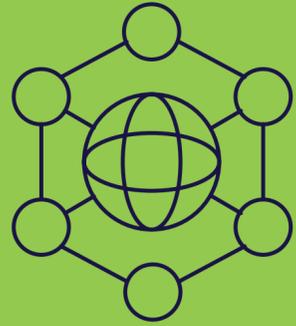
Does my event platform have all of the engagement tools I’m looking for?

What sort of information do I want to capture with polling, voting, surveys, and Q&A?

How important are virtual networking events or happy hours to my remote participants?

Am I entertaining a large audience? If you are, consider increasing your response time for questions to allow everyone the opportunity to answer

Connectivity



Make sure your venue's bandwidth can support a clear, uninterrupted video stream from your podium or meeting room to your remote users

Our bandwidth calculator can help you determine your venue internet needs.

 [Bandwidth Calculator](#)

What to consider:

Tech support onsite – dedicated local network support can get you back up and running if anything goes wrong

Remote user connectivity – offer recommendations to help users optimize their experience

Bandwidth – in addition to individual user Wi-Fi bandwidth onsite, make sure your video feed is supported as well

Scalability – your tech team's hosting provider should have the means to scale, but it's worth noting

Redundancy / Reliability – include a backup solution, as needed – additional equipment or internet service, for example

Level-set expectations – set clear expectations on what attendees and presenters can expect. Test, whenever possible

Things to think about:

Am I using a reliable cloud-based event platform with high-performance uptime?

Does my event require dedicated network tech support onsite? Or, can my team handle any issues that arise?

Are my off-site presenters equipped with sufficiently robust connectivity?

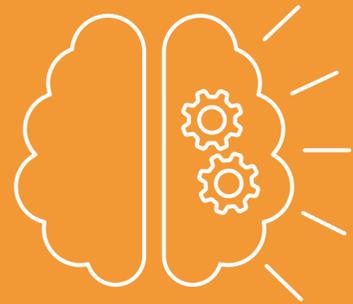
Recommendations for remote users:

Go wired. It sounds old school but plugging directly into your router removes any unpredictability with wireless

Make sure other users at home or in the same location aren't live streaming video or playing video games online at the same time

Use a headset that has been tested for clarity and limits ambient noise, preferably

Content



Take time to journey map your event through each participant's lens – in-person attendee, remote attendee, in-person presenter, and remote presenter

Learn more about incorporating storytelling into your content with EventMB's article, "Utilizing the Power of Storytelling at Your Next Event"

 [Power of Storytelling](#)

What to consider:

Theme / Branding – unify the experience onsite and online with shared themes/branding

Storytelling methods – provide a clear beginning, middle and end to your content and overall event

In-person creative content – look for areas onsite that allow you to share your video feed or repurpose digital assets

Digital creative content – upload helpful resources for both in-person and remote guests

Content specifications for different mediums and modes of sharing – remember that you need to test your content on a variety of screen sizes

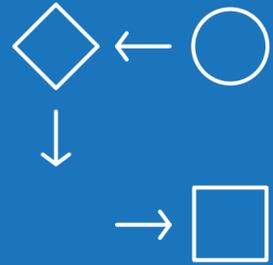
Things to think about:

Will everyone see and hear content simultaneously? Or, will I have more than one session occurring at once?

What assets do I already have that I can repurpose?

Does my content provide a clear beginning, middle, and end. Will each participant – in-person attendee, remote attendee, in-person presenter, and remote presenter be able to access content in the same way?

Production



Depending on the complexity of your event and the number of participants, production has the power to set the tone for a professional and engaging event experience.

Being intentional during the planning process is important. Here's an approach we recommend for hybrid events.

 [Learn More](#)

What to consider:

Production – traditional event production services combined with digital expertise delivers unmatched impact

Show Flow – with participants in multiple locations and on different schedules, focus tolerances, and competing priorities will need to be considered.

Process – success hinges on a deliberate approach; developing and adhering to a project timeline, and accommodating any constraints that arise

Roles - develop a project timeline with your team and map out all areas and components that may require production support

Things to think about:

How does the process and timeline work with our event / organizers / presenters?
How can I best align the various groups?

How will my remote experience differ from my in-person experience? In what ways will it be the same?

Have I considered all of the roles that I may need? (i.e. emcee, multi-site coordinator, show caller)

The Drivers at Work

Here are some common meeting types that demonstrate each of the key drivers at work. You'll see how each one helps the planner address different meeting objectives through those drivers.

As common as these scenarios are, they may not address all of the needs that you have for your upcoming event. These examples are practical ways to get started so you can see how the key drivers come together in your hybrid meeting experience.



- Get to Know your Hybrid Event Team
- Boardroom Meeting
- Small Meeting
- Mid-size Meeting
- Custom Event

Get To Know Your Hybrid Event Team*

Show Production	Digital Production	Content Production
Function		
Responsible for all elements of event production management such as pre-production, production schedules, logistics, run of show, show execution, and post-production.	Responsible for planning, coordination and execution of all digital elements such as streaming, Content 1 and Chime platforms.	Responsible for design and creation of all event creative assets such as motion graphics, lower thirds, renders, pre-records, show recording and post-production editing.
Typical Roles		
Producers, Project Managers, Stage Managers, Technical Specialists, Control Room Operators	Streaming Technicians, Digital Platform Project Managers, Digital Content Specialists, Digital Platform Designers	Creative Producers, Render Artists, Motion Graphics Artists, Editors



Encore's team follows industry guidelines for meeting safely



Boardroom Meeting



Environment

In this hybrid environment, 4 regional leaders are socially-distanced in a conference room and joined by 8 remote employees via Zoom across various locations and three time zones

Safety guidelines are in place – hand sanitization and mandatory PPE face masks for guests and staff. All equipment was sanitized thoroughly before and after the meeting for everyone's health and safety

The private conference room keeps noise at a minimum, provides good lighting, and a strong Wi-Fi connection



Experience

Instead of a conference call or Teams meeting, the group requested a nearby venue with private network and large monitor

The regional leaders felt as though being in the same room provided more of a united front visually for their employees



Engagement

A front-facing camera via a laptop or a 360° camera such as the one displayed here, allows remote participants to see everyone in the room



Content

Each presenter has the flexibility to share their screen and run a presentation or a video



Connectivity

Venue services are able to provide a private Wi-Fi network for their in-person guests



Production

Although the technology in the room is reliable and easy to use, it should still be tested onsite and remotely ahead of time to work out any technical issues



Production personnel you may work with: Hybrid Event Lead, Onsite network support

ROI

Qualitative – the setting provided the professional backdrop that the leadership team was looking for, allowing them to be in the same room, socially-distanced

Security and peace of mind – a dedicated wired network with appropriate web conference capabilities

Small Meeting

Environment

In this strategy meeting, 10 onsite Marketing leaders are joined by 8 remote Sales leaders to present and collaborate on go-to-market strategies for a new line of B2B products

Local corporate team members are socially-distanced in a meeting room with remote guests participating via Zoom

The venue and production team have taken care to sanitize equipment in the room and have enforced mask-wearing and traffic flow patterns to minimize public health and safety risks

Experience

The lighting that's hard-wired in the room is typically sufficient (not always) for a meeting of this size and type.

Two large monitors at the end of the room display all of the remote participants on one screen with the other monitor always displaying the current presenter – for a truly shared experience

Engagement

The room layout and equipment provide all of the engagement needed for an event of this type. The tables and chairs are strategically positioned to allow everyone to see one another onsite

The 360° camera in the center of the room allows the remote participants to see everyone in the meeting room as well

Content

Each presenter has the flexibility to share their screen and run a presentation or video

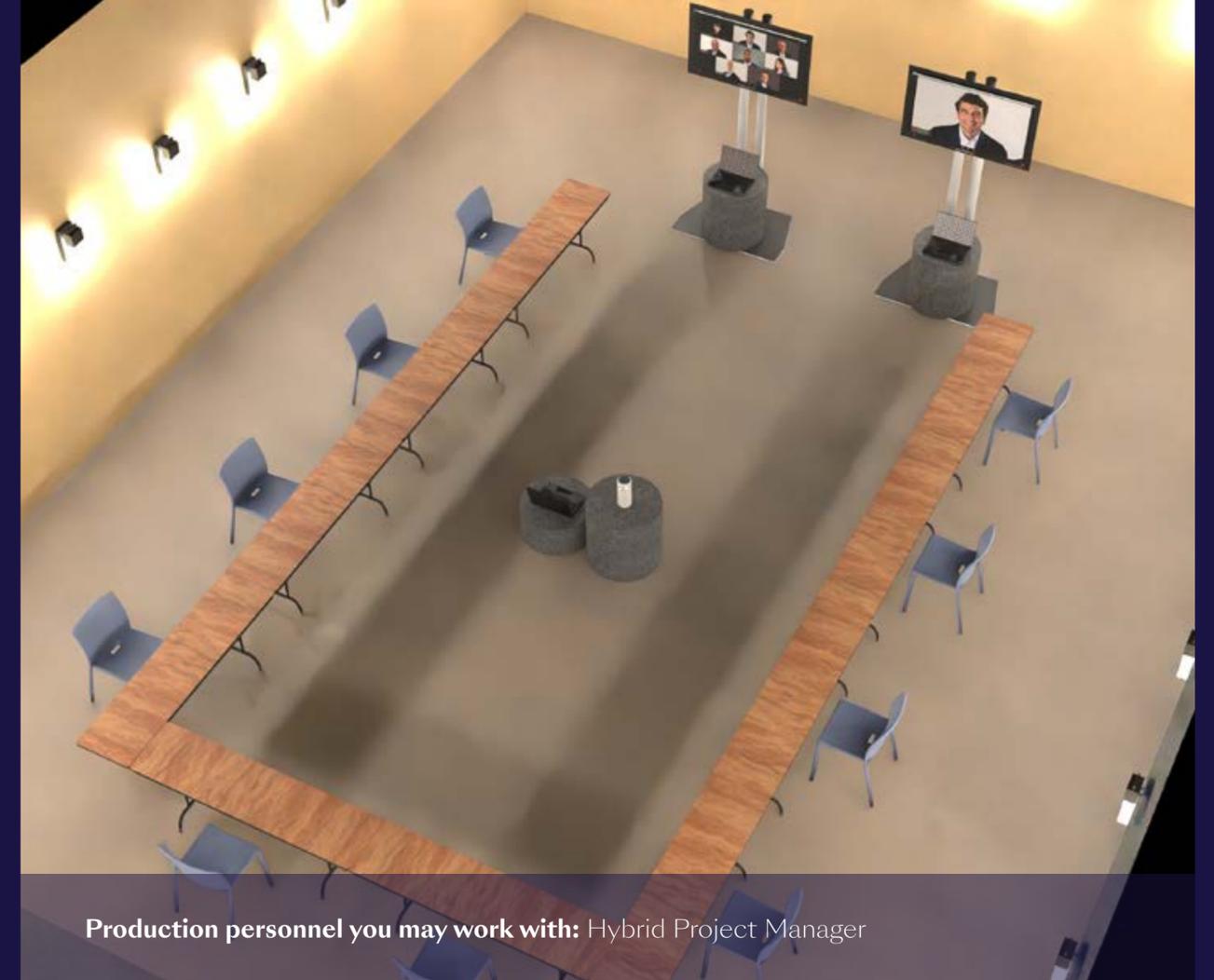
Connectivity

The venue's network connection is being monitored by a Hybrid Project Manager

Production

The Hybrid Project Manager assists not only with venue Wi-Fi connectivity, but also any technical issues related to the in-room camera and video displays

Venue staff have taken steps to encourage strategic traffic flow for room participants so that they're never congregated in any one area or blocking line of sight for other guests



Production personnel you may work with: Hybrid Project Manager

ROI

Gathering a group of this size to focus on one another's presentations and have a group discussion is only made possible by this hybrid setup.

The smart use of technology has allowed everyone to participate equally and fosters an environment of productivity with little distraction

Mid-Size Meeting



Environment

An association is hosting an educational conference with 50 in-person participants and 150 remote attendees

A panel of three hosts are broadcasting live from a Presentation Stage™ in another part of the venue, with professional lighting, sound, cameras and newsroom-style seating

The hosts act as event emcees – announcing presenters (remote and in-person) while providing thought leadership

The onsite team monitors safety guidelines such as temperature checks, hand sanitizing, and mandatory PPE face masks. All equipment is sanitized thoroughly before and after and traffic flow patterns are being enforced through signage



Experience

Classroom-style seating faces a podium and two large screens (with projectors)

Between the two screens is a video camera positioned to capture audience reactions for a more engaging experience

In the back of the room, a camera captures wide and tight shots of the podium/presenter

Onsite presenters are aided by confidence monitors with the ability to engage participants through the association's chosen event platform

Remote presenters are also provided with the ability to engage participants in the same manner through the event platform

In this scenario, sessions are being recorded and will be made available on-demand later



Engagement

All attendees were provided with a private URL that they could access two weeks prior to the event to view pre-conference materials and full agenda details

Planners opted for a platform that could host educational materials, provide networking opportunities between remote and in-person participants, and allow the hosts and presenters to live poll their hybrid audience



Content

With a variety of camera angles, the offsite newsroom hosts, hosted content and engagement tools, this meeting is stimulating and bridges participants together



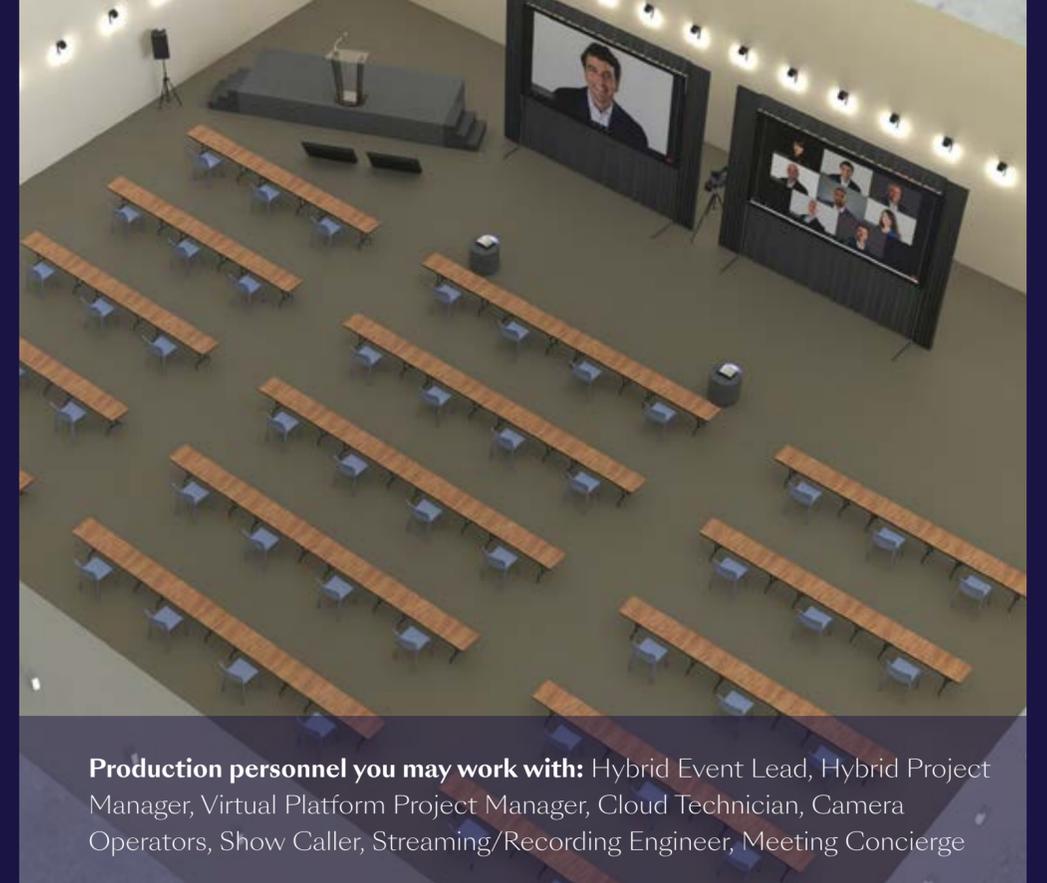
Connectivity

A strong, robust network provides all of the streaming capabilities required for a meeting of this size with minimal interruption



Production

Working with a team that you have confidence in allows you to focus on your content and stakeholder experience. Review some of the roles on page 14 to see the type of assistance available to you



Production personnel you may work with: Hybrid Event Lead, Hybrid Project Manager, Virtual Platform Project Manager, Cloud Technician, Camera Operators, Show Caller, Streaming/Recording Engineer, Meeting Concierge

ROI

A high level of engagement and enjoyable content provides a more memorable experience

With a hybrid event, you have the ability to include pre-and post- platform access to your content and later, to your sessions

A robust network in a classical meeting style, in a popular city is incentivizing to those considering an in-person experience

Custom Events

The previous scenarios are great examples of hybrid events on different scales – boardroom, small meetings, and mid-size meetings. Creative execution and scalability don't cap out with mid-size meetings though. As you scale your content needs, number of locations, size of your audience, and sponsorship opportunities, you can apply all of the key drivers to a custom meeting or hybrid event of any size. As your event needs get more complex, a more capable virtual event platform will become critical to the success of your event.



Environment



Connectivity



Experience



Content



Engagement



Production

- Conferences
- Meetings
- Trade Shows
- Exhibitions
- Plenary Sessions
- Corporate Training
- Awards and Recognition Programs
- Social Gatherings
- And any combination of in-person and remote participation



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