Certain

The Hybrid Event Strategy Playbook

Table of Contents

Introduction

Hosted events have long been a vital component of most companies' sales and marketing matrix. The experience of meeting face-to-face with prospects, customers, colleagues and peers offers an opportunity for businesses to build and grow relationships that is unparalleled by any other marketing channel.

But with the reach, ease of access and cost-effectiveness of virtual events, many businesses are now opting to produce event programs that blend the best aspects of in-person and digital event experiences through hybrid events. In fact, recent polling shows that 60% of marketers plan to increase spending on hybrid this year.

"

Recent polling shows that 60% of marketers plan to increase spending on hybrid.

So, what do we mean when we talk about hybrid events? It sounds relatively straightforward at first – hybrid is a blend of virtual and in-person event, right? In its simplest form, yes. But as this playbook will explain, **there's so much more to hybrid events.**

The most important thing to keep in mind when planning any event is your attendees. Above all else, understanding what your attendees need and how they want to interact with you should drive your strategy across events of every variety.

Certain

A Unified Event Experience

Hybrid events offer marketers a new flexibility – one that can be tailored to a small, target group of attendees, or flexed out to a broader 365 model where media and events are launched on a regular schedule throughout the year. Acting as a bridge between virtual and in-person events, **the common thread between each experience is engagement**. It's the driving, capturing and acting on event engagement data that moves the needle for businesses who invest in events as a marketing channel.

As businesses seek to define and design their hybrid events program, event and marketing professionals need to approach program development with robust digital tools and high-impact best practices. This playbook offers a series of steps for event professionals and marketers to consider as they contemplate their hybrid events program, and the resources needed for event success.

Regardless of what format or technology stack you choose, it's important to keep in mind that at the center of your event virtual, hybrid or in-person event strategy, you have a single unifying platform to integrate your event data.

Certain's event experience platform can ensure that all components of your events, sales and marketing stack are integrated seamlessly to make your work easier and amplify your program's successful outcome.

Certain
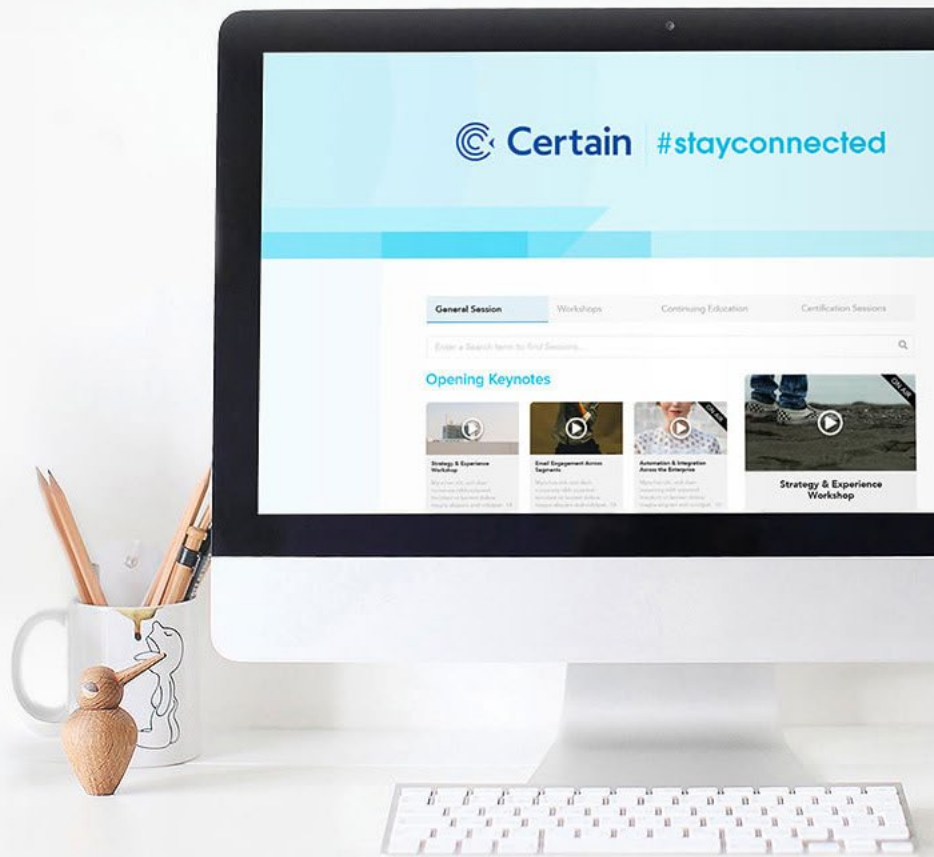
Selecting the Best Format for Your Event

When you get started with planning a hybrid event, there are a variety of factors to take in before you can decide on the best way forward. Your event delivery and format are going to best be determined by three key elements: **event goals, audience** and **budget**. But first, it's important to understand what your options are for program delivery.

While this playbook primarily focuses on the hybrid event model, it's important to look at the two event channels that define the hybrid experience – virtual and in-person events. This will help you navigate which event format is most appropriate for your specific programming goals, and give you an idea of how different formats can be combined to create a hybrid model.


Certain

Virtual Event

The virtual event format depends on digital technology to accommodate audiences and drive attendee engagement. People can easily participate in virtual events no matter where they are located simply by gaining an access link and logging in through a computer or mobile device.

Like in-person events, attendees have access to the usual offerings of a well-organized program (presentations, breakout sessions, personalized session tracks, etc.); however, these components are facilitated by live streams, on-demand video, and digital conferencing software. Virtual also provides exhibitors and presenters opportunities to engage in low-friction marketing methods, such as on-demand-demos, sponsored sessions, and banner ads.
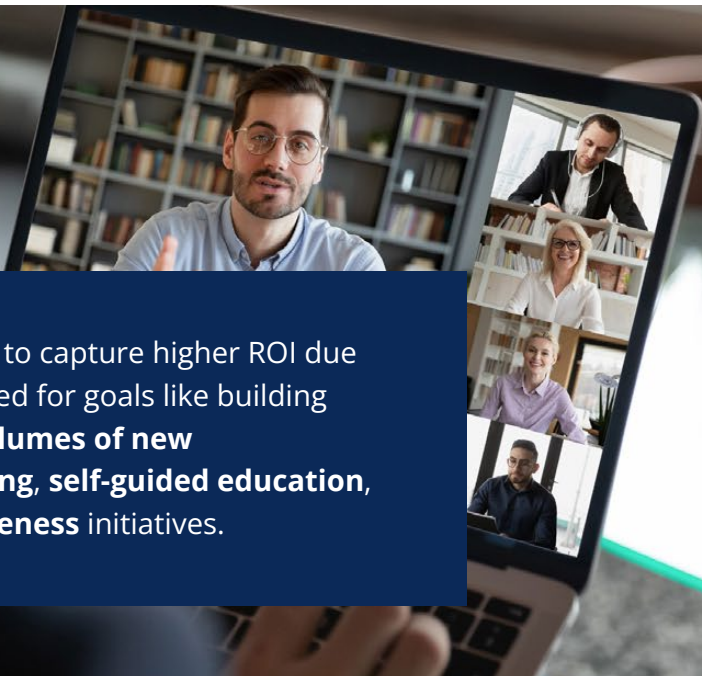
The virtual event format allows marketers to capture higher ROI due to being budget-friendly. Virtual is best used for goals like building **brand awareness**, **generating higher volumes of new leads with a lower CPL**, **hands-off training**, **self-guided education**, **customer engagement**, and **cause awareness** initiatives.

✔ Pro

Two of the most often cited benefits of using the virtual format are cost savings and broader audience reach. The virtual format also allows for greater data collection and analysis and removes geographic limitations for an increased

✘ Con

Virtual events have a higher rate of registration no-shows. The same characteristics that make it easy to attend a virtual event also make it easy to skip. Networking and social interactions are limited to what technology can replicate, which can pale compared to an in-person experience. Additionally, it can be challenging to hold attendees' attention when distractions are just a Google search away.

In-Person Event

In-person events use venues to physically host and engage with target audiences in order to achieve a specific goal. Depending on the type of event being presented, engagements can include live demonstrations, distribution of samples, interactive training, team-building exercises, closer physical proximity to industry luminaries and target personas, thought leadership presentations, networking, serendipitous conversations, and point-of-sale transactions.

In-person events have long been a business staple and they won't be going away on any permanent basis. Recent polling shows that 37% of marketing professionals want to utilize some form of face-to-face engagement, while 78% of attendees expect to participate in an in-person event in 2021.

In-person events produce the greatest impact when used for **B2B sales, sales of high-value products or services, networking, interactive training, team building, and live performances and entertainment**. It's much easier to book a meeting or demo with a prospect when you meet with them face-to-face.

✔ Pro

This type of event provides the opportunity for the highest level of person-to-person engagement. Physical events tend to produce better quality leads and higher conversion rates. They offer unique opportunities for building and strengthen-ing brand awareness through direct interaction with customers. Because of the perceived higher value of an in-person event, organizations can, presumably, charge higher registration fees.

✘ Con

With the cost of lodging, travel, rental fees, displays, shipping etc., this tends to be the most expensive of the event types, and as a result, ROI can be harder to capture. In-person events are also finite, often generating the best value during the brief period of time they are live, though this issue can be addressed with robust post-event follow-up.

Hybrid Event

As evidenced by the name, hybrid events blend elements from two or more event formats. For example, guest speakers might be hosted by an organization in a venue with limited space, while attendees join the event virtually. Another example of a blended event might be programming that delivers different engagement levels depending on the registration fee; higher paying attendees can participate in-person, while lower-paying attendees gain access to live or recorded streams of the event.

Hybrid events can, arguably, provide the highest level of ROI when the components of different formats are mixed with a solid strategy and attention to detail. **66% of event organizers** have said that including live sessions in virtual programming contributed to higher audience engagement. Some examples of programming that fit well in a hybrid format include **political events, town halls, training and workshops, thought leadership presentations, and internal events like sales kickoffs and team building**.
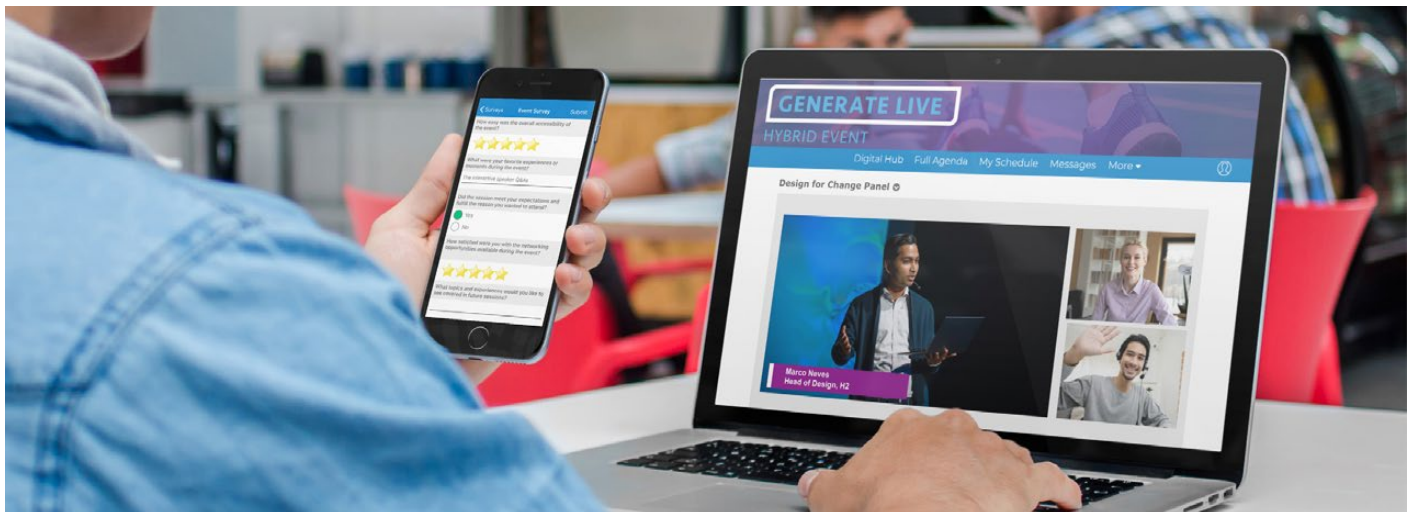
✔ Pro

Hybrid provides a high level of customization. The possibilities for appropriately matched programming can include added or subtracted components to meet a variety of scenarios and desired outcomes.

✖ Con

With a greater range of choices also comes increased complexity around program, content and data strategies. Without sufficient knowledge or experience, these areas can prove ineffective. Another issue that can arise from a hybrid format is deep disparities between the quality of experiences all participants encounter depending on whether they interface virtually or in-person with your event.

Certain

Hybrid Audience Considerations

There are further nuances to consider within the hybrid model that can determine how your event will be designed. Here are a few of the various hybrid audience types to consider for your event:

Focused Virtual Audience

Will your event be developed for a target audience that can't attend in-person? You will likely be looking at a focused virtual audience format that includes in-person presenters that engage with a virtual audience through one-on-one meetings, live Q&A sessions, and in-app private messaging.

Balanced Audience

If your event will be equally balanced between an in-person audience and a virtual audience, this is a balanced audience scenario. Your program development will require that you create a similarly engaging event journey tailored for these two disparate groups. Engagement tactics can include activity feeds, surveys, live polling, and gamification to reward engagement.

Parallel Audience

Events designed around this type of audience focus on a single theme or event brand while serving disparate audiences. As an example, a company may create an event that provides in-person programming for VIP customers and virtual programming for a wider, more location-diverse audience. The company will avoid blending these audiences while still ensuring that the virtual and in-person content is equally engaging.

365 Audience

Another audience type to consider is the 365 Audience. The event you will develop for this type of audience will include on-demand content during and after the live event. Post-event engagement can consist of thought leadership articles, prerecorded video streams, and surveys to gauge the effectiveness of the content being delivered.

Each audience type will require its own unique considerations when it comes to how you can best drive and capture valuable engagement data. It's important to return to this crucial element of planning in order to make the most of your event.

Hybrid Audience Types

Focused Virtual Audience	Balanced/Live Hybrid Audience	Parallel Audiences	365 Audience
• When a segment of your target audience is unable to attend in person. • Program and content are designed for this targeted audience in mind. • Focus is on reaching and increasing engagement with a smaller, focused audience. ***Engagement tactics include:*** • 1:1 meetings • Live, interactive Q&A • Private messaging • Discussion boards	• During your live event, audience is split between in-person and virtual due to an variety of circumstances. • Each attendee has a tailored event journey based on their dynamic registration experience. ***Engagement tactics include:*** • Activity feeds • Surveys & live polling • Gamification • 1:1 meetings • Live, interactive Q&A • Private messaging • Discussion boards	• Single theme or brand, two different audiences (virtual/in-person) • Audience is designated by predetermined factors. For example: • In-person training for specific, hands-on roles or content / virtual training for less tactile training. ***Engagement tactics include:*** • 1:1 meetings • Live, interactive Q&A • Private messaging • Discussion boards • Activity Feeds • Surveys & live polling • Gamification	• **Enables attendees** to engage with on-demand event content for an extended period beyond the live event dates. • Share content, thought leadership, etc. with an unlimited audience beyond your event. • Track on-demand engagement to inform relevant follow up. • Offer post-event surveys to gauge effectiveness of on-demand content. ***Engagement tactics include:*** • Discussion boards • Surveys • Activity Feeds • Private messaging

Certain

Hybrid Event Examples

▶ Conferences

A complex event, typically multi-days, organized as "two events in one" (in-person and virtual) with some sessions including a mix of attendee types. Offering a blend of live and on-demand for both in-person and virtual attendees and an extended timeline for everyone to be able to consume content before and after the live event. Attendees can be in-person only, virtual-only, or a mix of both (e.g., single-day in-person and attend the rest of the event virtually)

▶ Local Attendee Engagement Hubs

Live, primarily virtual events with local attendee gatherings and additional in-person keynotes and networking opportunities (e.g., product launches, major announcements). Participants can attend virtual only, and/or in one of the locations hosting a watch party, local session, and/or networking event.

▶ Workshops/Training

No overlapping sessions with hybrid events, but attendees can attend either virtually or in-person and access the same content. These could be single or half-day events, potentially offering different dates available for in-person and virtual. Some of the content might be on-demand only with an extended timeline, and could also support CE credits.

MAXIMIZING VALUE WITH SMART HYBRID

Ensure that no matter how your attendees are joining, your event data is flowing seamlessly across your event, sales and marketing stack.

Conferences

- Complex event
- 2 events in one
- Maximize the event experience for both attendee types
- Blend on Live and On-demand
- Extended timeline

Local Attendee Engagement Hubs

- Live hybrid keynotes
- Local "watch parties" with additional in-person activities
- Full digital experience, both live and on-demand

Workshops/Training

- Same content, different formats
- Hybrid events with no hybrid sessions (simultaneous blend of live and virtual audiences)
- CE credits offered
- Extended timeline

SEAMLESS EVENT & ENGAGEMENT DATA FLOWS

Certain

Event Goals

Perhaps the most important factors in determining your event format are your event and marketing goals. Going straight into planning an event without fully understanding what goal(s) you need to achieve is a sure way to risk losing valuable time and resources.

Once you have a clear idea of the desired goals and outcomes of your event, you can decide on the best format for delivery. For example:

▶ **Revenue Generation** – In-person events will inevitably generate the greatest amount of revenue, and lead to the highest quality of engagement with customers and prospects, potentially leading to greater business opportunities.

▶ **Lead Generation**
  • **Quality:** In-person events will bring the highest quality of leads due to the investment of interest and effort for a lead to attend.
  • **Quantity:** Virtual events bring in an exponentially larger quantity of leads due to the lack of investment in registration.

▶ **Brand Awareness** – Virtual Events allow the greatest amount of reach for brand awareness. However, a hybrid experience allows for interaction with your product or service if it does not translate well on a virtual platform.

▶ **Thought Leadership** – Hybrid events are an excellent way to share thought leadership, as they allow for a wider audience combined with greater interaction with thought leaders.

▶ **Training and Education** – Hybrid events are an ideal option for providing hands-on training when needed, while limiting expenses and unnecessary travel to onsite facilities for training that can take place virtually.

▶ **Customer Appreciation and Engagement** – While in-person is the best way to connect and engage with customers, hybrid is a strong option for customer advisory boards or user conferences when customers are unwilling or unable to attend in person.

Budget Considerations

As with any marketing channel, your available budget will also be a determining factor in which format is the best choice for your event. It's easy to assume that the in-person format will be the most expensive option, while virtual will naturally be the least. But with a hybrid experience, it's important to remember that the technology and production needs for the virtual element of your event do have a price tag attached.

For the most part, you should already have the audio/visual needs covered in your in-person event. Now factor in the cost of a virtual platform, livestreaming and media hosting technologies. These elements will make up a significant portion of your hybrid event budget.

Below is an example of the various offerings to consider based on your budget:

High to Med Budget	Med to Low Budget	Low to Zero Budget
• Book a marquee celebrity keynote speaker(s) • Partner with a production studio or agency that can elevate both the in-person and virtual elements of your event (multiple cameras, live feed, virtual broadcast studio, etc) • Employ an end-to-end event management platform for your website, registration, content, engagement, marketing, etc.	• Partner on an event with industry peers • Invest in a production kit with camera and high quality mic (a kit might range between $500- $1500) • Use registration and engagement app technologies to facilitate a highly personalized and interactive experience	• Interactive digital event/ webinar with virtual or in-person speakers + smaller audience • No catering • Offer simple or sponsored incentives • Invest in a mic kit and ring light for presenters • Partner with webinar provider on a larger attendee package

Certain

STEP 2:

Deciding on a Venue and a Theme

In the past, selecting an event venue was understood to automatically refer to physical spaces. Now venues can be a physical space as well as a virtual platform. When using a hybrid format, you will need to decide what ratio of your program will be virtual versus in-person or physical.

Regardless of the size or format mix of your hybrid event, Certain's **unifying platform** will allow you to seamlessly manage every component of your program from a single, convenient interface.

Selecting a Physical Space

When planning a hybrid event, you must consider your technology needs throughout the entire process, and this includes the existing support available from the physical venue. Essential questions to ask when hunting for the perfect space:

- Does the venue provide good Internet connectivity? This means knowing the speed and bandwidth capabilities of the connection.

- Is dedicated IT support available should anything go wrong?

- Does the venue have an adequate power supply? To support all aspects of your event's virtual audience and delivery, it's vital that equipment like cameras, lights, and audio work without interruption.

Beyond the technical aspect, other important considerations to keep in mind:

- Does the venue meet your size requirements? Can it accommodate all team members working on the event, plus any sound and video equipment you will bring along?

- Will you be able to get just the amount of room you need, or will you be forced to pay for unused space?

- Does the venue allow for physical distancing, have adequate ventilation and adhere to safety regulations per current recommendations?

Certain

No matter the size of your event, consider what you will broadcast to your virtual audience. Live-streamed media will require appropriate space for audio/video equipment set up. Be sure to block off areas for this equipment and test broadcasting before going live to ensure no objects or people are in viewable range that should not be there.

> For high-impact interactivity, consider including a Q&A session in your event similar to a **virtual town hall**. To facilitate, have a separate screen onsite for bringing on your virtual audience.

Selecting a Virtual Platform

In order to help select the best virtual platform for your events, start by developing a priority list of event goals and business outcomes, then identify the metrics needed to measure those outcomes. Use these to evaluate the capabilities offered by the platforms that you are evaluating – this will help to eliminate any solutions that cannot help you deliver on your goals.

How to determine essential technology for your event will be discussed in depth in Step 3 of this playbook.

Visit Certain's **#EVENTS360 Chat page** for examples of live virtual Q&A sessions in action.

Choosing the Theme for Your Event

When deciding on a theme for your event, it's vital to keep in mind that planning an event is never a one-sided endeavor. Once you've selected the goal and the format, you have to consider some further questions regarding your prospective attendees:

- **What do they need from you?**
- **What problem or pain point will your event solve for them?**
- **How can you make your event attractive, engaging, and convenient for them?**

Answering these questions will assist you with landing on a viable theme and help guide you as you make further decisions about the content, technology, marketing, and promotion for your event. In the end, you want to deliver an event that is mutually beneficial for both your company and your attendees.
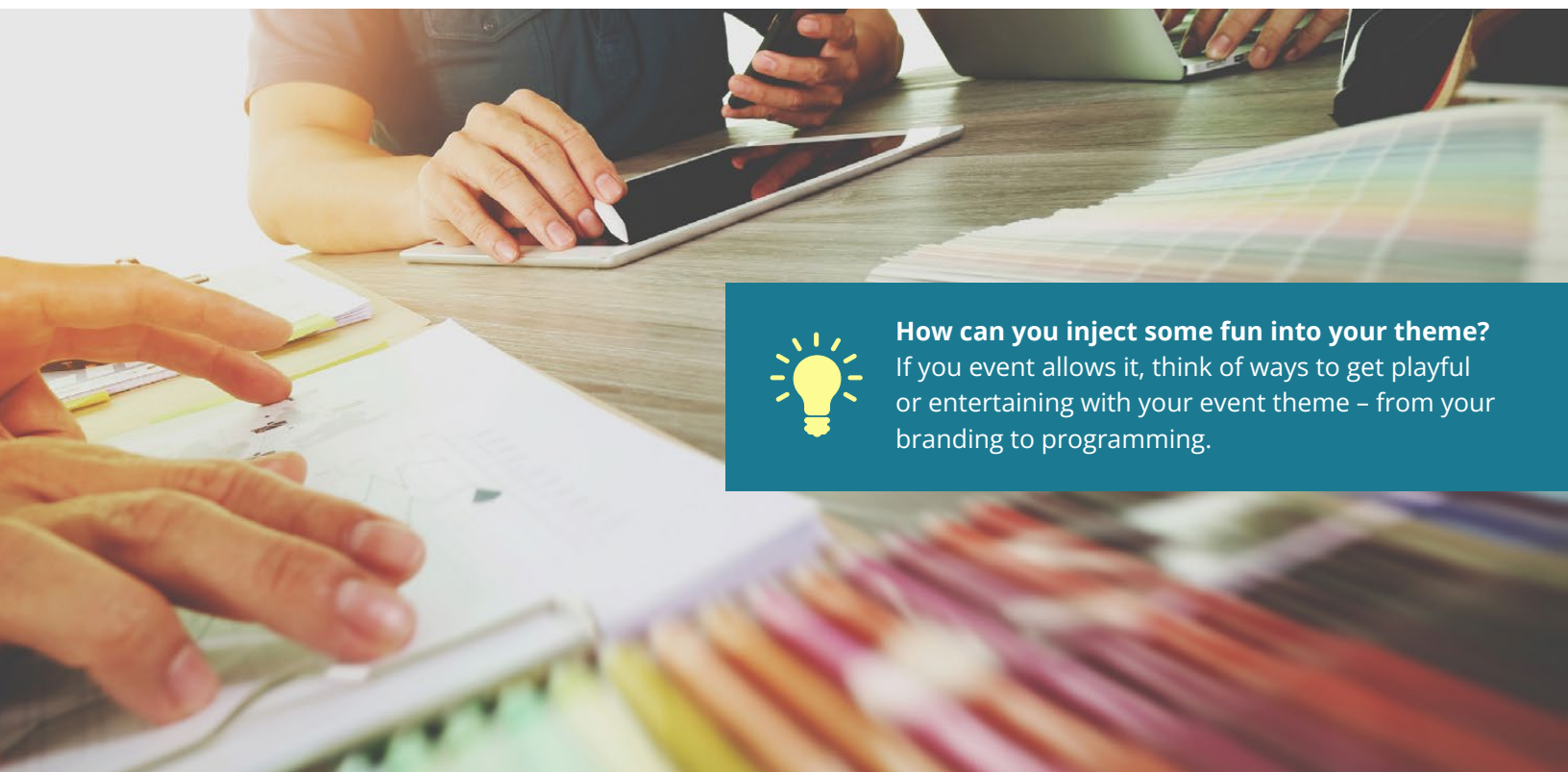
How can you inject some fun into your theme? If you event allows it, think of ways to get playful or entertaining with your event theme – from your branding to programming.

Certain

STEP 3:
Determining Essential Technology for Your Event

The reality of event technology is that there simply is no one solution that can cover all the complex and varying needs of a hybrid event. Chances are that you will be employing a variety of technologies for event production, delivery, marketing and so on.

With multiple event formats, we recommend you invest in a **technology solution** that can unify your technology stack. The ideal solution provider will partner with you to ensure that your investment can both offer a seamless experience for your attendees, as well as help you deliver on your business goals.

As we discussed in **Step 2**, your event goals, budget and audience will play a central role in helping you prioritize your technology needs. This can include but is not limited to:

Event Website

Your attendee journey begins the moment they access your event website, so your site should offer everything they need to know about what you're offering. This includes:

• Event Agenda

• Content and Speaker Catalogs

• Clear details on the event experience based on attendee type (virtual/in-person). For example, will virtual attendees have all the same access to keynotes, sessions and entertainment as in-person attendees?

Consider including a pre-recorded welcome or promo video from your CEO or Keynote to help provide this information.
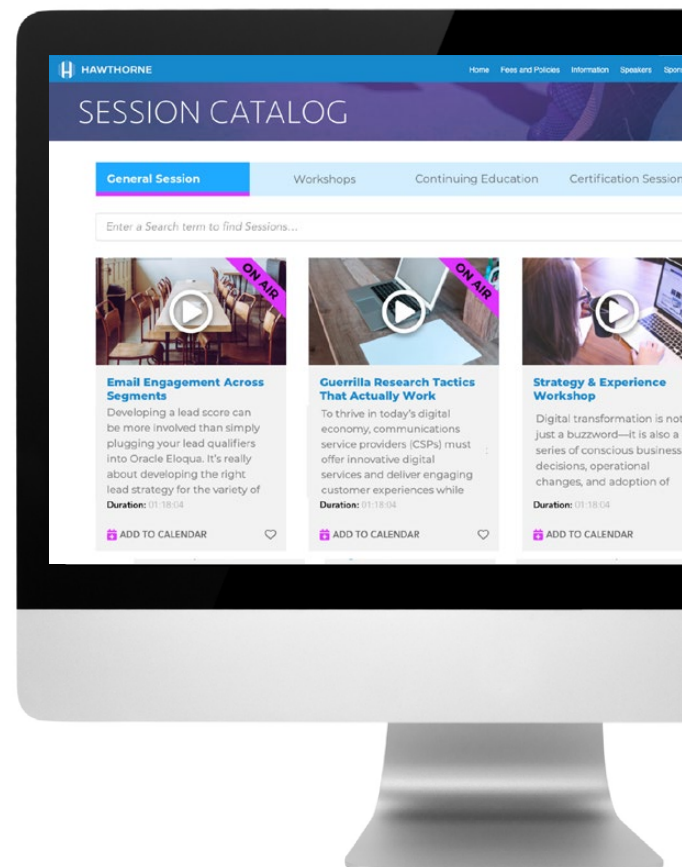
Registration

Before the event, in the course of registration, look to capture more than just typical demographic information. Ask additional questions to find out key areas of interest and motivations for joining your event. Use a registration technology that can provide custom questions based on attendee type. Ask:

• What do you want to know about your attendees? Where are they in the buyer's journey?

• How much of this can you learn from the start to help personalize the attendee experience?

Leverage a registration form experience that includes custom logic to help guide your attendees on a personalized event journey that offers tailored content and session recommendations to meet their unique interests.

Event Communication

Automate and personalize your event communications based on attendee type using features such as:

• Registration confirmations

• Add to calendar

• Event reminders

• Session recommendations

• Post-event follow up with on-demand links, personalized content recommendations, info on future events, CTA.

Certain
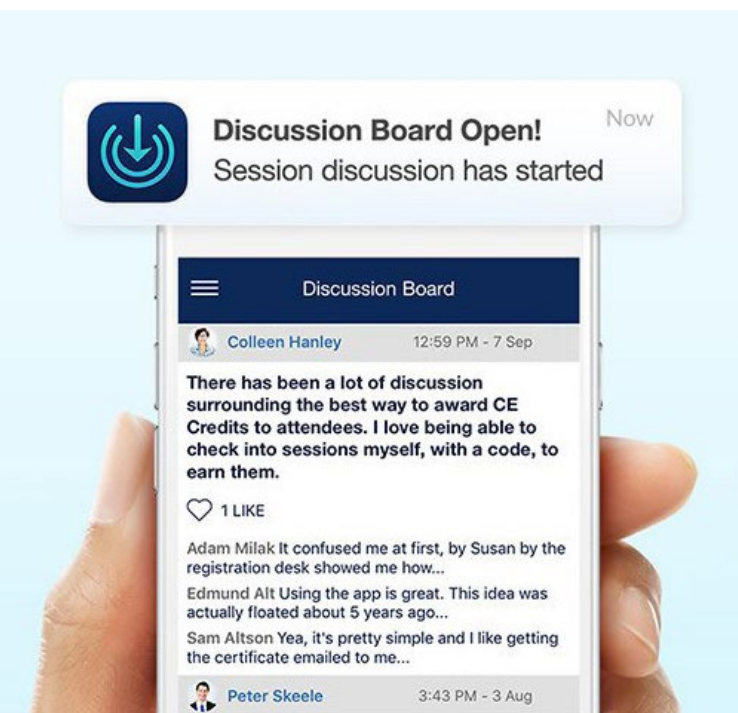
Engagement App

Remember, interactivity is the key to rich and memorable attendee engagement. Consider investing in an event engagement app that can facilitate interaction between your live and virtual audiences, such as:
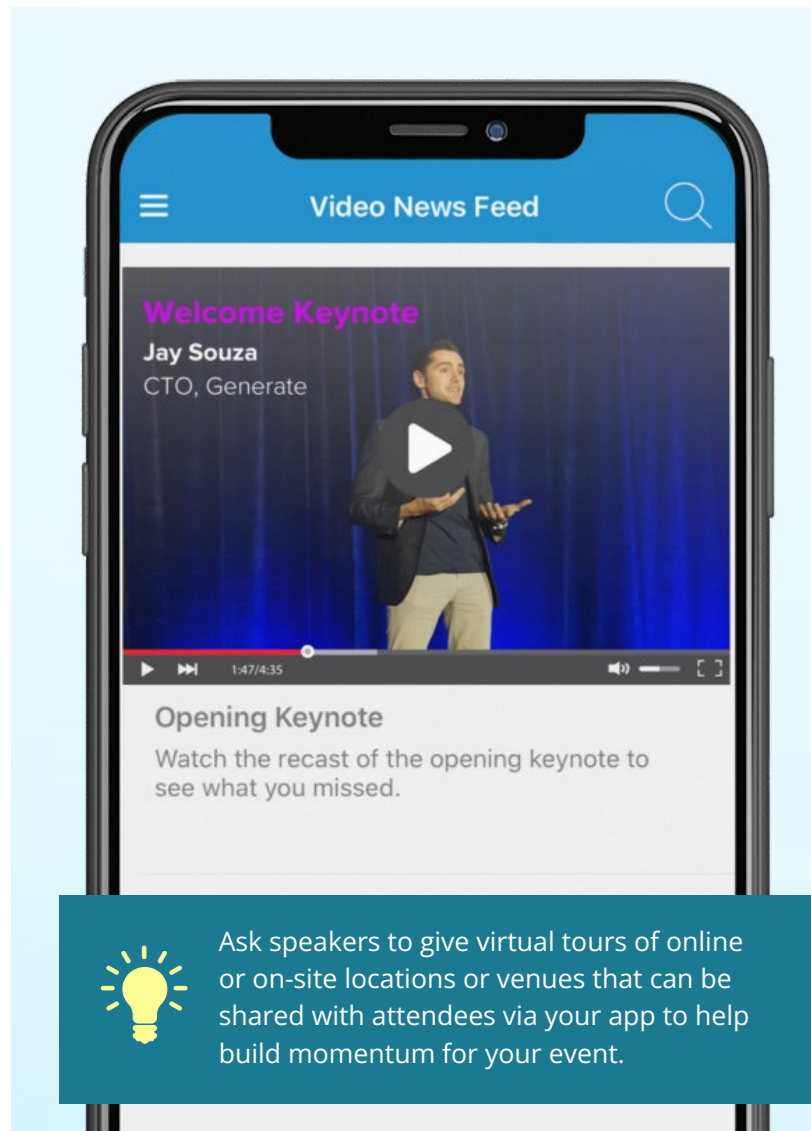
• Matchmaking live + virtual attendees

• Networking capabilities (e.g., 1:1 video calls, messaging, breakout rooms)

• Live chat, Q&A

• In-app messaging

• Sponsor engagement

• Personalized agendas and content grouping

• Video welcome messages, keynotes, virtual tours of onsite and speaker locations

• Social feed and photo sharing from event no matter where they attend

Ask speakers to give virtual tours of online or on-site locations or venues that can be shared with attendees via your app to help build momentum for your event.

Video Streaming

Your event platform should offer you a choice between using native video streaming or integrating with other video streaming platforms to maintain video systems already working well for your team – and in some cases increase interactivity and engagement data.


Certain

Sponsor & Exhibitor Resources

Whether they are participating in-person or virtually, sponsors, exhibitors and partners play a significant role in generating revenue for your event, so be sure to factor their needs into your event technology planning. Consider investing in the following:
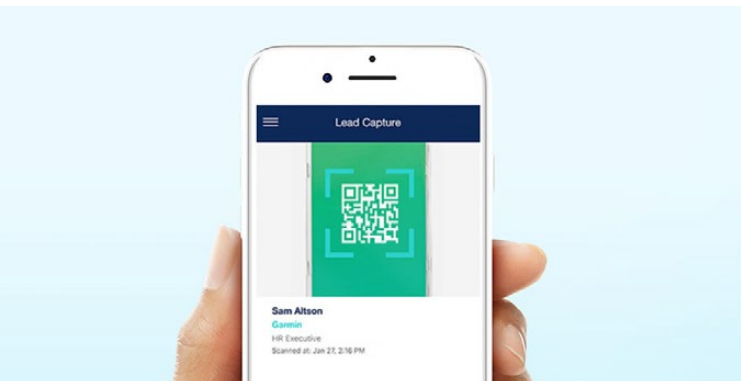
- **Lead Retrieval** – For hybrid and in-person events, give your sponsors and exhibitors the option of using a scan and capture feature for gathering sales leads for post-event follow up. They can scan an attendee's badge within seconds, quickly add notes and a rating to qualify the lead right after they've met.

- **Virtual Booth** – Highlight sponsors, exhibitors and partners with a virtual booth that includes company descriptions, contact information, links to social media pages, images, videos, presentations and marketing collateral.

- **Interactive Exhibitor Map** with drop pin on exhibitor locations at the physical venue that allows attendees to select favorite or specific exhibitors that they want to meet with.

- **Digital Sponsor Page** that enables attendees to discover and connect directly with sponsors based on their designated criteria.
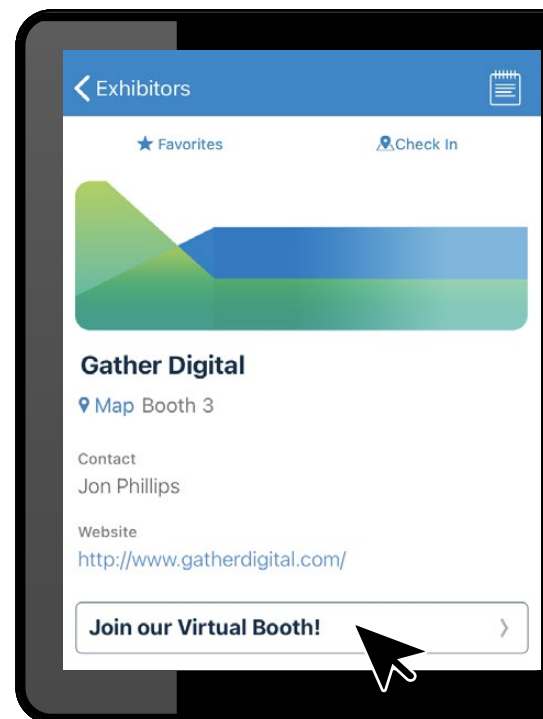
Data Management and Integration

In order to maintain the effectiveness of your event data (and your own sanity!), a **common platform** and database for managing your virtual and in-person attendee data is a must. This will help to ensure that all of your event data is easily accessed, analyzed and reported on in order to inform your events and marketing strategies. Ideally, this will be a core capability offered by an event platform provider – in combination with the aforementioned technologies.

Certain

We dive more into this in Step 4, but remember: Chances are that you'll be using multiple technologies for your event, so make sure you have a solution that will unify and aggregate the engagement data you collect from your events. You've invested so much of your time and resources into capturing valuable insights from your customers, partners and prospects – don't let that go to waste by failing to integrate your events, sales and marketing technologies!

Setting Up Your Hybrid Event Registration

Struggling to determine the pricing and registration for your hybrid event? Here's an example of how to set up your registration offerings based on how your guests will be attending:

In-person
$1000

Hybrid
$650

Virtual
$450

Price changes with opt-in choices for hybrid/virtual. For example: Marquee speaker or entertainment sessions are unavailable for virtual attendees because no recordings are allowed.

In-person	Hybrid	Virtual
• All sessions	• One day on-site access	• Access to on-demand content available in digital content hub
• Entertainment sessions which will not be available on demand or virtual	• Rest of sessions you can attend live	• Virtual attendance of sessions
• Lunch	• *Lunch onsite or lunch delivery service	• *Lunch delivery service
• On-site networking and expo access, Happy Hours	• *Expo access	• Live engagement through mobile app
• VIP 1-on-1 meetings with industry leaders/ thought leaders	• *On-site happy hours and networking sessions	• One-on-one virtual networking sessions
• Access to on-demand content available in digital content hub	• Access to on-demand content available in digital content hub	
• Live engagement in-person or through mobile app	• Live engagement in person or through mobile app	

Certain

STEP 4:

Event Business Intelligence and Data Strategy

For every event campaign, marketers should have a trusted plan for **collecting and analyzing data**. And with the added data points brought by hybrid audiences, an event data strategy has never been more essential for businesses who are looking to effectively understand and report on their event success. Below are key factors in establishing an event data strategy.

Collecting Data

One of the primary reasons you collect data from your event participants is to measure how successful the event was in meeting your goals. The more data you can gather and analyze, the better your ability to repeat components of your program that worked well and optimize other parts that missed the mark.

No matter what your event type, gathering event data also allows you to better understand your customer or prospect and how they interact with your brand.


Certain

When constructing your event data strategy, you will need to decide what data you will collect, at what points in the attendee journey you will collect it, and what you will use the information for. Some examples of points in the attendee journey that are ideal for data collection and the types of data to target:

- **Pre-Event:** event registration, mailing list clicks, opens and opt-ins, pre-scheduled meetings, and promotional engagements.
- **During the Event:** attendee check-ins, no-shows, activity participation, virtual session join and drop times, social media shares, poll responses, private messages, Q&A discussions, meetings completed.
- **Post-Event:** survey and poll responses, requests for further information, engagement with post-event marketing and 365 content.

You will also need to make sure that your data collection and data management process is compliant with **GDPR**, **CCPA**, and data security best practices.

Integrating Data

To make the most of your data and customer insights, your attendee engagement data must be integrated and shared across all of your technologies—CRM, marketing automation, communication, webcasting and event platforms. With a single view of your attendees' data, you can create an integrated, seamless, and more impactful stream of communication to your customers and buyers across channels and touchpoints.
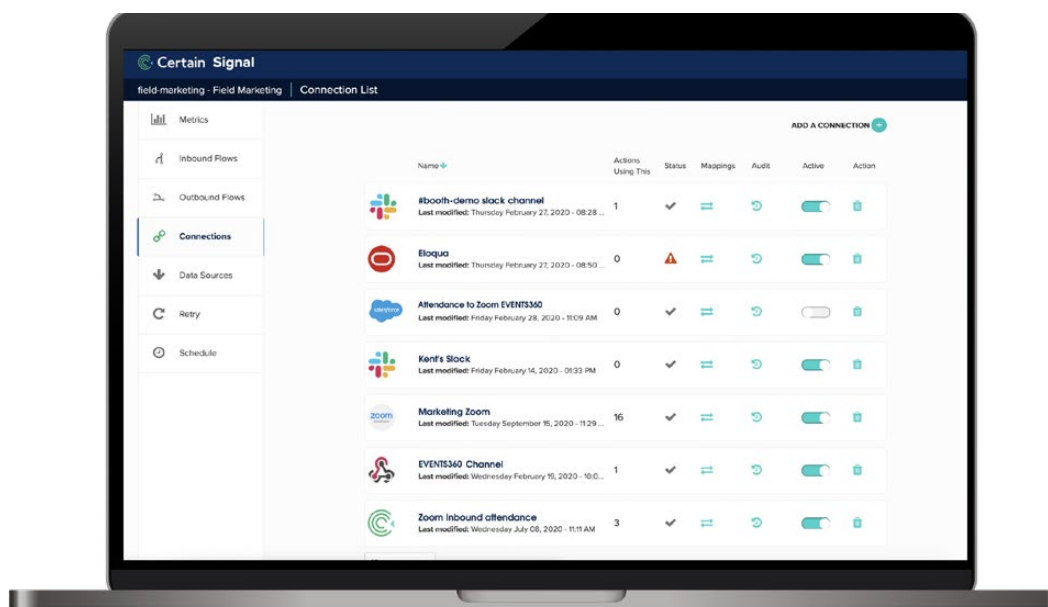
Data Analysis & Event Intelligence

Once you've gathered your data, you will need to analyze it to draw out actionable insights. You will basically be seeking answers to "who" and "how much." For example:

▶ **Attendance Data:**

- How many people from your target list registered and actually attended your event?

- What percentage of registrants showed up for the in-person portion of your programming versus the virtual?

- How many people attended breakout sessions and keynote presentations?

▶ **Engagement Data:**

- How interactive were event attendees?

- How many replied to polls and surveys?

- Touched every milestone of the attendee journey? If not, at what point did they drop out?

- Clicked or checked into sponsor booths?

- Who engaged in discussions, Q&A sessions, or private messages?

- Who requested product samples, made a purchase or indicated an intention to buy?

- What collateral was downloaded?

- How many networking attendees engaged in meetings and were able to make at least one connection?

To further explore engagement metrics, use the following table to compare the type of data you would analyze based on the event format.

Certain

Engagement Metrics

Metrics	Virtual	Hybrid	In-Person
Event Attendance:			
• Registered vs. Attended	✓	✓	✓
• Live vs. On-Demand	✓	✓	
• In-Person vs. Virtual		✓	
• # of Attendees from Target Account List	✓	✓	✓
• # of Customers who attended	✓	✓	✓
Session Attendance:			
• Join & Drop Times	✓	✓	
• Check-In data		✓	✓
Event App Downloads	✓	✓	✓
Event App Engagement			
• Games, Polling, Activity Feeds, Discussion Boards, Q&As	✓	✓	✓
Survey Feedback	✓	✓	✓
Sponsor Engagement			
• Lead Retrieval Scans		✓	✓
• Booth Visits	✓	✓	✓
• Sponsor Ad Clicks	✓	✓	✓
Meetings Scheduled with Prospects and Customers	✓	✓	✓

Event Business Intelligence

With the wealth of data collected from virtual, hybrid and in-person events, businesses are investing more heavily in business intelligence technologies to help with rendering their event data into actionable insights. This includes analyzing past events, planning future events, and telling the story of an event or series of events. For example:

- **Single Events:** Did we meet our goals? Who registered? Who came? Did they engage? How many 1:1 meetings were completed?

Certain

- **Event Programs:** What topics were the most engaging? What accounts engaged across the series? What content resonated with specific titles or personas? How can this inform the invitation strategy for the next event?

- **Account-based:** What accounts engaged with us across events? What questions are our strategic accounts asking?

A modern data strategy should incorporate business intelligence as a key factor for how to analyze data, measure key performance indicators (KPI) and seek out competitive advantages.

Taking Action on Data

By establishing a strong data strategy in advance of your event, you are setting up your sales and marketing teams to take immediate and intelligent action on attendee data throughout the event cycle.

Once you've collected and analyzed event data, you are in an informed position to make better decisions, capitalize on promising trends, and correct any initiatives that did not produce intended results. Post-event, this allows you to effectively measure ROI and generate insight reports for C-Suite leadership, as well as prepare data for handover to the sales team to assist them with nurturing and closing leads.

To help the sales team prioritize their time, conduct **lead scoring** of your registrants based on values you've deemed important to your sales and marketing strategy. These can be items such as how much time a prospect spent in a session or booth, what company they work for, whether they attended in-person or virtually, or whether this was their first or fifth time attending one of your company's events.

For individual leads, develop a personalized nurture track based on individuals' interests and engagement metrics. On a macro scale, you will create a high-level view of account engagement to help the sales team develop an **account-based marketing (ABM)** strategy to pursue warm leads.
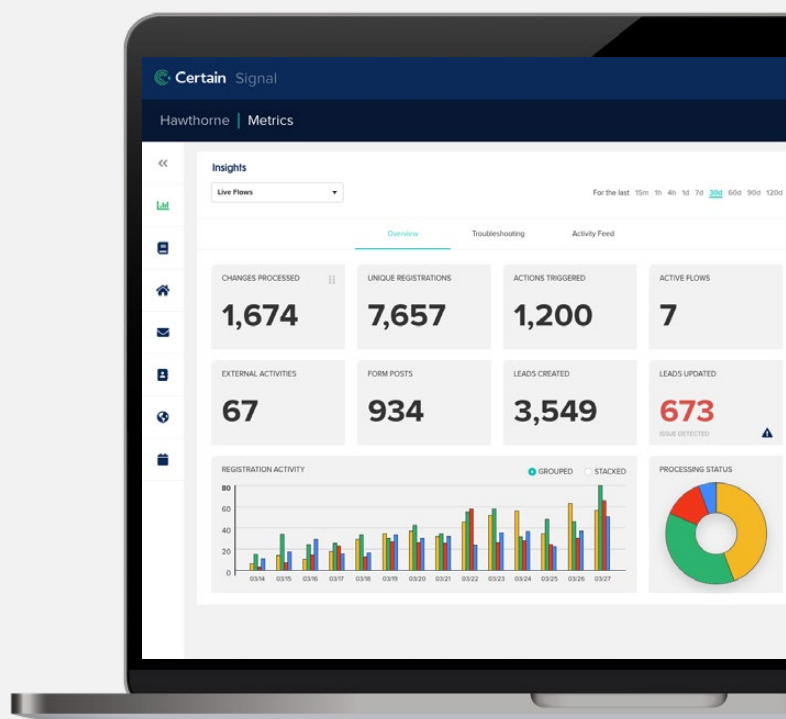
STEP 5:
Develop Your Content and Agenda

At this point in your planning, you have defined key aspects of your event required for success: best format, goals, theme, venue, technology, and data strategy. You've also determined your target audience and what type of hybrid audience you'll be hosting – a central consideration that will guide your content development.

This is the "heavy lifting" of developing content for an event; with these details in place, you will find content development to be an almost automated process.

Here are a few tips to help guide you:

• Answer questions that are being asked by your target audience.

• Provide information that solves a pain or problem for them.

• Find valuable content related to your attendees' industry and build upon it.

• Make sure that the content you provide is topical, relevant to industry trends, and up-to-date, and where appropriate, just plain fun.

• Create content that's designed to fill in knowledge gaps.

• Where feasible, make content interactive.

• To help battle screen fatigue, keep content length "bite-sized" and no longer than 30 minutes per segment.

Once your content is created, you can turn your attention to how the event will be structured and managed.
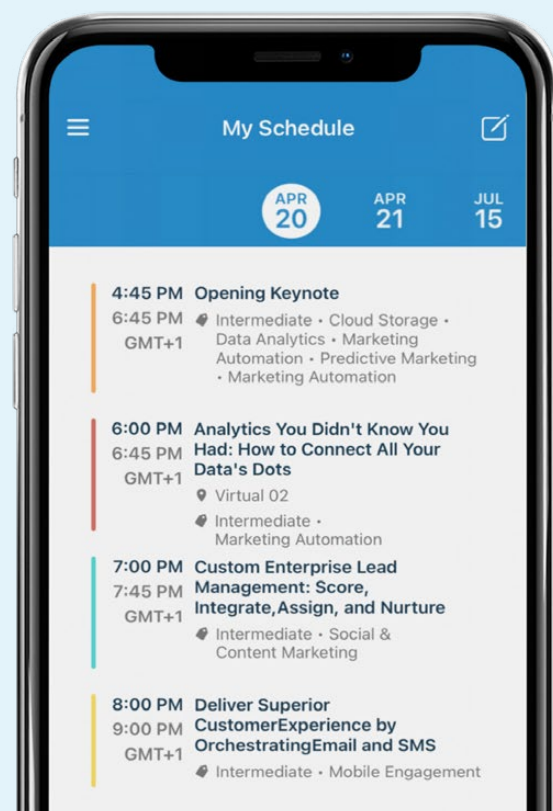
Keep in mind that delivery and format of content is **not a one-size-fits-all factor**, so let your audience guide your agenda.

Certain

Are Your Moderators and Presenters Ready for Hybrid?

One of the biggest challenges for sponsors, speakers, or moderators participating in a hybrid event is ensuring that both in-person and virtual audiences are equally engaged. If your event is designed to provide an equal-value experience for all attendees, you don't want to risk one group feeling slighted or undervalued.

> **The best way to ensure this doesn't happen is to rehearse the entire event before it goes live. Ideally, you want to do this one or two times well in advance of the actual event date; the more time you have to prepare and test, the better.**

Technical difficulties are bound to happen, so it's also equally important to test all equipment and technology that will be used during the event. This will give your moderators and sponsors an opportunity to get familiar with your selected technologies and ask any questions for clarification.

Plan for Engagement

With hybrid and virtual events, engagement can be tricky to facilitate; thankfully there are plenty of resources available to help bring audiences together. To help promote cross-audience interaction, build-in strategies like gamification and discussion boards. This will help to ensure that both in-person and virtual attendees participate to create an equal experience.
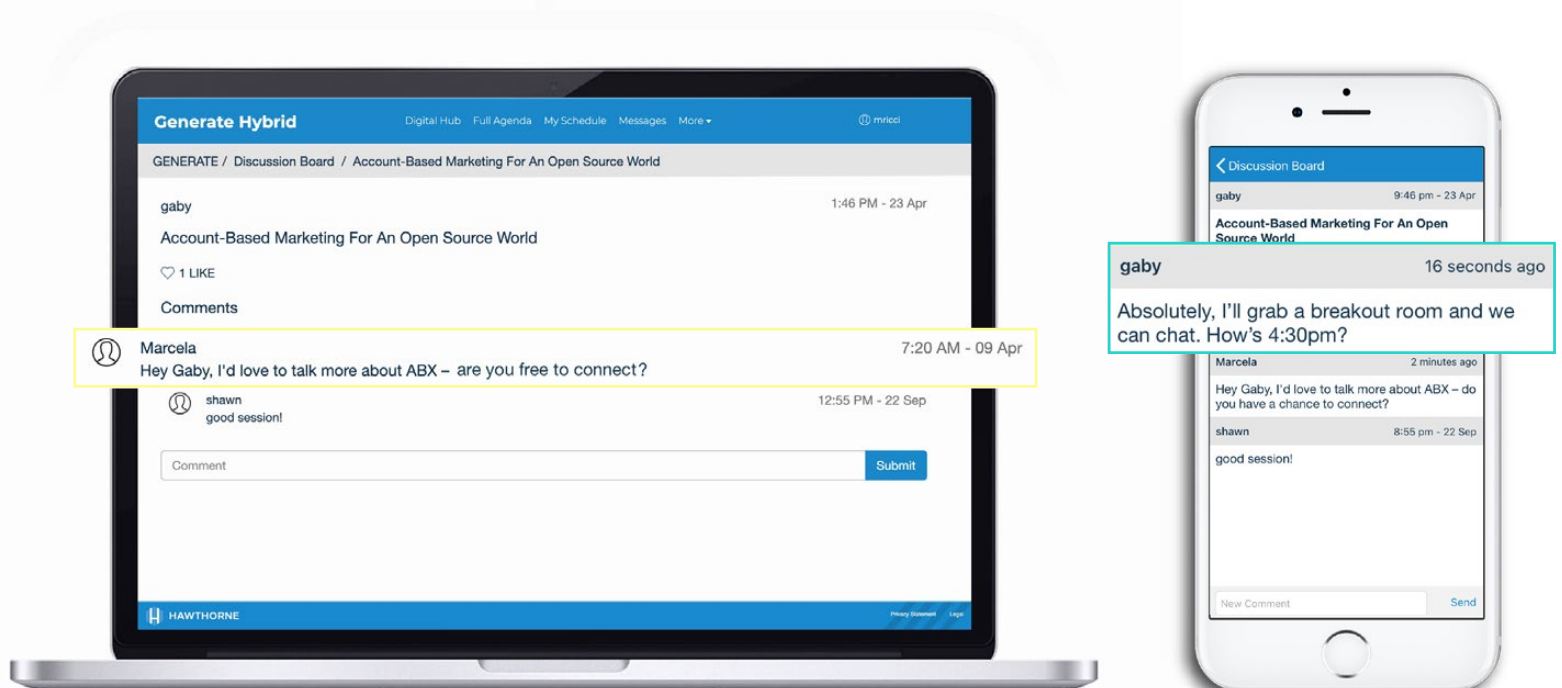
Networking

One of the biggest questions around hybrid events is how to solve for the networking issue between your virtual and in-person audience. Employing matchmaking to pair up attendees is a start, but how do you facilitate that interaction during the event? Consider creating designated networking areas at your onsite location where in-person attendees can connect with online ones. These areas should offer a quiet space with strong internet for guests to connect with each other via your event platform without having to remove themselves from the event.

Include Time for Breaks

Depending on the length of an event, in-person affairs always allow time for breaks. This allows attendees to stretch their legs, visit the restroom, grab lunch, or simply contemplate the information that's been delivered to them. The same should apply for your online audiences – avoid screen fatigue by building in this valuable break time for virtual programs.

Sponsors & Exhibitors

When it comes to sponsors and exhibitors, hybrid events offer a new wealth of options for how to engage with your audience. They, too, will be determining how they will participate in your event based on their own goals, so it's important that you have a well-thought-out model for them to consider.

Sponsors, too, want access to better data like ROI to justify cost; this was one of the most consistent complaints about the old in-person event model. They also desire access to extended lead generation, and they are willing to pay a higher price for obvious value. With solid event management technology and a robust data management plan in place, you have a selling tool to woo interested sponsors. Use it to show them what you will deliver, how you will deliver it, and over what period of time. If you have strong ROI data, now is the time to brag about it to demonstrate what a sponsor can expect from your event.

Certain

Hybrid Conference Sponsor Offering

Here is an example of a hybrid sponsorship model with varying offers based on how they can participate:

In-Person	Hybrid	Virtual
✓ 30 minute session presentation and access to session attendee list	✓ Live streaming booth appointments (chat and/or live camera feed at booth)	✓ 30 minute session presentation and access to session attendee list
✓ Exhibitor booth, with meetings tables and complimentary lead scan technology	✓ Live or virtual expo interactivity (live streaming from booth or visiting from your location at home, e.g. hopping in and out of chat rooms / booths)	✓ In-app ads
✓ Full registration list (on-site and virtual) pre and post event		✓ Session break sponsor video
✓ Access to on-site networking events (not recorded)	✓ Choice of attending 1 on-site network event (not recorded)	✓ Post-session Q&A
✓ Access to all on-site keynotes and sessions	✓ Access to x number of on-site keynotes and sessions	✓ Virtual 1:1 timeslots
✓ 1-1 meetings with VIP attendees, speakers and exhibitors (arranged in advance	✓ Option to include branded swag on-site and online (discounts on shipping courtesy Alyce or similar brand)	✓ *If there is an in-person element, then you get a 30 second virtual commercial between sessions broadcast only to virtual attendee
✓ Logo placement and boilerplate messaging on-site and in session catalog	✓ Option to broadcast promo video to on-site attendees between sessions	
✓ Opportunity to present during Guided VIP Expo hall tour	✓ Logo placement and boilerplate messaging on-site and in session catalog	
✓ Live streaming booth appointments (chat and/or live camera feed at booth)	✓ In-app ads	

Certain

STEP 6:
Event Marketing and Promotion

Now that your event has been designed, it's time to promote it. All marketing materials, social posts, and copy on your company website should give participants a clear indication of what to expect from the virtual and in-person experience. Equally important is providing comprehensive safety and social distancing protocols clearly posted on your website and in marketing materials.

The following details cover what tasks you should expect to complete during each of these phases.

Marketing
Pre-Event

Drafting a strategic marketing plan for your hybrid event is the most crucial first step. This will be the blueprint that guides your marketing decisions before, during, and after the event, and should contain a clear timeline for each task that needs to be executed.

To fulfill your plan, start by identifying and prepping your team. Everyone involved with the management and promotion of your event should clearly know their roles and there should be adequate time allowed prior to the event for testing and practice runs. You will also need marketing support specific to running the event; this will include people skilled in audience interaction, managing speakers and sponsors, and providing technical support.

Certain

Partnering with your technology provider is one smart way to add technical support to your team if that area is lacking. If budget allows, recruiting the services of an event production company that understands the virtual and hybrid event process can quickly round out your support team and fill in any gaps with less required effort on your part.

• At least two or three months before the event launches, establish a virtual command center for your team – be it a Slack channel or project management platform. This will help everyone use a single channel of communication while keeping up with task lists.

• Other pre-event marketing and promotion activities you should perform:

• Update your website to include details about your event. Descriptions should clearly depict the expected experience for both in-person and virtual attendees.

> **Help to put any potential in-person attendee concerns at ease by offering clear details on health and safety measures that will be in place onsite.**

• Publish social media posts and promotional teasers offering early-bird special rates.

• Launch email marketing campaigns to your existing prospect lists and providing lead magnets to entice new opt-ins.

• Consider offering sponsors co-branding opportunities with your swag and gifting strategies; this will help offset this particular marketing initiative's expense.

Build an Event Community

You've put in the effort to create an engaging experience for a target audience; as a result, you have a captured group of current or potential customers with a high interest in your brand. Extend the value that both you and your attendees can gain by creating an online community. Social media platforms like LinkedIn make this extremely easy to do.

Leverage custom hashtags and send direct messages on social networks to create a dialog with attendees leading up to the event. This is one way to measure engagement from your event— attendees posting about your event, event hashtag trending, or event content being shared and retweeted.

For virtual presenters, share a custom event background for speakers to use during their session (one that includes your event brand and hashtag). Ask them to take a screenshot with their background and share on social media to help build buzz. For in-person and hybrid events, create

Instagram-worthy opportunities (backdrops, installations, headshot services) for attendees to share on social.

Create a badge in your engagement app for social media shares and posts to your activity feed for added participation. This type of community-building will help to drive greater engagement and activity from your attendees before, during and after the event.

Remember: Interactivity is key when it comes to driving attendee engagement between virtual and in-person audiences. Plan for interaction between guests, speakers and sponsors throughout your event. This will elevate the experience from a passive (and possibly forgettable) event to a memorable and engaging opportunity for attendees to connect.

Marketing
During the Event

- Ensure that all marketing team members are primed on what to do with check-in data, lead capture, and event engagement data.

- Your event technology platform should segment and sync all data appropriately and send it where it needs to go.

- Encourage the use of gamification in conjunction with engagement apps to gather attendee data. Your engagement apps should also be used to gather survey feedback from all attendees, sponsors, and presenters for post-event evaluation and future programming.

- Have a designated social media manager to capture event footage and pictures and share on social media with event-specific hashtags.

- Designate a team member or writer to live-blog during sessions to add to your 365 event content library.

- Distribute swag directly to in-person attendees, and make sure to include virtual attendees in your swag campaign using direct mail or digital gifts.

- Record every event session so that it can be utilized in future marketing.

Certain
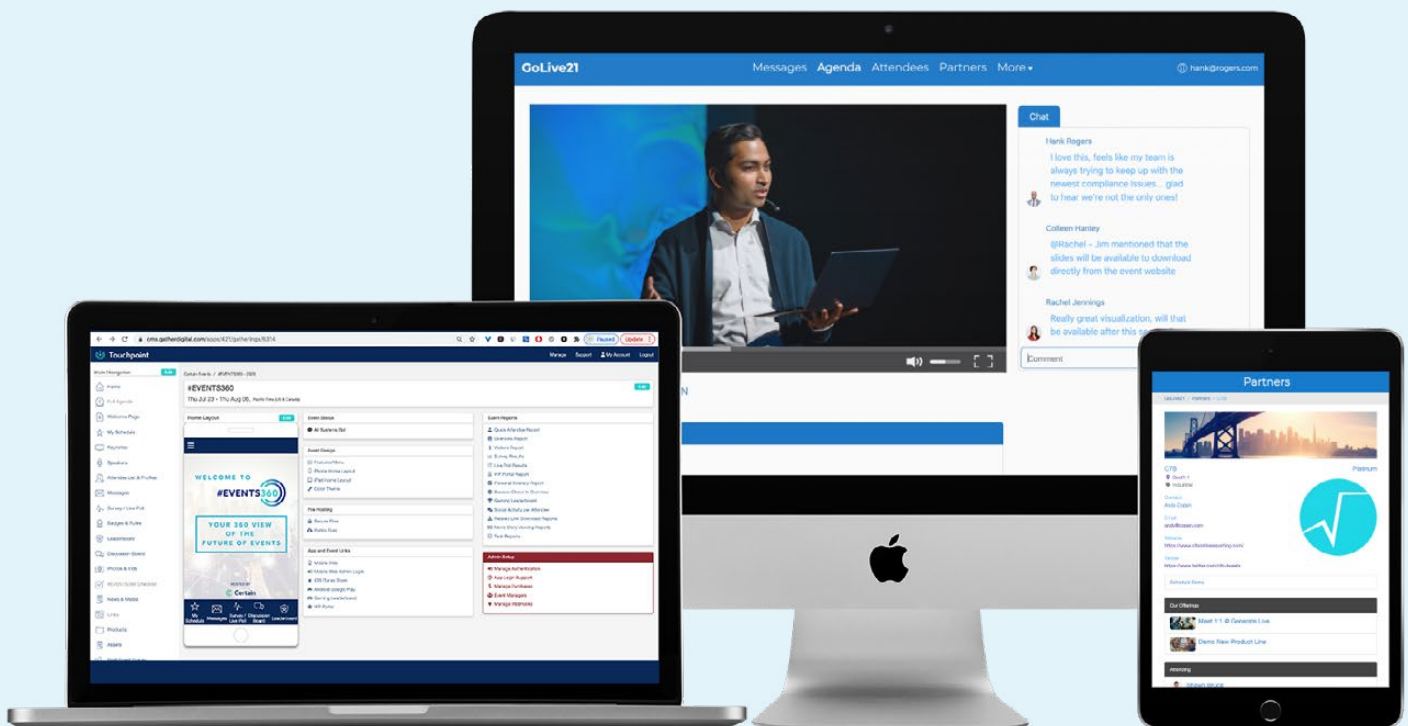
Post-Event

It's easy to assume that pre-event activities and tasks conducted during the event are the most vital parts of your marketing strategy; however, post-event activities are just as important, if not more so. Post-event marketing is where you convert warm leads, nurture cooler leads and show all who attended that you appreciate their time and effort.

With post-event marketing, time is of the essence. You want to reach out to attendees while your program is still fresh in their minds. The simplest method of follow-up is sending a "thank you" message to all who attended. If you have exit surveys or polls for your attendees, they can be included with this message as well.

• For additional follow-ups, make sure that your attendees have been broken up into segments so you can hyper-focus your messaging.

• For all attendees, make event sessions available as on-demand content; this will allow you to continue to gather important engagement data.

• Your marketing plan should include a defined schedule for post-event automated and manual follow-up campaigns that integrate with your customer relationship management (CRM) and email marketing service (EMS) platforms.

• Finally, make certain to have a debriefing meeting with your team to discuss what everyone feels went well, and which areas of the marketing strategy could be improved in the future.

Circle Back with your Event Community

Use your established event community or group page to deepen engagement, keep your audience informed, and to announce continuing events, content, promotions, or product releases. This will also help to keep audiences, speakers and sponsors connected and engaging with one another after the event.

Certain

The Hybrid Attendee Engagement Journey

Your attendee journey begins the moment they visit your event site and register for your event. Tailor your engagement with each attendee to their registration type, while ensuring ways for guests to connect and interact – regardless of where they're joining from. What does this look like in action? Take a look:

Registration

Virtual	Hybrid	In-Person
Attendee selects "Virtual Only" option.	Attendee selects number of days or sessions they will be attending in-person and remotely.	Attendee selects "In-Person Only" option.

Confirmation Email (Virtual)
- Join links to virtual sessions
- Add-to-calendar
- Program and session recommendation
- Event hashtags, community page
- Event engagement app instructions

Confirmation Email (Hybrid)
- Onsite health and safety details
- Join links to virtual sessions
- Add-to-calendar
- Program and session recommendation
- Reg links for networking events
- Event hashtags, community page
- Event engagement app instructions

Confirmation Email (In-Person)
- Onsite health and safety details
- Add-to-calendar
- Session recommendations
- Reg links for networking events
- Event hashtags, community page
- Event engagement app Instructions

Pre-Event Community Building
Attendees can start connecting via social media and the event engagement app:

- Discussion boards
- Polls & surveys
- Gamification (pre-event speaker trivia; event website scavenger hunt)

Tip: Get registrants engaging early with polls like "Vote on lunch for the opening keynote" "Pick the the event theme song"

Reminder Email (Virtual)
- Same info as confirmation email plus any relevant event or session updates

Reminder Email (Hybrid)
- Same info as confirmation email plus any relevant event or session updates
- Re-iterate importance of on-site safety measures

Reminder Email (In-Person)
- Same info as confirmation email plus any relevant event or session updates
- Re-iterate importance of on-site safety measures

Engagement During the Event
Attendees can interact and compete with fellow event-goers via:

- Gamification: badge games, trivia, scavenger hunts
- Discussion boards
- Live polls & surveys throughout the event
- Photo & video activity feeds
- Networking activities (virtual or in-person)

Tip: encourage speakers to start their own discussions to engage before/during/after their session

Post-Event Follow Up (Virtual)
Attendee receives:
- Links to on-demand recordings
- Post-event survey
- Personalized messaging with relevant offers, recommendations, CTA

Post-Event Follow Up (Hybrid)
Attendee receives:
- Links to on-demand recordings
- Post-event survey
- Personalized messaging with relevant offers, recommendations, CTA

Post-Event Follow Up (In-Person)
Attendee receives:
- Links to on-demand recordings
- Post-event survey
- Personalized messaging with relevant offers, recommendations, CTA

Certain

Event Execution

Now that everything is in place, it's showtime! All of your preparation and planning has positioned your event to be a smashing success. If you think of your program as a show horse, all you need to do is guide it through its pre-planned paces to bring home the ribbon. With that said, there remain specific tips and best practices for tipping the odds even further in your favor. Below are ten best tips for achieving a high-quality event execution.

01

Make sure that team members, showrunners, tech support staff, and presenters show up early. This will allow time for testing equipment and ensuring that technology is running smoothly. Presenters will also be afforded extra time to make final tweaks to their presentation.

02

Max out engagement. Make sure team members are tapping the full toolbox of available options: polling, survey taking, virtual photo booths, Q&A sessions, live social media feeds, gamification
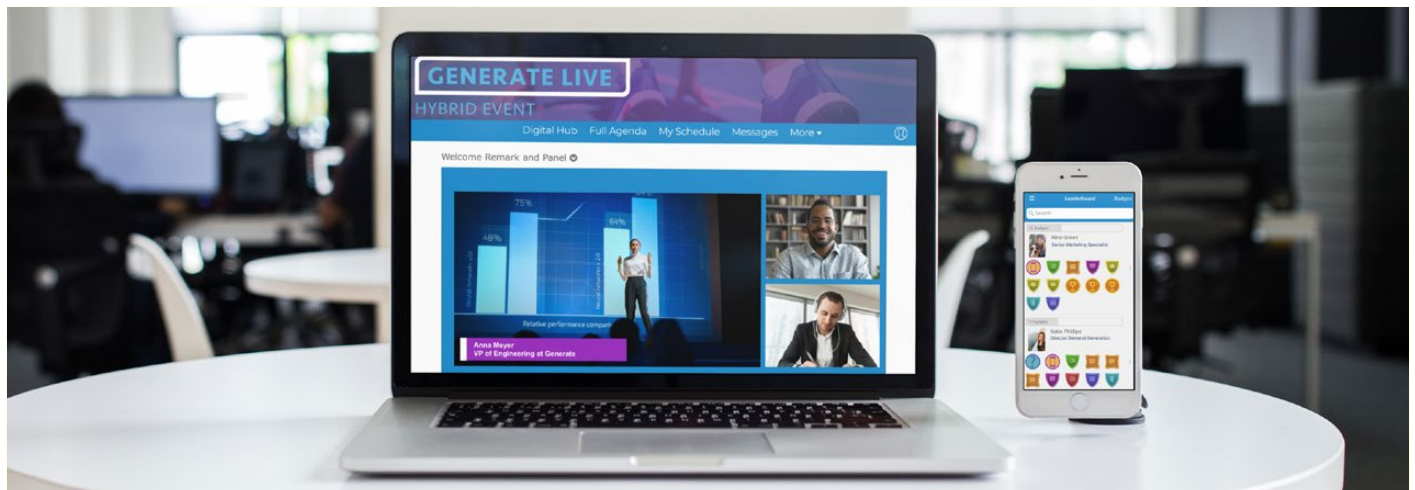
03

Have a dedicated team member act as a moderator for each of your audience types (virtual and in-person). Their job will be to encourage engagement and guide attendees through the event journey.

04

For your virtual attendees, send the link to login to your event minutes before it begins. This ensures that your join-in email will be somewhere at the top of their inbox.

Certain

05

Use an automated "touchless" check-in app to simplify the process and receive specialized alerts when VIP attendees arrive at your event. This will allow you the opportunity to personalize VIP attendees' experiences. Certain's check-in app also allows for scanning QR codes to comply with social distancing requirements.
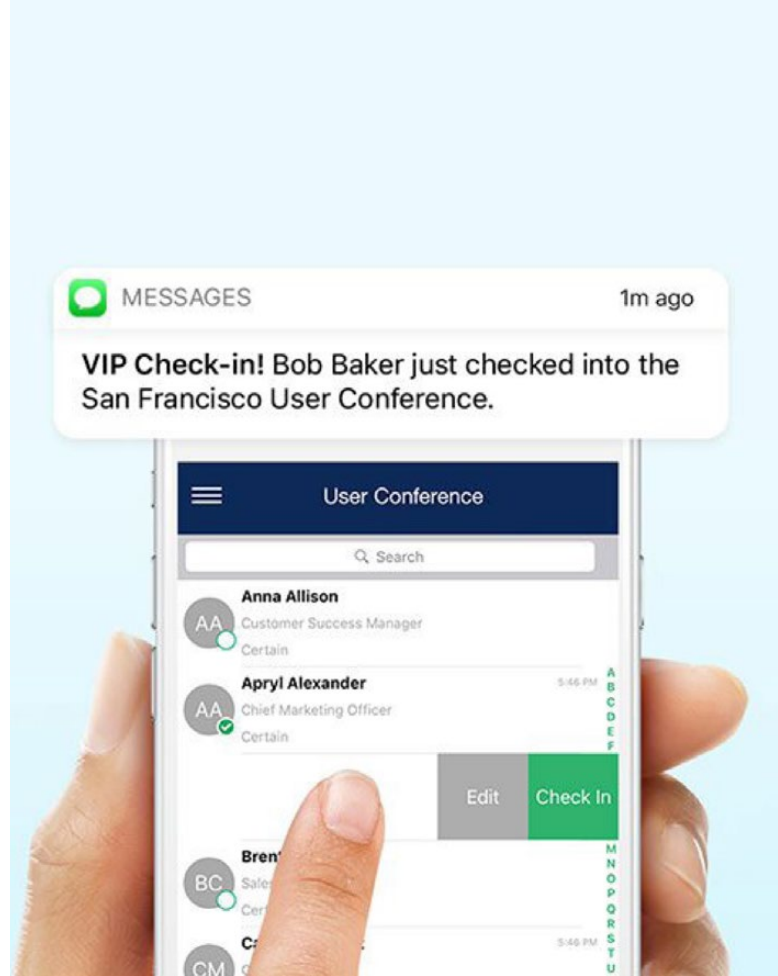

06

Consider easing any COVID-related concerns by making temperature checks a mandatory part of your check-in process for in-person participants. Considerations like sanitation stations and planning your in-person set-up to allow enough space for some social distance can go a long way in making your onsite attendees feel more comfortable.

07

If you plan to offer meals for in-person attendees, consider extending this same experience to your virtual participants. This will help to prevent any attendees from feeling left out. Here's an example from Grubhub.

08

To keep your virtual audience engaged, use valuable filler content for lulls between event sessions. Content can include interviews with thought leaders, messages from sponsors, additional Q&As or "parking lot" sessions, or special behind-the-scenes content.

09

Use the hybrid format of your event to open up new exciting ways to facilitate networking. Try pairing off virtual and in-person attendees for breakout sessions or icebreakers. Also, to ensure there is no opportunity for your virtual attendees to be excluded from activities, require that live chat be turned on for all event sessions.

10

Provide adequate engagement opportunities for your partners and sponsors. Consider making them available for direct engagement via social media live streams. Make sure that a dedicated moderator is available to check-in with them throughout the event to gauge their satisfaction with the event and gather their feedback.

Certain

STEP 8:

Essential Post-Event Activities

Congratulations! Your event is complete, but that does not mean your work is over. Throughout this playbook, we've mentioned the importance of performing post-event activities to help you gain maximum value from your program.

In carrying out these tasks, your goal will be to fulfill four distinct missions:

• Send promised deliverables to partners and sponsors

• Process and **analyze all of the attendee engagement data** you've gathered.

•Determine what worked well and what could be improved about your event.

• Generate ROI reports for yourself, your team, and C-Suite.

• Package insights and develop **nurture tracks** for the sales team.

Survey: How Was Your Experience?

Remember to gather exit data through polls and surveys to measure attendees' satisfaction with their event experience. It's also equally important to survey sponsors, partners, presenters, exhibitors, and team members that assisted with your program.

All of these stakeholders' input is valuable and vital to ensuring your company's events meet and maintain a high standard of quality. If these parties found some areas lacking, be open to their feedback and strategize with them about how future events can be made better.
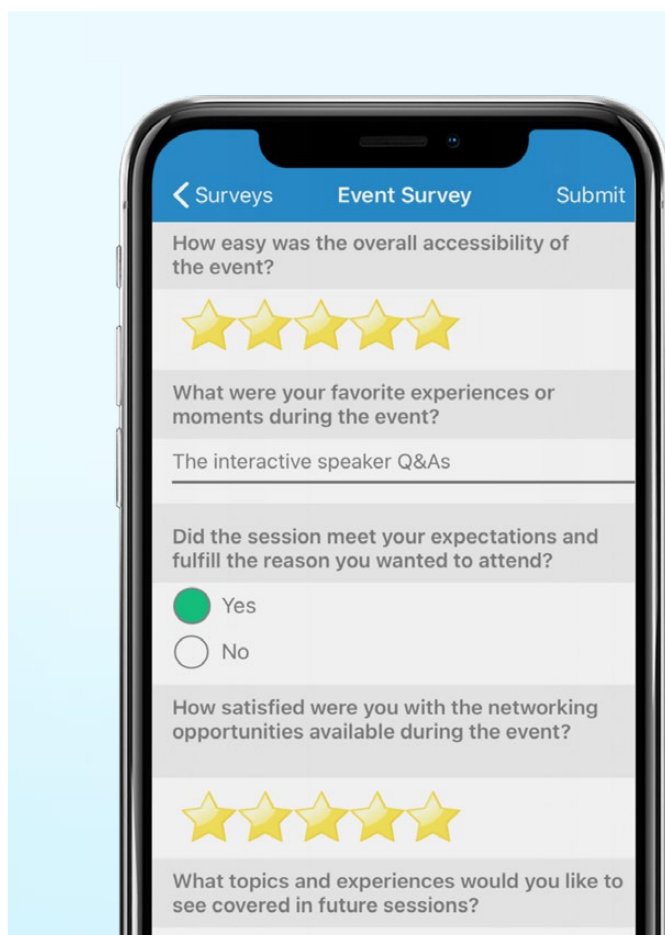
Post-Event Touch Plan

From the moment event participants registered for your program, they've provided insights into their wants, needs, and interests. You need to have a plan of action for continuing their engagement with your brand so you can capitalize on this data to convert them into customers and strengthen their relationship with your company.

It's important that you have a touch plan in place to keep communication with attendees orderly and goal-oriented. This will include details such as how many times you plan to follow up, what channels you will use to communicate, the type of messages you will send, and the call-to-action you would like attendees to take.

Check out Certain's **Post-Event Follow-Up Plan** for more ideas on how to stay connected after your event.
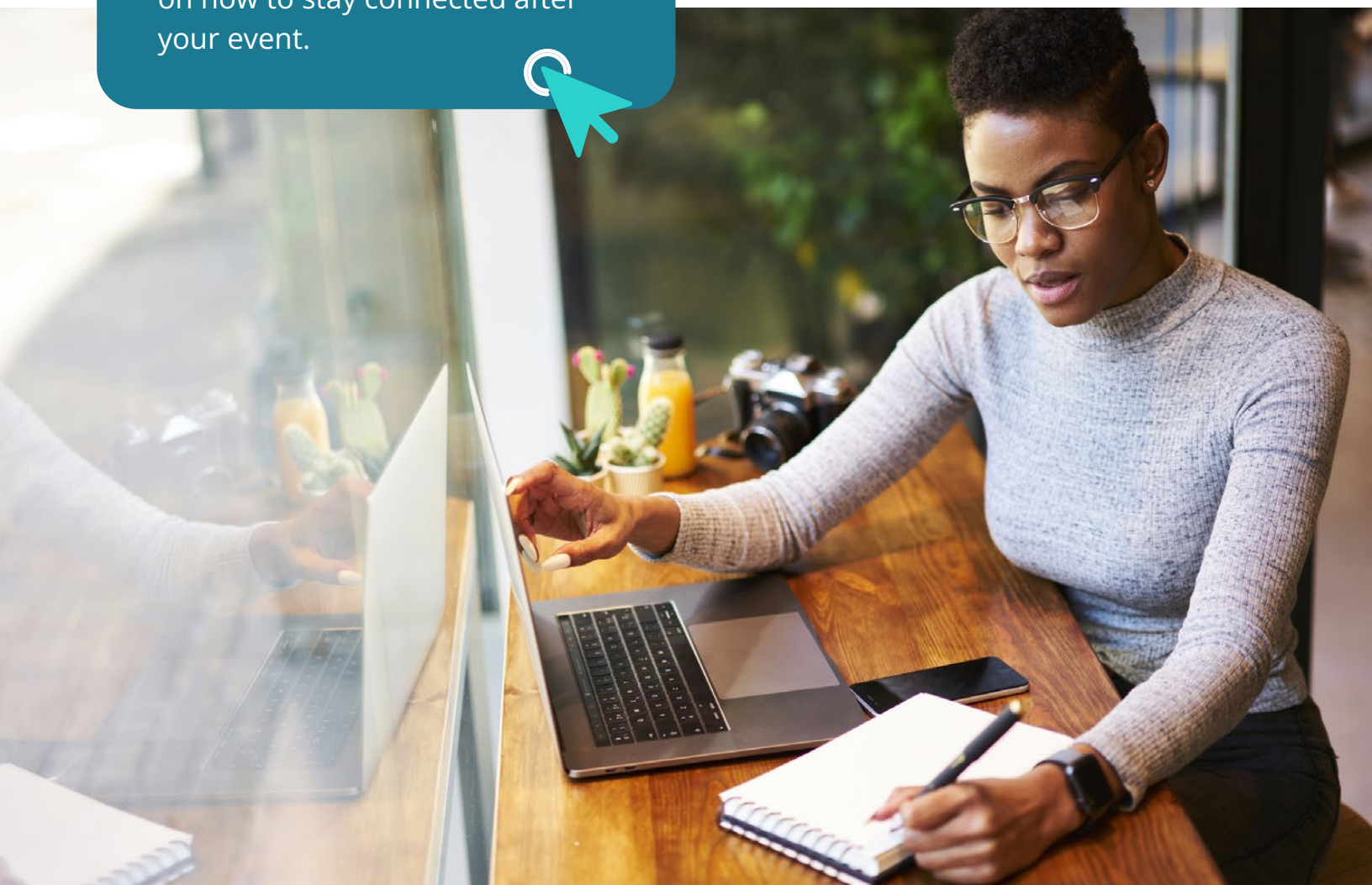
Proving Event ROI, Reporting to C-Suite

While your goals and that of your team have been focused on ensuring attendee satisfaction, gathering actionable data, and hosting a successful event, the CFO and other C-Suite executives have their eyes firmly fixed on cost. As businesses everywhere navigate economically challenging times, all expenditures must be justified to prevent certain business activities from being labeled expendable.

The most potent weapon you have to protect your event budget is ROI. If you've followed the steps provided in this guide, you should have a significantly easier time proving your event ROI and demonstrating that your program met or even exceeded key performance indicators. With all of the digital touchpoints suggested in this playbook, you will have ample data to share with the CFO.
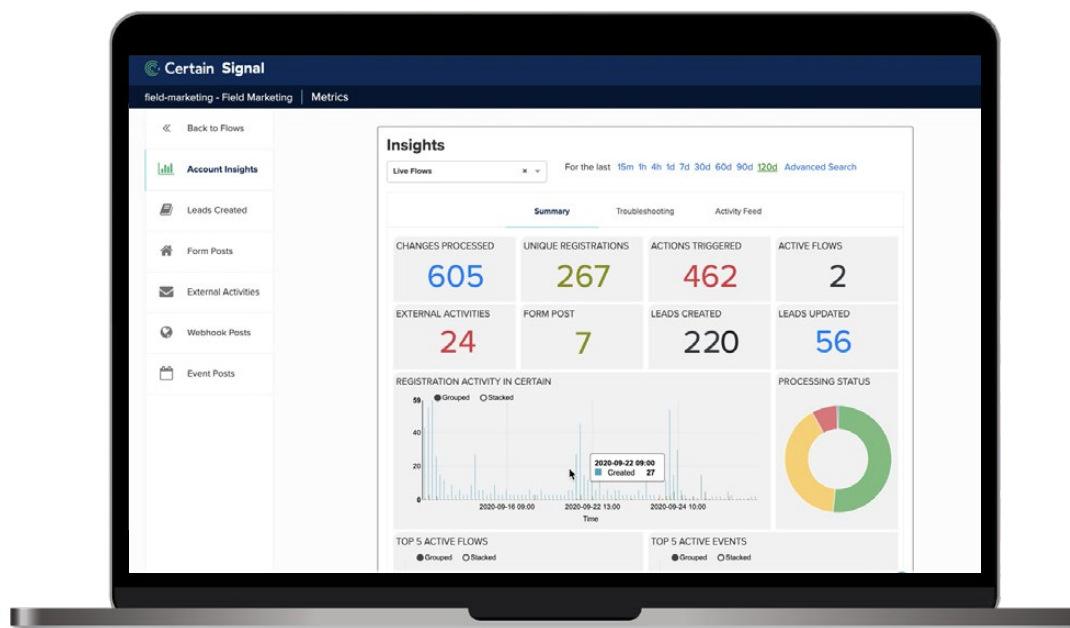
When preparing your report, you will want to focus on quantifiable data that demonstrates how your event's success was supported by meeting specific KPIs and how the event's success will generate leads

Below are some high-impact data points that you should consider including in your reporting.

▶ Layout the benefits (or drawbacks) of the hybrid format.

Your CFO will appreciate that the virtual format is cost-effective, excellent for top-of-funnel lead generation, and attracts a higher volume of attendance. If you have the data, you can compare past attendance numbers for purely in-person events and your hybrid event. The benefit that you will want to highlight for in-person programming is that it generates warmer and accelerated lead conversions.

However, if your numbers turn out not to be so impressive, it's important to be open about it; if the hybrid model was not the best fit for your event, it could be that the programming goal was solid but another format would be more appropriate.

▶ Digital technology integration vastly improves data collection and lead nurturing.

Lay out the digital technologies, applications, and platforms that were utilized to manage your event. If you used a complete event experience platform like Certain, that means all pertinent attendee data will tie easily into your pipeline to allow for deeper segmentation and personalization as leads are nurtured down the funnel. This will result in faster conversion of high-target prospects into paying customers.

To make this part of your reporting more impactful, it will be important specific data points like:

• Lead stage in correlation to where a specific prospect or ABM group is in the funnel
• Projected revenue if specific leads convert
• Pipeline costs associated with leads that are further down the funnel
• Campaigns that generated the most insights, and actionable data, and opportunities
• A breakdown showing specifically why certain campaigns worked so well

Certain

▶ **Reporting against specific KPIs.**

Some suggested KPIs to focus on include:

- Level of generated brand awareness and activism demonstrated through post-event surveys and focus groups

- Customer-focused sessions and events compared to the number of sales, renewals, or up-sell opportunities generated

- Networking opportunities compared to the number of successful deals made,

- Education sessions reported against the number of learners who attended and completed

▶ **Other convincing data you may consider reporting:**

- If you're running an ABM strategy, create a high-level overview of account engagement to help identify warmer leads from your events.

- Show how quantitative and qualitative data collected from stakeholders will drive future campaigns and event development.

- Show how the hybrid event model produces opportunities for unlimited attendee types and reporting

Conclusion

Hosted events are complex undertakings, and can be equally daunting for newcomers and seasoned pros alike. Our hope is that this playbook provides you with what you need to make your next hybrid event a smashing success.

By approaching hybrid event development with a solid, 360-degree game plan, you'll be in an optimal position to capture a higher return on the time and resources invested in your event. And by committing to a comprehensive engagemend and data strategy, you'll be armed with the valuable information you need to measure your event's KPIs, gain a deeper understanding of your target customers, and present data-backed reports to C-Suite.

Your All-in-One Event Solution

At Certain, we partner with event professionals to help them achieve all of their unique event campaign goals; from advanced automation and seamless integration, to touchless ticketing and attendee engagement, we offer a robust platform that can manage every aspect of your program.

Certain is your all-in-one platform for virtual, hybrid and in-person events. We provide you with all the solutions you will need to drive engagement, capture, manage and analyze your event data, and better optimize your future events of every kind.

How can we help with your next event? Schedule a demo with us to

SCHEDULE A DEMO

Certain provides the leading end-to-end event experience platform for data-driven marketers and event professionals. Our software empowers marketers to deliver truly engaging digital and in-person attendee experiences, capturing rich insights and buying signals that lead to greater sales and marketing results.

Certain

info@certain.com | www.certain.com | 1.888.237.8246