

FREEMAN®

Hybrid Event Checklist



This checklist was created as a helpful guide to planning a hybrid event. Because events can vary greatly in size and complexity, it's quite possible that you may need more or less time — and more or less steps — than what's indicated here. However, for many events, this should offer a solid set of guidelines and a good foundation from which to start.

At least 4–6 months before the hybrid event (depending on size and complexity) begin with foundational elements:

Establish your hybrid event goals and objectives — why hybrid and why this event? What can you offer both audiences?

Define and develop target audience(s) profiles — primary and secondary target audience information, roles, demographics, needs and care abouts, think/feel/do attributes, etc.

Determine the hybrid event format and experience — what elements will be in-person and what formats will be used for virtual (e.g., all live, simulative, or pre-recorded)

Develop a messaging matrix with event description, key takeaways, primary call to action, and any guiding principles and/or content strategies

Create preliminary agenda and continue to update/revise as details are adjusted/confirmed

Determine your event pricing structure (free, registration fee, or gating)

Determine your sponsorship/exhibitor plan for both virtual and live (identify sponsorship)

Create a preliminary budget that is updated and adjusted as more details are available

Select the event date(s) and time(s), and venue if that is not already contracted

Create an audience acquisition/marketing plan and timeline

Begin concept development for event brand/look and feel (e.g., logo, tagline, visual environment, physical environment design, signage, graphics package, etc.)

Identify your event support team — including both internal and external members — based on the initial goals, strategy, agenda and scope

Begin outreach to local authorities to obtain most up-to-date information on COVID operating status and restrictions; begin to build out your COVID-safe onsite plan accordingly

Begin to evaluate technology vendors with the goal of selecting and implementing platforms at least 4 months in advance of your event. Includes registration/ticketing, virtual event platform, mobile app, audience engagement tools, content management, lead retrieval, attendee tracking (RFID/NFC), etc.

3–4 months before the hybrid event:

Create your content narrative within the overall attendee journey/run of show (remember quality over quantity, especially in the virtual medium, and don't forget variety)

Develop onsite experience design (e.g., space planning for general session, breakouts, lounge and networking areas, dedicated hybrid spaces, sponsor areas, etc.). Allow enough time for detailed COVID compliance planning and review — ensuring your space planning and experience design adequately integrates social distancing

Identify and begin to confirm hosts, speakers, presenters, and/or other entertainers

Develop sponsor/exhibitor opportunities and begin identifying and soliciting relevant partners

Define and assign support team roles for pre-production and run-of-show activities such as content and speaker support, technical support, customer service, marketing and communications, A/V, sponsor/exhibitor, overall event operations, etc.

Begin content outlines for scripting

Develop speaker briefing documents and other resources

Finalize your monetization plan and determine any related specifications for the virtual event platform

Make your event platform selection and begin to configure all technology

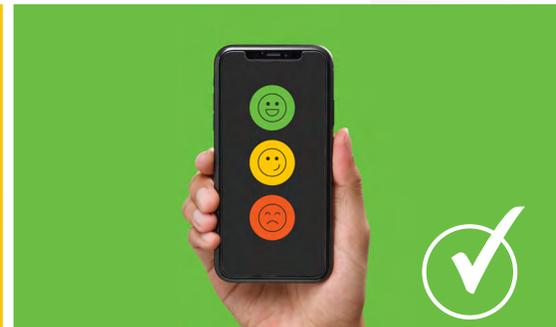
Develop pre-event surveys to be fielded in registration process

Create and approve program agenda

Complete technical design for scenic, lighting, video, etc.

Finalize event branding and any associated style guides

Launch save-the-date website landing page with option to sign up for updates



Two months before:

Finalize onsite experience designs and scenic design, prep for fabrication

Create your onsite signage grid and finalize creative for production

Launch promotional plan, including hybrid event website and/or landing page with registration/ticket sales. You'll need a variety of email reminders, confirmations and other outreach such as press releases, social posts, influencers and more to keep your audience engaged. Be sure to communicate how you will keep attendees safe during COVID restrictions, if applicable.

If applicable, create dedicated social media profiles for your event. Don't forget the unique hashtag.

Coordinate and place orders with other support suppliers (real and virtual swag providers, onsite electrical, AV and connectivity needs, food and beverage for in-person attendees and at-home food delivery for virtual, etc.)

Create a holistic health and safety plan for all aspects of the onsite experience for both attendees and staff. Coordinate and place orders for PPE and other COVID-related supplies (extra waste baskets, sanitizing wipes, etc.)

Create a preliminary rehearsal and production schedule for pre-recorded elements

Create a detailed onsite production schedule inclusive of all event partners

Confirm session content descriptions, gather bios and photos from all speakers/presenters, and have contracts signed (if applicable)

Request logos from sponsors and work with them on any co-presented content development

If applicable, provide speakers with branded presentation templates or on-screen guidelines (when using text/graphic overlays) to use when creating their content

Review and budget for any speaker/entertainment requirements and riders

Provide sponsor/exhibitors with promotional toolkits and ask them to promote to their customers; if they have an onsite presence, provide detailed instructions on how to ship materials

Ship remote speaker kits for anyone pre-recording with heavy post-production needs

One month before:

Monitor registration numbers for both in-person and virtual; offload in-person to virtual, if needed

Finalize all registration and analytics reporting (ensure access for all clients including whitelisting of email and websites)

Continue the marketing and promotion plan to encourage registrations

Remind speakers/presenters to continue promoting the event to their networks; provide additional resources if needed (e.g., “behind the scenes posts”)

Draft and finalize any outstanding content scripts — keynote presentations, host welcome, transitions, housekeeping, VOG, etc.

Update speakers and presenters with plan for table reads, rehearsals and recording schedules

Develop contingency plans for various scenarios (speaker difficulties, technology or internet outage, schedule change, change in COVID restrictions or protocol, etc.)

Identify and order speaker gifts

Ship remote speaker kits for anyone pre-recording with light post-production needs

Approve all onscreen graphics: lower thirds, slates, bumpers, etc.

Confirm backup staff for all positions including AV; develop plan in case staff members becomes ill

Confirm loading dock plan, routes, meeting points, safety concerns

Fire Marshal approval on all floor plans (if needed)

Overall health and safety plan approved internally, by venue(s) and any overarching government entities

Health and safety permitting for all F&B (if needed)

Speaker coaching and speaker management comms

2–3 weeks before:

Draft and send press releases and social posts about important event details, including keynote or celebrity speakers, new product information, honorees, etc.

Remind sponsors/exhibitors to finalize set up of their virtual marketing spaces

Test the platforms and technology that will be used

Ship remote speaker kits for live speakers

Start mailing out swag boxes/emailing virtual swag

Review speaker presentations/final scripts and finalize any edits

Set up any audience polls or Q&A used during the event

Conduct table reads

Finalize food and beverage order

Production schedule finalized and shared

Train staff on technology that will be used

Train speakers on technology that will be used (including any recording equipment)

Begin quality checking all content both prior to and after loading onto virtual platformspeaker management comms

3–7 days before:

Begin briefing all support staff about the schedule and their roles during the event

Crew letter shared with onsite team — all event details for staff (in advance of crew travel)

Conduct rehearsals for all speakers, including testing individual audio and lighting set-ups

Create an FAQ document for attendees, including instructions to access the event, troubleshooting tips and how to contact support to be shared in reminder email

Prepare and set-up real-time and post-event surveys for attendees, speakers, and sponsors

Send out speaker gifts/thank you notes

Pre-con with venue and all onsite partners

Venue load in and set up of all areas onsite

Review health and safety plan in onsite walk through with all staff

Deep cleaning and set up of PPE stations

All final content and presentation files due to AV control — for testing and ingest

Do a dry run of the entire event — cue to cue — on the event platform, including motion graphics, transitions, video rolls, audience interaction, etc.

Pre-con meeting/final review with full event and client team

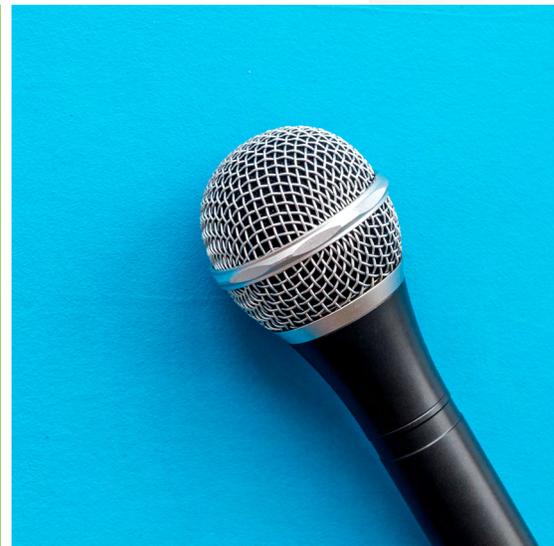
One day before:

Send a reminder email to registrants, including login instructions and the event schedule/program

Do another technical cue-to-cue content run through and verify everyone is ready to go

Prepare onsite rooms including green rooms; ensure adequate PPE supplies are staged

Share live production checklist with support staff



Day(s) of the hybrid event:

Send a final reminder/join now email to registrants

Have dedicated staff to escort speakers to onsite green room(s) and stage, recording or broadcast area

Have dedicated staff monitoring all technical aspects of event to address any challenges

Share and post real-time takeaways or news on social media channels

Thank everyone on your team for their hard work getting to this point!

Post-event:

Send recap with key learnings and takeaways to attendees; share links to any resources, downloads or recorded sessions

Share a separate recap with links to video-on-demand recordings to those who did not attend

Conduct a debrief to gather feedback from internal team members — what worked well, and what to improve for the next virtual event

Send thank you emails, including post-event surveys and links to any recordings if applicable, to internal stakeholders, speakers, partners and sponsors

Create a post-event report with a summary of insights outlining performance against objectives, feedback and lessons learned

Prepare a video highlights reel to share via email to participants, or to post on social media or your event website

Update the event website to announce the date for the next event, if known

Update budget with all final invoices and costs

Continue to engage with your audience!



Need a hybrid partner?

Don't go it alone — let us help you build an event maximized for both in-person and virtual audiences.

[CONTACT US](#)