

# Fundamentals of Great Online Conferences

## A Practitioner's Perspective

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## Why Do We Gather?

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Let's acknowledge some of the challenges many conferences "in the real world" have struggled to solve:

- They tend to attract a fraction of their potential audiences.
- They are expensive and time consuming especially when they require overnight travel.
- Keynote speakers and other presenters are notoriously inaccessible to attendees because they do not stay beyond their scheduled presentation and Q & A.
- Panels have been fraught with difficulties: from not including voices from a diversity of people, to simply not delivering an engaging or cohesive experience for attendees.
- Those who attend *might* gain an insight or two, or add new connections to their LinkedIN.

In September 2020, we undertook an online survey of staff working in BC-based museums, heritage and cultural centres. Importantly, what survey respondents value about physical conferences often isn't what many conferences traditionally actually deliver. This spells opportunity for online conferences.

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A project undertaken in partnership with



**Land Acknowledgement:** *As organizations of provincial scope, we recognize that our members, and the local history and heritage they seek to preserve, occupy the lands and territories of B.C.'s Indigenous peoples. We ask our members to reflect on the places where they reside and work, and to respect the diversity of cultures and experiences that form the richness of our provincial fabric.*

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"How important are these activities and events within a face-to-face conference to you?" (Scale from 1 to 5, with top box reported are "mostly" + "completely" important)		
MOST IMPORTANT	MID-FIELD	LEAST IMPORTANT
<ol style="list-style-type: none"> <li>1. Learning from colleagues about their practices and challenges (75%)</li> <li>2. Meeting experts for conversation and exchange of ideas (72%)</li> <li>3. Workshops by experts (71%)</li> <li>4. Time to get to know colleagues (68%)</li> <li>5. Building their professional network (63%)</li> </ol>	<ol style="list-style-type: none"> <li>1. Keynote speakers (53%)</li> <li>2. Facility tours (52%)</li> <li>3. Q and A sessions (48%)</li> <li>4. Panel discussions (47%)</li> <li>5. Social events (45%)</li> </ol>	<ol style="list-style-type: none"> <li>1. Meals with conference attendees (39%)</li> <li>2. Free, unstructured time (31%)</li> <li>3. Awards gala (23%)</li> <li>4. Exhibit area for suppliers (21%)</li> <li>5. Entertainment (20%)</li> <li>6. Fitness, morning yoga (15%)</li> </ol>

*(The survey had an email open rate of 62% resulting in 147 completes—a 33% participation rate—with a margin of error of +/- 7.2%)*

## To Confer: Exchange and Discussion

Before you begin to design an online conference, consider something more basic: **what precisely is the purpose of conferring together?**

Literally, **to confer** means to "exchange opinions", "to have discussions." It does not mean to sit politely and listen to speakers espouse their ideas.

As such, we propose that conference hosts, moderators, workshop facilitators and speakers will be well-served when they deliberately build an environment for meaningful connections and interactions that support open discussions of ideas and exchanges of opinions, in short, an effective learning environment.

### Connection and Belonging

At our core, human beings are social creatures. When we gather, we realize one of our rudimentary needs: the feeling of belonging and connection. Even those of us who tend toward introversion will admit to enjoying the warm, fuzzy feelings associated with genuine human connection.

Fundamentally, regardless of your formal agenda and identified objectives, in hosting a gathering you are fulfilling this basic human need; if participants come away without having gained any sense of connection or belonging, they likely will not feel fully satisfied.

Herein lies the key to designing awesome online experiences: to remember that, first and foremost, you are setting the stage for meaningful human connection, interactions and for learning to take place.

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## Establish Your Goals

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With this understanding, you are ready to define the goals and objectives of your particular gathering. Online conferences and face-to-face gatherings tend to have similar broad goals including:

- to share information and provide an opportunity for discussion and exchange about common issues
- professional development, workshops
- networking and meeting colleagues
- working meetings to develop options and/or make decisions about actions moving forward.

Defining your goals and objectives specifically and the balance of various activities will help determine your content.

Here the planning process for in person and online conferences and gatherings diverges: how can your goals be most effectively achieved in the digital world, mediated through a computer screen, with all the distractions of an office or home office set up, while you design for authentic human-to-human interactions?

## Select the Right Tools

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There are myriad digital tools to help you host online meetings and conferences, tools that are evolving rapidly, continuously being developed and honed for an effective, dynamic digital experience. The trick is to match the content and activities on your agenda with the technology that will be most effective in helping achieve your goals.

First you must decide upon your platform. A complete online conference system (such as [Socio](#) or [HeySummit](#); Socio has integrated Zoom as its video conferencing tool) will provide ample functions and capabilities, but it will be more difficult to use for both the host and likely for the attendees. Video conferencing platforms such as [Zoom](#) (meeting or webinar), [WebEx](#) (online collaboration), [Crowdcast](#) (webinar), may be more familiar to users and event producers can create excellent experiences using these less complex applications. Ultimately, the stage you set for human-to-human interactions to take place will depend more upon your intention and imagination, than your chosen video conferencing.

To that end, a primary consideration in platform and software selection is accessibility, in a very broad sense, for both hosts and attendees. This entails looking at elements such as familiarity with software, ease of software download and installation, bandwidth requirements for video upload, and the ability for the platform to support true participation of attendees, taking into consideration language and other potential barriers.

The more detailed work of matching your activities with the right technology will comprise exploring available functions of the software, such as activity buttons (raising hand, applause, etc.), opportunities for chat, file and screen sharing, polls and quizzes, break-out rooms, recording options and integration of other applications.

In selecting your technology, keep in mind the needs of your participants, doing everything you can to create an environment that fosters human-to-human interaction. However, also give some thought to meeting the needs of other stakeholders, such as sponsors, funders, and your community at large.

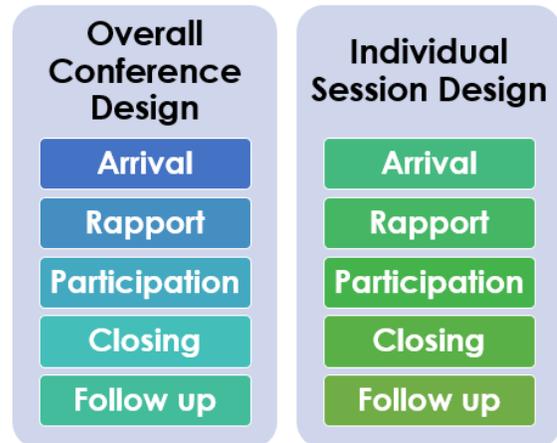
### A Comparison of Platforms

components	ZOOM	SOCIO	Crowdcast	HeySummit	Hopin
<b>OVERVIEW</b>					
Platform Classification	<b>Webinar</b>	<b>eConference</b>	<b>Webinar</b>	<b>eConference</b>	<b>eConference</b>
Anticipated Pricing	\$1,860-4,520	\$3,500-6,500	\$500	\$2,000	UNCLEAR
Entry Pricing	\$530	\$3500+	\$62/mo+	\$116/mo+	\$1,500
Work Across Devices	YES	YES	YES	YES	YES
Video Conferencing	NATIVE	VIA ZOOM	NATIVE	UNCLEAR	NATIVE
<b>PRE-EVENT</b>					
Conference Website	NO	YES	LIMITED:	YES	YES
Built-in Registration	LIMITED	YES	YES	YES	YES
Customized Registration	LIMITED	YES	YES	YES	NO DATA
Event Management	NO	YES	NO	NO	YES
Custom Branding	NO	YES	NO	NO	YES
<b>DURING EVENT</b>					
Allows Multi-Stage or Multi-Session	NO	YES	YES	YES	YES
Waiting Room/ Virtual Green Room	YES	YES	YES	NO	YES
Built In Schedule	NO	YES	LIMITED:	3RD PARTY	UNCLEAR
On-Stage Speakers/Panelists	100	YES	6	UNCLEAR	6
<b>INTERACTIVITY</b>					
Chat	YES	YES	YES	YES	YES
Live Polling	YES	YES	YES	YES	YES
File Sharing	YES	YES	YES	YES	YES
Screen Sharing	YES	YES	YES	YES	YES
Reception/Social Networking	NO	YES	NO	NO	YES
Advanced Networking	LIMITED	YES	LIMITED:	NO	YES
Breakout Rooms	YES	YES	LIMITED:	YES	YES
Whiteboard	YES	YES	3RD PARTY	NO	NO
Support for Meetings	NO	NO	NO	NO	YES
Community Forum	LIMITED	YES	NO	YES	YES
1 to 1 Video Networking	NO	NO	NO	NO	YES
Gamification	NO	YES	NO	NO	NO
<b>BACKEND</b>					
Installed or Cloud-Based	CLOUD	CLOUD	CLOUD	CLOUD	CLOUD
Mobile APP	YES	YES	YES	YES	YES
Digital Sponsorship Benefits	NO	YES	NO	YES	YES
APIs / Integrations	YES	YES	ZAPIER	YES	UNKNOWN
Email & Reminders	YES	YES	YES	YES	YES
Recording Capability	YES	YES	YES	YES	YES
Multistream	YES	YES	YES	NO	NO
Post-Event Recordings	YES	YES	YES	YES	YES
Analytics	YES	YES	YES	YES	YES
Embeddable	LIMITED	NO	YES	NO	NO
<b>INITIAL ASSESSMENTS</b>					
Ease of Use: Producer	****	****	****	***	***
Ease of Use: Attendee	****	****	****	***	***
Platform Stability	****	****	***	****	****
Overall Accessibility	****	****	****	****	***
Mobile Accessibility	****	****	****	***	NO DATA
Overall User Interface	***	****	****	****	***
Human Resources	****	****	****	**	**
Participatory engagement	***	****	****	****	****
Customer Service	***	****	***	****	***

## Online Event Design

The design of the conference overall as well as each individual conference session should take account of basic human needs related to opening the conference/session (arrival and settling in), doing the work by establishing rapport and participation, providing adequate time for closure, feedback and post-event follow up.

Both the online conference overall should reflect this design as well as individual sessions. Coordinating moderators and panelists and ensuring everyone has a common understanding is achieved through a preparatory meeting and well-structured communications.



### Insert the tangible

Introduce the physical into this otherwise digital experience. For instance, send something tangible by mail prior to the event, such as a swag bag, ingredients to prepare a special beverage or meal during a planned networking session, or gift certificates (also an opportunity to support local businesses and/or promote sponsors). Whatever you choose, have fun with it, and your attendees will, too. Most important building anticipation for the online conference or event can be crucial to securing actual attendance and active participation.

## Production is a Team Sport

No matter which platform you choose, be aware that shifting from a physical venue to a digital one does not mean less work organizing necessarily. It does mean different work, new planning considerations and some new roles. In some ways it will be easier; in other ways it will require more preparation and there are different cost drivers involved beyond the platform costs.

A well-run online conference or event will take significant effort and skills on the part of staff and speakers, so make you have enough people for the tasks at hand. Over and above event producer, roles might include MC (or Chair, for introductions, and be the common thread/personality linking sessions), producer (ensuring smooth flow of technical aspects of the agenda), moderator (chat box, break-out sessions, etc.), and technical support for video production, presenters and panelists.

### Quality reigns

Do everything you can to put together a first-rate production (leaving plenty of room for being human as too polished can simply turn into boring). High quality sound and lighting are essential for maintaining audience engagement. Use a good headset microphone, ensure excellent sound, reduce shadows and make sure faces are well-lit, and consider presenters' clothing and background.