



The Event Webcasting Toolkit:
A Pain-Free Guide to Taking
Your Conference Online



sonicfoundry[®]
event services



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You may have pondered taking your event online in the past, but when you are deep in the planning process, the last thing you want to do is create more headaches by introducing new technology or conference partners into the mix. However, webcasting your conference can be easy when you know in advance what questions to ask.

Inside this kit:

- **A brief overview of event webcasting options** that illustrates the advantages and disadvantages of different approaches to help you decide what's right for your event, audience and organization
- **What to look for in a webcast provider**, including questions to ask about their people, process and technology
- **The event webcasting checklist** to ensure you'll avoid any last minute surprises
- **Template presenter release form**
- **Presentation best practices** to help your presenters record their most polished presentation

About Sonic Foundry Event Services

- Sonic Foundry Event Services is a seasoned team of systems engineers and project managers with extensive audio/video production and webcasting experience. The team and its strategic partners provide the technical webcasting services and expertise for organizations to easily and conveniently extend their conferences or events to audiences via the web. Since January 2007, Sonic Foundry Event Services has provided Fortune 500 corporations, universities, associations, sporting events and charitable organizations the ability to strengthen their communications and broaden their reach through live and on-demand webcasting.

A brief overview in event webcasting options

Should you webcast live or on-demand? Or both?

Advantages

Disadvantages

Live

- Bridges distance, allowing people to attend virtually
- Enables interaction between off-site viewers and presenters through moderated Q&A
- Encourages more registrations from people that are not able to travel to the event
- Provides for the creation of overflow rooms for your most popular on-site sessions
- Ideal for a listening session to involve a larger group than the conference room could hold
- Creates opportunity for an additional revenue stream via a virtual conference registration
- Allows critical event sessions and information to be received simultaneously by all on-site and off-site participants

- For effective audience interaction, requires a moderator in the room to review incoming Q&A and read questions to the presenter
- Could detract from on-site attendance, but this is infinitely manageable if you continue to promote networking opportunities as a major attendee benefit
- Requires dedicated high speed (wired) internet connection in all presentation spaces, which can sometimes be unreliable in certain venues

On-demand

- Gives both the on-site and off-site attendees access to all recorded tracks
- Lets on-site attendees see all sessions of interest, particularly if they wanted to attend two concurrent sessions
- Enables interaction after the presentation between all viewers and presenters through the ask function, which can email directly to the presenter if desired
- Creates the option for replay throughout the conference in internet cafes, lounge areas or on the exhibit floor, and sessions can either be scheduled in a theater format or played on-demand individually via kiosks
- Offers a reference tool, letting on-site attendees focus on the session vs. taking notes
- Generates unique content that can be used in the marketing and promotion for future events
- Creates the opportunity for an additional revenue stream from non-attendees

- Slightly delayed access to conference content for off-site attendees
- Does not facilitate live Q&A from off-site attendees

Should you make content available online only? Or available through DVD/CD/USBs after the event?

Advantages

Disadvantages

	Advantages	Disadvantages
DVD/CD/USBs	<ul style="list-style-type: none"> • Provides viewers offline access to content • Continues to generate revenue after the event 	<ul style="list-style-type: none"> • Delayed access to content due to dubbing and distribution • Necessitates purchasing media and labor, plus mailing costs • Requires people to have the DVD/CD/USBs in order to play content for their own review or for team members • Enables duplication by unauthorized parties • Content could be uploaded to other unauthorized websites like YouTube • Does not allow updates to be made to the content should presentations need to be edited or revised at a later date • Eliminates the ability to report on who watched what, when and for how long
Online only	<ul style="list-style-type: none"> • Provides instant access anytime, anywhere • Makes content publicly available or locked down to require password authorization • Supports automatic, post-event revenue generation via e-commerce • Enables conference organizers to report on viewing activity to see which presenters are the most popular (e.g. which sessions are watched most frequently, which sessions attract repeat viewing) and which attendees consumed the most content • Easily permits real-time updates should information change after the event • Content can be repurposed, promoted and shared by adding hyperlinks to the catalog or individual presentations (including key points within presentations) in electronic newsletters, email signatures, links to editorial and other online outlets • Allows upsell/cross-sell for other training and events on the web page where the presentations are hosted 	<ul style="list-style-type: none"> • Password could be shared with others • Viewer must be online to access the content

Should you webcast audio or video along with the graphic material?

Advantages

Disadvantages

Video and audio	<ul style="list-style-type: none"> • Creates a more personal and interactive learning experience because viewers feel like the presenter is addressing them directly • Captures the facial expressions and body language of the presenter • Once recorded, both audio-only and video versions of the presentation (automatically synchronized with graphics) can be made available with different players to accommodate different presenter and viewer preferences 	<ul style="list-style-type: none"> • Some presenters become more uncomfortable on video • Often requires a camera operator in the room throughout the presentation (to track presenters who walk as they talk)
Audio only	<ul style="list-style-type: none"> • Accommodates presenters who may not be comfortable on camera 	<ul style="list-style-type: none"> • Not as engaging as video – greater likelihood of listener “tuning out” • Viewers may not feel as if presenter is talking directly to them

Where should you host the online content?

Advantages

Disadvantages

Your organization hosts	<ul style="list-style-type: none"> • Your organization retains full control of content 	<ul style="list-style-type: none"> • Requires servers, data center, bandwidth and internal IT expertise
Your webcasting partner hosts	<ul style="list-style-type: none"> • Your organization retains full control of content • Allows you to effortlessly kick-start your webcasting initiative • Minimizes challenges associated with IT or network infrastructure issues • Provides a low-risk test drive before bringing event hosting in-house • Eliminates cost of servers, data centers, bandwidth or internal IT resources • Enables large scale webcasting to thousands of concurrent viewers • Generates reports on viewing activity to see who is watching what, when and for how long; detailed data can be provided for the entire catalog and each presentation, or by user • Content is stored in a redundant, secured environment 	<ul style="list-style-type: none"> • May necessitate installing, configuring and maintaining – or contracting for – streaming servers, web servers, content storage and backup, distribution networks • Content may be progressively downloaded vs. streamed • Fees will apply based on the number of concurrent viewers you anticipate and the length of time you would like the content hosted

How do you determine who gets access to what online content?

	Advantages	Disadvantages
Access only for on-site attendees	<ul style="list-style-type: none"> • Ability to promote online on-demand access as an additional perk for conference attendees and to help drive registrations 	<ul style="list-style-type: none"> • Eliminates the opportunity to get the information to non-attendees
Access for both on-site and off-site attendees	<ul style="list-style-type: none"> • Meets the needs of people who cannot travel to the conference • Provides richer review material for people who attended • Helps grow the pool of registrations as people see what the conference sessions have to offer • Creates potential for new revenue streams, to sell live or on-demand access to both on-site and off-site attendees (often the price for virtual registration will be similar to on-site fees to mitigate attendance concerns) • Provides opportunity to sell access to individual presentations or the entire conference catalog 	<ul style="list-style-type: none"> • Could detract from physical attendance in theory, but typically conference attendees are also interested in networking and other on-site interaction • Does not expose new audiences to conference proceedings
Promotional access only to a select group of presentations	<ul style="list-style-type: none"> • Exposes new audiences to the conference experience • Will never detract from the desire to attend the conference on-site, but rather attract interest as people want to see more content 	<ul style="list-style-type: none"> • Does not provide full access to the conference sessions • Limits the use of on-demand presentations as reference material to only a few recordings

When do you publicize that online content is available?

Advantages

Disadvantages

	Advantages	Disadvantages
Before the event	<ul style="list-style-type: none">• Promotes online access as a value-add for conference attendees to help drive both on-site and off-site registrations• For live events, pre-notification is critical to ensure online attendance• Helps off-site attendees feel connected to the conference proceedings• Meets the needs of people who cannot travel to the conference	<ul style="list-style-type: none">• Could potentially detract from on-site attendance
During or after the event	<ul style="list-style-type: none">• Eliminates concerns about impacting on-site attendance• Provides an opportunity to email your community after the event to thank them for participating and draw their attention back to the conference presentations• Reminds authorized users they can reference the material now that they are back at home	<ul style="list-style-type: none">• Removes the ability to market a virtual registration or live event

What to look for in a webcast provider

Samples and references

- What does the recorded content look like?

- Can you read the presentation materials (PowerPoint slides, detailed graphics/images, etc.)? Are the video and/or audio clear?

Webcast providers differ greatly in how the presentation is delivered to the viewer. Some webcast providers will encode the presentation into the video stream while others will have separate windows for the presentation materials and the video of the presenter.

Generally speaking, webcast providers that deliver the presentation materials in an independent window will deliver higher quality images, which is important when the presenter is using small fonts, flow charts, spreadsheets or other detailed imagery.

- Does the playback experience represent the quality, look and feel of your organization?

The webcast player is an extension of your organization's branding and the vehicle for delivering the content. Make sure you can customize the player with your logo, banners and links and the interface is professional in appearance.

- Does the recorded presentation provide your viewers flexible navigation and playback options in an intuitive interface?

Quality webcasts include several options that allow on-demand viewers to easily navigate the presentation and quickly find the content they seek. These can include DVD-style video controls (play, pause, stop, skip back), adjustable video playback speed, thumbnail navigation through presentation slides and chapters.

- Have they done events of your size and scope?

Webcasts can and should be high exposure communication vehicles. Not only does a failed webcast not bode well for your organization, but it does not bode well for the individual who selected the provider. Make sure your vendor has done work that is similar in size and scope to your event, be it a live or on-demand webcast. Ask for references and contacts who can share their webcast experience.

Turn-around time

- If you're archiving your webcast, how long will it take to get your content online?

Presentations often have a short useful life or the value of the content diminishes over time. It is not uncommon that a webcast provider takes more time to return the finished product than the time in which the content has value. Maximize the value and timeliness of your webcasts by selecting a vendor that provides a finished product immediately or soon after the event concludes.

Viewer requirements

- Do viewers need to install software to watch the content?

Webcasts are attractive to online viewers because they are convenient. It is frustrating for your audience if they've allocated time to watch your webcast and instead must download and install software to view the presentation. Pick a webcast platform that makes it easy for your audience.

- What operating system and browser are required?

If your audience contains Macintosh users, make sure your webcast provider can deliver content equally well to these users as to PC users. Similarly, your webcast provider should be able to support viewers using any of the leading browsers – Internet Explorer, Firefox or Safari.

Presenter requirements (level of obtrusion)

- Do your presenters need to interact with the technology?

The last thing your presenters will want to do is significantly alter how they usually present or potentially install additional software on their laptops. From the presenters' standpoint, webcasting their presentations should be as unobtrusive as connecting their laptops and testing their microphones. Also, at many events, there simply is not time between speakers for time-consuming presentation setup and configuration.

Look for a webcast provider that makes the technology transparent to your presenters and allows them to present as they typically do. Your webcast provider should be able to tap into existing audio-visual and video feeds already being sent to the projector to capture the presentation material. This avoids the awkwardness of installing software on presenters' laptops or having them present from a different computer. It also eliminates inconveniencing presenters for their presentations ahead of time and preventing them from making last minute changes.

- Are your presenters limited to PowerPoint?

Be sure you know how your webcast provider handles the situation when the presenter decides to leave the typical PowerPoint slide show and open an Excel spreadsheet or browse to a website. Make sure your webcast provider is not limited to PowerPoint presentations only and can deliver anything and everything the presenter presents as it is being presented – including images shown on other devices such as tablet PCs, e-boards or document cameras if desired.

Production requirements

- What inputs are needed by the encoding/webcast platform?

If your webcast provider is separate from your AV provider, make sure the webcast platform seamlessly integrates with your AV provider's equipment. By coordinating their services early on, you can avoid having your presenters wear two microphones and minimize the amount of cables and AV equipment in the room.

- What are their setup requirements?

An intrusive webcast provider can be distracting to the in-room audience and the presenter. Make sure they are willing to set up and test well in advance of the presentation and that they do not detract from the in-room presentation experience.

Editing capabilities

- Will you need to make changes to the presentation after it is webcasted?
Although editing can delay the delivery of the final recording, it may be necessary to edit the webcast before it is published for archived online delivery. If editing is important, make sure the webcast provider can provide this service and turn the webcast around in a timely fashion.

Security and reporting

- Do you want to require log in for your presentations?
As conference organizers, you will need to decide if you want to make your presentations publicly available or if you prefer to have them secured where viewers will need a log in to watch. The process of securing presentations can take many forms, from integrating with an existing directory of users to customizing e-commerce functionality that authenticates individuals who have purchased access. Once you determine your requirements, you can then gauge your webcast provider's ability to provide this service out of the box or through custom development.
- Will you want to see reports on who is watching your presentations?
Most webcasting companies will provide you with some level of reporting on how many people watched a given presentation. However, you may want to explore this kind of data in further detail to determine what presentations were most popular, who is accessing content when and for how long. Often this data can be provided in a downloadable format like Excel, while more advanced companies also can publish graphical representations which make it easier to share viewing information with a broader review group. Determine the level of viewing statistics desired and ask your webcast provider for samples of available reports.

Flexibility and trust

- Do you trust your webcast provider to interact with your other partners and vendors?
Because there are often many parties involved in producing a webcast – meeting planners, hotel staff, AV, IT, marketing, catering – keeping all parties coordinated can sometimes be the most challenging part of producing an event. Your webcast provider should be accessible and flexible, serving to build positive relationships with your existing partners and vendors. How flexible your webcast provider is may impact whether you hire them for your next webcast.

The event webcasting checklist

Part 1 - before the event

Define your event objectives.

- What's the purpose of recording / webcasting?
- What sessions are going to be recorded / webcasted?
- What are your viewing requirements for your audience?
- How will the content be disseminated?
 - Will you webcast live or on-demand or both?
 - Will you make content available online only? Or via DVD/CD/USBs? Or both?
 - Will you webcast audio only or video along with the graphic material?
 - Who will get access to what online content?
 - When will you publicize that online content is available?
 - Where do you want to host the online content?
 - How long do you want the content to be available?
- What are your requirements for interacting with presenters (level of obtrusion)?

Identify a webcasting partner.

- Ask the partner to identify your webcast project manager who will then:
 - Coordinate audio-visual / IT sources.
 - Determine who is providing the audio, video and projection/presentation materials (VGA).
 - Determine who will operate the camera.

- Specify who will provide internet connectivity (if necessary) and support the internet connection.
- Discuss how technical support questions will be handled from the online audience.

Identify your security requirements.

- Who will have access to the content and when?
- Provide webcast partner with required registration fields.

Finalize your presentation schedule.

- Document all meeting locations and times.
- Identify which presentations will be webcasted live, on-demand or both.
- Schedule time for your webcast provider to be on-site to review room locations, set up equipment and conduct testing.

Communicate with presenters.

- Obtain permission to webcast their presentation
- Share best practices for webcasting a presentation.
- Coordinate Q&A.
 - If webcasting live, identify a moderator and the workflow for handling incoming questions from both the on-site and off-site audiences.
 - If taking questions from on-site audience, determine how the audience will get mic'd (standing microphone, staff circulating with mics or presenters repeating questions).

Provide webcast partner with presentation information and branding.

- Presentation titles.
- Presenter names, titles, organizations, headshots and links to presenter websites.
- Supporting material that should be linked within the webcast player.
- Order presentations should appear in your catalog (by date/time, module, alphabetical).
- Banners for catalog and player.
- Identify where those banners should link (conference website, organization home page, etc.).
- Webcast provider should then provide you with URLs for the presentation catalog and individual presentations.

Determine marketing strategy.

- For either a live or on-demand webcast, how will the audience be notified of the presentation or catalog?
- Will access to presentations be sold before, during or after the event?
- Will DVD/CD/USBs be produced?
- If selling content on-site, create a space to enable sales and provide cards with URLs, USB, DVD or CDs.

Part 2 - during the event

Coordinate set up and testing with your webcasting partner.

- Provide on-site introduction to other event partners (AV, IT, catering).
- If webcasting live, be sure a live stream is tested at least 24 hours in advance.
- Ensure all mics are tested and that camera angles and lighting are appropriate for your presenters, on-site and online audiences.

- Approve the audio, video and graphics quality from a test webcast.

Remind your presenters and audience that you are webcasting.

- Consider on-site signage indicating presentations will be available after the event.
- Announce during key sessions that presentations will be available live, on-demand or both.
- Remind presenters and on-site attendees to repeat questions that were not captured by a microphone.

During the webcast process.

- Ensure your webcasting partner is frequently monitoring the incoming audio, video and image quality throughout the event.
- For live events, identify remote testers to monitor the webcast and provide feedback during the event.
- Will additional space be required for webcasting to an overflow room?

Part 3 - after the event

Prepare responses for commonly asked questions from presenters and attendees.

- Presenters may ask the following types of questions. In all cases, your webcasting partner can make these changes for you under your direction.
 - Can I have a copy of this presentation for my website? (If the presentations are available publicly, your presenters can simply link to them from their own websites.)
 - How can I make changes to my presentation? (e.g. I found an error on my slide. My video needs to be edited.)
 - I don't want my presentation in the catalog.
 - I need to add a link to my presentation material.

- Viewers may ask the following types of questions.
 - I'm having trouble viewing this presentation. (You will need to determine with your webcast provider how technical support questions from viewers will be routed - to a designated staff person or directly to the webcasting provider.)
 - I'm being prompted for a log in and I don't know what it is. (In this case, an unauthorized person may have been given a presentation link. You'll need to decide if you want to require them to register or take other action before viewing.)
 - How can I share this presentation with other people on my team? (You will need to decide if you want to require registration or other activity. If it is publicly available, they can simply forward the link.)

Review archived content.

- Share individual presentation links with the presenters.
- Determine if any edits are necessary to correct information or trim presentations.
- Ensure content plays properly on-demand. Your webcasting partner should also test viewing via different browsers and computer configurations.
- Confirm post-event registrations and e-commerce engines are functioning properly.

Leverage content.

- Create links to the presentation catalog and/or individual presentations from conference or organization website.
- Send post-event email with presentation links.
- Link to presentation content in upcoming newsletters and email messages.
- Create highlight reel from individual presentations to use in marketing the next event.

Review reporting statistics.

- Confirm how to access event reporting statistics and share information on managing your recorded archives with designated staff.
- Assess viewing data immediately after the event and then at pre-determined intervals to gauge trends.

Template presenter release form

Date: _____

Presenter: _____

Program title: _____

Presented at: _____

Recorded by: _____

- The speaker/presenter agrees that this recording may be used for instructional purposes and/or added to the conference or organization website and online presentation catalog.
- The speaker/presenter agrees that no compensation is to be paid for her/his services unless stated in separate agreement
- The speaker/presenter retains the right to preview the recording and to request revision.
- The speaker/presenter authorizes the conference or organization to use, reuse, publish and republish the presentation in whole or in part, individually or in conjunction with other presentation captures, DVD/CD/USBs, digital video or digital still images for instruction, marketing, illustration or promotion.
- The speaker/presenter releases the conference or organization from any and all claims and demands arising out of or in connection with the use of the presentation, including any and all claims for libel, publicity rights or other similar actions.
- The speaker/presenter places the following restrictions on the use of the recording:

Signature of speaker/presenter or legal representative

Date

Presentation best practices

Be thoughtful of your web audience.

- They will be experiencing your presentation via the web live or on-demand.

Wear the appropriate clothing and accessories.

- Wear solid colors, pastel, medium shades or off-white for shirts and blouses.
- Don't wear tight pin stripes, busy patterns or very dark suits.
- Don't wear shiny, loud or distracting jewelry or scarves.

Position yourself so that you'll be captured by the camera.

- Remaining stationary behind the podium/table is encouraged.
- Walking around is fine as long as you are walking on stage where the camera can capture you.
- Avoid excessive movement like swaying. One technique is to point one foot forward and put your weight on that foot, leaning toward the microphone.
- Don't second-guess the camera. Act as if you are always on screen.

Speak clearly into the microphone.

- Make sure your language is decipherable.
- Before the presentation, technicians will ask you to speak into the microphone so they can set audio levels. On this audio check, make sure you are speaking at your usual voice level.

Lapel microphone tips.

- Place it on your lapel, outside of clothing and away from jewelry.

- Try to keep it directly under your mouth and not too far to the left or to the right.
- Do not fumble with your microphone when it is on.
- Make sure your phone or PDA is completely turned off as it will interfere with the sound system.
- Make sure to turn your microphone on before the start of the presentation and off at the end.

Repeat questions asked by audience during Q&A.

- The web audience then knows exactly which question you are answering. (This is for presentations where the audience does not have a microphone, therefore the questions they ask aren't being captured within the webcast.)
- Take your time and start again if your answer gets jumbled or confused. Don't hesitate to simply say, "I'd like to try that again."

Keep in mind the source on the screen is the source being captured by the webcasting technology.

- Please inform the conference organizer what you plan to present.
 - PowerPoint, software demo, media, other devices (document camera, etc).
 - You do not need to provide your PowerPoint slides or other media in advance. The webcasting platform will automatically capture any digital presentation material while you present.
- If using a laptop, for best results set your screen resolution to 1024 x 768.