



Virtual Events Best Practice Guide

Virtual Events Best Practice Guide

Virtual events and webcasts enable quick and effective communication with shareholders while providing the opportunity to reach potential investors who may not have been previously accessible. However, engaging an audience in a virtual environment and delivering a successful event is different from in-person.

To help take your in-person events online and create an engaging virtual experience, we developed this guide to share our best practices.

Location and Technical Requirements

One of the biggest obstacles when taking your event online is replicating the same engaging experience that your investors would have in-person. The first step in achieving that means securing the right environment and technology.

Location

Consider where you're going to host your virtual event. There are a multitude of factors that can negatively impact the quality of your audio and in turn, the quality of your event. A few of these factors include: room size, proximity to potential noise such as traffic, loud hallways and windows, even whether the room is concrete or glass. All of these factor into the acoustics of your virtual event. It's important to remember that when investors are unable to understand your message on the call, they may tune out or even drop off.



Technical Requirements

Regardless of whether you're hosting in-house or externally, it's essential that there is available bandwidth and a stable internet connection. You can either hard-wire into your internet, or to ensure that wireless usage in a space is restricted. Finding [a provider](#) to host your event externally can alleviate the bulk of hosting a virtual event. For example, your provider can ask questions about the space and technology requirements that you hadn't considered, ultimately saving you time and most importantly, a stressful call. When preparing for your event, schedule a stream test with your provider, this will give you time to adjust or switch the location if necessary. If you're hosting your event in-house, it's encouraged to leverage a knowledgeable AV team that is able to make sure your event is staged, properly connected and ready to go.

Daniel Welch, Director of Corporate Finance at Sonos, describes the process of hosting his first earnings call with Q4 as "simple and clear." He worked closely with his Client Success Lead, both for the call itself, as well as to update and sync their website for the big event. According to him, "the Q4 team expertly helped us navigate our first Earnings call with ease."

Key Takeaways

Ensure your environment provides the right acoustics, away from excess sound.

Check that there is available bandwidth and a stable internet connection.

Schedule a stream test ahead of time with your provider.

Communications

Pre-Event

Prior to your event, you want to ensure that you communicate your event details to investors in a timely and effective manner. According to ON24, 31% of people surveyed say they promote their virtual events 1-7 days in advance. This shorter promotional period makes the most sense regarding social media, where all news needs to be current. With longer promotional cycles starting 15 days out, it allows for multiple email touch points to encourage registration. During this longer cycle, also make sure that your event is prominently featured on your IR website.

Key Takeaways

Start promoting your event 15 days in advance via email.
Start promoting your event 7 days in advance via social.
Showcase your event on your IR website.

Setting Expectations

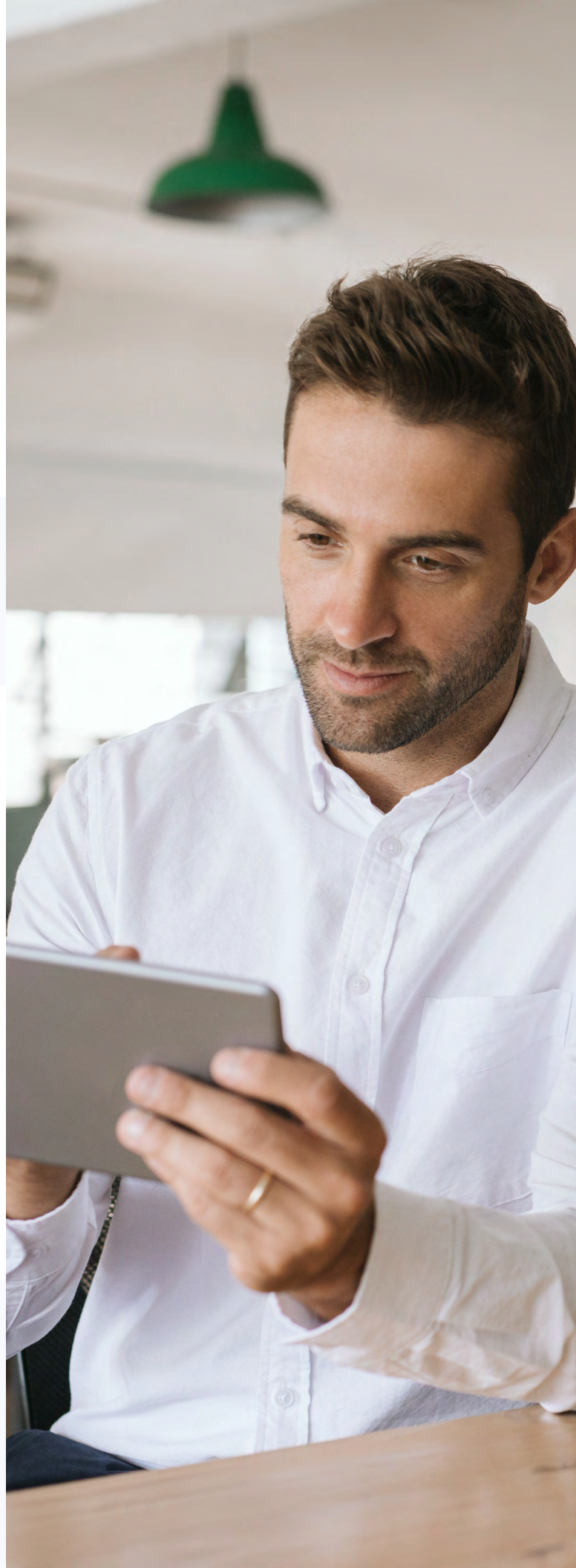
In the time leading up to your virtual event, prepare not only for what is going to be presented, but also how you're going to prepare investors and set expectations. It's important that you spend just as much time preparing for your virtual event as you would for an in-person event. Additionally, asking investors ahead of time what they're interested in learning can go a long way in hosting a successful event.

Pre-Event Materials

Pre-event materials can refer to any assets that relate to the message you're going to deliver. Add any supporting material for participants to digest at their leisure prior to the virtual event. This includes speakers bios, presentations, press releases, URLs and video clips.

Key Takeaways

Consult investors regarding what they'd like to learn from your virtual event.
Provide materials before the event to prime attendees.
Preparing for your virtual event as you would for one in-person.



Creating a Presentation for a Virtual Audience

Messaging and Presentation

You're hosting this virtual event to deliver important updates and need to be as clear and concise with that message as possible. You should be direct and to-the-point on what you want to achieve with your messaging and what you need to communicate. That means keeping it simple and sticking to your main message, don't get sidetracked with tangents and excess information. To help distill that message, consider involving leadership from other departments to help align your message.

Victoria Wicks, Event Manager at Q4 adds, "Webcasts that utilize the speaker's webcam allows for a more engaging experience vs. audio-only. Participants are able to interact through the Q&A widget, with questions going directly to the speakers, and those dialed into the conference call can ask questions over the phone."

Creating Engaging Slides

As mentioned, you want to ensure that your virtual event is just as engaging as an in-person event. One aspect that can help hold your audience's attention is incorporating different types of media into your webcast such as extra videos, user-controlled or presenter controlled slides, and even video that is streamed from other live events. It's also key to remember that your slides should all be the same template, color, font size and so on. Having a visually appealing, cohesive presentation goes further than you'd think.

Key Takeaways

Keep your message clear, concise, and to-the-point.

Align message with feedback from cross-department leadership.

Incorporate different media to keep slides engaging and ensure formatting is consistent.



Preparing Presenters

Align Beforehand

Even before your test stream, you want to ensure that your participants are well prepared not only to deliver the presentation, but all possible scenarios — good or bad. Walk through these scenarios with those presenting, assess their answers, and make suggestions as to how they can tweak tone or messaging based on shareholder sentiment.

Train for Virtual Presentation

For those that haven't presented at a virtual event before, adapting to the platform can potentially be a bit awkward. In helping your presenters feel confident, provide them with a list that focuses on what you've told investors during that quarter so they can remain consistent. When you review the list, you'll be able to work in their comments and tweak messaging more quickly once final numbers have come in. Additionally, if you see early on in preparation that your participants are struggling with a difficult message, you may want to consider pre-recording your call. By pre-recording you're able to shift your preparation focus on the Q&A period with investors instead.

Key Takeaways

Prepare for all potential scenarios - good and bad.

Provide a list of what you've told investors that quarter.

Consider pre-recording if there's a struggle delivering the message.

Engaging your audience

Even with engaging slides, it's important to capture and keep your audience's attention for the duration of your virtual event. There are a number of ways that you can integrate this into the online experience.

Tools and Platform

Some ways that you can make sure your audience is interested and attentive include user polls or surveys. These are easy to implement and can give you instant insight into how your call is faring. Not only do these tools keep your audience engaged, they can help you shape future calls by giving you a better understanding of what's important to participants, speaker performance and overall audience engagement.

Q&A

Inject some activity into your virtual event by implementing live questions and answers functionality. A Q&A feature allows users to directly ask questions and interact with the presenter providing a two-way conversation. Investors have expressed concern about the accessibility of the executive team during an online event. Which isn't the case; in fact, 82% of ON24 survey respondents choose this tool to engage with attendees. Social media sits in second place at 35%; consider creating an event hashtag that people can follow and ask questions via Twitter.

Using Social Channels

Social media is a powerful tool for sharing your company's achievements, financial information, and showcasing your management's vision — not to mention, increasing traffic to your investor relations website and earnings calls. In terms of what social channels to focus on, we suggest Twitter. According to [Brunswick's 2019 Digital Investor Survey](#), 98% of investors report using digital sources to conduct research, and a whopping 88% are actually making decisions based on information they have learned online.

You can leverage Twitter by tweeting about your upcoming event, reminding closer to the date, sharing excerpts from press releases, live-tweeting conference calls, and inviting investors to submit questions. As a best practice, keep your tweets short and succinct, making references to the key metrics (such as operational and financial highlights) and linking back to official disclosures when appropriate.

“Social media platforms such as Twitter and LinkedIn can and should be utilized to augment the reach of your message. At a minimum, your team should be posting event dates, links to earnings press releases, investor day information and registration links to garner participation by stakeholders.”

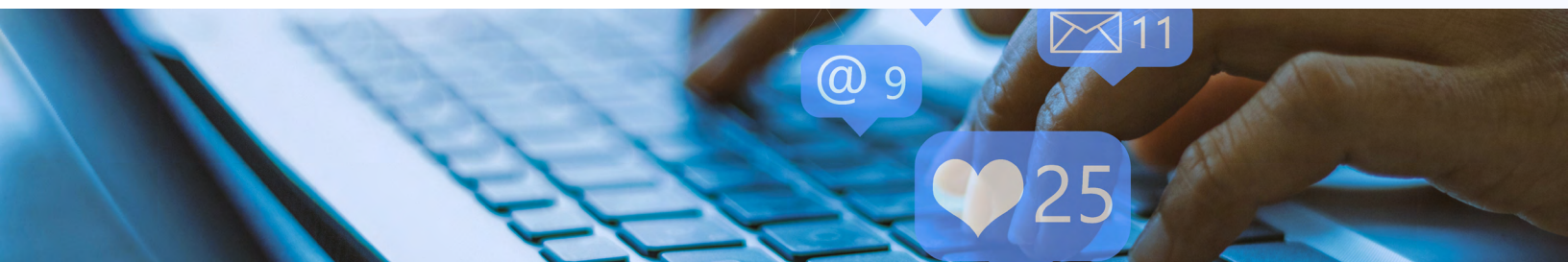
Matt Van Tassel
Manager, Global Disclosure
Services at Business Wire

Key Takeaways

Increase attendee engagement by including polls and surveys.

Integrate Q&A to create a dialog and receive important insight.

Leverage Twitter for timely, succinct updates.



Post-event Follow-up

Once your event is over there's still more to be done in order to maximize your virtual event's impact.

Providing Recording

Ensure that you email and distribute the recorded version of your virtual event so that those who could not attend may view, as well as for those that want to re-watch. A recorded version enables attendees to share your message with their peers and allows investors to watch at their own pace. Ultimately meaning that they can absorb your message in their own time or pick up on information they missed during the live event.



Transcribing Q&A

Transcribing your Q&A portion is beneficial if there are any questions submitted but were not answered during the call, they can be answered and shared after (ideally in the same place as the recording of your virtual event). And to maintain compliance with Reg-FD, the question and answer document would include any of the information used by the attendee at the time they registered, along with the question they've asked and response from the company's representative.

Having a transcript available enables attendees to read the event verbatim and perhaps even highlight key interests.

Share Relevant Content or Direct to Investor Relations Website

Recorded content lives on your IR website as a lens into your company for investors to consume quickly. You are provided the opportunity to tell your story to someone who you may not have the opportunity to connect with in person. Ensure that you're sharing all of the hard work that came of your virtual event on your IR website.

Additionally, there are technology products such as **Desktop** that can even load events attendees into the tool allowing you to make the connection between attendance and future investor behavior.

Key Takeaways

Send out a recording of your virtual event to all attendees or those that could not attend.

Transcribe your Q&A for accessibility and easy access.

Update your IR website with the recording and materials from your virtual event.

Ultimately, hosting a successful event is all about thinking creatively, being organized and involving the right people. All these elements will make attendees feel it was worthwhile attending your event. It also ensures they leave your event feeling as though they gathered pertinent information and insight, met management and were introduced to a wider set of internal stakeholders. By leveraging these best practices, your events will lead your business forward with key thought leadership and well attended future events.

With over 2,100 virtual events hosted in 2019 and a 99% success rate, our clients have entrusted Q4 to transform their IR workflow, changing how they communicate, engage, and gain insights into their strategy. They partner with Q4 because of our commitment to building a custom solution that maps to their unique market opportunity.

To Learn more about hosting stress-free virtual events, learn more about Q4 and get in touch, [click here](#).

Q4

Q4 is a leading global provider of cloud-based investor relations, with the mission of partnering with customers to achieve their strategic IR objectives. With best-in-class customer experience and an innovative suite of IR technology, Q4 is a trusted partner to over 1,200 of the world's largest brands. With our comprehensive portfolio of IR communications and intelligence solutions, supported by an industry-leading customer experience model, we empower our customers to build impactful and strategic IR programs. Q4 has offices in New York, Toronto, Copenhagen, and London. To learn more, visit: www.q4inc.com.

sales@q4inc.com [@q4tweets](#) [Q4 Inc.](#)

