

Northwestern | Kellogg

**Virtual Events  
Best Practices Guide  
for Alumni Leaders**

June 2021

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## Recommendations for Delivering High Quality Virtual Events

- Review this document
- Align with club leaders of your alumni club or affinity network on goals for your virtual event
- Complete the [Events Form](#) as far in advance as possible and request any event support as needed (see these [Step-by-Step Instructions](#))
- Conduct a pre-event walkthrough with speakers and hosts as needed

## Virtual Event Considerations

- Can your event goals be met in a virtual setting?
- Is there another virtual event hosted by Kellogg or another alumni club that meets your goals?
  - If so, consider sharing that event with your club members and hosting a separate discussion session following the event
- Are your speakers comfortable in a virtual setting?
- Can networking at your event be achieved in a virtual setting?
  - Consider dedicated networking time with Breakout Rooms
- If you utilize Q&A, how will it be managed and by whom?
  - Online Q&A via chat
  - Audio/video Q&A via allowing participants to unmute themselves
- What is the appropriate length for the event in a virtual setting?
  - In most cases, we recommend no longer than one hour
  - Consider a 50 - 55 minute event so that participants have time to get to their next meeting
- Will you record the event?
  - Request permission from event speakers to record (see [Appendix C](#) for Sample Recording Release Statement)

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- Consider where you will store the recording and how will it be used
- How will you track event registration and attendance?
- By what metrics would you consider a virtual event a success?

## Zoom Digital Platform

Kellogg recommends hosting virtual events on the Zoom digital platform

- **Getting Started with Zoom**
  - There are two types of Zoom accounts
    - **Zoom Meetings** - Designed to be a collaborative event with all participants being able to screen share, turn on their video and audio, and see who else is in attendance
    - **Zoom Webinars** - Designed so that the host and panelists can share their video, audio and screen. Webinars allow view-only attendees. They have the ability to interact via Q&A, chat, and answering polling questions
    - For more info: [Meeting and Webinar Comparison](#)
  - For more info: [Quick Start Guide for New Users](#)
  - **Northwestern Zoom accounts** can accommodate up to 300 participants, and are accessible for alumni club events along with a Virtual Course Moderator (VCM) provided by Kellogg
    - VCMs are expert Zoom hosts and experienced in using Chat, Breakout Rooms, and other Zoom features (see [Appendix B](#))
    - A Northwestern Zoom meeting link and VCM can be requested through the [Alumni Club and Affinity Network Events Form](#). Requests are subject to VCM availability, and must be made at least one month in advance of an alumni club event

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- **Zoom Bombing / Event Security**
  - Zoom Bombers are people who disrupt an online event
  - Do not put the meeting link on a public website. Share it only with participants
  - Require a [Passcode](#) for the meeting
  - Use [Waiting Room](#) functionality
  - Prevent participants from [Screen Sharing](#)
  - For more info: [In-Meeting Security Options](#) and [How to Keep Uninvited Guests Out of Your Zoom Event](#)
- **Zoom Virtual Backgrounds**
  - [Kellogg branded Zoom backgrounds](#) are available to bring a Kellogg look and feel to your virtual events
  - If you will be moving significantly during your meeting or if you have the above issues, forgo the virtual background and use a real setting in your workspace that is professional or choose a simple backdrop
  - For more info: [Virtual Backgrounds](#)

## Zoom Tips and Best Practices

- **Audio** - The microphone icon allows you to mute/unmute your audio. Unless you are actively speaking, mute your microphone to avoid disrupting the session
- **Mute participants** - Mute/unmute individual participants or all participants at once. This allows you to block unwanted, distracting, or inappropriate noise. To mute everyone, click **Manage Participants** and select **Mute All**. You can also enable **Mute Upon Entry** in your settings to keep noise at a minimum during large classes or meetings.
- **Video** - The video camera icon stops/starts your video. This does not

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stop sharing your content (e.g. PowerPoint slides).

- [Share Screen](#) - Use this to share your PowerPoint or other content
- [Chat](#) - The in-meeting chat allows you to send chat messages to other users within a meeting. You can send a private message to an individual user or you can send a message to an entire group. As the host, you can choose who the participants can chat with or to disable chat entirely.
- [Waiting Room](#) - The Waiting Room feature allows the host to control when a participant joins the meeting. As the meeting host, you can admit attendees one by one or hold all attendees in the waiting room and admit them all at once.
- [Breakout Rooms](#) - Breakout rooms allow you to split your Zoom meeting in up to 50 separate sessions. The meeting host can choose to split the participants of the meeting into these separate sessions automatically or manually, and can switch between sessions at any time.
- [Zoom Meeting & Webinar Best Practices and Resources](#)
- [Running Engaging Online Events](#)

## Zoom Training

- [Zoom Video Tutorials](#)
- [Live Training Webinars](#)

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## Presenter Tips

- **Preparing as a Presenter**

- Be familiar with your content and the event format
- Do test runs for length and delivery
- Be familiar with the digital platform ahead of time
- Conduct a prep call / trial-run on the digital platform as needed. Make sure you're in the location you plan to take the meeting. Check for any connectivity issues or potential location disturbances
- Clearly communicate with attendees and speakers in advance to set the virtual event norms and expectations (e.g. attendees muted until Q&A, level of audience participation, timeline of event, etc.)

- **Technical Considerations**

- Test your meeting connections in advance, especially when using equipment or locations not regularly used
- Have hosts, moderators and speakers arrive at least 15 minutes prior to event start time
- Create a backup plan in case you have trouble connecting
  - Assign an Alternate Host or Co-Hosts on Zoom
  - Include a dial-in option
- Disconnect as many devices as possible from your Wi-Fi to minimize disruption to your signal
- If available, use a grounded internet or Ethernet connection

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- **Sound and Lighting**

- Find a quiet area with little echo
- Choose a setting such as a desk, home office or a plain wall
- Limit personal items in the background
- Ensure there is no political messaging within the frame of vision
- Avoid distractions. No moving objects, pets, people, or personal items that may cause viewers to lose focus
- Position yourself in the center of your video frame and have your computer at or near eye level.
- Situate yourself in a well-lit area
- Avoid backlighting, which will cause you to appear as a silhouette

- **Other Presenter Tips**

- Wear headphones when possible to offset any background noise
- Mute yourself when you are not talking
- Refrain from typing or other distracting behaviors
- If screen sharing, clear out your browser and bookmarks of anything that may be distracting
- Think of ideas that will introduce or close your event on a personal level, such as an ice breaker or a social activity
- Consider adding gamification, use of graphics and music and interactive breakout groups

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Other Kellogg Support - Request via the [Events Form](#)

- **Faculty Speaker Requests**
  - If you're interested in having a faculty speaker present at a virtual event, submit your request for a faculty speaker and Alumni Relations would be happy to help you secure a faculty speaker or recommend a speaker based on your event goals
  - A request for a faculty speaker is subject to faculty availability, and should be made as far in advance as possible in order to accommodate faculty schedules
  
- **Cvent Registration Page**
  - Streamline the event management process and request Cvent to have a professional looking Kellogg-branded registration page created for you by Kellogg staff
    - Once the registration page is live, you will be granted access to view registrations through the Cvent portal
  - If you choose not to use Cvent, make sure to share the list of attendees with the Alumni Relations team following your event
  - A request for Cvent must be made at least 10 days in advance of registration start date. Changes or updates to the request will take additional time
  
- **Event Promotion**
  - Have your event shared on the [Alumni Events webpage](#) and monthly newsletter to all club leaders
  - Request [access and training for iModules/Encompass](#) through "Our Northwestern" to send out club communications and promote your events

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## Appendices

**Appendix A:** Zoom Readiness Checklist

**Appendix B:** Zoom VCM Capabilities

**Appendix C:** Sample Recording Release Statement

**Appendix D:** Summary of Resources

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## Appendix A: Zoom Readiness Checklist

### At Least One Month Before (or more)

- ✓ Confirm your event type, details and speakers/presenters (if applicable)
- ✓ Confirm the date, time, title and description of your Zoom meeting
- ✓ Schedule the meeting via Zoom website or app
  - Determine if your meeting will require attendees to register
  - Given security and privacy issues around “zoom bombing” it is recommended that you schedule registration with a password and share login details and password in confirmation emails
- ✓ Submit the [Events Form](#) to request a Cvent registration page and any other event support, as far in advance as possible
  - If not using Cvent, create an event in Eventbrite with relevant event information and make sure to share the list of attendees with Alumni Relations following the event
- ✓ Assign meeting roles: host, co-host, panelists, and attendees

### One Week Before

- ✓ Hold a live Zoom test session as a participant and a host, as needed
- ✓ [Test the video capabilities of your device](#)
- ✓ [Practice promoting/demoting hosts](#)
- ✓ Practice [managing participants](#):
  - Mute/unmute
    - [Mute on join / Mute all](#)
    - Host Tip: Mute audio during the session, unless you are speaking to the group
  - [Screen sharing](#)
  - [Chat window](#)
  - [Hand raising, thumbs up, thumbs down, etc. \(non-verbal cues\)](#)
- ✓ Practice Whiteboarding (under screen sharing)
- ✓ Practice [Breakout rooms](#)
- ✓ Practice [Polling](#)

### One Day Before

- ✓ Send confirmation email to attendees.
- ✓ Host/Presenter Tip: Plan to set up camera, computer or laptop in a well-lit area of your space (avoid placing the source of light behind you)

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## **15 – 30 Minutes Before**

- ✓ Start meeting
- ✓ Greet speakers/panelists and review everyone's roles
- ✓ As speakers/panelists join, confirm their audio and video are working
- ✓ Set-up and manage any tools you plan to use such as chat, participant mute, polls, etc.
- ✓ Disable any features for your audience that you don't want to use (i.e., chat or raise hand features). The controls appear at the bottom of the panelists tab in the participants' panel
- ✓ Host/Moderator: Welcome attendees and let them know you'll be getting started soon

## **Meeting Start**

- ✓ Start recording (unless you have enabled automatic recording) if applicable
- ✓ Unmute yourself and start meeting
- ✓ Begin any presentations, housekeeping, and confirm presenters are ready
- ✓ Monitor chat for questions or technical concerns
- ✓ Host to give closing remarks with any potential follow up

## **Post-Meeting**

- ✓ Download the video, if recorded
- ✓ Send "thank you for attending" email to attendees following the event
- ✓ Send registration list to Kellogg Alumni Relations staff liaison or directly to [alumni-clubs@kellogg.northwestern.edu](mailto:alumni-clubs@kellogg.northwestern.edu)

## **Additional Support**

Visit Zoom's online [Help Center](#)

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## Appendix B: Zoom VCM Capabilities

### Summary of Virtual Course Moderators and Zoom Support

By requesting Zoom support through the [Alumni Club and Affinity Network Events Form](#), club leaders can gain access to a Virtual Course Moderator (VCM) to help manage the back-end of an upcoming virtual event.

- VCMs are contractors, trained and paid hourly by Kellogg to manage Zoom sessions for remote classes and special events
- VCMs are experts in:
  - **Screen sharing** (presenting a slide show you have during a virtual event)
  - **Breakout Rooms** (for small group discussions or networking)
  - **Enabling/disabling chat and reactions** (hand-raising, thumbs up, etc.)
  - **Waiting Room** (ensuring that only registered participants can enter your Zoom event)
  - **Polling** (if you have survey questions you'd like to ask your participants during the event)
- VCMs also come with their own Northwestern Zoom account, and can accommodate up to 300 participants
  - Your VCM can provide you with the Zoom link for your upcoming event through their account

\* Please note that requests for Zoom support are subject to VCM availability, and must be made at least one month in advance of an alumni club event through the provided form

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## **Appendix C: Sample Recording Release Statement**

Add to event registration page for attendees and send to speakers to approve:

By participating in this Kellogg Alumni Club of XYZ event, you acknowledge and agree to grant the Kellogg Alumni Club of XYZ the right to record, film, photograph, or capture your likeness in any media now available or hereafter developed and to distribute, broadcast, use, or otherwise globally to disseminate, in perpetuity, such media without any further approval from you or any payment to you.

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## Appendix D: Summary of Resources

[Zoom Meeting & Webinar Best Practices and Resources](#)

[Running Engaging Online Events](#)

[The \(New\) Art of Virtual Collaboration](#)

In this recorded webinar, Kellogg Professor Leigh Thompson shared actionable insights on how to be successful when leading virtual meetings

[Step-by-Step Instructions to the Events Form and Support Requests](#)

(including Northwestern Zoom and VCM support, and Cvent registration)