

Case Studies from Real World Events

Actual events are a great source of learning for how to make future events a success. Following is a snapshot for some of the events we've conducted, including success strategies for each.

A standard format is used to present key information for each case study. Each includes real "success strategies" that we used for the "cases" discussed plus lessons learned from our experience. "We" refers to Marcia Elder and CPI Consulting for our own events and those we've produced for clients.

In most cases, the event name shown is generalized or approximate. The topics of the events are not the focus for purposes of these examples. Rather, the strategies, roles and other information provide the educational value for case study purposes.

Also included for each example are the main technology used, whether or not event access was free or fee-based, whether sponsors were involved, the roles we played, the event format and length, and other information of interest.

Note: While our many years of experience have made us pros in online events, we hold the belief that there's always more to learn and ways to make the next event or project even better as a result of that learning process. We welcome you to learn from our experience.

Event #1

Event Type: Multi-Speaker Tele-Seminar Series

This event was our first ... and we nailed it! As a tele-seminar, it did not air live online but the recorded replays were available for online listening. It's included here as an example of what can be done for online events as well.

Highlights

Event Name: Community Growth & Development Series

- Six week series
- Featured faculty of 45 experts
- Format: moderated panels
- Length: most 90 minutes each
- Dignitary address by Secretary of State
- Interactive with audience
- On-demand replays via Web plus CDs
- Subject: Community quality of life, community planning & development, the environment, housing, other topics
- Held live in 2005

Sponsor: Statewide nonprofit organization

Manager: CPI Consulting

Event Host: Marcia Elder (CPI Consulting)

Technology: Teleseminar bridge line; recording software

Fee/Free: A registration fee was charged, \$125 for the series

Attendance: Strong

Result: Popular and very well-received. Participants wanted more so a ten week follow-on series was organized and held, also popular.

Our Roles: Developed concept. All event planning, organizing and management. Identification of topics for agenda. Identification of all potential speakers. Selection of speakers, speaker recruitment and arrangements. Same with resource experts (technical panels). Website creation. Creation of online registration and payment options. Customer service. All marketing and promotions. Technology services. Conducting live events. Event moderating. Product creation and fulfillment. Other related duties.

Success Strategies

- 1. Creative Origination:** Marcia was aware that major legislation had just been passed by the State Legislature and knew that it was complex, controversial and far-reaching in impact.
- 2. Niche Targeting:** By the nature of the legislation, specific target audiences were identified and promoted to statewide.
- 3. Urgency of Topic:** The change in law meant that hundreds of local governments would have to change their policies and operations as would state agencies and other public bodies. Many professions, trades and other stakeholder groups would also soon be affected.
- 4. Key Speakers:** Marcia targeted a wide assortment of experts from diverse fields and organizations related to the legislation, and included high level individuals who would be a draw for participants, some of whom most would never otherwise have the opportunity to hear or convene with.

- 5. Resource Panelists:** While 45 speakers were a lot, the breadth of the legislation was such that there were still other experts and specialists with a valuable role to play, and whose presence on the agenda would create a further draw for promotional purposes. Marcia invited teams of panelists for some of the sessions, with time reserved for them to offer perspectives and raise additional points based on the content covered.
- 6. Diversity in Format:** Including resource panelists and allowing them to contribute at various points in the programs added variety and interest.
- 7. Interactive:** All sessions included an active Q&A process, further keeping the audience engaged.
- 8. On-Demand Replays:** The sessions were recorded and made available to additional registrants after the live events.
- 9. Physical Product:** In addition to the online recordings, interested parties had the option of ordering CDs of the events, individually or as a set.
- 10. Online Orders:** Registrations and other orders could be done online (which, at the time and especially with the target audience, was not common so it added a welcome convenience).

Key Points/Lessons Learned

Most important: when highly motivated and organized, a successful, large multi-speaker event can be planned, launched and

undertaken with limited time and staff. From the time Marcia thought of the concept for this event, she (as project manager) had one month to pull it all together and launch the series.

Unlike with most Web events the questions were taken aloud from participants. The Moderator “stepped up” even further with her skills in order to ensure a professional event and one that would result in quality replays.

Event #2

Event Type: Webcast

Highlights

Event Name: State Policy Forum

This event was part of a multi-part contract involving a range of technology solutions recommended by CPI.

- Featured Secretary (head) of a major State agency
- Format: brief opening remarks then non-stop Q&A
- Length: 2 hours
- Highly interactive with audience
- On-demand replay
- Website created by CPI for this & other replays
- Subject: Transportation policy
- Held live in 2009

Sponsor: State government agency

Manager: CPI Consulting

Event Moderator: Marcia Elder (CPI Consulting)

Technology: Webcast

Fee/Free: Free and promoted statewide to agency constituents

Attendance: Very strong

Result: Highly popular and very well-received. Estimated 1,200 live participants, with still others attending the replay.

Our Roles: Develop concept. Event planning, organizing and management, in coordination with agency senior staff. Website creation. Creation of online registration. Assistance with marketing and promotions, including development of promotional materials, database development and direct outreach. Technology services. Preparation of presentation materials. Conducting live event. Event moderating. On-demand replay. "Customer" support, responding to inquiries for agency staff. Other related duties.

Success Strategies

- 1. Creative Origination:** Interviewed agency officials on current priorities and needs. Recommended Webcast, and its speaker and format, as a way to meet a pressing need.
- 2. Urgency of Topic:** In this case, too, controversial legislation had been enacted, with strong statewide implications. Many were anxious to know its meaning and how the lead state agency would be interpreting and implementing it.
- 3. Key Speaker:** The agency Secretary was not only an experienced administrator but an attorney and subject matter expert as well.

- 4. Unusual Format:** Almost two hours of Q&A was not a “usual” event format ... but it worked exceptionally well, and there were many more questions than could even be addressed.
- 5. Interactive:** The event was highly interactive, as the fundamental purpose of the format.
- 6. On-Demand Replay:** The sessions were recorded and made available to additional registrants after the live events. Just as the live event was extremely popular, many also attended through the replays.
- 7. Website:** Creating a project Website for the various support services provided by CPI (the replays, online registration, online surveys and others) was an asset for the agency and its constituents.

Key Points/Lessons Learned

The “market” drove the agenda. By the program format (non-stop interactive), we were able to laser in on the topics, concerns and questions of participants.

Marcia offered to conduct the event at the agency in a conference room where senior staff could choose the questions that she, as Moderator, would present to the Secretary – given the fact of a live event, his role as a major State official, the sensitive nature of the subject and the fact that members of the statewide media would be attending. He was familiar with her capabilities and declined, telling her that he trusted her judgment in selecting the questions based on her own knowledge in the field and general guidance on his part.

A flood of questions came in and kept building throughout the event. Many used acronyms. Many included duplicative parts or themes. Marcia had to prioritize the questions (as the list kept growing), consolidate the intent of questions where there was duplication (folding multiple questions into one) and with her familiarity with the terminology, spell out acronyms for those not familiar.

The agency experienced a technical issue and lost Internet connection for about 5 minutes during the event. Marcia took over and kept it going, covering material that she knew would be approved by and valuable for the agency.

Rather than experience delays in getting multiple event replays and other information posted as soon as ready, or to ask that CPI (as a consultant) be granted access to the agency Website (in a Webmaster role), Marcia recommended that CPI create a new Website for this purpose and link it to the agency site using a similar sounding domain. The site was developed so that it appeared to be part of their site and we were able to act immediately on its content.

Event #3

Event Type: Webinar Series & Virtual Conference

These events were part of an even larger project employing varied virtual services

Highlights

Event Name: Smart Planning & Alternative Energy

- 11 month multi-part initiative

- Included 11 Webinars, a Simulcast & Virtual Conference & Expo
- Featured faculty of 85 national and state experts
- Format: Varied by event. Most Webinars included 3-4 speakers. Conference had 35 speakers
- Length: Most Webinars 2 hours. Conference ran 2 1/2 days
- Interactive with audience and questions could be submitted in advance as well as live
- On-demand replays produced and of ongoing value
- Subject: Planning, energy resources, sustainability
- Held live in 2011 - 12

Sponsor: Statewide nonprofit organization with an invited co-sponsor

Manager: Marcia Elder

Event Host: Marcia Elder (CPI Consulting)

Technology: Webinar, Webcast, Simulcast

Fee/Free: No charge for participants. Funded by grant.

Attendance: Very strong

Result: Popular and very well-received. Thousands attended live and many attended the replays and still are

Our Roles: Developed concept. Event planning, organizing and management. Identification of topics for agenda. Identification of potential speakers. Selection of speakers, speaker recruitment and

arrangements. Pre-event prep sessions with speakers. Website creation. Creation of online registration and payment options. Customer service. Marketing and promotions. Media relations. Social media accounts set-up and promotions. Technology services. Preparation of presentation materials. Conducting live events. Event moderating. Audio/video production. Evaluations and analysis. Handled extensive reporting requirements of funder. Other related duties.

Success Strategies

- 1. Creative Origination:** Marcia found the grant opportunity for the nonprofit client, developed the proposal and developed the event and technology services concepts and plans.
- 2. Niche Targeting:** Identified and strategically engaged a very diverse range of interest groups affected by the topics.
- 3. Annual Program:** Holding monthly events enabled attracting a regular following of participants, as well as those attending by topical interests.
- 4. Key Speakers:** Prominent officials and experts were invited and secured, including individuals and organizations that would be a significant draw.
- 5. Diversity in Format:** Multiple styles of events were held and multiple technology approaches demonstrated.
- 6. Interactive:** All events included audience participation, with questions and input provided for before and during the live events.

- 7. On-Demand Replays:** Created and hosted on a Website that we created for the project.
- 8. Web Analytics:** Third party software was used for detailed tracking of participation rates and interests.
- 9. Partners:** Prominent organizations were invited to be official partners in support of the initiative and to help promote the events.

Highlights/Lessons Learned

Some speakers were hard to get but Marcia was strategic and persistent in pursuing them as well as effective in developing phone scripts and correspondence for use by a partner in contacting some.

The funder instituted last minute strong requirements for attendance minimums for each event. This had not been agreed upon but was “non-negotiable” so we had to make it work or abandon the project. Many barriers occurred and Marcia's strategies and determination were responsible for our meeting and exceeding the requirements.

Requirements of government officials were substantial and required that Marcia develop a comprehensive and effective approach for tracking and measuring results of project events. This took extra time but was informative, both for these events and procedures for future events.

Prep sessions were held by Marcia in advance of events to coordinate speakers on their topics plus ensure that they were familiar and comfortable with the technology. This was time consuming given the number of events (and the conflicting schedules of speakers) but paid off in program results.

Event #4

Event Type: Simulcast

This event was held onsite at a State University and those unable to attend in person were able to do so online.

Highlights

Event Name: Annual Statewide Symposium

- Two day event
- Featured national official and other experts
- Format: moderated panels and keynote. Six sessions of the event were aired by Simulcast (concurrent breakout sessions were not)
- Length: Sessions ranged from 45 – 90 minutes each
- Interactive with audience
- Subject: Economic Development & Energy Innovations
- On-demand replays via Website that we created
- Held live in 2012

Sponsor: Regional nonprofit organization along with an institute of the State University System

Manager: Marcia on behalf of nonprofit

Event Host: Marcia Elder (for Simulcast portion)

Technology: Simulcast set-up with audio system (for auditorium)

Fee/Free: A registration fee was charged

Attendance: Strong

Result: Popular and well-received

Our Roles: Developed concept. Simulcast planning, organizing and management. Creation of online registration. Marketing and promotions. Technology services. Preparation of limited presentation materials. Conducting live event. Q&A moderating.

Success Strategies

- 1. Creative Origination:** Marcia came up with the idea as an enhancement for the Simulcast.
- 2. Niche Targeting:** We were able to promote to an expanded audience of stakeholders on our lists that were not on the list of the host.
- 3. Diversity in Format:** The Simulcast enabled people from around the state to attend who otherwise would not travel to the physical site to attend.
- 4. Interactive:** Q&A was provided for the online participants to ask questions of the onsite speakers.
- 5. On-Demand Replays:** Created and provided on Website that we created.

Highlights/Lessons Learned

Our work demonstrated an innovative, cost-effective approach to state officials, the university system and others while significantly enhancing the event.

A speaker from across country encountered flight problems and we were able to patch him in online so that onsite (and online) participants could benefit from his presentation.

Event #5

Event Type: Tele-Summit

Highlights

Event Name: National Leaders Forum

Marcia and CPI organized this event for national Internet-marketing superstar, Tom Antion.

- Three night event
- Featured faculty of 7 prominent experts
- Format: presentations and interviews
- Length: 3 nights, 2 ½ - 3 ½ hours each
- Interactive with audience
- Time limited on-demand replays via Antion Website
- Held live April 2013

Manager/Organizer: CPI Consulting

Event Host: Tom Antion

Technology: Webinar

Fee/Free: No charge to attend. Products sold

Attendance: Strong, with close to 1,800 registrants

Result: Popular and very well-received. Host and speakers happy.

Our Roles: Develop concept. Event planning, organizing and management. Support in identification of speakers. Speaker requests, arrangements and liaison. Coordination on affiliate arrangements. Limited customer service. Preparation of selected presentation materials. Technology support. Support in conducting live events.

Success Strategies

- 1. Initiative:** Proposed event to host with options and ideas for format and approach
- 2. Key Host:** Hosted by popular national leader in his fields with ability to draw large audiences with strong interest in the topics. Strong experience in hosting role and as an engaging professional interviewer
- 3. Key Speakers:** Program featured prominent, engaging speakers appealing to a wide audience
- 4. Interactive:** Q&A included, interspersed with product promotions
- 5. Value Added:** The speakers made outstanding presentations and added to the value delivered by offering cutting edge, top quality products at discounted prices.

Lessons Learned

As part of agenda planning with host, suggested three speakers, as approved by host (one of which was not contacted as the agenda was full). Worked with a diversity of key speakers and their staffs.

The host gave significant latitude and made clear his tight schedule so Marcia prepared updates and decision documents to make it easy for him to see the status and give direction where decisions on his part were needed.

Other Considerations

Many other Case Studies are available on a range of topics – Virtual Book Tours with authors, virtual auctions and fundraisers, public speaking training, motivational and other professional development events and others.

The examples used above focus on niche topics but have been chosen here as strong examples of the various roles, functions and successes involved.



Replays for selected events will soon be available through the Website where you downloaded this report.

For now, we hope that the case study information shared here will benefit you as you plan and host your own online events.

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