

# Case Study: Virtual Speaker Management

## Background

Our original scope of work was to manage a 2,000 plus registrant, 3½ day face-to-face medical conference and exhibit in October 2020. Program elements included keynotes, plenary sessions, workshops, accredited symposia, concurrent sessions, e-posters, gamification and networking.

In mid-May 2020, due to COVID-19 and the ensuing facility shutdowns and travel restrictions, the decision was made to move to a 100% digital environment over the same dates.

Intertask worked with the client on the platform selection, notifying attendees of the change to virtual, modifying the program, contacting and confirming speakers' pre-recording and rehearsal times, realigning the sponsorship opportunities to fit into a virtual dynamic, programming the virtual exhibit, managing the process to populate the virtual platform, and provide support during live days. All tasks had to be accomplished in under six months.

## Challenge

One of our biggest challenges became speaker management. Program timelines were changed, reduced and ultimately compressed. Session information typically finalized in August was still being received into early October. Unavoidable delays in finalizing speakers, sessions, session types and other aspects of the program put the speaker management team behind by approximately 2½ weeks. As a result, we had only 3½ weeks to set up and complete all speaker and moderator rehearsals and pre-recordings of the 137 unique sessions within the platform.

In the first week, speakers indicated that they did not want to pre-record or rehearse their group session together. In addition, the scientific program committee instructed us that speakers could present in one of three formats: live with Q&A; Simu-live with Q&A; or Simu-live with text Q & A (Simu-live is a pre-recorded session that airs at a specific date and time, giving audiences the illusion that it is taking place live). This increased the number of potential recordings/rehearsals from 137 to over 400.



We now had to coordinate over 400 individual speaker schedules to align with the platform producer's time slots, and confirm the type of format speakers would be presenting in. Some speakers also decided to provide their own pre-recorded presentation in an MP4 format.

The individual recordings related to each session would now have to be edited together by the platform producers, and then reviewed by us and the client prior to opening the platform to delegates.

Originally, we assigned three speaker management staff to manage the process.

## Solution

We increased our Speaker Management Team to five managers, and assigned each to manage the logistics for specific sessions.

This ensured that the speakers were always dealing with the same person via email or phone to answer their questions and coordinate all deliverables such as: photo, bio, contact and alternate contact information, permissions and waivers, registration, how and when to submit presentations and schedule times for rehearsals, recording and live day participation.

After the first week of platform accessibility for speakers, and with almost no recording times confirmed, the available recording hours were extended by two hours each day (08:30-21:00, Monday – Friday) for the next three weeks. Recording times were also opened up from 9:00-18:00 on both days over the Thanksgiving long weekend.

When the majority of speakers indicated they wanted to access the platform in the final week before the conference start date, a third recording/rehearsal “room” was added by the platform to accommodate the demand. Our team had to work overtime to complete the recordings by the deadline.

Team members attended their respective session recordings and rehearsals to facilitate introductions between speakers and producers and were on-hand to reconfirm session parameters and expectations (e.g. allotted speaking time). They ensured that speakers were using the optimal web browser; that they pre-tested their webcams and computer audio; and ensured that the speakers had pre-submitted their presentation in advance of their recording and/or rehearsal. All of these measures helped to alleviate concern or worry for the live day.

Because the actual presentation day brings on new jitters when appearing in a “Live” session, a team member was assigned to each and every session to on-board each speaker and liaise with the platform production team, again ensuring that all technical details were functioning and presentations were ready to go.



## The following tools were used to support the Speaker Management Team.

### Airtable

This cloud-based database was used to house all information about the speakers and the specifications of their sessions, and was a useful tool for the Speaker Management Team, the platform and client. The customizable views enabled each of the team leads to have their own personalized view of the data they needed to manage, while still having an overall picture of the entire event, live and in real time, for all to access.

As requirements were refined and identified, features could be added at a moment's notice.

### Google Drive Docs

The shared cloud-based excel chart was used by the Speaker Management Team and the platform to schedule platform access for recordings and rehearsals, and was the repository for the ever-growing list of unique URLs per session.

### Dropbox

This dedicated event file request folder was extremely useful in gathering presentations effortlessly, without having to create different event accounts and access multiple file share platforms. The Speaker Management Team shared access to the Dropbox presentation folder with the platform, and producers were able to grab and upload presentations onto the platform with ease. This was beneficial because it side-stepped the need to compress oversized files, which would have been an additional step had they been sent via email.

## Lessons learned

- **Timelines and presentation skills** are different in a virtual environment. Speakers who are experienced in a face-to-face setting don't necessarily migrate smoothly to presenting virtually/remotely. Last minute changes to the presentation cannot be loaded by the tech at the back of the room and be ready to present in ten minutes. Technical issues cannot be resolved as quickly as during face-to-face because they may not be caused by the platform: they may be the speaker's Internet, computer or log-in issues.
- **Develop a Risk Mitigation Plan** within the Project Plan that anticipates a variety of likely scenarios and approved key messages.
- **A Critical Path is a must have.** Set realistic and achievable objectives and timelines, and manage the expectations of all parties. Set firm deadlines, and outline the impacts if not met.



- **Show Flow Document:** when you have multiple speakers per session who are permitted to record in multiple formats and individually as opposed to in a group, a show flow document is imperative. This document should be shared with the platform producers of each session so that they are able to easily follow the flow/order of the session, which in turn enables them to edit multiple speakers together, producing a final recording that transitions seamlessly and logically.
- **Contact numbers:** For speakers, providing a contact number should be a requirement of presenting. This is essential for communicating with speakers who do not show up for recordings, rehearsals, or on live day.
- **Implementing a communications network** for the live days is crucial. Stakeholders need to receive constant updates and be aware of issues and solutions in real time. We created a network that had the project manager as the hub – with spokes going to the platform technical team, speaker green room (to communicate with our Speaker Management Team), the client’s project team, and the senior client lead.

This may seem excessive and confusing, but it provided us with immediate communications to the key resources: the technical team who had overall control of the platform; the speakers who were delivering the content; our team who were monitoring every session; and the senior client lead who had to respond to questions from senior staff and the Scientific Program Chair.

- **Speaker Communications Plan:** Finally, having onboarded over 800 speakers for recordings, rehearsals and live days on two different platforms and Zoom, we have learned that implementing a specific communications plan for speakers is paramount. In our experience, most people read the first few lines of an email, then skim the rest – often missing important details and information.

Keeping emails short, to the point and singularly focused is the recipe for speaker management success.

It is important to provide speakers with clear and consistent messaging for requirements, deadlines and deliverables based on their session dynamics. This messaging should start with the call for abstracts and speaker selection, and carry through to post event evaluations.

## Outcome

More than 2,000 registrants participated in the conference.

In spite of the abbreviated planning timeline and speaker management challenges we encountered, the client received rave reviews on the Congress from attendees.