



Guide to Virtual Convenings

Having been on the cutting edge of virtual work for more than a decade, GHV draws on its experience to compile this guide of best practices, creative ideas and solutions, available resources, and platforms for conducting virtual meetings, events, and convenings. Our experience has shown that working-level meetings with specific objectives, pledging events, and conferences—including those that require a higher level of production value and visibility—can all be successful as virtual events.

Below are some lessons learned and targeted approaches and tactics to help make any convening effective in this new era of virtual working.

Planning & Format

Hold pre-meetings ahead of time to ensure the agenda and format meet participants' needs.

GHV's approach is to convene a diverse planning committee and/or conduct smaller pre-meetings, focus groups, or phone calls (e.g., regional or country-specific sessions) to gather insights and ideas that can feed into the creation of the meeting or event, including the structure, mechanics, and agenda to ensure that they reflect participants' interests, needs, and/or limitations.

Assess your objectives critically and be innovative in the best way to achieve them.

Look carefully at your objectives and consider creative ways to achieve them – including assessing whether an in-person meeting, virtual convening, or other format makes the most sense. Often times you don't need to be sitting in a room together to learn from one another, build consensus, or make decisions, you just need to identify an appropriate set of tools and approaches to help you achieve the meeting goals.

Acknowledge the reasons for hosting a virtual convening and celebrate the positive aspects.

Be able to explain your reasoning to participants for choosing to host a virtual convening, instead of an in-person event. For example, virtual convenings and meetings can allow for more diverse participation, are lower cost, and offer a more climate-friendly approach, reducing excess travel and carbon emissions. It is also important to acknowledge unavoidable circumstances, such as the COVID-19 pandemic, which increase the need for and utilization of virtual platforms to meet the needs of at-home working.

Don't be afraid to disrupt the norm.

Integrate a disruption piece or component – one that moves people out of their comfort zone. Think outside the box and create a virtual convening that inspires participants and fosters interaction through a creative approach (e.g., an engaging video or art piece, an array of diverse and animated presenters, participatory elements, etc.) You do not have to follow the status quo and use a PowerPoint presentation or a webinar format to have an impactful convening. Check out this great [podcast](#) which

interviews Priya Parker, author of [The Art of Gathering: How We Meet and Why It Matters](#), about the possibilities and options for shaking up virtual convenings.

Ensure adequate time for breaks or pauses.

For many virtual events, 60-90 minutes will be sufficient. For longer events, breaks in the agenda help to ensure that your audience remains engaged, allowing them to step away for an allocated period of time and return to the conversation fresh and ready to re-engage.

Create personal sharing opportunities and/or check-ins.

Creative approaches like virtual networking and novel ice breakers will help to fill in for the personal connection that we miss during face-to-face meetings and events. It can also foster cross-sector collaboration which can improve impact. Here is a [resource](#) for creative ice breakers specifically designed to promote human connectedness during the COVID-19 social isolation.

Design for your audience and utilize visually engaging content and resources.

When planning a virtual convening, be sure to design it in a way that allows you to engage with your intended audiences and have lasting content that can be used for wider distribution. Ask yourself, “Who is our target audience and what channels of communication do they most often engage with? What video, audio, and photographs do we have that can be used to create more interesting and interactive content?” These assets and resources can also be used in outreach to promote a virtual convening.

- Engaging participants through the use of a **short video** within a larger virtual convening platform is a great way to generate interest from the onset.
- **Photography** also helps to break up text content in PowerPoint presentations or as a backdrop to liven up virtual conversations, and can also be used in outreach to promote a virtual convening. [Prezi](#) is a great tool for creating more dynamic, persuasive, and visually interesting presentations.
- **Interactive tools** like [Mentimeter](#) allow you to gather real-time input or assess participants’ knowledge of or views on a particular issue, giving participants the chance to feel more engaged in the presentation.
- **Virtual breakout sessions** are another great way to split attendees into smaller sub-groups to allow for more focused conversations.

Consider a variety of media, including pre-recorded elements.

From speaker panels to a “fireside chat,” you can pre-record short segments or vignettes that can be followed by an interactive session with selected participants or the

full group of attendees. To help the event flow smoothly, we recommend working with a strong technical partner to ensure that you can seamlessly splice components together. We also work closely with speakers to ensure they are well-prepared and aligned to any pre-recorded content (including through coaching, drafting remarks when appropriate, or supporting them on visuals and presentation materials.)

Make event materials easily accessible.

To include participants who are unable to attend and to sustain engagement following the event, share any pre-recorded materials at the culmination of the event (with permission), provide a meeting outcome document that details top-line takeaways that are easily digestible, and consider the pros and cons of recording the event to share. To reach new audiences and expand impact, identify pieces of the virtual convening or meeting that can be repackaged and shared on social media and other channels (e.g., an organization’s website) for continued visibility following the meeting or event.

Reach & Attendees

It can be challenging to get attendees to engage and participate in a virtual convening in the same way they would an in-person meeting or event. To engage target audiences prior to the convening and spark interest, utilize media and social channels for pushing out the event information. You can also repurpose pre-recorded materials to create smaller snippets of event content to drive up interest. Prior to the virtual convening, through the use of a survey, phone calls, or other research, it is important to:

Identify possible technology and language barriers.

The beauty of virtual convenings is that you can include individuals who otherwise may not have been able to attend in-person due to outstanding barriers (e.g., geographic, financial, etc.). Understanding the various language needs and technology barriers participants may face before the convening is critical to ensure inclusion and proper planning for translation. It is good practice to designate a point person who will receive text-based input, via a global platform such as [WhatsApp](#), which offers secure messaging and calling globally, in the event that people experience connectivity problems during the event, or a virtual platform that allows for a running text discussion in the sidebar. A good technical partner will be able to help you identify problems with key participants’ audiovisual equipment, user settings, and internet connectivity in advance. These concerns can be addressed during pre-event, or pre-meeting sound and video checks to help ensure the technology runs smoothly.

Identify and accommodate different time zones.

To ensure the broadest participation, identify the various time zones in which participants live. [Doodle](#) is a great tool that factors in time zones and allows you a visual look at available date and time options for selection by participants. You may explore holding a series of virtual convenings to align with the needs of various language groups and/or respective time zones or regions.

Collect contact information.

Asking people to register for your event, webinar, or meeting not only ensures the platform can be sized to accommodate everyone but also allows you to engage participants in other ways. Consider the optional sharing of emails, WhatsApp contacts, and Twitter handles so that participants can actively connect and share information prior to the virtual convening. Encourage participants to live-Tweet or engage on selected social platforms to share relevant content from the convening with others. You can also consider hosting an event-specific chat, for all participants, allowing the moderator to plug relevant questions to drive conversations prior to and following the virtual convening or meeting. This allows participants to be engaged with one another and active on social media platforms before, during, and following the convening, drumming up energy and support for your initiative or organization.

Identify and facilitate connections.

You can also use a survey to determine who participants would like to hear from (e.g., speakers, moderators, etc.) throughout the convening and/or connect with during a breakout or facilitated virtual networking session.

Presenters & Moderators

Identify a dynamic moderator.

A vibrant moderator will keep the meeting flowing and the virtual audience engaged and will infuse relevant commentary and key discussion points to spark conversation.

Test run connectivity.

Prior to the launch of the virtual convening, meeting, or event, be sure to test the platform with your team and, ideally, a strong technology partner. This will help you understand how the platform works ahead of time and provide the opportunity for a practice run to sidestep avoidable technology issues. Appoint back-up point persons for critical roles in the event of unavoidable connectivity problems.

Limit presentation length.

Where possible, engage the audience and have firm boundaries for presenters regarding presentation time slots and slide lengths (e.g., density and number of slides). Special approaches like the [PechaKucha](#) technique (20 images, 20 seconds each, connected with a well-developed narrative) can be a fun way of encouraging speakers to try a new style of presenting as well as keeping your agenda running on time.

Provide a quick virtual orientation on arrival.

It is important to reiterate clear “ground rules” for the meeting to ensure that the flow and objectives of the event are not disrupted, such as telling participants to mute the line and how to use the chat and Q&A functions to make comments and pose questions to speakers.

Virtual Convening Platforms

Do-It-Yourself Platforms:

 Zoom	Robust virtual experience, with video and text chats, webinars, and breakout rooms.
 Icebreaker	Virtual video gatherings; questions to foster collaboration and team growth.
 Facebook Live	Interact in real-time; comments on stream.
 Google Meet	Business-oriented; integrates with Google Calendar and Gmail.
 Instagram Live	Share a live video; connect in real-time.
 Microsoft Teams	Chat, video meet, call; syncs with other Office 365 platforms.
 Skype	Video and voice calls, messaging and screen sharing; allows calling to mobile phones or landlines.

Contracted & for Purchase Webinar Platforms:

 6Connex	Virtual environments, learning management, and webinars.
 Adobe Connect	Remote training, webinars, virtual classrooms, and video conferencing.
 BlueJeans	Audio, web, and video conferencing; screen sharing, Q&As, polling, recording, and text chat.
 Circles	Peer learning; creates an environment rooted in equality.
 Crowdcast	Live video, Q&As, summits, and webinars; registration, payment, and video recording.
 Demio	Webinar services without a download; pre-record content; chat options, registration, polls, Q&As, and post-analysis.
 GoToMeeting	Conferencing calling, video conferencing, screen sharing, and meeting recording.
 VoiceVoice	Unlimited number of people into small groups; high-impact conversations on video.
 Webex	Video conferencing, webinars, virtual meetings, file sharing, and messaging.
 WebinarNinja	Live, automated, series, or hybrid webinars; registration, screen sharing, Q&As, and polls.

Other Resources on Hosting Successful Virtual Convenings:

 How to Host a Successful Virtual Event: Tips and Best Practices
 How to Host a Virtual Conference – 10 Tips for Success
 Virtual Convening: How to Convene for Connection, Transformation, & Action

How We Can Help

GHV has been a virtual company since its founding in 2008 and brings deep knowledge, ability, and strategic guidance to help partners execute virtual meetings and events. Our work includes strategically planning meetings and events to ensure the greatest impact, considering pre- and post-work for increased engagement, and meeting and event facilitation on the day of for greater flow.

For certain needs, we also partner with [Spark Street Digital](#), a Washington, DC-based live webcast production company, to provide the technical expertise needed to execute certain virtual meetings and events seamlessly.



Our work includes:

Virtual Meeting and Workshop Planning and Facilitation.

Meetings are planned with the end goal in mind to ensure the participants are engaged throughout the entire meeting and/or event.

Visual Presentation Materials.

The presentation of materials to support the meetings can play a critical role in sparking conversation or questions, engaging the audience, and garnering input and feedback. We offer in-house expertise to develop professionally designed materials, presentations, and films.

Supported Webinars.

These webinars are similar to videoconferences, such as those hosted on Zoom, but add scale and control through technical assistance, light branding, and visual support.

Virtual Panel Livestreams.

With two components – a closed videoconference for presenters and a refined broadcast for the public – this option is best suited for mid-range events and includes polished visuals, a virtual green room, and smooth speaker transitions.

“TV-Style” Livestreams.

Resembling live television, this option is the top tier, offering seamless transitions and branding, a virtual green room, live-edit feeds, and support to both plan and execute the run of show. It is best suited for high-profile events in need of all the bells and whistles.