Prep for your first event: Best practices worksheet

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This article is designated for all users.

Overview

Hello there! We're so happy you've chosen Kaltura Events for your next event. Planning, creating, and hosting an event can be huge task for everyone involved. That's why we've created this worksheet, filled with essential best practices, to help take some of the stress out of event planning. Following the event setup process described below will ensure everything runs smoothly and successfully, and that you maximize the overall impact of your event.

Please be sure to identify your organization's Kaltura subject matter expert (SME). They stand ready to answer any questions you may have as you read through the items listed below.

Download a PDF version of this worksheet here: Prep for your first event- best practices worksheet.pdf

Planning: Before your event

Pulling off an event without a hitch is no small feat, but it is certainly possible through careful planning.

Speakers – Guidelines for executives and VIPs

Consider going through a dry run to simulate run-of-show scenarios and go over everything that's relevant to the session.

As the event organizer, invite the executives and VIPs to register to your event with a personal email or call ahead of time. If you're not using the platform's system emails to invite speakers, there's an option to invite speakers without email. Simply share with them their personal login link (if using magic link). When it's time to log into the event site, speakers can authenticate by registering again or by using their personal magic link.

Checklist:

- ☑ Setup devices ahead of your Interactive or DIY live broadcast session. Check camera and microphone, how to mute/unmute, etc. Learn more about how to enable devices on your browser here.

💡 **Tip for the day of: Book VIPs to join at least 15 mins ahead of time. Once they join, check their device setup.**

☑️ Check presenter's personal background: Confirm speaker's background is appropriate and decide if you'd like to use an image background or blur. Learn more here.

☑️ Presentation assets: Be sure you have all the assets you need. Identify where to add new assets, how to navigate between them, and present on stage. Learn more here.

☑️ If using interludes, check the backstage area, where on stage speakers can have private conversations.

A word about dry runs

When dry runs must be recorded, the best practice is to create a dry run session and use it to test. Make sure to unpublish and delete the dry run session and/or recording once finished. Log into the room where the event is held at least once before the dry run to check everything is set up.

Roles and permissions

Let's first get to know your event team and start delegating responsibilities.

- **Administrator**: The admin has access to all configurations and events created for this account, adds/removes team members, and manages their own user.
- **Event organizer**: The Event organizer manages specific events. They have full access only to events they manage. Within these events, the Event organizer can manage and configure all capabilities, settings, content, and people. Event organizers are also assigned as moderators on their events.
- **Content manager**: The Content manager manages content of specific events. The Content manager is responsible for curating, organizing, and managing the content that will be presented during the event. Content managers cannot create events and do not have access to the full user list, analytics, and reports.

To learn more about Kaltura Events roles and responsibilities please visit this link.

Choosing the right template

Now it's time to decide what kind of template you'd like to use for your event. At

Kaltura, we provide four preset templates and one blank template for use in creating events. Each template has a unique selection of layout components to help save time and promote efficient teamwork. After selecting your template and creating your event, all you have to do is add your event details. For more information on Kaltura's preset templates and how to get started, please visit this link.

Your organization may also have one or more custom templates available for use. These templates were created according to your organization's brand guidelines and specific requirements. If your account is configured with custom templates, you'll find them under the "Custom" tab. Each custom template includes a name and description set by the Kaltura Events administrator in your organization that can help you understand if it's the right template for you. If you're not sure, please contact your organization's Kaltura SME.

Types of sessions

Let's add some sessions to your agenda! Kaltura offers four types of sessions – Interactive room, Live webcast, Pre-recorded, and DIY live webcast. Following are descriptions of each.

Interactive room

Deliver immersive sessions using advanced moderation controls or facilitate smaller group interactions through breakout rooms. Leverage a suite of interactive tools including chat, live polls, screen sharing, and whiteboards to create a meaningful, engaging session between attendees and between speakers and attendees.

Setup recommendations and considerations:

- Manage stage access (moderator point of view): Choose your session experience. Would you like to allow participants to join the stage or not? To learn more, click here.
- Manage audience participation (audience point of view)

  ☑ Let them know, in advance, the level of participation that is expected from them; should they prep to go on camera, breakout room, answer polls, or just chat?

  ☑ In the beginning of the session, guide your audience on where they should submit questions

  ☑ Branding: Customize your session's room with virtual stage backgrounds, speakers' personal backgrounds, lower thirds, and a layout. Learn more about branding here.

- Think about the session structure

  ☑️ Storyboard: Control what content should appear and in what order (see below for more info).

  ☑️ Interlude (pre roll/post roll): If you’re using a countdown timer, set it up to run a few minutes into the event so participants have time to join in. Learn more about interludes here.

  ☑️ Recordings are available right after the event, in the Media tab of your event site.

  ☑️ Setup up devices: Check camera and microphone, how to mute/unmute, etc. To learn more about how to enable devices on your browser, click here.

> Please refer to “Speakers - Guidelines for executives and VIPs” section for additional recommendations.

For more information about interactive sessions click here.

DIY live broadcast

Broadcast a live session directly from a Kaltura Studio room.

Setup recommendations and considerations:

💡 **Tip: Remember to hit "Go live" when ready!**

- For speakers

  ☑️ Share a link to the Studio where the event will take place.

  ☑️ Before the session starts, the moderator will open the room and make sure speakers are signed in to the event.

  ☑️ Setup up devices: Check camera and microphone, how to mute/unmute, etc. To learn more about how to enable devices on your browser, click here.

- The link to the session where attendees will be watching is different than the virtual Studio from which speakers will be broadcasting.
- Branding: Customize your session’s room with virtual stage backgrounds, speakers’ personal backgrounds, lower thirds, and a layout. Learn more about branding here.
- Interlude (pre roll/post roll): Add a countdown timer. Set it up to run a few minutes

into the event so participants have time to join in. Learn more about interludes here.
    - If using interludes, check the backstage area where on stage speakers can have private conversations.
- Allow for 10 seconds after finishing the session or add a post roll at the end before closing the live session.
- Recordings are available right after the event, in the Media tab of your event site.

For more information about DIY live broadcast click here.

Live webcast

Produce live streaming events for large audiences. Live webcasts are orchestrated and highly produced. Kaltura Webcasting supports you from the initial planning stage to live broadcast production and management and finally to post-production and after-event management. This session type includes automated transition from live to VOD and requires an encoder. For more information about Live webcasts click here.

Pre-recorded live session (simulive)

Pre-recorded live sessions are pre-recorded videos that are broadcasted as if they were live. The live entry is prepared, recorded, and uploaded to the event ahead of time and broadcasted live upon the scheduled session time.

Setup recommendations and considerations:

☑️ Record a test run for your setup: Check lighting, camera, and sound.

☑️ Check presenter’s personal background: Confirm speaker’s background is appropriate and decide if you’d like to use an image background or blur. Learn more here.

☑️ Interlude (pre roll/post roll): If you’re using a countdown timer, set it up to run a few minutes into the event so participants have time to join in. Learn more about interludes here.

☑️ Upload pre-recorded video source in advance: Long form content can take a while to upload and process. Please be sure to upload the video as early as possible.

💡 **Tip: Need a studio to record your session? Some customers use the DIY live broadcast room as a studio for recording the pre-recorded sessions.**

For more information about pre-recorded live session click here.

Services, add-ons, and integrations

Here at Kaltura, we are committed to bringing your vision to life. Should you need more support in planning and carrying out your event, our experienced Services team is here. We will support, guide, and collaboratively work with you to turn your event into a success story. With our Services team by your side, every detail of your event will be carefully managed, and every challenge met with creativity.

To book services for your event, please contact your organization’s Kaltura SME. Booking services for any event should be done ahead of time.

Following are some services and add-ons you may wish to consider adding to your event.

Services

- White glove services
- Participant support (Tier 1): Offers enhanced support, covering the entire event experience as specified by the event agenda. Support during the registration period follows the standard SLA, while issues during the event are managed according to the customer's support package. A minimum notice of 4 weeks before the service’s start date is required.
- Live monitoring: Live broadcast preparations include two dry runs with the customer's production team, testing stream health, quality, stability, captions, multi-audio, failover, speed, and packet loss. A live encoder review is also conducted to suggest the best configuration. Pre-recorded broadcast preparations involve testing the pre-recorded sessions against the scheduled agenda, spot-checking video quality, and reviewing features like captions and audio channels. Event content must be provided at least one week before the event.
- Kaltura Events training
    - Intro to Events (basics): This session introduces event organizers to Kaltura Events, guiding them step by step on creating, managing, and editing events. The training lasts up to 90 minutes.
    - Private training session (recommended for event organizers): Private training sessions tailored to your knowledge and needs, conducted in your environment. Sessions are customized based on a discovery session with a trainer and can be basic, advanced, or refresher courses for admins, end users, trainers, or support teams. Each 2- hour workshop includes:
        - Discovery session to determine training needs
        - Custom session development
        - A follow-up summary with on-demand learning materials

Add-ons

REACH services

Kaltura REACH helps ensure content accessibility and inclusivity so that everyone can enjoy and understand your event. REACH provides human captions, automatic captions, transcription, translation, and enrichment services including audio description, chaptering, in-video, and cross-library search and discovery, deep-linking capabilities, metadata, and keyword extraction.

Before your next event, consider adding one of the following REACH services:

- Live human captions: Human captions for live webcast type sessions.

  💡 **Tip: Be sure to order captions in advance; 5 days before the session starts.**

- Machine captioning (live and VOD): Also known as ASR, this algorithm-based service offers 85% accuracy with a two-hour turnaround, providing searchable video content with editable transcripts, and improves over time with custom vocabulary support.

  💡 **Tip: Be sure to order captions in advance; up to 15 mins before the session starts.**

- Human or machine translation services (live and VOD)
  - Professional: Professional translations by native speakers. You can add notes for the person who is doing the translation.
  - Machine: This requires an automated captions file of the source language. Recommended for transcripts that are time-sensitive or needed within minutes of uploading.
- Human or machine chaptering (VOD only): This AI-based video service creates chapters, reviewed by professionals, and adds them as content metadata. This is available in English only.
- Advanced audio description (VOD only): Pauses the video to provide detailed descriptions, ensuring key visual information is accessible to people with visual impairments.
- Alignment (VOD only): Alignment services convert a text file (word-for-word transcript) to captions.
- Dubbing (VOD only): Dubbing (also known as “voice-over”) is the process of adding new dialogue or other sounds to the soundtrack of a video.

Integrations

Kaltura offers integrations to marketing automation platforms and CRM providers. If you're interested in adding one of these to your next event, please check with your Kaltura SME. Integrations include the following:

- Adobe Marketo
- Salesforce
- HubSpot

Branding guidelines

Events echo your organization's core values and culture, so we want to make sure every small detail is reflected in the way your events look and feel. Please review the following considerations for your next event.

- Homepage banner guidelines
  - The image may be cropped. We recommend avoiding text and placing the subject at the center of the image.
  - Recommended banner size: 1920x1080 px.
- No text should be on the edges of the banner to avoid overlapping with the event navigation area.
- Event logo guidelines
  - We recommend that your logo has adequate contrast on dark backgrounds.
  - Recommended size: max height 200px.
- In-session branding (Interactive or DIY live broadcast session): Customize your session's room with virtual stage backgrounds, speakers' personal backgrounds, lower thirds, and a layout. Learn more about branding here.

Content uploading and management

Storyboard

When preparing for your next session, use Kaltura's Storyboard to upload your session's content (slides, videos, files, and images) in advance. Next, organize the content chronologically according to your session's flow and schedule in pre roll, breaks, and post roll (using interludes) to simplify the session's management.

The storyboard feature is available when hosting an Interactive session or DIY live broadcast. To learn more, click here.

Media tab

Manage VOD content needed for your event in the Media tab:

- Upload media and publish it to your event site or the organization's Legacy Video Portal. (Please check if your organization is using the Legacy Video Portal product.)
- Edit, download, and delete media.
- Order captions.
- Add downloadable attachments to the media.
- Includes all interactive sessions recordings.

To learn more, click here.

Content engagement

Take an item off your list by scheduling audience engagements ahead of your event. Create notifications, announcements, reminder emails, polls, and crowd reactions in advance, right from the event setup area. To learn more, click here.

Attachments

Upload public attachments to your session.

Add downloadable content (like videos, images, and documents) and attach it to any session in your event. Session viewers can access the content anytime located in the ‘Attachment’ tab in the session description area. To learn more, click here.

During the event - for the moderator

Q&A moderation

Throughout the event, other than connecting with each other, attendees can engage with and ask the speakers questions over the live stage chat and/or ask the event moderators questions on the chat’s Q&A tab.

Questions from the audience can be managed from the moderator app, or in the chat area of the session.

Moderator app

What’s the Moderator app, you ask?

The Moderator app is a robust, separate, application where moderators organize, manage, and answer Q&A threads. The app facilitates different actions that help manage the event like publishing polls, public session Q&As, and private chats.

When should you use the app?

We recommend using the Moderator app in sessions where you expect to have more than 3 moderators.

In-session moderation

In-session moderation is where moderators engage with attendees using the same chat interface as the attendees. Moderators manage and respond to questions posed in both the Q&A tab and the Chat tab.

When should you use in-session moderation?

We recommend using in-session moderation in sessions where you expect to have up to 2 moderators.

Tips and tricks:

☑️ Share link to Moderator app with your moderators in advance. Every event has the same link.

☑️ Double check that the moderator and speakers are assigned to the event AND the session.

☑️ Prepare polls and announcements in advance, ready to go with a click.

☑️ Familiarize your in-session moderators and speakers with the backchannel chat.

Chat and collaboration

The chat and collaboration area provides a place to:

- Connect and network with each other: Attendees will have the opportunity to connect privately with likeminded individuals or publicly in the group chat (if enabled on your template; please contact your Kaltura SME).
- Connect with event hosts: As an event host or speaker, connect with attendees through the chat to see what’s on their minds and ask questions.
- Add an interactivity layer to you session: A place to engage your audience will polls, questions, announcements, and Q&A.
- Moderate the session: Moderators have a set of capabilities to help run and manage the event smoothly.
- Speak privately in the backchannel area: Moderators can chat and stay on top of their session in this private chat tab.

AI Assistant: In-session helper

The Assistant tab offers moderators and event organizers a single location to learn, manage time, and take actions that help boost the event’s engagement and increase ROI, all in real-time. Using an interactions recommendations mechanism, the AI Assistant leverages the session’s data to suggest immediate actions that moderators can take to grow attendance, boost content discovery, enrich the end-user experience, and increase engagement.

To learn more, click here.

After the event + preparing for your next one

- Analytics report: Our comprehensive analytics dashboards provide trends and drill down analysis on previous, current, and future events. Before your next event, make sure to go over the collected data and determine what you’re interested in learning about. Learn more here.
- Legacy Video Portal integration: The Legacy Video Portal centralizes curated content from events and marketing materials, allowing visitors to discover and interact with videos, recorded sessions, and marketing collateral on a fully customized site. It simplifies content management, organization, and repurposing, enabling you to highlight and create new assets from top content to maximize your investment. Learn more here.
- Keep your event site open: Your event site and content you choose will still be available after the event has ended. Guests will be able to enjoy the event, and you will continue tracking and gaining data on your VOD recordings. Our 360-degree lifecycle event approach takes care of everything from the welcome landing page, event promotion, registration, the big day, and lastly, the post-event site.
- Showcase your content: Use the Showcase feature to boost engagement and promote upcoming, past events, and video-on-demand on one landing page. Decide which events you’d like to include and create a "Showcase page" that event organizers can customize, share, or embed on any website. Event organizers can choose the specific events they want listed on their Showcase page, as well as those events they want to highlight and promote at the top of the page. Visitors can browse to view a list of events coming up, register for them, and watch past events on demand. Learn more here.
- Landing pages: Build custom pages using a variety of graphic building blocks like a hero banner, speaker gallery, free text, clickable images, and more.
    - Make the pages public: To attract new registrants/leads and include special content and promotional material.
    - Make the pages restricted: Offering exclusive content accessible only to registered and authenticated attendees.

Helpful links

- Knowledge Center
- Best practices when sending a support ticket
- Whitelist KME for speakers & audiences

Additional information

Kaltura Events datasheet.pdf