

Virtual Experiences

A best practice guide for faculty, staff and students

Preface

Goal

This document serves to create a dynamic and comprehensive document to inform Kellogg faculty, staff and students about tactical how-tos, best practices, experiential recommendations, and key resources for virtual experiences.

**Note that there is a separate compilation for [virtual teaching guidelines](#).*

Contributors to this document

Representatives from Special Events, KIS, Speakers & Conferences, Office of Student Life and Creative & Digital Services have compiled this document, which will evolve over time.

Engaging resources on your event

In order to deliver a high quality virtual experience and secure support, there is a protocol for engaging resources. The process for events has not changed:

- **Students:** For all student and club events contact Jarvis Broom: jarvis.broom@kellogg.northwestern.edu directly and use this [student resource](#)
- **All Staff and Faculty Experiential Events:** Reach out directly to your point of contact in the Kellogg Special Events or Speakers & Conferences teams. We will engage KIS, CDS or other resources to plan your event
- Follow similar process to 'in-person' events
 - Review this deck
 - Align with your team on purpose, objectives, scope
 - Schedule time with your POC to discuss goals/objectives and determine format, tech tools, overall resource needs
 - Complete Event Overview to be reviewed with resources

Table of contents

Part 1: Introduction to virtual experiences	<i>pages</i> 6 – 11
Part 2: Digital platforms	<i>pages</i> 12 – 18
Part 3: Considerations for presenters	<i>pages</i> 19 – 24

PART 1

An introduction to virtual experiences

What are virtual experiences?

Virtual experiences are online events that involve people interacting in a virtual environment on the web, rather than meeting in a physical location. They can be highly interactive and seek to connect a group over a topic in ways similar to an in-person experience.

Virtual experiences may include:

- Presentations
- Webinars
- Live Streaming
- Live talk or address to a group
- Recorded talk or address to a group
- Interactive discussion online
- Town hall meetings

Virtual vs. physical experience checklist

If deciding between a physical event and a virtual one, think about the goals for the experience. Key considerations:

- Can your goal(s) can still be met in a virtual setting? If so, how?
- Can you deliver Kellogg's high standards for event experience virtually?
- By what metrics would you consider a virtual event a success?
- Do you and your team have bandwidth you and your team support and manage a virtual event?
- Can networking at your event be achieved in a virtual setting? (Consider dedicating networking time, using registration data to connect attendees, set up group chats and breakouts, facilitate video calls, chat groups, and appointments.)
- Is an in-person event possible now or might it be postponed due to timing or budget?
- Are your speakers comfortable in live setting, or is recording in advance a better option?
- If you utilize Q&A, how/who will manage?
- How will you track attendance?
- Do your attendees have all the materials they need to attend virtually?
- Does the event content translate well in a virtual setting? Does the content work well for on-demand delivery?

Feature options for a virtual experience

Virtual experiences can be interactive in many ways. Your vision will drive timing, preparations, resources and platforms. Consider of the type of virtual event you're planning and which of these features you may choose to leverage:

- Event website & registration
- Live content: speakers, panels, keynotes
- Live, one-way audio/video
- Q&A
- Live polling
- Note taking/favorite slides
- Recorded content
 - *Please consider: What is the purpose of recording? How will you use the footage? Where will it live? How long will content be relevant?*
- Interactive video conferencing
- Feedback surveys

Virtual experiences defined

Once you have assessed your event goal and feature set, select an event type to create a detailed plan. Kellogg virtual experiences are defined below.

Meeting

A meeting can be small or large, formal or informal.

Webinar

Webinars are 45 – 90 minutes in length and allow attendees to join in and listen as one or more speakers present the content. Webinars can allow Q&A and the ability to present live or a pre-recorded video.

Virtual Conference

Like in-person conferences, these are built around a live agenda that can include keynotes, sessions and breakouts. They can offer multi-session content and involve community engagement tools.

Internal Virtual Event

This could be a town hall, department training or other large meeting. These are used to share a message to the entire community when internal stakeholders are not all gathered in the same place.

External Virtual Event

These events are held for those outside of our internal stakeholders. They may include donors, alumni, corporate partners or prospective students. They may require higher levels of production and engagement opportunities so that virtual attendees are provided the same value that they would if they were experiencing the event in-person.

Considerations for event formats

The format will drive some decisions for your virtual event. Consider the following.

Small scale events

- In smaller scale events or meetings, ask each participant if they have anything to ask, add, or update.
- Include a variety of features including polling, chat boxes, quizzes, note taking, etc. to increase productivity and attention. Have polling questions ready before the meeting takes place.
- Direct questions to a certain member of the attendee list, calling on them by name to avoid talking over one another.
- Using the “virtual hand raising option” in Zoom to control who talks when and gives the moderator ability to mute and unmute one at a time.

Large scale events

- Conduct breakout sessions after the full group meets to further discuss/ask questions in a more intimate setting.
- Refrain from open discussions with groups of 20+ .
- Carefully consider conducting Q+A sessions through the chat feature. This may risk unsolicited comments/concerns/questions.

Other tips

- Have an agenda and stick to it. Send agenda ahead of time along with the URL for the meeting
- Ask participants to contribute, and be engaging.
- Start on time, end on time, do time checks throughout the session
- As you would a live event, plan for attrition when setting attendance caps
- Determine Rules of the Road in advance and have the moderator share them at the start of the call. Examples include:
 - Who are the hosts/panelists?
 - Is everyone else muted?
 - Will attendees participate via video or just audio?

PART 2

Digital platforms

Overview of digital platforms

The KIS team works closely with Northwestern University to offer Kellogg technically-sound, secure and modern solutions for our virtual experiences. While there are many options to choose from, KIS supports the following platforms and recommends uses for each.

Supported and recommend platforms:

- [Zoom](#)
- [Microsoft Teams](#)
- [WebEx](#)
- [Panopto](#)

Zoom

Zoom is a popular virtual event tool. Every Kellogg email account is eligible to participate in our Zoom platform, with varying attendee levels depending on the audience.

Uses

- Collaborating inside or outside Kellogg
- Small to large group meetings (can host up to 3000 attendees)
- [Chat](#) feature
- Waiting room option
- Option to [co-host](#) calls
- '[Breakout rooms](#)' feature
- [Polling](#) and [Q&A](#) features, including virtual hand raising
- [Recording](#) option
- [Dial-in options](#), Audio and/or Video
- File Sharing

Best practices and tips

- Use Zoom for scheduled meetings, presentations, and collaboration in groups of any size.
- Schedule meetings directly through Zoom, or simply share your Personal Meeting ID link in your profile for instant meetings (see image right).
- Leverage host and admin capabilities for large or more structured meetings. For example: mute all participants during a presentation, or assign breakout rooms for small group work.
- Connect with computer audio or with dial-in option (good for those who may not have optimal computer audio capabilities).

Zoom

Getting started with Zoom

- *Create your account:* Visit <https://northwestern.zoom.us/> and log in with your NetID and password. Your account will be provisioned automatically.
- *Download the Zoom App:* Visit <https://northwestern.zoom.us/download> to download the desktop app. The app will launch whenever you access a meeting link and is the preferred method for using Zoom.
- *Get Support from Zoom:* Zoom offers daily training webinars, live support, [video tutorials](#), and a comprehensive [help center](#). You can also join a test meeting at any time to test your internet, audio, and video connections.

Learn more

- Visit the [Zoom Conferencing Service Page](#) on the IT website for more information and visit the IT Knowledge Base for step-by-step instructions on how to schedule and attend meetings using Zoom.
- [New to Working from Home? Here Are Some Tips to Help You Meet Like a Pro](#) Zoom blog highlights some general best practices along with Zoom features like, holding the space bar to temporarily unmute, blur your background, and "Touch Up My Appearance".

Zoom

CAUTION:

Avoid “ZoomBombers,” people who disrupt an online event for the “fun” of it.

- Do not put the meeting URL on a public website. Instead, share it only with participants.
- Use a random Meeting ID, not your personal one for the event
- Lock the meeting after 10 minutes
- Zoom [has a list of suggestions with specific how-tos](#)
- Only authenticated users can join meetings using their NetID
- Require a password when scheduling new meetings
- Require password for participants joining by phone

Zoom virtual backgrounds

- Zoom backgrounds are fun to play with, however, there are often **buffering issues, motion tracking issues and a green screen effect** which causes the appearance of floating heads or limbs. Test and use with caution
- If you are going to be moving significantly during your meeting or **if you have the above issues, select a *real setting in your workspace that is professional or choose a simple backdrop***
- While virtual backgrounds portray a sense of a place, **these backgrounds do not look realistic due to lighting and dimension**. If your background does not match your real setting, please try another image or do not use them in order to **avoid distraction for your viewers**
- The KIS team is looking into more solutions for your virtual experience to be identified as Kellogg’s. **A branded Zoom experience is to come**
- You can find a set of Zoom virtual backgrounds here: <https://northwestern.box.com/s/ccjm2cxlj8yal6orrzdelw5dpxkzgpyl>

Microsoft Teams

Teams is used to collaborate across Kellogg in a real-time chat manner. Teams is used for conversations to alleviate meetings or physical separation.

Best practices and tips

- Keep Teams open throughout the workday to connect with teammates in real time.
- Create 1:1 or project-related group chat channels for brainstorming, file sharing, and more.
- Use call, or video features for 1:1 check-ins or small group meetings.
- Collaborate with colleagues across NU (Teams is available to all NU staff).
- Work seamlessly across Microsoft applications: send Outlook Calendar invites, access SharePoint, and more.

Uses

- Collaborating within Kellogg
- Person-to-person meetings
- Small group meetings
- Sharing your screen with others
- Chat feature
- Max powerpoint File Size, 2GB

Microsoft Teams

Getting started with Teams

- [Download](#) the Teams desktop client.
 - Enter your Northwestern email address.
 - You will then be redirected to Online Passport.
 - Sign in with your NetID and NetID password.
- To access via the web, go to <https://teams.microsoft.com>.
 - Enter your Northwestern email address
 - You will be redirected to Online Passport
 - Sign in with your NetID and NetID password. Note: If you are already signed in to Online Passport, you will go directly to Microsoft Teams.

Learn more

- For answers to commonly asked questions about the use of Microsoft Teams at Northwestern, visit the [IT Knowledge Base](#)
- [End user training for Microsoft Teams](#) includes video, quick start guide, and additional documentation.

PART 3

Considerations for presenters

Preparing as a presenter

Just like in-person events, presenters should be familiar with their content and the format of the event.

It is recommended to do test runs for length, delivery and be familiar with the platform ahead of time. On the following pages, you'll find guidance on preparing yourself and your surroundings for a successful virtual experience.

We suggest planning a prep call and/or trial-run using the opted format. Make sure you and any speakers are in the location you plan to take the meeting and check for any connectivity issues or potential location disturbances.

Clearly communicate with your attendees and speaker in advance to set the virtual meeting norms and expectations (i.e. muted until Q&A, level of audience participation, timeline of event, login details, etc.)

Technical considerations

Connectivity

- When using equipment or locations not regularly used, test your meeting connections in advance.
- When possible, establish online video conferencing connections several minutes before the meeting start time. (Recommend at least 15 mins prior)
- Create a backup communication plan in case you have trouble connecting with remote participants.
 - A backup plan can include asking participants to connect to the meeting through their laptops, having the mobile app downloaded and ready for use, and a dial-in option for last resort.
 - To ensure stability and to clear up last minute confusion, we recommend scheduling dry-runs and rehearsals, as well as having panelists/moderators arriving 15 minutes early to the gathering.
- If possible, connect your laptop to an ethernet port on your router or cable box log in with your NetID and password. Your account will be provisioned automatically
- Disconnect as many devices as possible from your wifi to try to minimize disruption to your signal
- We suggest planning a prep call and/or trial-run using the opted format. Make sure you and the speaker are in the location you plan to take the meeting and check for any connectivity issues or potential location disturbances.
- Clearly communicate with your attendees and speaker in advance to set the virtual meeting norms and expectations (i.e. muted until Q&A, level of audience participation, timeline of event, login details, etc.)

Sound and Lighting

The KIS team will support location details for virtual events within Kellogg buildings*. In the event you are working from a remote location, please use the following guidelines.

Placement of your recording device

- Find a quiet area with little echo for your presentation
- Choose a professional setting such as a desk or home office with limited personal items in the background
- If there is not a suitable or professional setting available, choose a plain wall as a backdrop
- Avoid distractions. No moving objects, pets, people, or personal items that may cause viewers to lose focus
- Ensure there is no propaganda or other political messaging or symbols, from any country, within the frame of vision
- If you will be seated as an individual during your presentation, place your recording device about 1 foot to 2 feet away from you and raise up/angle as needed to bring camera of device to eye level
- 3 feet to 6 feet is the suggested distance from you to the nearest wall behind you
- Position yourself directly in the center of your videos frame, and have your computer at or near eye level. If you have a laptop books can help elevate your computer

Lighting

- Situate yourself in a well-lit area. Seek natural or artificial light sources
- Avoid backlighting, which will cause you to appear as a silhouette
- If there are windows in your room, have them to the left, right or front of your setup

*Note: Given current building access restrictions during Covid-19 KIS is unable to provide in-person support.

Wardrobe

First and foremost, dress as though you were conducting official Kellogg business in person. Be professional and polished.

Patterns and colors

- No stripes or complex patterns. Checks, extreme stripes or dramatic herringbone patterns tend to moiré—appear to vibrate—on screen
- Extremely small checkered shirts can be an issue
- Solid colors are best. Colors that work well are purple, shades of gray, salmon orange/pink, blues. Pure white is not ideal. Nothing extremely bright

Style

- Be comfortable, if you rarely wear a tie/scarf while speaking then do not wear one for your virtual delivery
- Avoid items of clothing that have fluffy edges or loose fibers, such as mohair sweaters

Backup attire

- Bring a back-up if your first choice is not suitable. If you have multiple versions of the same item, bring them in the event of a stain

Glasses/Jewelry

- If you are going to wear glasses, a pair that has a non-reflective coating is preferred
- Do not wear 'noisy' jewelry

Other presenter guidelines

As a presenter, you want the audience to be engaged and focused on your message.

Provide a checklist to participants to ensure an effective video conference

- Wear headphones when possible to offset any background noise that may distract the group
- Stay focused during the call. Refrain from typing or other distracting behaviors
- Do not eat while on the call
- Mute yourself when you are not talking
- If screen sharing, clear out your browser and bookmarks of anything that may be distracting.

Be engaging

- Keep your tone up and don't lose stamina
- Think of ideas that will introduce or close your event. Some ideas are an ice breaker or a social activity to start or end the conversation off on a personal level
- Virtual fatigue may set in. Please think of setting your event apart. Can you turn content into an infographic to be shared? Can you turn your meeting into a game? Can you host interactive group breakouts?
- Things to consider: add gamification, consider use of graphic and music versus lots of text for presentation materials

If you have a specific need or are looking for a particular virtual experience, please refer to [slide 3](#) for resources to help you plan your event. Thank you!