



# Turn Your Physical Conference to Virtual

## COVID-19 Conference Emergency Guide

# Why We Created This Guide

At Openwater a majority of our customers depend on annual meetings, conferences and summits to raise awareness, engage members and inspire others to join. The impact of COVID virus is forcing organizations to reconsider their all-important events in 2020.

This guide will present the framework and toolkit to quickly migrate from a physical conference to a virtual conference through Zoom, or similar meeting tools like GoToMeeting. It is worth noting that OpenWater is not affiliated with Zoom and this is not a sales guide for Zoom. This is a quick start technical guide for event managers.

While there is no way to replace the immersive experience of a physical event this guide can assist an organization that needs to urgently transition to a virtual conference while abiding by the expectations of attendees, presenters and sponsors.



Kunal Johar, CTO



## **A Typical Meeting Includes:**

1. Breakfast / Reception
2. Keynote Speaker
3. Breakout Session
4. Lunch / Exhibitor Hall (Sponsors)
5. Breakout Session
6. Networking Events

## **Overview of Our Process**

The first step is beginning to transfer the breakout sessions and keynote speakers from physical rooms to virtual rooms.

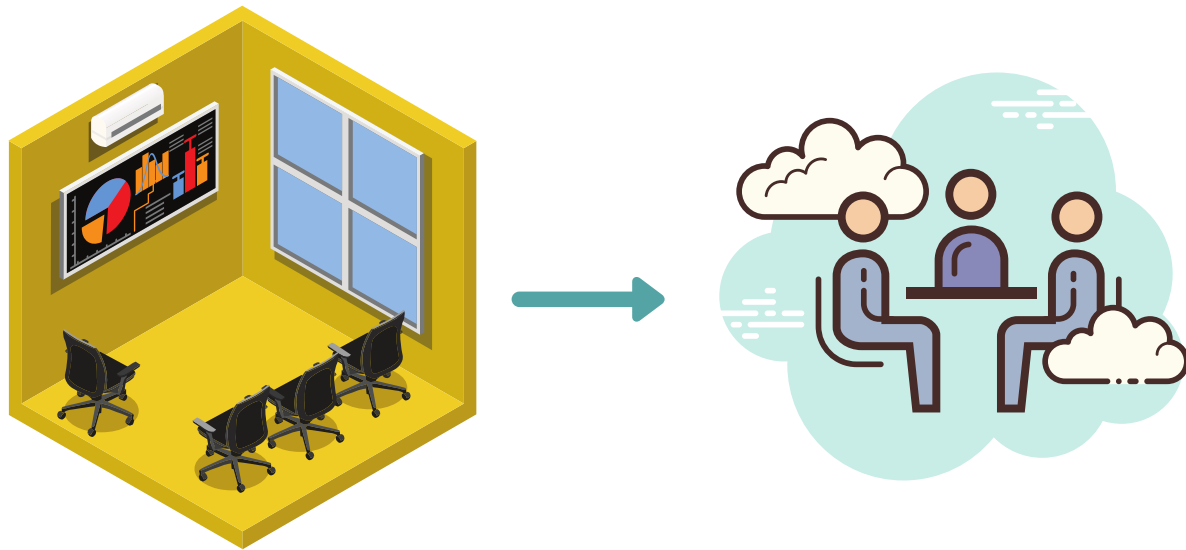
Think of each virtual room as a unique webinar room. Each virtual room will be accompanied by its own host. Similar to physical rooms, hosts who would have otherwise helped with the projector and microphone will now play the same roll administering the Zoom meeting.

The room host will have a small set of responsibilities to ensure a productive session. These steps will ensure the presenter is not burdened with the technology side and ensure all attendees can virtually network, or ask questions.

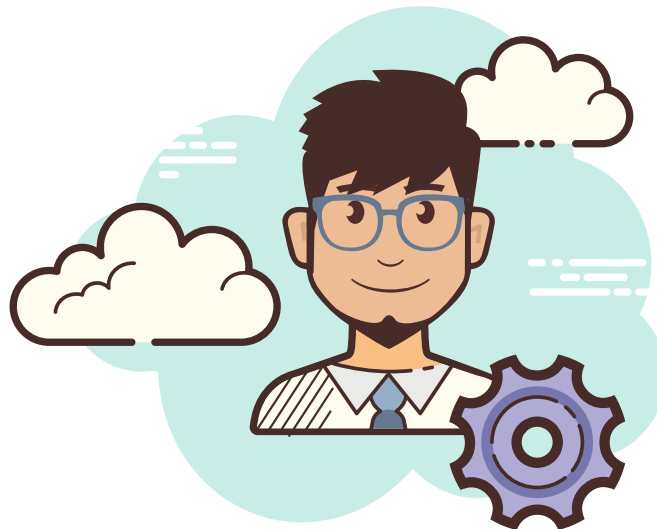
Finally, we want to record all the sessions, perhaps this will be a small bonus in the eyes of attendees.

# What We Will Accomplish

**Reassigned Our Physical Rooms to Virtual Rooms**



**Assign Each Virtual Meeting Room a Host**



# 1

## Create a Pro Zoom Account

Zoom is our ideal tool for a virtual event because the subscription plans allow for one master administrator and then a number of "hosts."

The number of hosts will equal the number of physical rooms that your conference was going to have originally.

In essence imagine that each room at the original conference would have a dedicated tech manager. Instead of setting up a projector, arranging seats and mic checks this new virtual host will manage the everything through Zoom.

If your having trouble estimating the number of hosts to create in Zoom wait until after you complete step two, mapping the virtual rooms in a sheet.

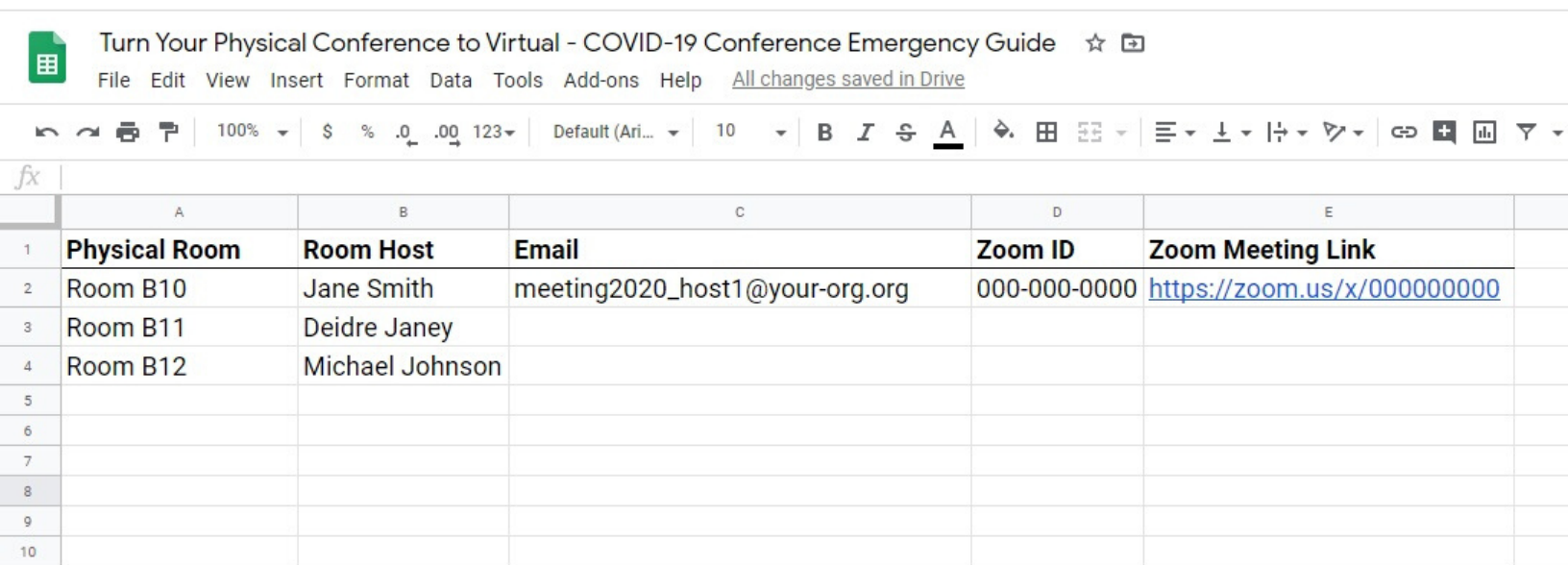
<https://zoom.us/pricing>

# 2

## Map Physical Rooms to Virtual Rooms

In order to map physical rooms to our new virtual rooms let's create a simple excel sheet to manage the process. You can use our template.

### [Sheet Template](#)



The screenshot shows an Excel spreadsheet with the following structure:

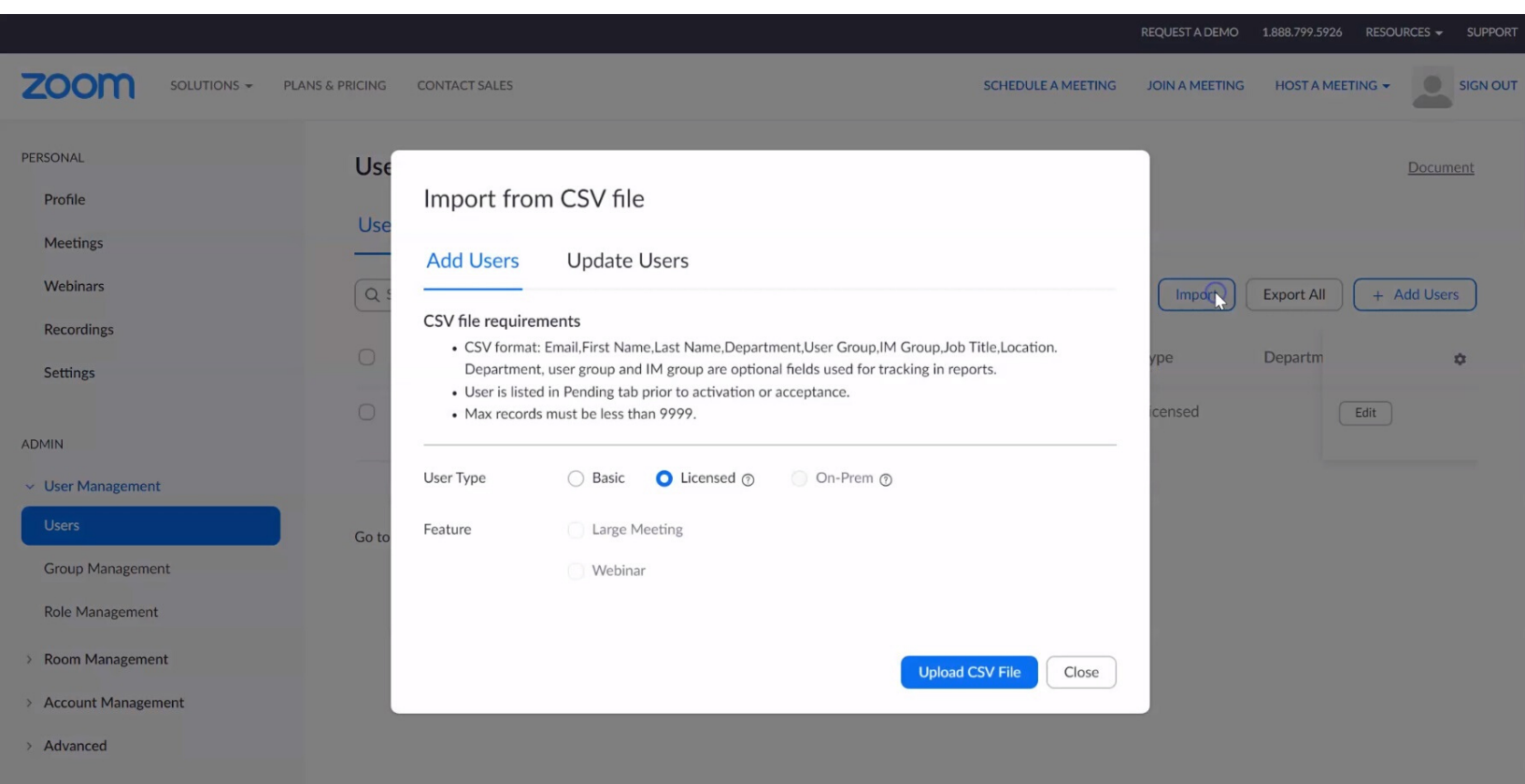
	A	B	C	D	E
1	<b>Physical Room</b>	<b>Room Host</b>	<b>Email</b>	<b>Zoom ID</b>	<b>Zoom Meeting Link</b>
2	Room B10	Jane Smith	meeting2020_host1@your-org.org	000-000-0000	<a href="https://zoom.us/j/000000000">https://zoom.us/j/000000000</a>
3	Room B11	Deidre Janey			
4	Room B12	Michael Johnson			
5					
6					
7					
8					
9					
10					

# 2

## Map Physical Rooms to Virtual Rooms

With regards to the email column, we urge your IT department to create a unique email for each room host. Next, go into Zoom and import these email addresses as users.

To do this go to Admin > User Management > Users and select add user. Make sure to label them as "Licensed."



The screenshot shows the Zoom Admin console interface. The top navigation bar includes links for REQUEST A DEMO, 1.888.799.5926, RESOURCES, and SUPPORT. The main navigation menu on the left lists PERSONAL (Profile, Meetings, Webinars, Recordings, Settings) and ADMIN (User Management, Users, Group Management, Role Management, Room Management, Account Management, Advanced). The 'Users' section is currently selected. A modal dialog box titled 'Import from CSV file' is open, showing options to 'Add Users' or 'Update Users'. Below this, 'CSV file requirements' are listed: CSV format (Email, First Name, Last Name, Department, User Group, IM Group, Job Title, Location), optional fields for tracking, user listing in the Pending tab, and a maximum record limit of 9999. Under 'User Type', 'Licensed' is selected. Under 'Feature', 'Large Meeting' and 'Webinar' are options. At the bottom of the dialog are 'Upload CSV File' and 'Close' buttons.

zoom SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING SIGN OUT

PERSONAL

- Profile
- Meetings
- Webinars
- Recordings
- Settings

ADMIN

- User Management
- Users**
- Group Management
- Role Management
- Room Management
- Account Management
- Advanced

Import from CSV file

[Add Users](#) Update Users

CSV file requirements

- CSV format: Email,First Name,Last Name,Department,User Group,IM Group,Job Title,Location. Department, user group and IM group are optional fields used for tracking in reports.
- User is listed in Pending tab prior to activation or acceptance.
- Max records must be less than 9999.

User Type ☐ Basic ☒ Licensed ☐ On-Prem

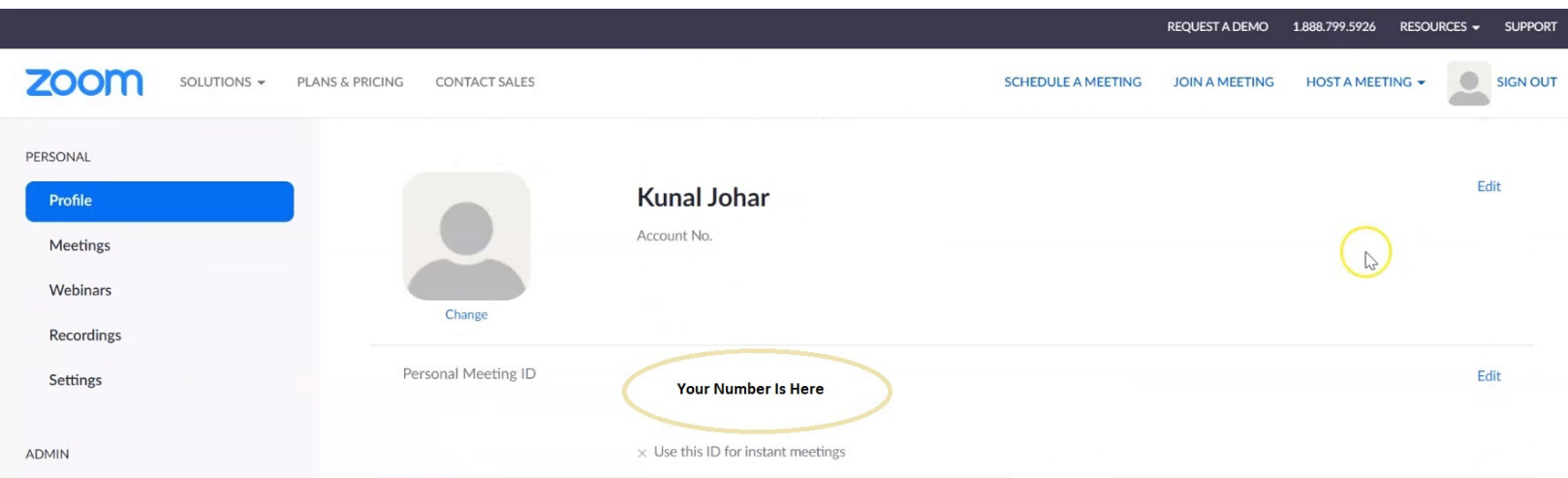
Feature ☐ Large Meeting ☐ Webinar

Upload CSV File Close

# 3

## Log Host Room ID, URL, Configure Zoom

**A)** Now that we have each host setup in Zoom we need to access their individual zoom accounts and copy the Meeting ID and Meeting URL into our sheet. Login using the email address you had created and go to the profile in Zoom.



zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾ SIGN OUT

PERSONAL

- Profile
- Meetings
- Webinars
- Recordings
- Settings

ADMIN

Kunal Johar  
Account No. [redacted]

Change

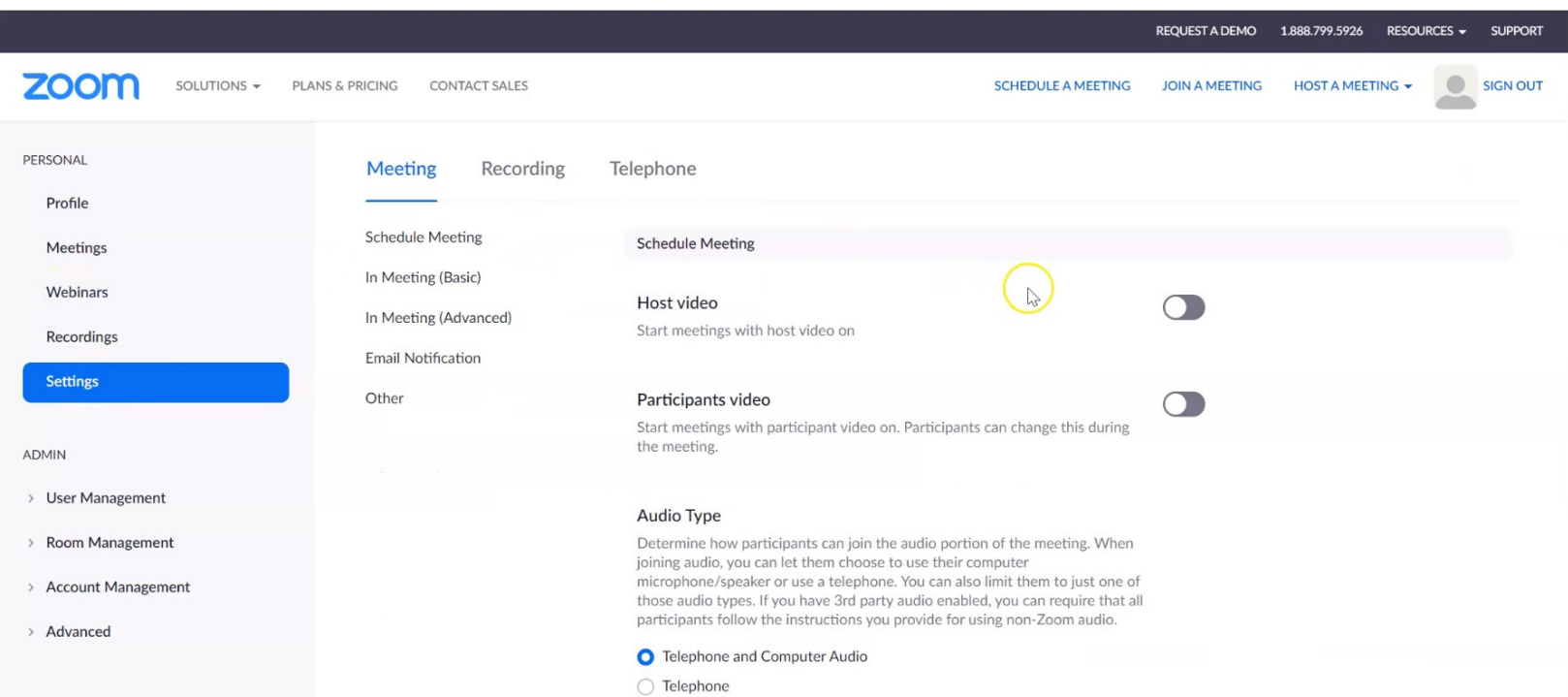
Personal Meeting ID [redacted] **Your Number Is Here**

× Use this ID for instant meetings

# 3

## Log Host Room ID, URL, Configure Zoom

**B)** For each host you'll also want to configure a few default settings. Go to "Setting" under the left hand column in Zoom. You'll notice that there are many settings, we urge you to explore each of them. Pay close attention to these settings listed on the next page.



The screenshot shows the Zoom web interface. The top navigation bar includes links for "REQUEST A DEMO", "1.888.799.5926", "RESOURCES", "SUPPORT", "zoom", "SOLUTIONS", "PLANS & PRICING", "CONTACT SALES", "SCHEDULE A MEETING", "JOIN A MEETING", "HOST A MEETING", and a "SIGN OUT" button. The left sidebar contains a "PERSONAL" section with "Profile", "Meetings", "Webinars", "Recordings", and "Settings" (highlighted in blue), and an "ADMIN" section with "User Management", "Room Management", "Account Management", and "Advanced". The main content area has tabs for "Meeting", "Recording", and "Telephone". Under the "Meeting" tab, there are sub-sections: "Schedule Meeting", "In Meeting (Basic)", "In Meeting (Advanced)", "Email Notification", and "Other". The "Schedule Meeting" sub-section is active, showing settings for "Host video" (toggle on), "Participants video" (toggle on), and "Audio Type" (radio buttons for "Telephone and Computer Audio" and "Telephone"). A yellow circle highlights the "Host video" toggle switch.

# 3

## **Log Host Room ID, URL, Configure Zoom**

Here are the settings we suggest:

- Auto-Mute All Participant
- Don't Play Sounds When Someone Leaves
- Record to Cloud
- Always Record
- Auto Record
- Set Password (if restricting access is important)
- Allow Join Before Host
- Turn Off All Video
- Use Personal ID
- Auto-Save Chat
- Allow for Co-Hosts
- Allow for Polling
- Allow Only Hosts to Screen Share
- Allow Only Hosts to Start Sharing Screen

# 4

## Notifying Attendees, Update the Website

Now we need to begin notifying attendees. Just sharing the sheet might make things confusing. We suggest wherever a room or location is mentioned on your website to add the new meeting room URL. Another option would be include a Google calendar link on the page so that people can add the event to their own calendars and manage their schedule virtually.

### Session Gallery

#### Search

Title, Keyword, Author

- ☐ Search within Session Description
- ☒ Search within Abstracts
- ☐ Only show Virtual Attendance

Additional Filters

#### SESSION

**Time:** 60 Minute(s)

**Type:** Paper

**Theme:**

**Sponsor Groups:** SPONSOR

**Day:** 4/9/2020

**Start / End Time:** 3:20 PM / 4:35 PM

**Room:** Plaza Court 3, Sheraton, Concourse Level

**New Virtual Room**

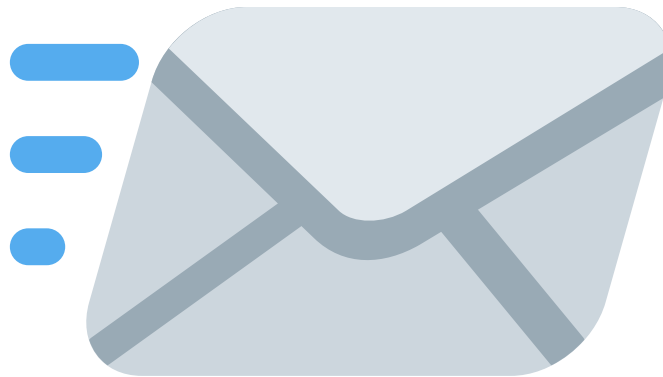
<https://zoom.us/j/000000000>

# 4

## Notifying Attendees, Email Tips

It will be important to notify all of the attendees that the meeting has moved to a virtual setup. When you do this here is what we suggest to include in the email:

- Airline / Hotel Policy & Refund
- Presenter Timing Has Not Changed
- All Physical Rooms Are Now Virtual Rooms
- How to Build a New Virtual Conference Schedule



# 5

## Training Meeting Hosts

A critical step in this process will be working with each room host to ensure that the line-up of virtual presentations goes off without a hitch. We suggest that each room host utilize Zoom's various startup resources and most importantly complete a test of running a Zoom meeting itself.

[Run a Zoom Test Meeting](#)

[Zoom Startup Resources](#)

### Critical Host Skills

- Passing the presenter role
- Starting a meeting
- Run a Zoom test with presenters prior to the meeting
- Setting up meeting recordings, screen recordings
- How to help attendees login, or call in to a meeting

Each host should have a list of presenters by time and day including contact information for each presenter. Attendees should understand worst case they can login via phone.

# 6

## Solutions for Sponsors

Naturally a huge drawback is that sponsors are missing out on the ability to meet with customers face to face. Here are a few solutions to incorporate sponsors into your virtual event:

- Allow sponsors to present at the start of sessions
- Create a dedicated session for each sponsor to present
- Allow sponsors to field questions during their session
- Allow sponsors to poll attendees at the start of sessions.



# Thank You

## What Is OpenWater?

OpenWater is a cloud-based application and review platform designed to automate and help grow awards and recognition programs along with fellowships, scholarships, grants, and abstract submissions.

Learn More at [GetOpenWater.com](https://www.getopenwater.com)