

TC Practice Guide How to Toolkit 4 - Planning TC Outreach



European Bank
for Reconstruction and Development



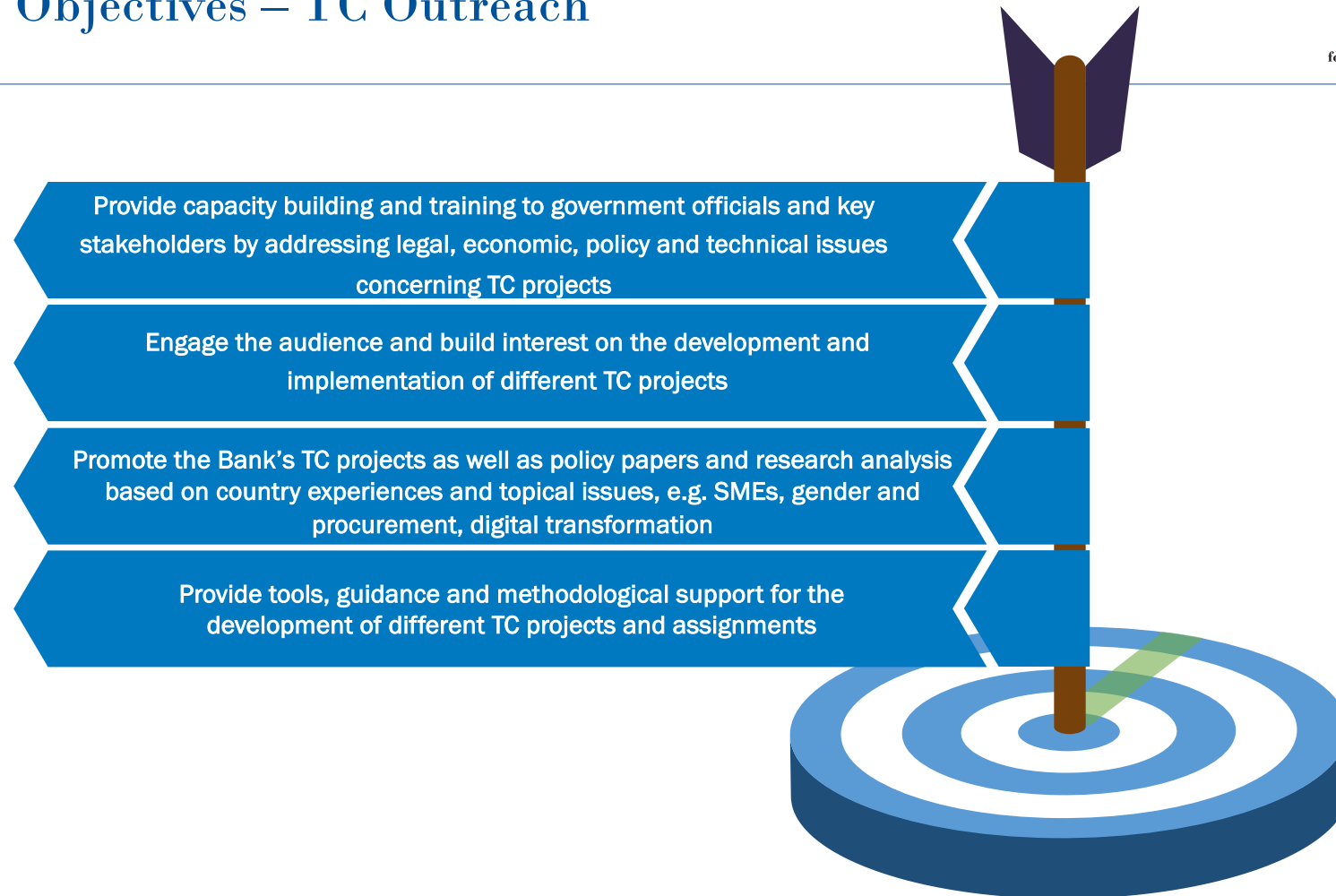
Outline

1. Definition – TC Outreach
2. Objectives
3. Scope of work for event planning and available tools
4. Planning, preparation and management of the event: standard event planner tasks
 - Development of the event outline – Key message, Key speakers and Target Audience
 - Planning and content creation – Huddle app
 - Event preparation – GlueUp app
 - Launch & Marketing – GlueUp and social media
 - Feedback collection and Follow up
5. Event Planner Checklist – Online Event Checklist/Face-to-face Event Checklist
6. Risk management – Why Plan B is a must?
7. Tips & Tricks: main takeaways from Huddle, GlueUp and Zoom

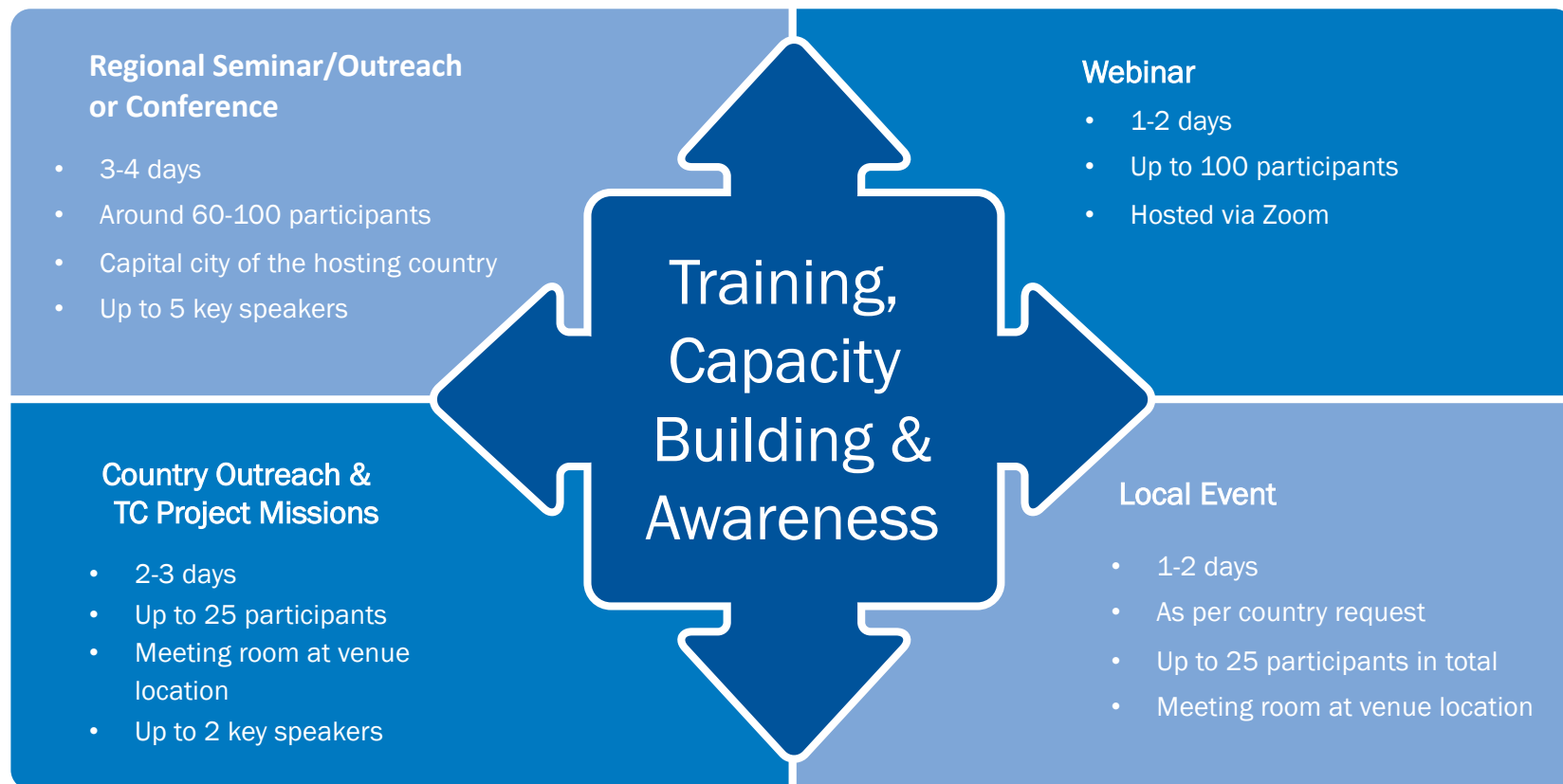
What is TC Outreach?

- Consultants deliver TC outreach events as a separate TC deliverable or as an activity under the TC deliverable.
- The outreach may constitute a **training**, a **capacity building** or **awareness** raising session.
- The scope and objective of outreach is defined in the terms of reference for the TC Assignment and afterwards in the Inception Report.
- An outreach proposal prepared by the Consultant, including the event outline and all detail, is subject to the OL approval.

Objectives – TC Outreach



Scope of work for event planning



Available Tools for ‘virtual’ and ‘face-to-face’ Outreach Events

Huddle

- Internal knowledge and document repository

GlueUp

- Event management platform

Webinar for Zoom

- Webinar, streaming, and online meeting platform, integrated with the GlueUP tool

Breeze.pm

- Project management tool to plan, track and organize assignments

Detailed information on these tools is available from slide 16

Planning, preparation, and management of the event



CONCEPT

Confirm date and location/ Webinar
Define goals and objectives
Agenda
Speakers



PLANNING & PREPARATION

Logistics:

- Venue, equipment, catering
- Flights, accommodations, visas

Draft GlueUP page
Presentations, research paper, case studies, etc



LAUNCH & MARKETING

Launch GlueUp page

Campaigns:

- Invitations
- Registration
- Reminders and re-promotion

Follow-up on logistics



EVENT DELIVERY

Zoom

- Host the webinar, open the platform on time, promote participants, etc.

On-site

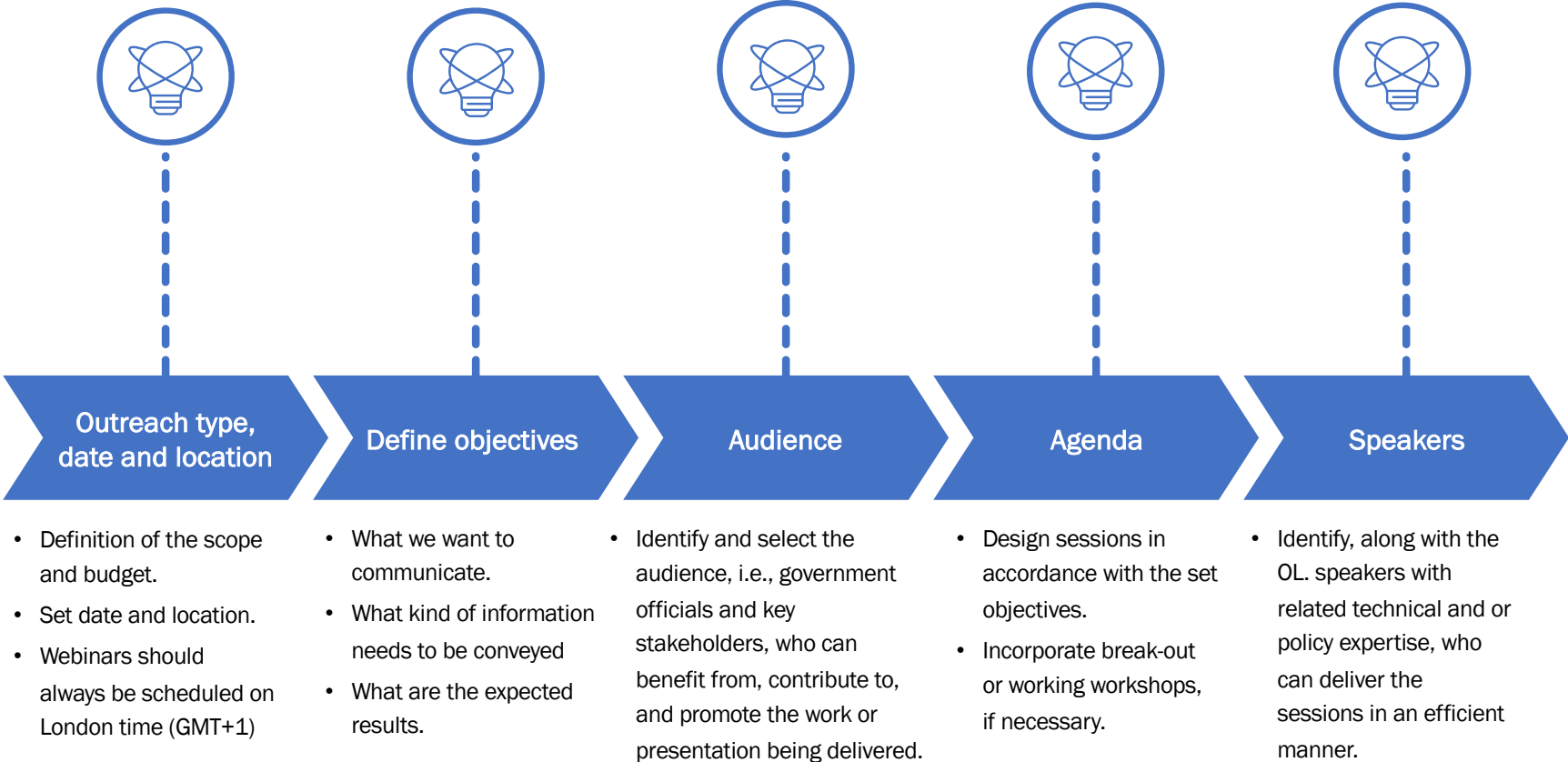
- Check equipment, laptops, microphone, speakers
- Coffee breaks and lunch



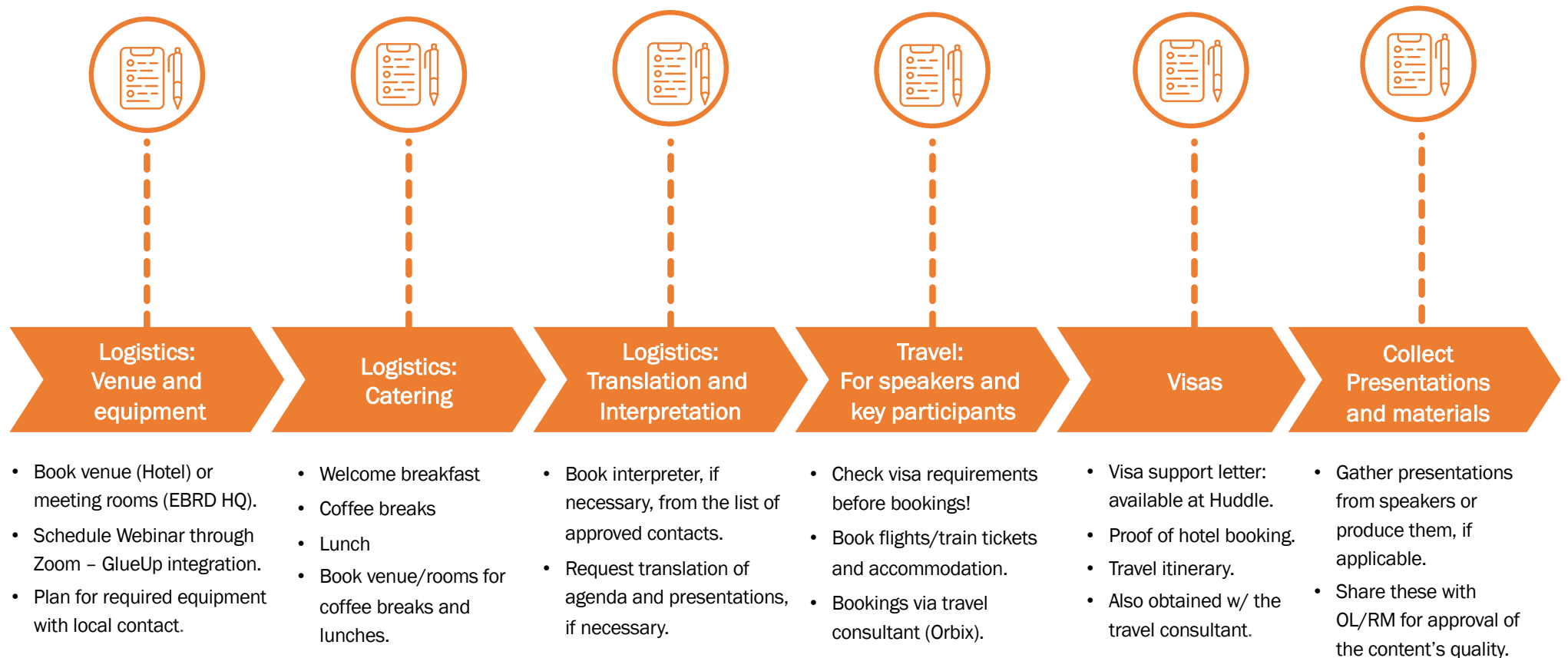
FOLLOW-UP

Thank you notes to speakers and participants
BTOR
Reimbursement forms, if any

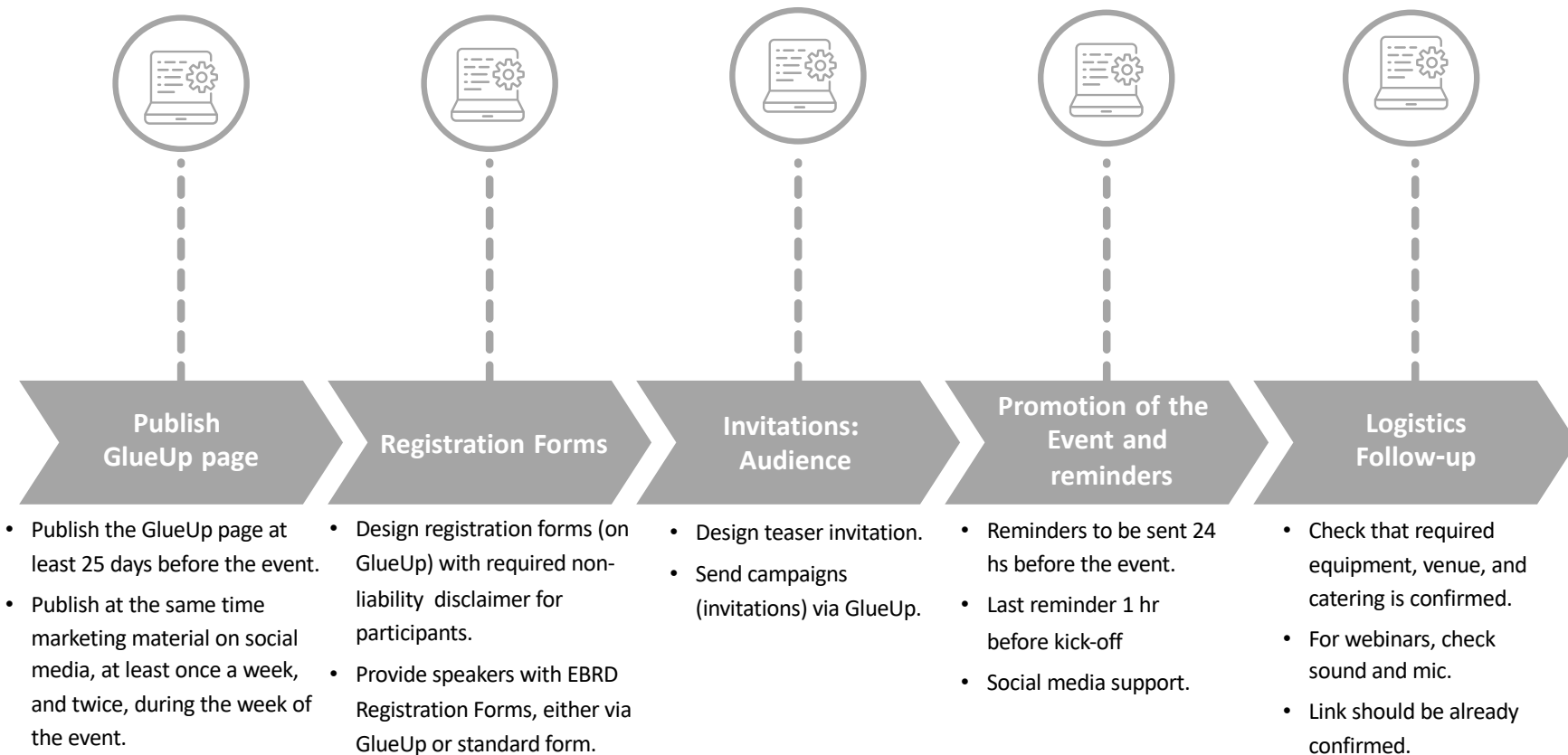
Development of the event outline – Key message, Key speakers and Target Audience



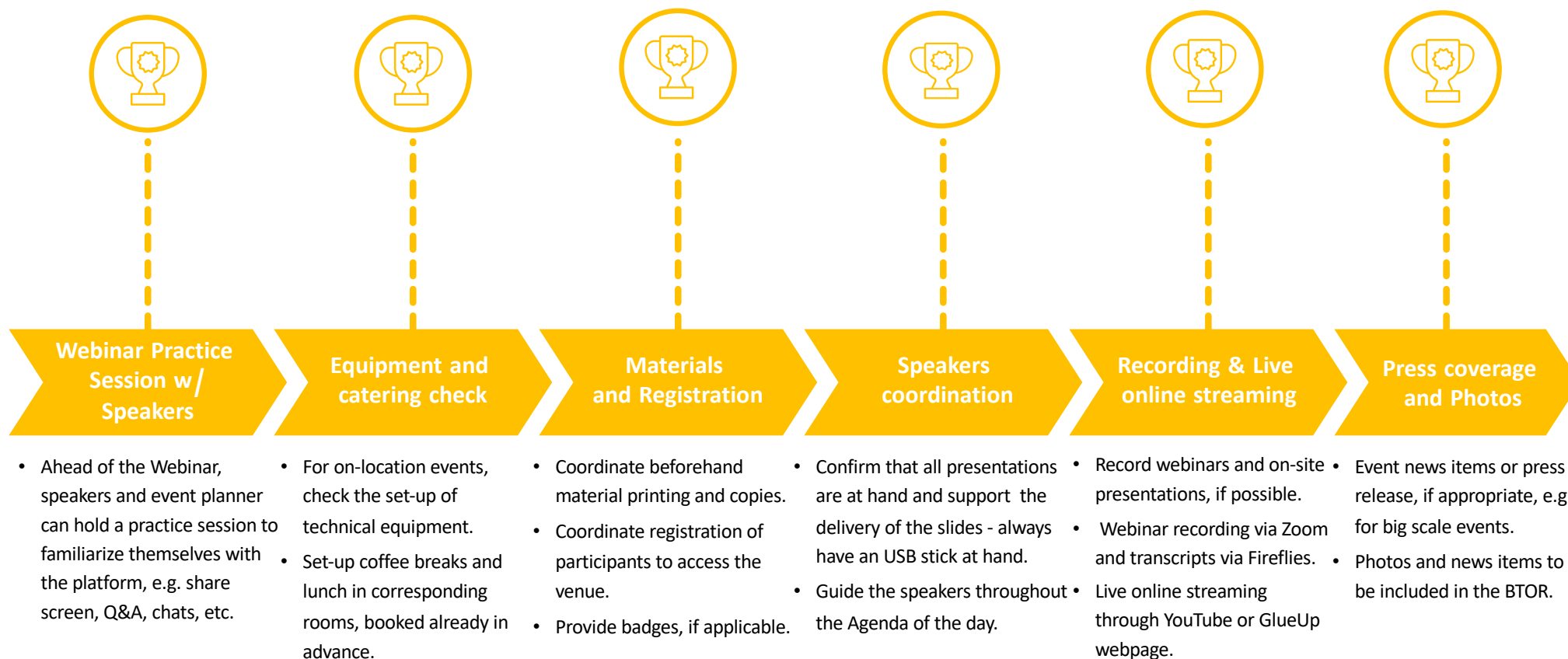
Planning and content creation – Huddle app



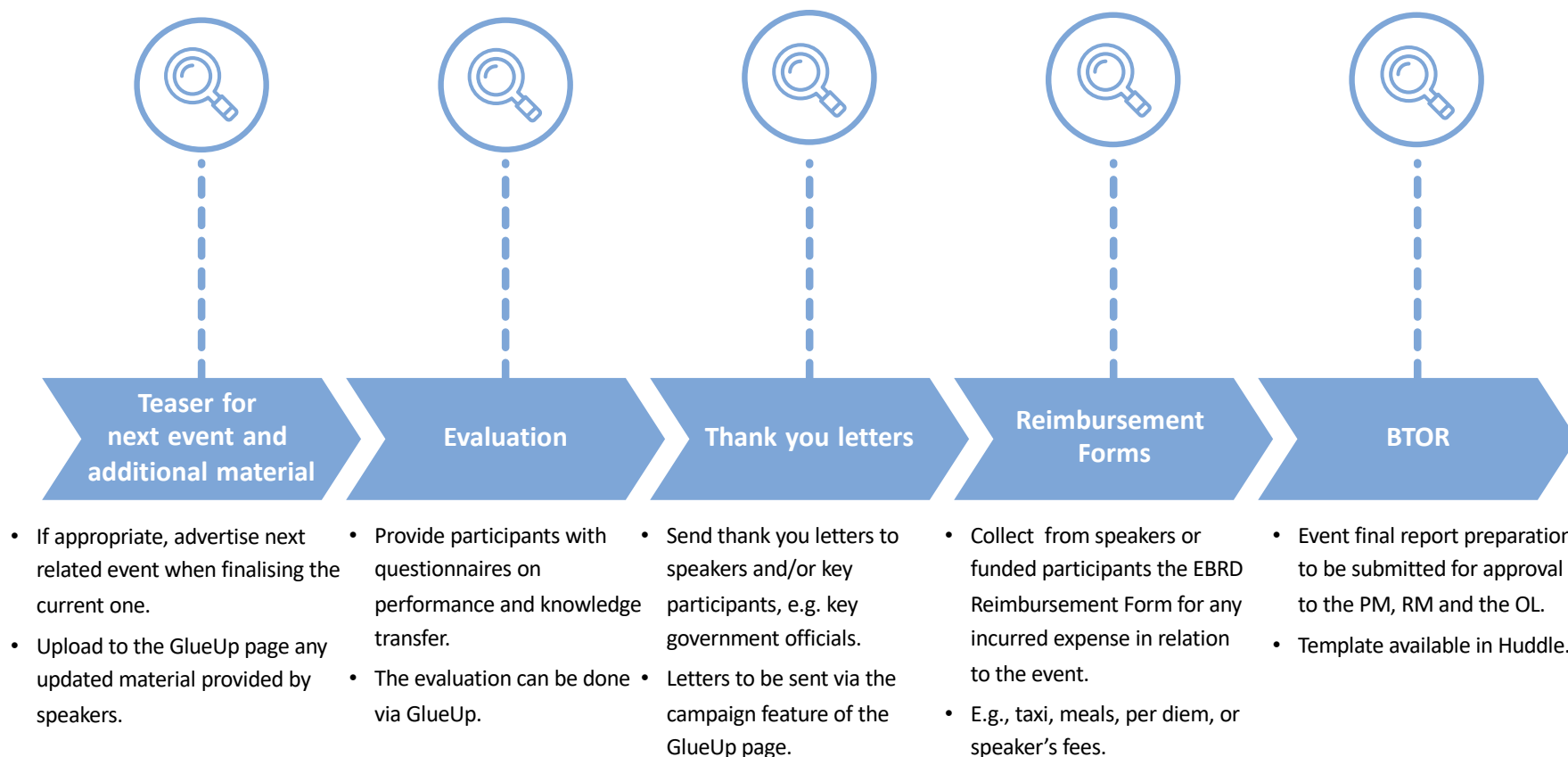
Launch & Marketing – GlueUp and social media



Event face-to-face or online delivery – GlueUp and Zoom apps



Feedback collection and Follow up



Event Planner Checklist – Online Event Checklist/Face-to-face Event Checklist



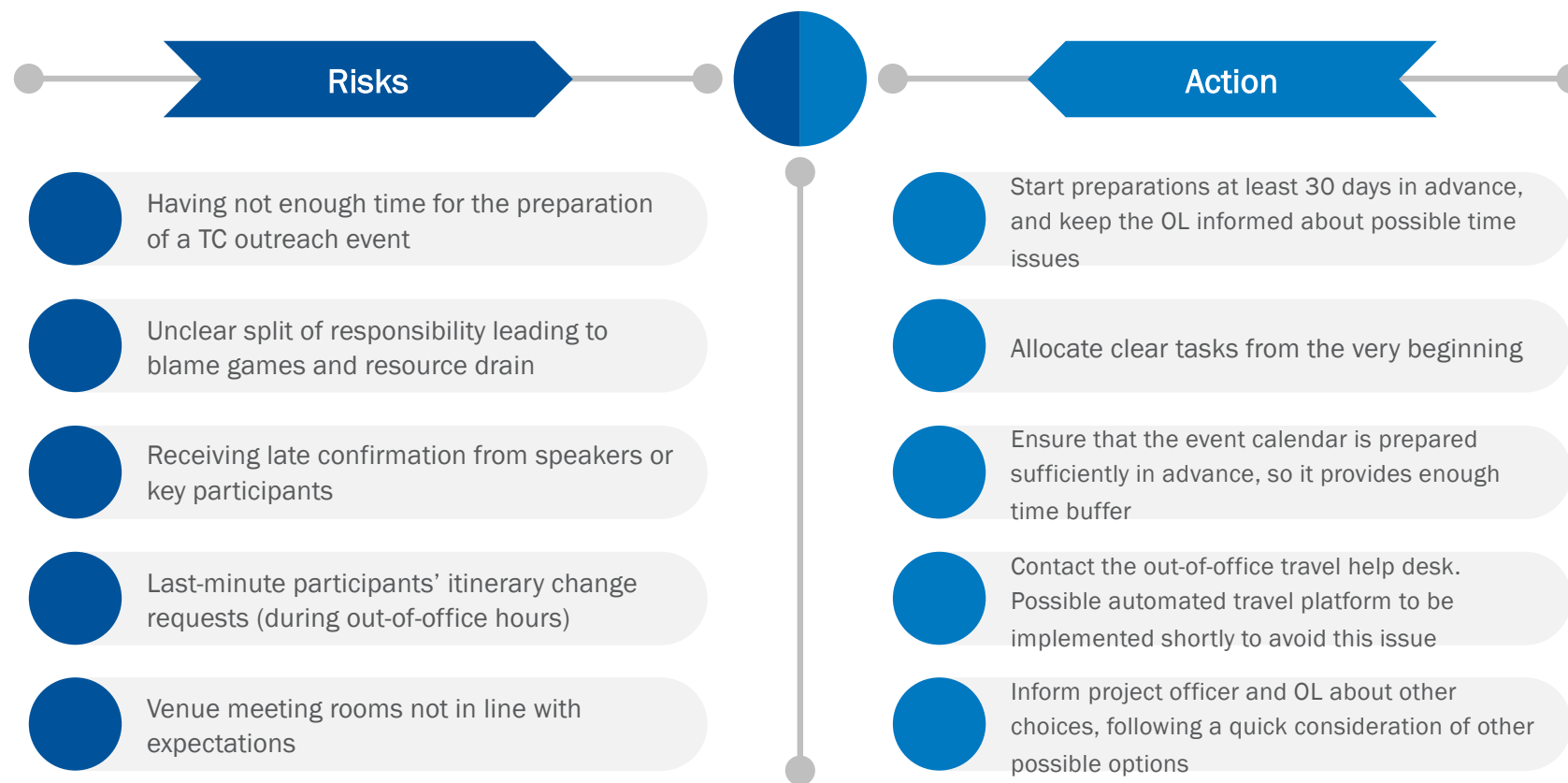
WEBINAR CHECKLIST					
ID	TASK	PRIORITY	DONE	COMMENTS	RESPONSIBLE PERSON
		When to start activity (in number of days prior to Event start)	yes/no		
EVENT DATES					
1	Set up provisional agenda and list of potential speakers	30			
2	Share the draft for comments of the responsible people (OL or Outreach coordinator)	30			
3	Webpage set up (Content: settings, summary, agenda, speakers, partners, layout design)	25-30			
4	Publish the Event	25			
5	Send placeholders to speakers through the system	25			
MARKETING					
6	Design teaser for invitation	25-30			
7	Publish marketing content on the EBRD LinkedIn, Twitter, Facebook	25			
8	Last event reminder for speakers and participants	1			
9	Final event reminder for speakers and participants	1h before E.		Highlight the webinar link in the campaign text	
PARTICIPANTS					
10	Draft full name list of participants, taking into account the focus of the webinar	30		Contacts from previous events are already saved in the CRM	
11	Finalisation of the list with the OL or Outreach coordinator	25			
12	Invitations to approved list of participants through the EventBank app	20-25			
LOGISTICS					
13	Video link technology set up (Zoom Webinar)	25		Use Project Accounts	
14	Set up meeting recordings (Recording – Zoom, Transcript – Fireflies)	25			
15	Set up physical meeting room, if necessary, for in-house experts	25		EBRD HQ	
16	Technical equipment arrangement	25			
17	Live online streaming. E.g. YouTube and/or through main event webpage	25			
18	Interpreters/designers/facilitators arrangement	25			
KEY SPEAKERS AND MATERIALS					
19	Confirm the speakers and check their registration on the EventBank app	20-25			
20	Acquiring material inputs from key experts (Presentations, slides, bio, picture)	20-25			
21	Materials editing and translation	20			
22	Materials compilation (Webpage upload)	15		In Documents section and linked to the Agenda	
FINAL LOGISTICS					
23	Check the registration of participants	15			
24	Send a follow up campaign to not registered participants	15			
25	Event reminder to be sent to speakers	10			
26	Webinar practice sessions with speakers	2			
EX-POST ACTIVITIES					
27	Teaser for next event, if appropriate	On the day of E.			
28	Upload additional materials after the Event	2 d. after E.			
29	Event feedback realization/meeting	2 d. after E.			
30	Preparation of Event questionnaire and thank you notes	2 d. after E.			
31	Event Final Report preparation	5 d. after E.			
32	Collection of bills, event final budget and account statement preparation	5 d. after E.			

Preparation and follow-up checklists for event planner:

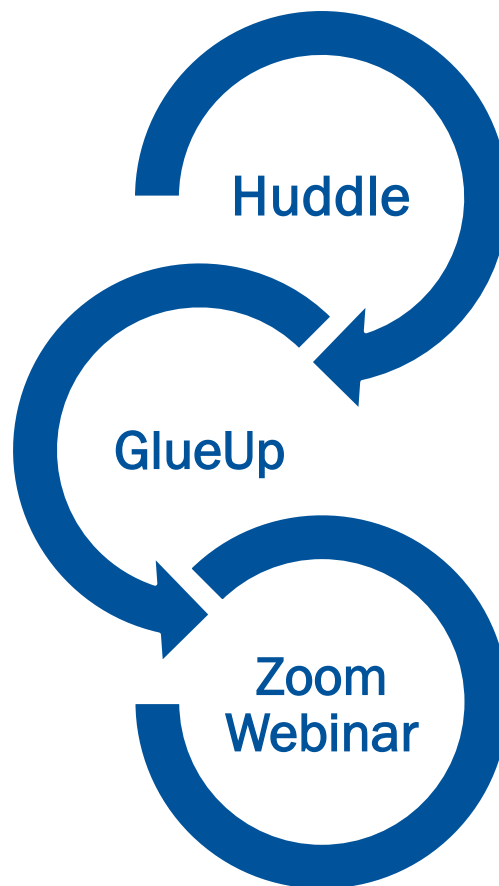
- Webinar_GlueUp_Zoom:
<https://my.huddle.net/workspace/38641839/files/#/78929286>
 - Local Event_GlueUp:
<https://my.huddle.net/workspace/38641839/files/#/78929280>
 - Regional Seminar or Conference:
<https://my.huddle.net/workspace/38641839/files/#/78928882>
-



Risk management – Why Plan B is a must?



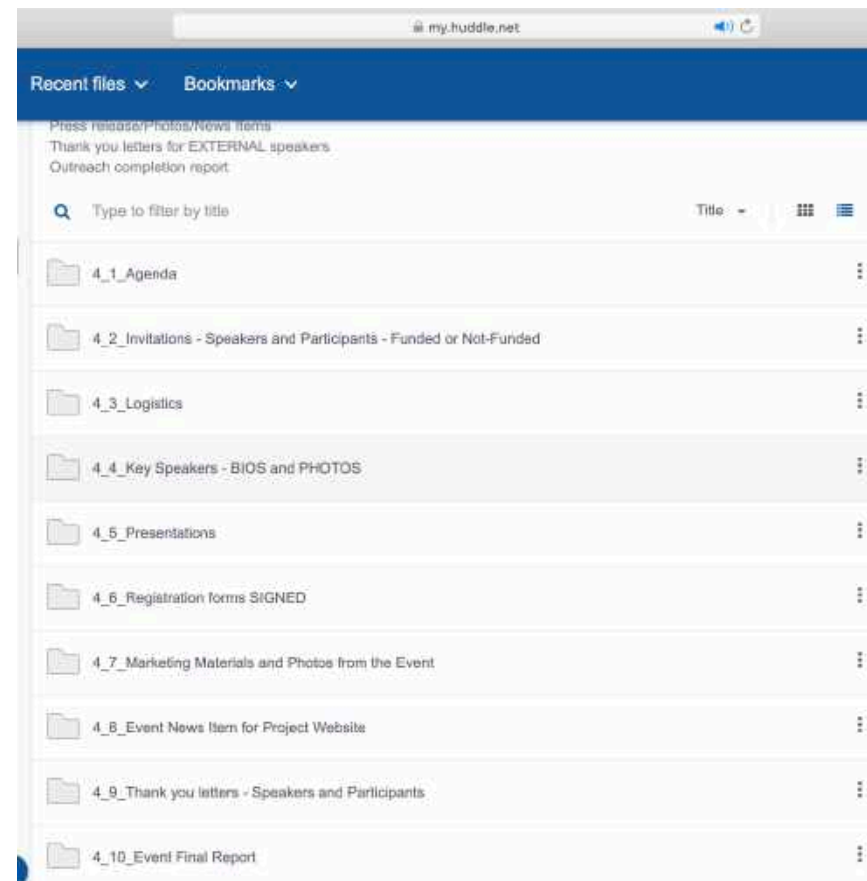
Available tools for *'virtual'* and *'face-to-face'* outreach events - Tips & Tricks



Huddle

The Basics for Outreach Planning

- Internal knowledge and document repository.
- Individualized folders include, among others, agenda, invitations, logistics, thank you letters and event final report.
- Templates vary according to the type of outreach event.
- For each outreach event, a separate Huddle folder is to be created with the pre-defined structure copied from the Huddle folder template in the corresponding Workspace.
- Only for documents that cannot be uploaded in the GlueUp webpage and as a back-up repository of other relevant documents, such as presentations and agenda.
- Please use it when consultant project team organises an outreach event as a separate deliverable or an activity under the deliverable.



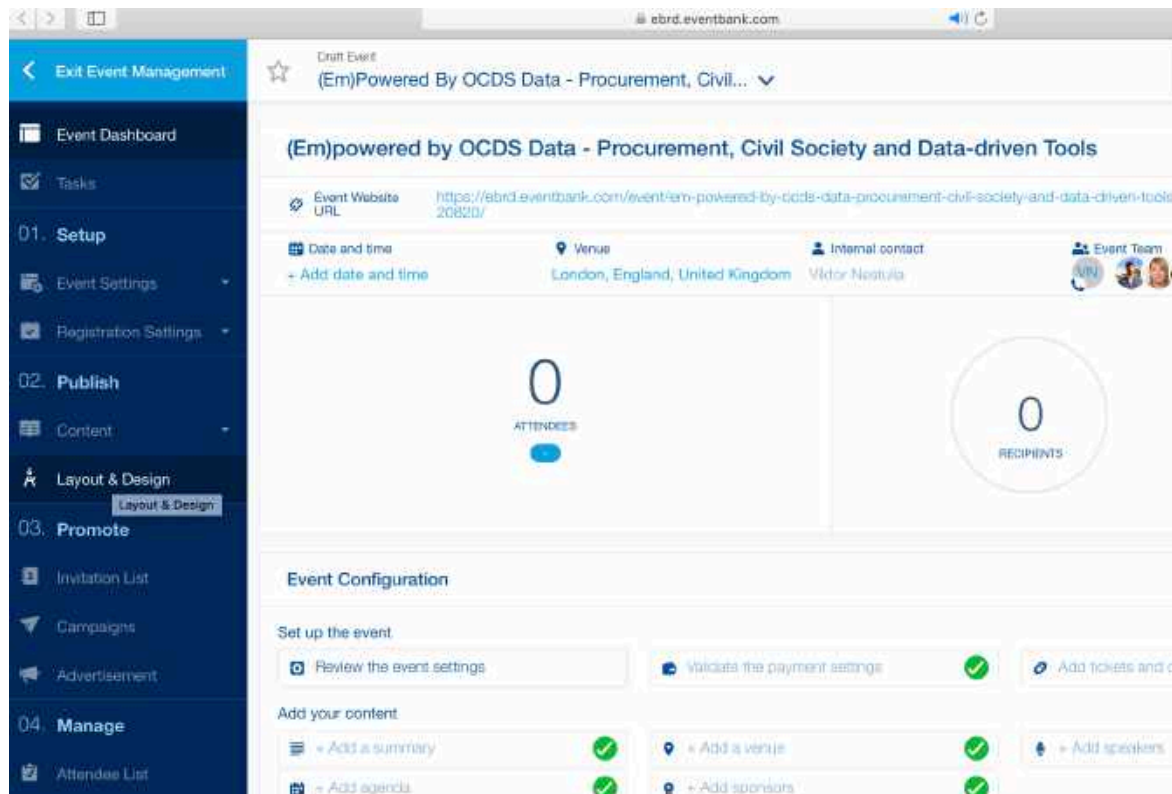
Huddle templates available for different types of outreach event:

- Webinar_GlueUp_Zoom:
<https://my.huddle.net/workspace/38641839/files/#/folder/49566980/list>
- Local Event_GlueUp:
<https://my.huddle.net/workspace/38641839/files/#/folder/49566968/list>
- Regional Seminar or Conference:
<https://my.huddle.net/workspace/38641839/files/#/folder/49566499/list>
- Country Outreach & TC Project Missions:
<https://my.huddle.net/workspace/38641839/files/#/folder/49566992/list>
- Regional Outreach:
<https://my.huddle.net/workspace/38641839/files/#/folder/49567004/list>



Please refer to How to Toolkit 3 for more information about Huddle.

What is GlueUp?



An event management platform, with the following functionalities:

- CRM – contact directory.
- Design event’s webpage.
- Send invitations/campaigns.
- Promote event/reminders.
- E-mail marketing.
- Registration of participants.
- Repository of documents for the audience.
- Reporting and analytics.
- Feedback.
- Mobile app.
- Social media integration.



What is published on GlueUp?

At a minimum, a published GlueUp webpage should contain the following:

- Event info, including, title, subtitle, date, time, location, and Zoom link;
- Agenda;
- Summary (Background and Objectives);
- Speakers' list with photos and bios;
- Documents, namely:
 - Presentations
 - Case studies
 - Research papers
 - Handouts



10-Step Event Planning Guide:
<https://blog.GlueUp.com/event-planning-guide/>



GlueUp: Roles and Responsibilities

Who must create an 'outreach dedicated' GlueUp page?

- Consultants in charge of delivering an outreach event as a separate TC deliverable or as an activity under the TC deliverable, supported by the corresponding Project Officer.

Who should do what?

- **Consultants** must create/prepare/procure/deliver the content of the GlueUp page and outreach event and provide it to the PO for upload.
- **Project Officers** assist on logistics, namely, setting up the GlueUp page and its functionalities.

What is included under CONTENT?	What is LOGISTICS?
<ul style="list-style-type: none">• Providing 'confirmed' date and time of event.• Drafting Agenda.• Drafting 'Background and Objectives'.• Reaching out and <u>confirming</u> speakers.• Providing speakers bio and photos, if not available in the CRM.• Presentations or other materials to be delivered.	<ul style="list-style-type: none">• Setting up the GlueUp page, including the Zoom Webinar link and teaser design.• Uploading the 'content' provided by the Consultant.• Setting up, sending, and following up with the campaigns, namely, invitations, reminders, and thank you notes through the system.• Setting up the Webinar integration, when available.

POs must coordinate with the Consultant on any missing content: at a minimum, the items mentioned in the previous slide must be mandatorily provided!



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How to set-up a GlueUp page for an outreach event? A play-by-play



Consultants and POs must be 'Team Members' of EBRD's GlueUp account to access the tool.

New Consultants who need to make use of GlueUp must request access from GlueUp's Manager at LTT (Julia Shaw, ichetkij@ebrd.com)

On the Home Dashboard, choose the '**Events**' tab and then click on '**+ Create Event**'

The screenshot shows the GlueUp dashboard interface. On the left is a dark blue sidebar with navigation options: Home, Contacts, Events, Campaigns, Finance, Communities, and My Tasks. The main content area is titled 'Events' and features four summary cards: '11 DRAFT EVENTS', '1 CURRENT & UPCOMING EVENTS' (with 43 New Registrations), '23 PAST EVENTS' (with 1,050 Attendees), and '0% AVG. CHECKED IN'. Below these cards are tabs for 'Draft', 'Current & Upcoming', and 'Past'. The 'Draft' tab is active, showing a table of draft events. At the bottom right of the dashboard is a green '+ Create Event' button. A black arrow points from the 'Events' tab in the sidebar to the '+ Create Event' button. Another black arrow points from the 'Events' tab in the top navigation bar to the '+ Create Event' button.

EVENT ID #	EVENT TITLE	LOCATION	START DATE	ACTIONS
☆ 21545	(Em)powered by OCDS Open Data - Business Process	--	--	:

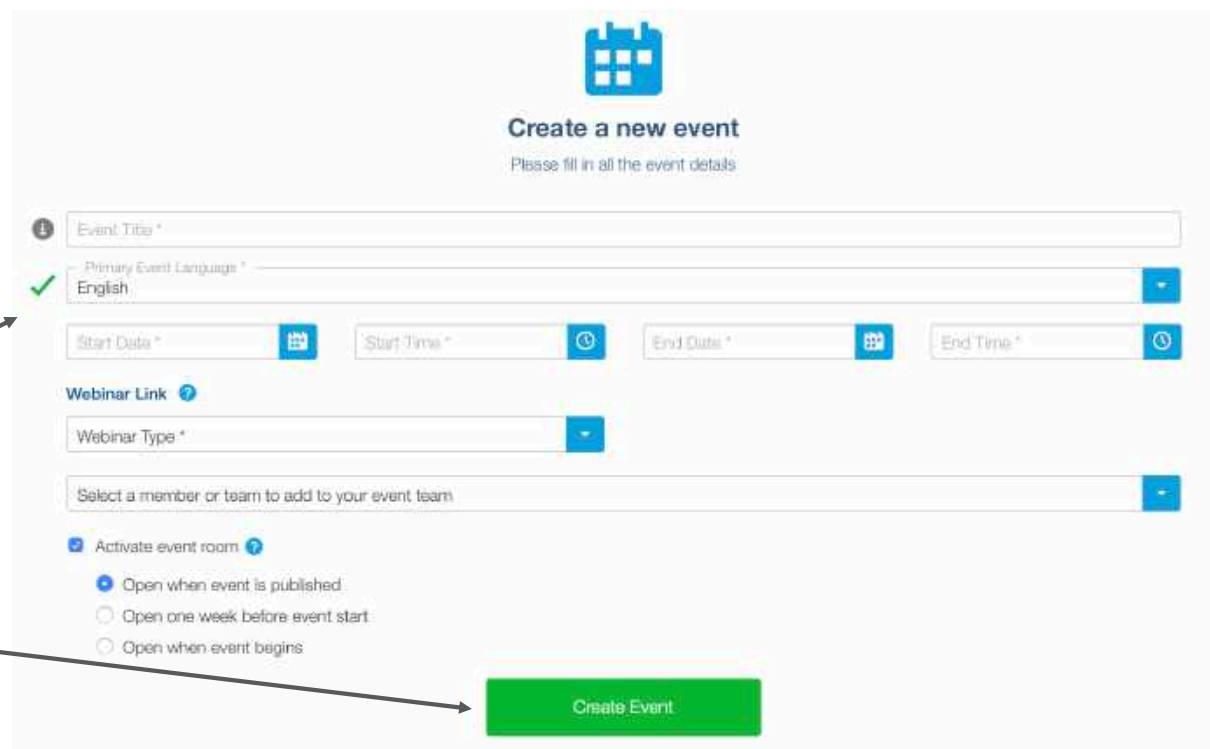
How to set-up a GlueUp page for an outreach event? A play-by-play

Select online event from this two options:

- Offline event or,
- Online event

Fill-in the requested details and click:

'Create Event'



Create a new event
Please fill in all the event details

Event Title *

Primary Event Language *
English

Start Date * Start Time * End Date * End Time *

Webinar Link ?
Webinar Type *

Select a member or team to add to your event team

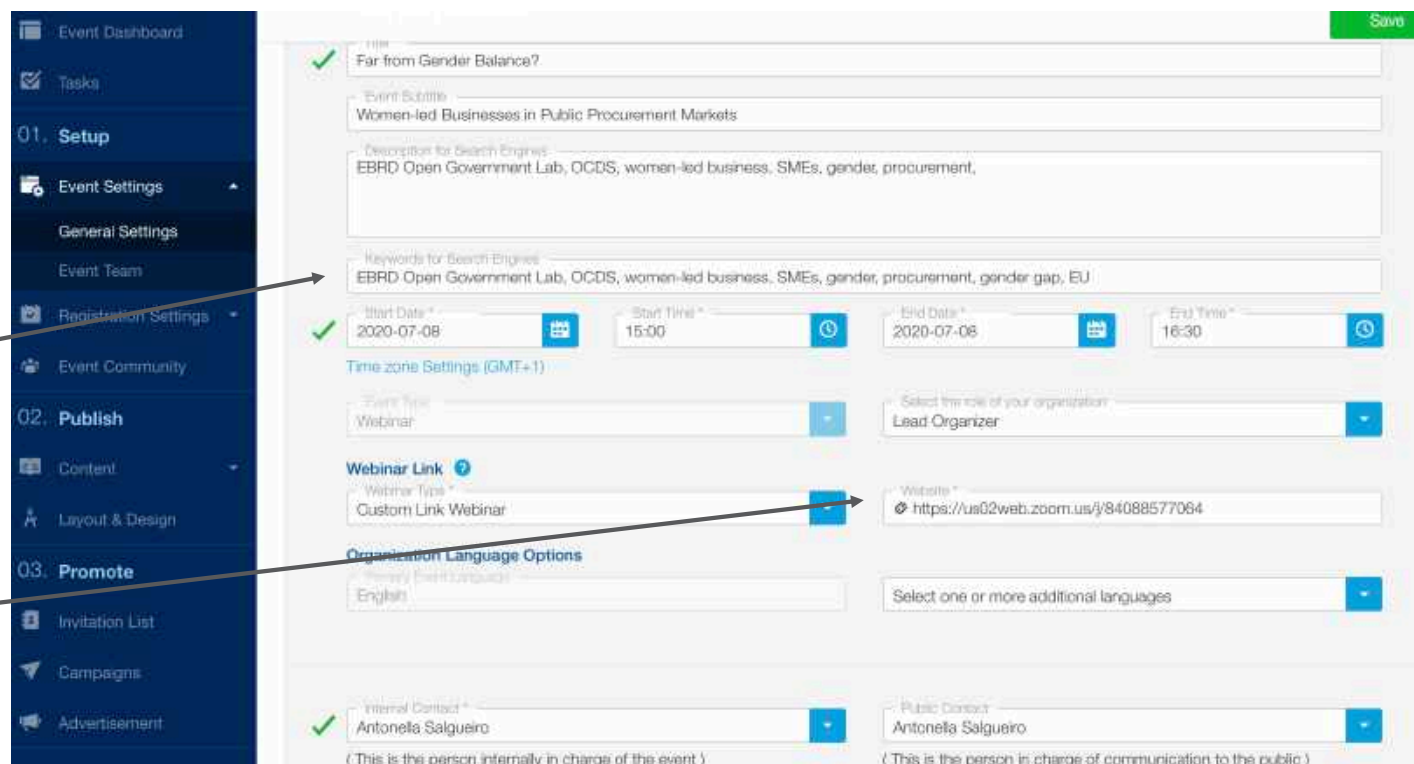
Activate event room ?
 Open when event is published
 Open one week before event start
 Open when event begins

Create Event

How to set-up a GlueUp page for an outreach event? A play-by-play

On Event Settings, fill-in the details related to the outreach events, including:

- Description for search engines: short keywords which facilitate search engine optimization and the event to be found online.
- Webinar link, which will be made available at the event's page.
- Set the contact in charge of the event



The screenshot shows the 'Event Settings' page in the GlueUp system. The left sidebar is dark blue with white text, listing navigation options: Event Dashboard, Tasks, 01. Setup (with a sub-menu for Event Settings), Registration Settings, Event Community, 02. Publish (with sub-menus for Content and Layout & Design), and 03. Promote (with sub-menus for Invitation List, Campaigns, and Advertisement). The main content area is white and contains the following fields:

- Title:** Far from Gender Balance? (checked)
- Event Subtitle:** Women-led Businesses in Public Procurement Markets
- Description for Search Engines:** EBRD Open Government Lab, OCDS, women-led business, SMEs, gender, procurement.
- Keywords for Search Engines:** EBRD Open Government Lab, OCDS, women-led business, SMEs, gender, procurement, gender gap, EU
- Start Date:** 2020-07-08 (checked)
- Start Time:** 15:00
- End Date:** 2020-07-08
- End Time:** 16:30
- Time zone Settings (GMT+1):** (dropdown)
- Event Type:** Webinar (dropdown)
- Select the role of your organization:** Lead Organizer (dropdown)
- Webinar Link:** Custom Link Webinar (dropdown)
- Website:** <https://us02web.zoom.us/j/84088577064>
- Organization Language Options:** English (dropdown)
- Select one or more additional languages:** (dropdown)
- Internal Contact:** Antonella Salgueiro (checked)
- Public Contact:** Antonella Salgueiro (checked)

Arrows from the text on the left point to the following fields in the screenshot:

- Arrow from 'Description for search engines...' points to the 'Description for Search Engines' field.
- Arrow from 'Webinar link...' points to the 'Webinar Link' dropdown.
- Arrow from 'Set the contact in charge of the event' points to the 'Internal Contact' field.

How to set-up a GlueUp page for an outreach event?

Setting-up the page and Publication

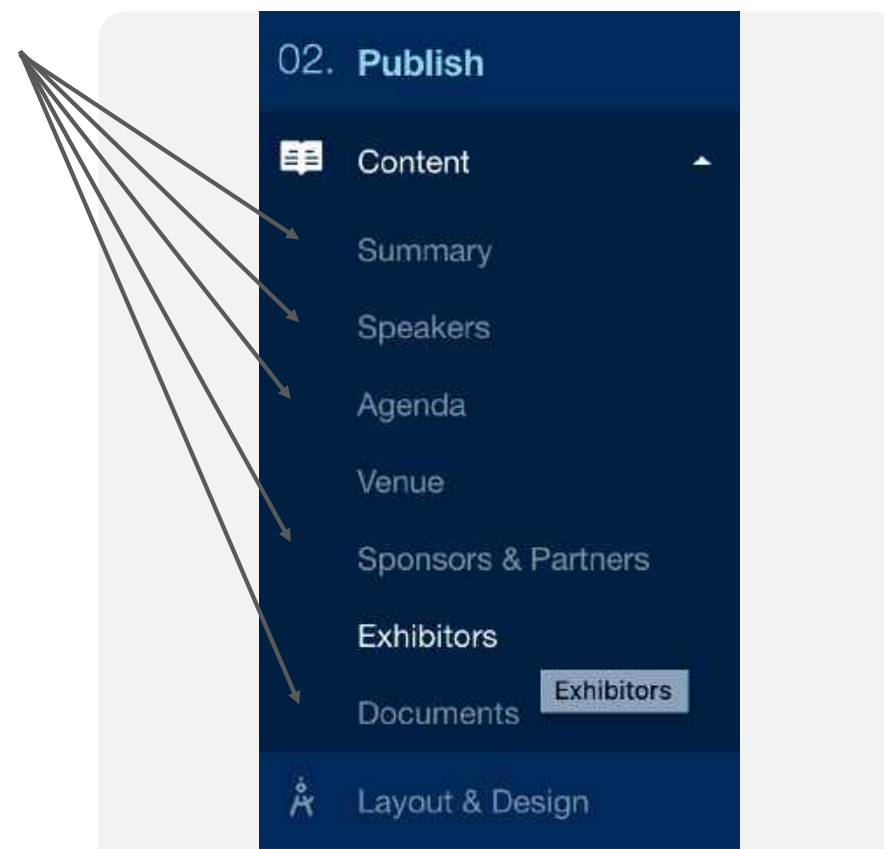
On the “**Publish**” tab, set-up each of the requested fields with the information already available and provided in advance!

In “**Layout & Designs**”, choose a template that fits the purpose of the event taking into account: audience, size of the event, available materials, webinar or face-to-face seminar, etc.

Please choose, for background picture and banner, files with good resolution. **Approved pictures of the EBRD HQ can be found [here](#).** Also, free and good quality pictures can be found on:

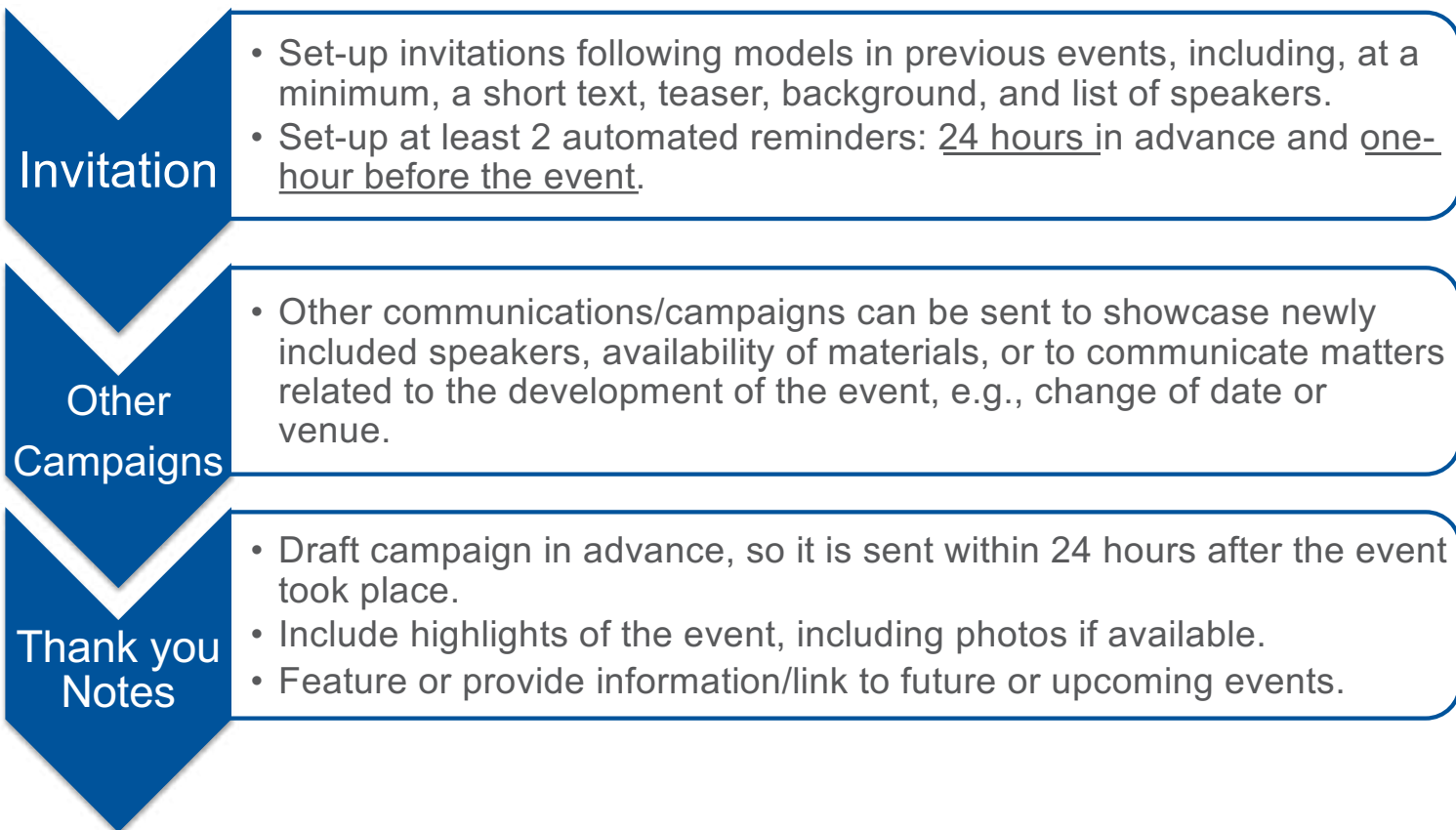
- www.pexels.com
- Unsplash.com

Please do not repeat, if possible, banners/pictures from previous events!



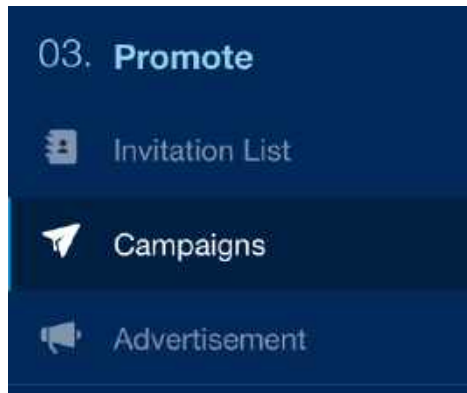
How to set-up a GlueUp page for an outreach event?

Sending Campaigns



How to set-up campaigns through GlueUp?

Where?




How?



As a default “*Guest List*” invitations should be sent to the CRM list of contacts. Please check beforehand, with RM or OL on particular issues related to invitees.

How to set-up campaigns through GlueUp? The 4-Steps



1. You may choose to add as 'default recipient' all contacts in the CRM list.
2. Campaigns can also be sent to particular lists created via the CRM tab.
3. Or to participants already registered for the event, in case of follow-up e-mails.

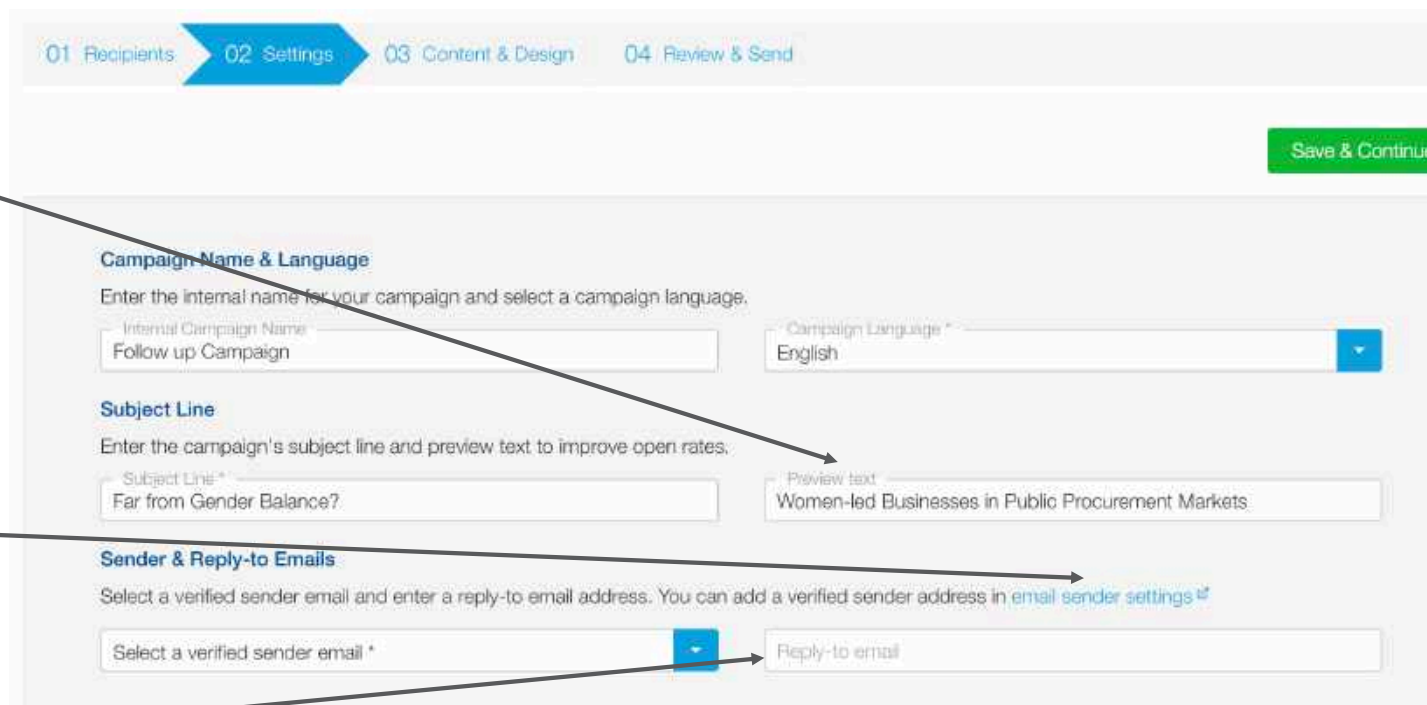
How to set-up campaigns through GlueUp?

The 4-Steps

Preview text allows to add a line or short description that will appear to recipients under the subject line.

Select a verified e-mail to send the campaigns. If not verified, do it through here.

Add e-mail to receive replies or questions.



The screenshot displays the 'Settings' step of a 4-step campaign setup process. The steps are: 01 Recipients, 02 Settings (highlighted), 03 Content & Design, and 04 Review & Send. A green 'Save & Continue' button is located in the top right corner. The 'Campaign Name & Language' section includes an 'Internal Campaign Name' field with the value 'Follow up Campaign' and a 'Campaign Language' dropdown menu set to 'English'. The 'Subject Line' section has a 'Subject Line*' field with 'Far from Gender Balance?' and a 'Preview text' field with 'Women-led Businesses in Public Procurement Markets'. The 'Sender & Reply-to Emails' section features a dropdown menu for 'Select a verified sender email*' and a 'Reply-to email' field. Three black arrows point from the text on the left to the 'Preview text' field, the 'Select a verified sender email*' dropdown, and the 'Reply-to email' field.

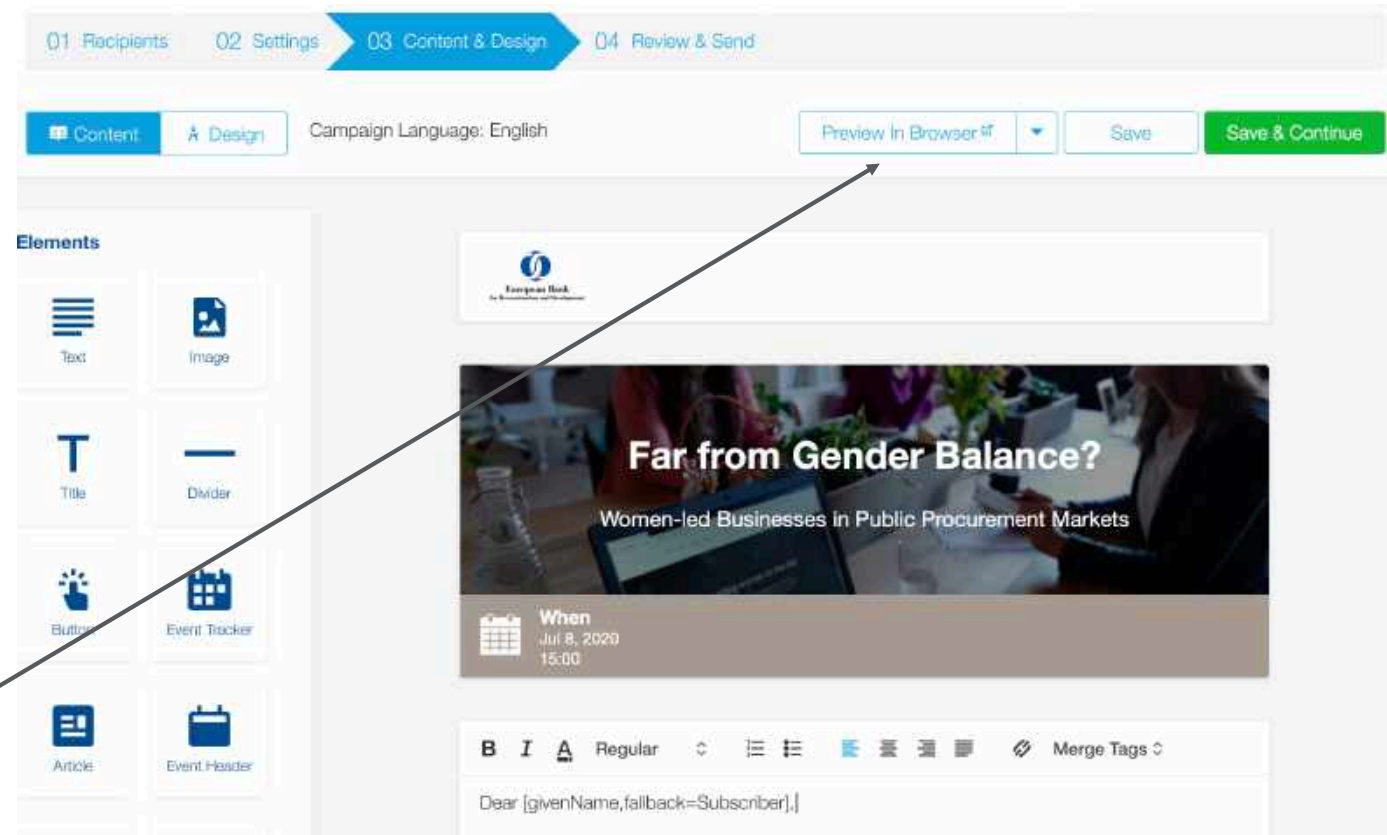
How to set-up campaigns through GlueUp?

The 4-Steps

Design campaign, including at least the following elements:

- Banner with title, subtitle, time, date and location.
- Short invitation text
- Background
- Speakers
- Organizers

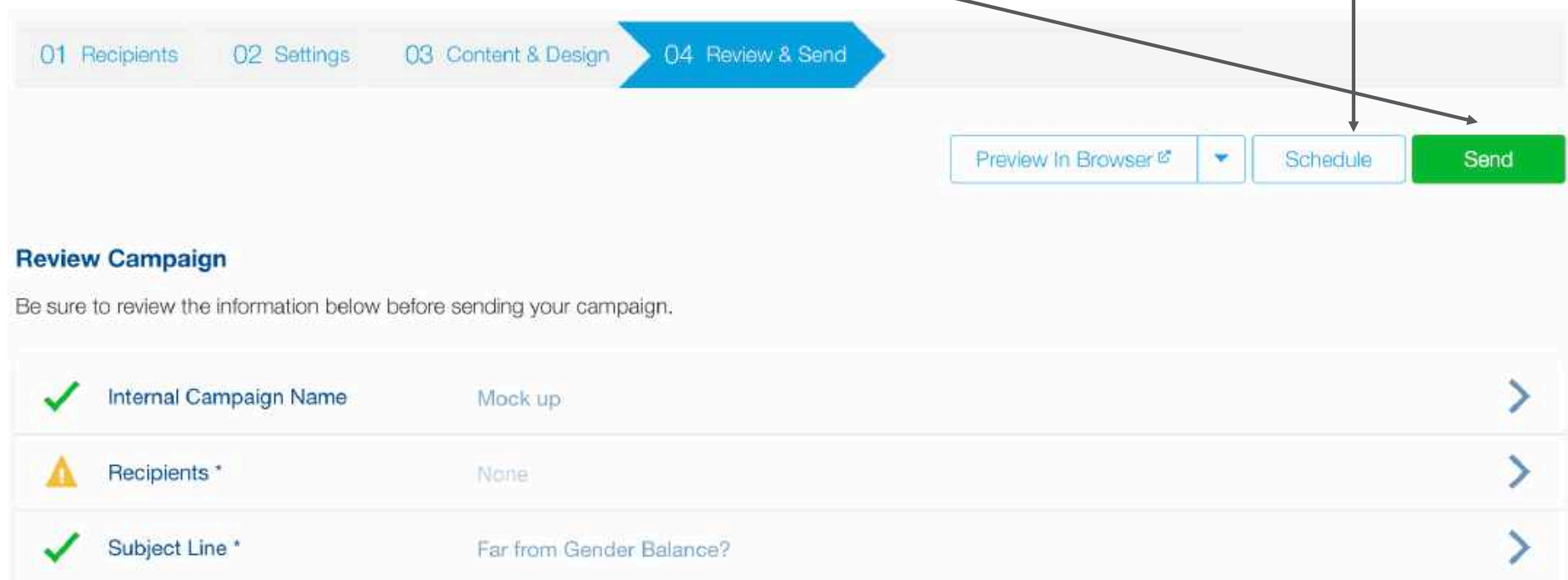
Preview the campaign to see how it would look like before sending it!



The screenshot shows the GlueUp campaign design interface. At the top, there are four steps: 01 Recipients, 02 Settings, 03 Content & Design (highlighted), and 04 Review & Send. Below the steps, there are tabs for 'Content' and 'Design', and a 'Campaign Language: English' dropdown. To the right, there are buttons for 'Preview In Browser', 'Save', and 'Save & Continue'. On the left, there is an 'Elements' panel with icons for Text, Image, Title, Divider, Button, Event Tracker, Article, and Event Header. The main design area shows a banner with the European Bank logo, a title 'Far from Gender Balance?', a subtitle 'Women-led Businesses in Public Procurement Markets', and event details 'When Jul 8, 2020 15:00'. Below the banner is a rich text editor with formatting options (Bold, Italic, Regular, text color, background color, bulleted list, numbered list, link, unlink, Merge Tags) and a placeholder text 'Dear [givenName,fallback=Subscriber],'. An arrow points from the 'Preview In Browser' button to the text 'Preview the campaign to see how it would look like before sending it!'.

How to set-up campaigns through GlueUp? The 4-Steps

To finalize the campaign, Consultants may either send it directly or schedule the campaign to be sent a a later time




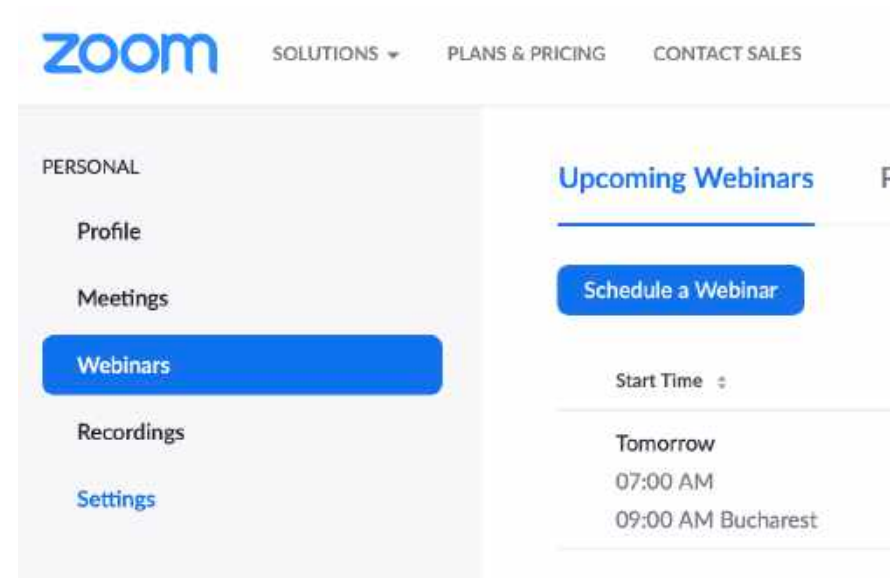
Review Campaign

Be sure to review the information below before sending your campaign.

✓	Internal Campaign Name	Mock up	>
⚠	Recipients *	None	>
✓	Subject Line *	Far from Gender Balance?	>

Zoom Webinar – The platform in a nutshell

- Subscription account for webinars:  User Name: gpafacility@ebrd.com
Password: 741852En
 - www.zoom.us
- Easy set-up and registration.
- Schedule in advance.
- Possibility of online streaming.
- Q&A section.
- Recording.
- Different ‘access link’ for speakers and participants, with the possibility of promoting participant to speaker category.



Zoom Webinar

Set-up Integration with GlueUp

- See following slides!

Set-up other webinar settings at Zoom's webpage

- Always in UK time

Provide panellists' access link

- So they can share video and screen.

Include banner/teaser for Webinar communications sent from Zoom.

Obtain Reports on Attendees and participation for BTOR.



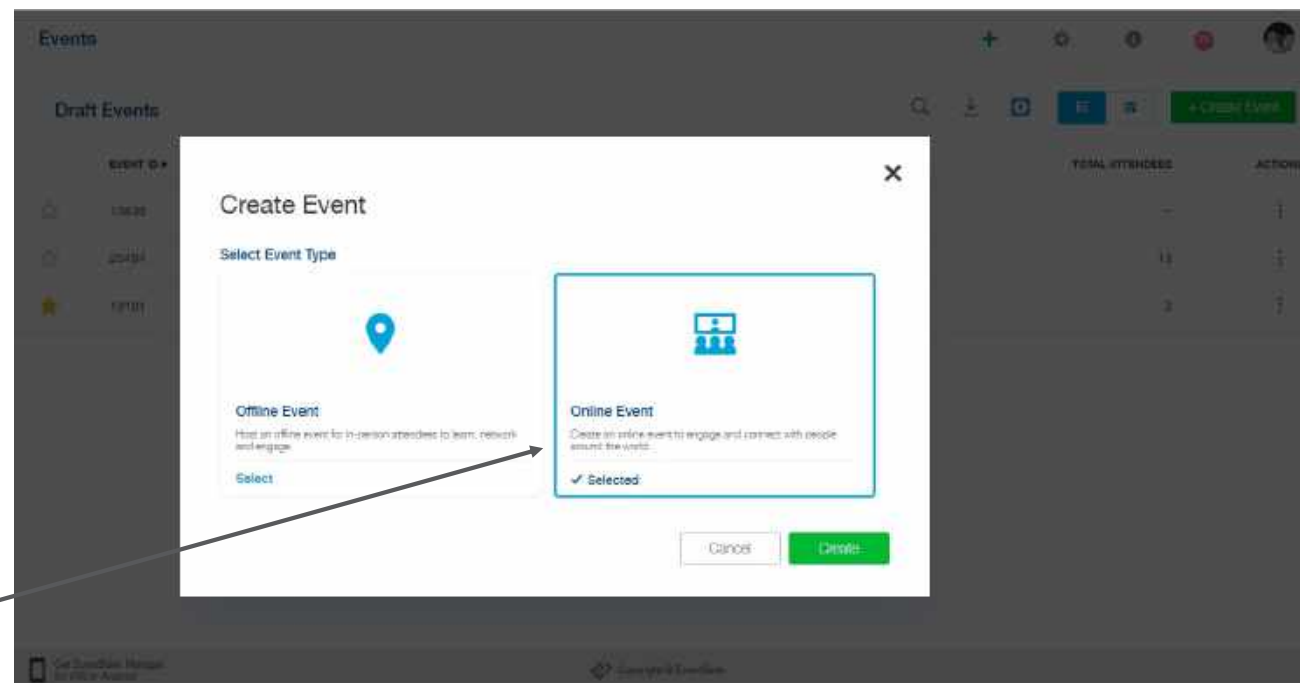


Integration GlueUp - Zoom

GlueUp's app Engagement Solution with Zoom allows a full webinar experience within the GlueUp app.

Users are asked to choose the event type when creating an event.

To benefit from the integration feature **Online Event** selection will need to be chosen when hosting a Zoom Webinar!



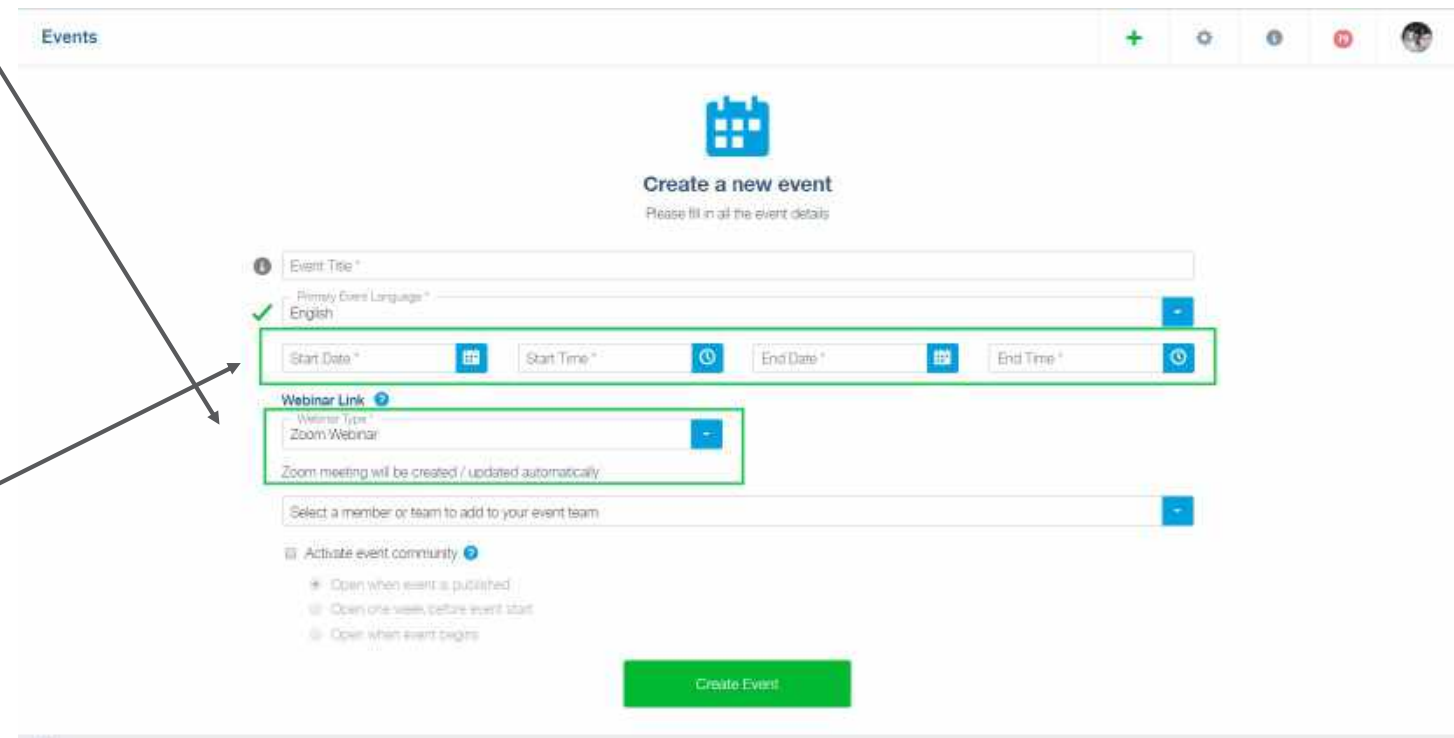
The following slides provide a guide to setting-up the GlueUp-Zoom integration. Additional information on this Webinar Engagement solution add-on can be found [here](#)

Integration GlueUp - Zoom

Select “**Zoom Webinar**” as the Webinar type and the Zoom link will be automatically created on your Zoom account as well as displayed in the confirmation email.

Please always fill-in all mandatory details, as these will be reflected in the Zoom platform.

Basic Event information will be automatically synchronized into Zoom side!



Events

Create a new event
Please fill in all the event details

Event Title *

Primary Event Language *
English

Start Date * Start Time * End Date * End Time *

Webinar Link

Webinar Type *
Zoom Webinar

Zoom meeting will be created / updated automatically.

Select a member or team to add to your event team

Activate event community

- Open when event is published
- Open one week before event start
- Open when event begins

Create Event



Integration GlueUp - Zoom

Publish event

- Once you 'Publish' your event on GlueUp, you will have created a Webinar event which will automatically be listed and created on your Zoom Account.

On the day of the Webinar

- The person who is hosting the webinar will have to log in from the Zoom app to host the webinar.
- When clicking on the email reminder with the 'Go To Webinar' button, attendees will land on a page on GlueUp with the video of the Zoom call embed in it.

After the Webinar

- Once the webinar is ended by the host from the Zoom account, the attendees will be logged out of the call.
 - Dialogue from the chat will be accessible to attendees 1 hour before the start and 1 hour after the end of the webinar.
-

Integration GlueUp – Zoom Functionalities – End-user view



The **embed video** from Zoom will be displayed in the center.

The **“Event Room”** (live chat) and list of **“Attendees”** will be displayed on the right column. Users can type and post here text, and upload files. From the attendee list, business cards can be shared to network with other registered users.

“Event Title” at the top, and at the bottom a tab with **“Sponsors and Partners, Speakers, Agenda and Documents”**, if applicable.

Other functions for attendees also include **“Q&A”** and **“Raise Hand”**

“Leave Webinar” or Adjust **“Audio settings”** appear at the two bottom corners of the video window.

Webinar for Zoom – General Tips!

- 1. Set up practice or “mock-up” session at least 24 hours in advance to check mic and cameras with speakers.
 - 2. Make use of the “Waiting room”: start admitting participants only 3-5 minutes before the event, so as to avoid them listening the pre-event conversation.
 - 3. Request speakers, in case they are turning off their cameras, to provide a profile picture, or a one page slide with picture, position, and organization.
 - 4. PO or Consultant handling logistic of the webinar, i.e. setting up the meeting room, should keep as profile picture the “Agenda” of the event.
-

Zoom Webinar Virtual Backgrounds



Please make use of prepared virtual backgrounds for Webinar and Meetings

EBRD UNCITRAL
Public Procurement
Initiative

EBRD GPA TC
Facility

<https://ebrd.huddle.net/workspace/38641839/files/#/80748874>

<https://ebrd.huddle.net/workspace/38641839/files/#/80748877>