

Online Event/Summit Planning Templates

An online summit is a virtual conference. Launching your own summit is a great way to build your email list, network with other industry names, and grow your authority. It can also help you level up your business, especially if you've been stuck lately.

The first thing you need to do to set your online summit in motion is to decide on a theme. This theme should be one that appeals to your target audience. If you're a health coach, then you want your content to be about healthy living. Don't try to put on a conference about marketing or business. Your audience won't respond to it because you aren't known for that type of content.

Do keep your topic broad enough that you can bring in experts. A fitness conference on the topic of macronutrients will be too narrow. But a conference on nutrition and healthy eating allows you to bring in experts that complement your business.

Make sure that the name of your online summit is easy to say and spell. Ideally, you want someone to hear the name and instantly know *what type* of content to expect from your event. Do not use vanity, misspellings or ambiguous words because this makes it difficult for the desired attendee to understand your event offerings. Confusion begets disillusion!

Grabbing the Domain Name

Don't forget to register a domain name for your conference. It might be tempting to use your own website URL for the summit, but don't do that. If you get a high volume of traffic, your website may crash and become unresponsive. You will lose attendee interest.

Instead, create a separate website and use a [hosting company you trust](#). It's best to host your site on a dedicated server, so be sure to set that up before you begin marketing your conference. By using your own server, you should prevent traffic from causing outages or other technical issues.

Once you've decided on a theme and registered the [domain](#) name, it's time to come up with a timeline. A summit that lasts for seven or more days can be overwhelming,



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especially if this is your first time hosting an online conference. We have used [1&1](#) service for many years and highly recommend them.

Aim to have your summit last 3-4 days. This gives you enough time to share meaty content but it shouldn't exhaust you with details.

Deciding Between Free and Premium

One detail you need to tackle early on is whether your event should be free or premium. The advantage of a free event is that you can get more participants to sign up. If your goal is to grow your email list or add new members to your online community, then free might be the way to go.

But the problem with free events is that participants may not attend on time and may not be as focused. Users who have paid to attend your event will take it seriously and are more likely to act on the information you're sharing.

What some summit hosts do is make their event free. Then they create an "All Access Pass" and sell it to participants. The "All Access Pass" comes with special perks that free users don't get. These perks may include recordings of each session, workbooks, or even a special Q & A time.

Give your speakers an affiliate link for the pass. They can share about the conference with their networks and they'll get paid if someone purchases the pass through their link.

Keep in mind that your event pass doesn't have to be expensive. Even a low-priced pass can generate thousands of dollars in sales for both you and your speakers.

Creating Your Speaker Lineup

Now that you have some of your basics nailed down, you need to start reaching out to your network. Most summits have between 15-25 guest speakers. Since you'll be interacting with these speakers frequently, you'll want to choose experts and industry leaders that you know and like.

A good place to start your search is on [LinkedIn](#). Look through your contacts on this social network and see if anyone might be a good match for your event.



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You can also look on LinkedIn groups for potential speakers. There's even a group titled, **Need A Speaker / Be A Speaker**. All you have to do is post a request for speakers on your topic and see who responds. With thousands of members, you're likely to find more than one speaker who would be a good fit.

Another website you may want to use is [SpeakerMatch](#). You can post about your event and speakers who are interested can respond to your invitation directly. You can also browse for speakers using a keyword such as 'leadership' or 'branding'. The [NSA](#) is a favorite as well.

When you find a user, who might be a good match for your event, click on their profile. You can see their biography, program ideas, and even testimonials from other satisfied clients.

You can also reach out to your contacts directly through email. Let your network know that you're hosting an upcoming event and you're on the lookout for speakers and leaders. One of your contacts most likely knows an expert that would be interested in participating in your event.

Picking a Platform

Once you have your lineup, it's time to get started working. Record your interviews with each speaker. You can use platforms like:

- [Zoom](#) (free for 1-on-1 interviews)
- [BeLive.TV](#) (BeLive uses Facebook Live to stream interviews in real time)
- [Pamela](#) (Paid recording software for Skype users)
- [Facebook Live](#) (free, recording limit)
- [YouTube Live](#) (free, recording limit, 12-hour archive)
- [LiveStream](#) (Paid recording, unlimited storage)
- [DaCast](#) (Paid, large data cap and storage options)

Things to Consider

You want your summit to be the best it can be so when choosing the platform, make sure you research well and choose the best service you can afford or if you choose a free one, make sure it's a reputable service. Here are a few things to consider when choosing the platform.

- Price
- Does it offer analytics?
- Live embedding options?
- Where you can record from; desktop, mobile, iPhone or Android phones, etc.?
- Are there options for monetizing the videos?
- Do they charge for extra bandwidth?
- Are there caps or limits to how many people can join live recordings, length of recordings and so forth?
- What kind of storage to they offer?
- How long will they save the recordings for you?
- Can you download the recordings after the event ends?
- Are they advertisement free or will 3rd-party ads pop up during the presentations?

Making Your Event Run Smoothly

You want your summit to be a seamless experience for your attendees. This means you should guide them through the entire event so they can follow along easily. Here's how to keep everything running smoothly:

Keep interviews short. Regardless of whether your interviews are pre-recorded or live, you want them short and focused. Try to aim for thirty minutes of content. If you need to,



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prepare 7-10 questions or speaking topics in advance. This will keep you and your guest from babbling to fill the silence.

Focus solely on your event. If you've pre-recorded most of the content, then you may be tempted to spend your week blogging or podcasting during your summit. But if there's a technical error or your website stops working, then you'll be the last to know. Instead, block off your week so you can dedicate your time and attention to your event.

Be responsive. Keep in mind this event is the start of new relationships with dozens of subscribers. During your summit, you're likely to see high levels of engagement on social media. You may also receive dozens of emails or comments about the content. Make sure you personally respond to these messages and you reply on social networks.

Follow up. After your event, make sure to reach out to your speakers. Let them know you enjoyed their participation. If there's someone you really connected with, mention the idea of working together again in the future. You never know where this new relationship might lead.

Help subscribers take the next step. You did it. Your summit is over and you can finally relax. But don't disappear quite yet. Know what next step you want your new subscribers to take. If you want them to buy your course or download your Kindle book, create a funnel for your new list members.

Let's Talk About the Templates and Tools Included in this Package:

Our goal is to make things simpler for you... getting your online summit ready and make it a success! With that in mind, let's look at this month's tools.

❑ Online Summit Planner Worksheet

This planner will help you hash out the details for your online event from deciding on a name to deciding on a platform. Keeping all the details in this planner will help keep you organized.

❑ Online Summit Scheduling Spreadsheet

We've included a detailed spreadsheet that will help you organize all of your speaker information so you have it all in one place.

❑ Speaker Invite Letter Email Template

We've included an invitation to make it super easy for you to invite guests to be a part of your online event. It gives them the details and benefits they should know while they consider joining you.

❑ Speaker Follow-Up Letter Email Template

If you haven't heard back from a potential participant, don't give up. Use this email template to send a follow-up email as a reminder to encourage them to get back to you.

3 Speaker Acceptance Letter Email Templates

Once your speaker accepts your request to be part of your event you will want to be prepared to send them more details right away. We've got 3 email letter templates you can run with based on your event:

- Speaker Acceptance Letter
- Speaker Application Acceptance Letter
- Speaker Interview Acceptance Letter

3 Follow-Up & Thank You Email Templates

You'll get 3 more email templates to help keep the event running and finish smoothly while keeping your guests on track.

The 3 emails include:

- Follow-Up for Missing Information Email
- 24-Hour Reminder Email
- Thank You for Participating Email

Online Summit Application Template

Make it easy for your potential guests to apply to be a part of your event. With this application template, you know you are asking all the questions needed to decide if the applicant is right for your event. We've got you covered.

Online Summit Schedule & Submission Form Template

Once your guests have agreed to be a part of your event, you'll need to start preparing the schedule and marketing materials. Use this template to request all the details you need from your guests to ensure you present them in the best way possible during the event.

❑ Online Summit Speaker Release Form Template

To protect yourself and your business, use this template to get written permission from each of your participants to ensure that you have the right to share and use the materials they provide you during your online event.

❑ Online Summit Organization Checklist

To keep you organized and on track before the event, we've got this detailed organization checklist to keep you on track.

❑ Online Summit Marketing Checklist

You want your event to be a success which means marketing is crucial. Use this handy checklist before your launch, during your event and after to be sure you don't miss a thing when it comes to marketing.

❑ Running a Smooth Event Checklist

The better you prepare for your event, the smoother it will go. Use this checklist to ensure everything runs as planned during the event from the location, to the speakers to the tech this checklist will help.

❑ Online Summit Sales Page Template

We've even included a template for creating your sales page. Just plugin all the details for your event and you're done!

Online Summit Graphics

You want to display your guests and event details with eye catching graphics. We've created them for you! You'll get the following in both .jpg (blank and samples) and .psd to versions so you can edit and make your own.

- Single Speaker Graphic (.jpg and .psd)
- Multi-Speaker Graphic (.jpg and .psd)
- Single Speaker Graphic with room for more details (.jpg and .psd)
- Register Now button for your sales page (.png and .psd)



As you can see, all of the templates included in the Online Summit Planning Templates bundle will give you the boost you need to get started planning for your next successful event.

Happy planning!