

Microsoft 365 Live Event Sample Checklist

Live Event Overview

Use in your initial Live Event intake and planning. Delete placeholder text and unused rows.

Event Name	[official event title that will be used everywhere]
Event Description	[2-3 sentence summary of the event]
Event Date	
Event Time	
Event Goals	1. 2. 3.
Target Audience	<ul style="list-style-type: none"> ○ What is the profile of a typical attendee? ○ Have we asked them for their expectations? ○ What are the outcomes/next steps we want them to take?
Executive Sponsor	[who has organizational resources/authority to assist]
Action Items	[what actions will attendees take next after the event]
Post-Event Content	[where is content to be posted? How will people access it?]
Event Promotion	[how will we tell people about the event?] [do we need a formal registration] [are there rules/policies on who can attend]
Event Location	[Which app will you use to schedule and host the Live Event?] Teams - Live Event will be hosted and viewable in Teams Yammer - Live Event will be hosted in a Yammer Group with an event page/conversation Stream - Live Event will be hosted in Stream in embeddable Stream player

Teams-Produced Live Event Decision Points

Settings you will need to make when you schedule a Live Event produced in Microsoft Teams

Live Event Permissions	People and Groups - Specific people, contact groups, or Office 365 groups you name Org-wide - Everyone in the organization can watch the live event Public - Attendees outside your org, anonymous join, only for Teams-Produced events
Attendee Recording	Yes/No (attendees can watch the recording on demand for 180 days)
Closed Captions	Yes/No (Captions are available to event participants)
Attendee Q&A	Yes/No (attendees can interact with producers and presenters in a moderated Q&A)
Attendee Report	Yes/No (You can download a report that tracks attendee participation)
Customer Support URL	URL if attendees click "help" during event (default is https://support.office.com/)

External App or Device Live Event Decision Points

Settings you will need to make when you schedule a Live Event produced in with an external encoder

Attendee Recording	Events produced with an external encoder are automatically recorded. Attendees can watch the event on demand until the recording is explicitly deleted in Microsoft Stream.
Captions	Yes/No (captions are available to event participants)
Attendee Q&A	Yes/No (Teams-hosted only - attendees can interact in a moderated Q&A)

Event Production Team

Your project team for this Live Event. Add rows as needed. Consider creating a Team or Channel to coordinator work.

Role	Person	Mobile Phone	Email
Executive Sponsor	[A leader with a special and unique interest in the education or insights of the audience]		
Organizer	[Event host. Create the event, set permissions, invite event team, curate event links]		
Producer	[Responsible for starting and stopping the live event, queuing content, back channel chat. This could also be the Organizer.]		
Presenter(s)	[This role is only in Teams-Produced Live Events. Responsible for content and commentary. They can present audio, video, and share their screen with the attendees. You can have up to 250 presenters but 10 or fewer is recommended so you do not overwhelm the producers.]		
Moderator	[Moderator to help facilitate Teams Q&A or Yammer Conversation in the Live Event. In Teams should be an Organizer or Presenter, in Yammer should be a Group Admin.]		

Presenters and Moderators

Anyone presenting remotely? What room/system account are they using? Are remote participants gathering centrally?

Room	Presenter or Moderator	Location	Account Used	Mobile Phone
[room]	[name]	[room/home office]	[account]@organization.com	
[room]	[name]	[room/home office]	[account]@organization.com	
[room]	[name]	[room/home office]	[account]@organization.com	
[room]	[name]	[room/home office]	[account]@organization.com	

Event Agenda and Content Notes

Store the final agenda in Office 365 and work from a single source of truth. Check in directly with your presenters and discuss exactly what they plan to present. Do not rely on assistances or intermediaries to accurately relay requirements.

Time	Length	Topic	Presenter(s)	A/V Requirements, Other Notes
hh:mm	[min]	[topic]	[presenter]	[video, demo, other]
hh:mm	[min]	[topic]	[presenter]	[video, demo, other]
hh:mm	[min]	[topic]	[presenter]	[video, demo, other]
hh:mm	[min]	[topic]	[presenter]	[video, demo, other]
hh:mm	[min]	[topic]	[presenter]	[video, demo, other]

Live Event Links

Resources for Town Hall	URL or Link	Notes
Attendee - Attendee Link	[https://teams-url-or-short-url]	[List here so you are not scrambling in Outlook/ Teams to find the link right before the event. Consider using a URL shortener/redirector]

Presenter - Teams Meeting	[https://teams-url-or-short-url] Conference: [###.###.####] Conference ID: [#####]	[List here so you are not scrambling to find the link or conference bridge right before the event] [DO NOT FORWARD - Remind presenters not to forward to anyone not on the event team]
Event Team - Backchannel	[https://teams-url-or-short-url]	Back channel for Event Team to use for discussion during event. Can use the Chat in Teams Live Events
Ingest URL	[rtmp://ingest-url-for-encoder]	[RTMP Stream endpoint URL for External Encoder to connect to. Remove this row if not using.]

Presenter Confirmation

Sample Confirmation Communication - Remind your presenters not to forward to attendees

Town Hall Meeting
Thank you for presenting at the upcoming Town Hall. If you are presenting from a company office, make sure you coordinate with the site moderator for your location, so they are prepared for you to present. Let us know if you will be presenting from someone else’s computer or a room system.

Presenter Information Only - DO NOT FORWARD
Join in Microsoft Teams: [<https://teams-url-or-short-url>]
Conference Number: [###.###.####]
Conference ID: [#####]

Next Steps

- Complete your [Slide Presentation Here](#) by [dd] [hh:mm] [a.m./p.m.]
- Let us know if you will be presenting using anything other than your own computer in Microsoft Teams
- Attend the Presenter Check-In Call at [dd] [hh:mm] [a.m./p.m.]

Attendee Invitation

Sample Confirmation Communication -Consider using a URL Redirector for the Join Meeting link

Town Hall Meeting
Please join us for the upcoming All-Hands meeting.

Date: [mmm] [dd] [yyyy]
Time: [xx:xx am - xx:xx pm]
Join the Live Event: [<https://teams-url-or-short-url>]
Instructions: [How to attend a live event in Microsoft Teams](#)

Office Locations and Site Moderators
In the office? Please join your local team to watch the Live Event together in the room below.

City	Room	Site Moderator
[city]	[room]	[moderator]
[city]	[room]	[moderator]

Event Planning

Add or delete tasks as needed. Consider using Planner or Teams Tasks to coordinate across the event team.

T-Minus	Checklist - Content/Meeting Moderation/AV/Live Event
4 Weeks	<ul style="list-style-type: none"> <input type="checkbox"/> All: Read https://resources.techcommunity.microsoft.com/live-events <input type="checkbox"/> All: Watch https://youtu.be/8EzlsTajWb8 (1 minute) <input type="checkbox"/> All: Determine if you need to create a “System Account” for podium computers or room systems <input type="checkbox"/> Business Objectives/Outcomes Event justification—one or two sentences <input type="checkbox"/> Event Team Identified - Consider a Microsoft Team to coordinate <input type="checkbox"/> Event Team Collaboration Space (Teams, SharePoint, Outlook) - Agree on collaboration tool <input type="checkbox"/> Presenter Confirmation - Confirm presenters. Confirm timelines. Confirm content expectations. <input type="checkbox"/> Begin Working on Content - Use placeholder content, communicate to speakers where it is stored. <input type="checkbox"/> Schedule Live Event - Schedule using settings determined above <input type="checkbox"/> Secure Short URL - Consider a URL shortener/redirector, with appropriate branding <input type="checkbox"/> Share Event Links - Send Join and Attendee links
2 Weeks	<ul style="list-style-type: none"> <input type="checkbox"/> Presenter Best Practices Training - Test/Confirm the Following (Just run down the list with them): <ul style="list-style-type: none"> • Video - Have presenters practice positioning their webcam so they are in frame, well illuminated • Audio - Ensure presenters are using certified audio devices and know how to configure in Teams • Audio - Have presenters practice positioning their audio device for optimal clarity • Audio - Validate if anyone will be calling in. Remind them to use #6 to mute/unmute • Audio - Have presenters practice using mute. Remind them they must unmute themselves • Connectivity - Remind presenters to use wired connection, not wireless, if possible • Connectivity - Remind presenters to test bandwidth (e.g. www.speedtest.net), 1.5 Mbps needed • Content - Validate how you’ll share content: Each presenter sharing, or one PC showing slides • Content - Have each presenter practice sharing their screen if you will switch back and forth • Content - Have presenter practice advancing slides, using slideshow remote (if in person) • Q&A - Confirm presenters understand moderated Q&A is how they will interact with audience • Q&A - Confirm presenters understand questions may take 15-20 seconds to come over (ask early) • Attire - Confirm presenter will not wear striped or checkered clothing patters that cause aliasing • Attire - Confirm presenter will wear clothing with closed neck if using lavalier microphones • Notifications - Confirm presenter knows Focus Assist in Windows 10/Do Not Disturb on Mac <input type="checkbox"/> Practice Live Event - See the instructions in the appendix
1 Week	<ul style="list-style-type: none"> <input type="checkbox"/> Presenter Checkpoint Call <ul style="list-style-type: none"> • Review agenda • Remind of content deadlines, remind to work from content repository (don’t email attachments!) • Discuss event moderation, Q&A procedures, if a presenter will help moderate <input type="checkbox"/> Event Team Checkpoint Call <ul style="list-style-type: none"> • Ensure moderators have appropriate event permissions (producer, presenter) • Stage boilerplate announcements, answers, links in a text file (to drop into Q&A as needed) <input type="checkbox"/> Content Computer (confirm for each presenter or the “podium computer” in common venue) <ul style="list-style-type: none"> • Provision “podium computer” (event laptop, venue computer, etc.) if presenters centrally located • Sign in using the Teams credentials to be used during the Live Event (e.g. user or system account) • Run Windows Update, apply any needed updates; pause updates for seven days • Power Plan set to <i>High Performance</i>, Turn Off Display set to <i>Never</i> • Sync the collaboration repository (Teams, SharePoint) document library <input type="checkbox"/> Encoder Connection (External App/Device Produced Event) <ul style="list-style-type: none"> • Connect encoder to the Ingest URLs, verify RTMP settings are correct • Do not start the event!

T-Minus	Checklist - Content/Meeting Moderation/AV/Live Event
3 Days	<ul style="list-style-type: none"> <input type="checkbox"/> Event Team Update - Check in call, add any final presenters/producers to the Event Team <input type="checkbox"/> Agenda Final - Update and finalize the agenda <input type="checkbox"/> Content Update - Confirm status, deadline, submission. Validate if you'll consolidate slide decks. <input type="checkbox"/> Presenter Update - Send/share presenter confirmation. Address questions/concerns. <input type="checkbox"/> Presenter/Content Computer - Verify content sync
1 Day	<ul style="list-style-type: none"> <input type="checkbox"/> Content Final - Finalize deck(s), demos. Ensure content is synchronizing to Content Computer. <input type="checkbox"/> Content Test - Test deck animations, transitions. Check fonts. Embed linked videos. <input type="checkbox"/> Content Consolidated - Merge into single deck, if appropriate. <input type="checkbox"/> Q & A Moderator - Pre-stage posts (in OneNote, Notepad, Word, etc.) for Q&A or Yammer <ul style="list-style-type: none"> ○ Icebreakers and Conversation starters ○ Links to content after event, Anticipated answers <input type="checkbox"/> Event Reminder - Share event reminder via Intranet, Email, Yammer, etc. <input type="checkbox"/> Presenter/Content Computer - Pause Updates, enable Focus Assist, check Power Plan, clear Desktop. <input type="checkbox"/> Presenter Update - Send/share presenter confirmation. Remind to join early. <input type="checkbox"/> Encoder Connection - (if using) Test external encoder RTMP connection again
1 hour	<ul style="list-style-type: none"> <input type="checkbox"/> Event Team Join Live Event <ul style="list-style-type: none"> ○ Sound checks, video check before presenters arrive on the call ○ Do not start the event! <input type="checkbox"/> Encoder Connection (External App or Device Produced Event) <ul style="list-style-type: none"> ○ Connect encoder to the Ingest URLs, verify RTMP settings are correct ○ Do not start the event! <input type="checkbox"/> Complete Room Preparation - If Presenting from Central Location e.g. an auditorium <ul style="list-style-type: none"> <input type="checkbox"/> Room A/V System Powered On, Tested. Power on A/V, warm up projector, display routing <input type="checkbox"/> Headset/Microphone Setup - Prep/test mikes, replace batteries, position speaker phones <input type="checkbox"/> Teams Room System - Join the Live Event (if using a TRS). Do not start the event! <input type="checkbox"/> Content Computer Setup <ul style="list-style-type: none"> ○ Open PowerPoint deck locally ○ Ensure laptop has a wired Ethernet connection and can get to the Internet ○ Join Live Event (Do not start the event!) ○ Close any unneeded applications and services
30 Minutes	<ul style="list-style-type: none"> <input type="checkbox"/> Presenters Join Live Event <ul style="list-style-type: none"> ○ Sound check, video check ○ Remind to come off mute when speaking ○ Remind how Q&A will work ○ Test content sharing ○ Close any unneeded applications and services

T-Minus	Checklist - Content/Meeting Moderation/AV/Live Event
Pre-Flight	<p>Teams Live Event Pre-Flight</p> <ul style="list-style-type: none"> <input type="checkbox"/> Presenter/Podium Computer. Click Share > Share desktop if sharing content <input type="checkbox"/> Queue Content. Set Live event video on opening slide or first speaker's webcam <input type="checkbox"/> Queue to Live. Producers send the preview que to the live preview in Teams <p>External App or Device Pre-Flight</p> <ul style="list-style-type: none"> <input type="checkbox"/> Title Card. Stage title card, bumper slide, intro video in the encoder <p>Other</p> <ul style="list-style-type: none"> <input type="checkbox"/> Live Event Viewing. Onsite moderators should set player to <i>Full Screen</i> for local audience. <input type="checkbox"/> Final Sound and Webcam Check - Check webcams. Ask each presenter for a sound check. <input type="checkbox"/> Go/No Go - Confirm Producers/Moderators/Speakers are ready <input type="checkbox"/> Start - Click Start, go live in Live Event <ul style="list-style-type: none"> · Welcome and Intros - Moderator or first speaker welcome and housekeeping. · Teams Q&A or Yammer - Moderator post a "welcome" message into the discussion · Everyone - Contribute/assist moderator with Yammer Conversation or Teams Q&A
Live	<ul style="list-style-type: none"> <input type="checkbox"/> Producer - Stage Video/Content View, Send Live, update as needed <input type="checkbox"/> Producer - Monitor Live Event call quality status <input type="checkbox"/> Presenters - Share Desktop if appropriate, ask for questions just prior (15 seconds) to Q&A <input type="checkbox"/> Presenters - Remember to unmute (Teams-produced event) <input type="checkbox"/> Moderator - Encourage engagement. Reminder how to participate in Teams Q&A or Yammer. Post links and resources as they are mentioned. Leverage prepared content.
Wrap	<ul style="list-style-type: none"> <input type="checkbox"/> Moderator - Add "Thanks for Joining Us" to Q&A or Yammer. Thank everyone verbally <input type="checkbox"/> Moderator - Post link to follow-up content. <input type="checkbox"/> Producer - End Event
Post Event	<ul style="list-style-type: none"> <input type="checkbox"/> Moderator - Escalate any unanswered Q&A to presenters as needed. Coordinate with Organizer. <input type="checkbox"/> Organizer - Manage event recording and access

Appendix I: Practice Live Event

You can easily hold a practice Live Event with your event team. It will help you see what each role experiences and will prompt discussion on how you will manage the experience for your users.

You will need at least four people:

- **Organizer** - Person who schedules the Teams Live Event. Also has Producer controls.
- **Producer** - Person who manages the Live Event stream, moderates Q&A. Also has Presenter controls.
- **Presenter** - Person who shares their video, audio, and desktop into the Live Event. Also moderates Q&A
- **Attendee** - Person who participates as an Attendee (Producer/Presenter can also Join as Attendee.)

Live Event Training Videos - Each Person Should Watch (5 min)

- Video: [Plan and Schedule a Live Event in Teams](#) (2 min)
- Video: [Produce a Live Event in Teams](#) (1 min)
- Video: [Attend a Live Events in Teams](#) (45 secs)
- Video: [Moderating a Q&A](#) (1.5 min)

Follow these steps to practice your Live Event

1. [Getting Started with Teams Live Events](#) - Everyone (read)
2. [Schedule a live event](#) - Organizer
3. [Invite attendees](#) - Organizer
4. [Produce your live event](#) - Producer, Organizer
5. [Present in your live event](#) - Presenter, Producer
6. [Attend a Live Event](#) - Attendee
7. [Manage the recording and reports](#) - Producer, Organizer

Practice Tips

- Event Team - the Organizer, Producer, and Presenter are the "event team" - when they join the Live Event, they will be in a Teams Meeting where they can talk and prep before the Producers starts the Live Event
- Have people try different roles and share what you are seeing - During the practice, describe what you are seeing to the other people. The UI is different for each role.
- Attendee Limitations - The Attendee person will not be able to talk or share video and can only interact via Q&A if the Organizer enabled it. Discuss how you will moderate Q&A in an actual event.
- Scheduling Dialog - When the Organizer schedules the Live Event in Teams, some of the settings may be hidden in the New Live Event dialog box. Scroll down on each pane to see them all.

Internal Discussion

Discuss how the practice event went. Validate that what happened was what you were expecting. Did the Live Event appear automatically on people's calendar? How did the Organizer get the invitation to everyone? Will you record your Live Event? Will you enable Transcription? Will someone need to be dedicated to moderating Q&A? How will you let each presenter know it is time to present? Should you invite your "talent" as Presenters or Producers?

Appendix II: Office 365 Administrator (Teams Administrator)

Live events enable anyone to create live and on-demand events that deliver compelling communications to employees, customers, and partners. Events use video and interactive discussion across Teams, Stream, or Yammer and can be as simple, or as sophisticated as needed. Up to 10,000 attendees can participate in real-time from anywhere, on any device, or catch up later with powerful AI features that unlock the content of the event recording.

NOTE: To help support our customers, through July 1, 2020, Microsoft will enable custom events for as many as 100,000 attendees through our live events assistance program (below).

Overview

- [Live Events Across Microsoft 365 in Yammer, Teams, and Stream](#) (Comparison table)
- [Live Event Assistance](#) (request assistance from Microsoft, free during preview spring 2020)
- [Teams Academy](#): Video: <https://aka.ms/teams-live-events-session>, Deck: <https://aka.ms/teams-live-events-deck>
- [Microsoft Ignite 2019: Host Large Scale Town Halls](#) (recorded session)

Networking

- [How to quickly optimize Office 365 traffic for remote staff](#) (VPN split tunneling)
- [Prepare your organization's network for Teams](#) (general)
- [Make sure all endpoints are reachable in your network](#) (ensure endpoints are white listed and accessible to viewers)
- [Microsoft Stream video delivery overview](#) (for events produced with an external app or device)
- [eCDN: Set up a Video Distribution Solution for Teams-Produced Events](#) (eCDN configuration for Teams production)
- [eCDN: Scale Video Deliver and Monitor Network Traffic](#) (eCDN configuration for external encoder production)

Configuration - Teams-Live Events

- [Plan for Teams Live Events: Licenses needed to create/schedule live events, Who can watch live events](#)
- [Assign Office 365 Licenses to Users](#) (Teams license is automatically assigned)
- [Manage End User Access to Teams](#) (optional, granular control of Teams license)
- [Set up Live Events policies in Teams](#) (controls who can hold Live Events and features enabled)
- [Configure Live Events Settings in Teams](#) (connect Live Events to SDN/eCDN provider)

Configuration - Stream Live Events

- [Enable Microsoft Stream](#)
- [Administration controls for Microsoft Stream live events](#)

Configuration - Yammer Live Events

- [Enforce Office 365 Identity for Yammer Users](#) (Office 365 identity [must be enabled in Yammer for Live Events](#))
- [Configure Office 365 Connected Yammer Groups](#) (Only O365-connected groups can host a Live Event)
- [Manage a Group in Yammer \(read to understand the Yammer Group Admin role\)](#)