



kaltura

# Prep for your first event: best practices worksheet





Kaltura SME contact info:

Full name: \_\_\_\_\_ E-mail: \_\_\_\_\_



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# Introduction

Hello there, we're so happy you've chosen Kaltura Events for your next event! We know planning, creating, and hosting any event can be really a stressful and busy time for everyone involved. That's why we created this worksheet filled with tips and best practices to help you host the best event ever. All you have to do now is read carefully and tick all the boxes that apply.

Keep this worksheet handy for your next event too! Some of the items below might apply for this one and some— for the next. If you have any questions, please contact your organization's Kaltura SME, filled out at the top of this worksheet.

Before you begin your event setup, please read this document thoroughly. It contains essential steps and best practices that will ensure your event runs smoothly and successfully. Understanding the full scope of the setup process will help you avoid common pitfalls and maximize the impact of your event. Thank you for taking the time to prepare!





# Planning: Before your event

It's no small feat to pull off an event without a hitch. We've prepared recommendations and considerations to think about when thinking, strategizing, and setting up your event space.

Please be sure to read "After the event" section for more information on additional tools available at your disposal to best showcase your event.

## Speakers

### Guidelines for executives and VIPs

Consider setting up a **dry-run** to simulate run-of-show scenarios and go over everything that's relevant to the session. Also, please review the following suggestions:

#### Event organizers:



**Invite the VIPs and executive speakers to register to your event with a personal email, or call, ahead of time.**

If you're not using the platform's system emails to invite speakers: there's an option to invite speakers without email, simply share their personal login link (if using magic link). When they need to log into the event site, speakers can authenticate by registering again or using their personal magic link.

### Checklist:

- Setup devices ahead of your Interactive or DIY live broadcast session: check camera and microphone, how to mute/unmute. Learn more about how to enable devices on your browser [here](#).



**Day of: book VIPs to join at least 15 mins ahead of time.**

**Once they join, check their device setup.**

- Check presenter's personal background: Confirm speaker's background is appropriate and decide if you'd like to use an image background or blur. Learn more [here](#).
- Presentation assets: Be sure you have all the assets you need, and identify where to add new assets, how to navigate between them, and present on stage. Learn more [here](#).
- If using **interludes**, check the **backstage area**, where on stage speakers can have private conversations.

### A word about dry runs

When dry runs need to be recorded, the best practice is to create a dry run session and use it to test. Make sure to unpublish and delete the session and/or recording once the dry run is done. Log into the room where the event is held at least once before the dry run to check everything is set up.

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## Roles and permissions

It's time to get to know your event team and delegate responsibilities for this event and possibly future ones. Each team member will only see and manage their specific assignments, ensuring clear and focused roles for everyone involved. To learn more about Kaltura Events roles and responsibilities please visit [this link](#).

- **Administrator:** The admin has access to all configurations and events created for this account, adds/removes team members, and manages their own user.
- **Event organizer:** Manages specific events. The Event organizer has full access only to events they manage. Within these events, this role can manage and configure all capabilities, settings, content, and people. Event organizers are also assigned as moderators on their events.
- **Content manager:** Manages content of specific events. The Content manager is responsible for curating, organizing, and managing the content that will be presented during the event. Content managers cannot create events and do not have access to the full user list, analytics, and reports.



## Choosing the right template

### But first, what are Kaltura Events templates?

Now it's time to understand what kind of setup, components, and session/s you'd like to use for your event. This is when the templates come into play: each template is pre-set with a selection of layout components, to help save time and increase efficient teamwork. When selected, upon creation, some areas of your event will be created and waiting for you to populate with your event details. At Kaltura, we provide four pre-set templates, and one blank template. For more information on Kaltura's pre-set templates and how to get started, please visit [this link](#).

Your organization may also provide a 'custom template' that was created according to your organization's brand guidelines and specific requirements. This can also be found in your 'Create event' area under 'Custom' tab.

Each custom template includes a name and description set by the Kaltura Events administrator in your organization and can help you understand if this is the right template for you. If you're not sure, please contact your organization's Kaltura SME, filled out at the top of this worksheet.

## Types of sessions

### Interactive session

Deliver immersive sessions using advanced moderation controls or facilitate smaller group interactions through breakout rooms. Leverage a suite of interactive tools including chat, live polls, screen sharing, and whiteboards to create a meaningful engaging session between attendees and between speakers and attendees.

Setup recommendations and considerations:

- Manage stage access (moderator POV): Choose your session experience, would you like to allow participants to join the stage or not. To learn more, click [here](#).
- Manage audience participation (audience POV):
  - Let them know in advance what is the level of participation that is expected from them: Should they prep to go on camera, breakout room, answer polls, or just chat.
  - In the beginning on the session, guide your audience on where they should submit questions
  - Branding: Customize your session's room with virtual stage backgrounds, speaker's personal background, lower thirds, and a layout. Learn more about branding [here](#).
- Think about the session structure:
  - Storyboard: Control what content should appear and in what order (see below for more info)
  - Interlude (pre roll/post roll): If you're using a countdown timer, set it up to run a few minutes into the event, so participants have time to join in. Learn more about interludes [here](#).



- Recordings are available right after the event, in the Media tab of your event site.
- Setup up devices: Check camera and microphone, how to mute/unmute. To learn more about how to enable devices on your browser, click [here](#).
- Please refer to “Guidelines for executives and VIPs” section for additional recommendations.

For more information about interactive session click [here](#).

### DIY live broadcast

Broadcast a live session directly from a Kaltura studio room.

Setup recommendations and considerations:



**Remember to hit "go live" when ready!**



- For speakers:
  - Share a link to the Studio where the event will take place.
  - Before the session starts, the moderator will open the room and make sure speakers are signed in to the event.
  - Setup up devices: Check camera and microphone, how to mute/unmute. To learn more about how to enable devices on your browser, click [here](#).
- The link to the session where attendees will be watching is different than the virtual Studio where speakers will be broadcasting.
- Branding: Customize your session’s room with virtual stage backgrounds, speaker’s personal background, lower thirds, and a layout. Learn more about branding [here](#).
- Interlude (pre roll/post roll): add a countdown timer, set it up to run a few minutes into the event, so participants have time to join in. Learn more about interludes [here](#).
  - If using **interludes**, check the **backstage area**, where on stage speakers can have private conversations.
- Allow for 10 seconds after finishing the session or add a post roll at the end before closing the live session.
- Recordings are available right after the event, in the Media tab of your event site.

For more information about DIY live broadcast click [here](#).

### Live webcast

Produced live streaming events for large audiences, requires an encoder. For more information about live webcast click [here](#).



### Pre-recorded live session (simulive)

Pre-recorded videos that are broadcasted as if they were live. The live entry is prepared, recorded, and uploaded to the event ahead of time, and broadcasted live upon the scheduled session time.

Setup recommendations and considerations:

- Record a test run for your setup: Check lighting, camera, and sound.
- Check presenter's personal background: Confirm speaker's background is appropriate and decide if you'd like to use an image background or blur. Learn more [here](#).
- Interlude (pre roll/post roll): If you're using a countdown timer, set it up to run a few minutes into the event, so participants have time to join in. Learn more about interludes [here](#).
- Upload pre-recorded video source in advance: Long form content can take a while to upload and process. Please be sure to upload the video as early as possible.



**Need a studio to record your session? Some customers use the DIY live broadcast room as a studio for recording the pre-recorded sessions.**

For more information about pre-recorded live session click [here](#).

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## Services, add-ons, and integrations


Creating an exceptional event requires meticulous planning, dedication, and a commitment to your vision. With our experienced Services team by your side, every detail will be carefully managed, and every challenge met with creativity.

We are here to support, guide, and collaboratively work to turn your event into a success story. Should you need more support, you may wish to consider adding the following event services and add-ons.

To book services for your event, please contact your organization's Kaltura SME, filled out at the top of this worksheet. Booking services for any event should be done ahead of time.

### Services

- White glove services
- Participant support (tier 1): Offers enhanced support, covering the entire event experience as specified by the event agenda. Support during the registration period follows the standard SLA, while issues during the event are managed according to the customer's support package. A minimum notice of 4 weeks before the service's start date is required.

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- **Live monitoring:** Live broadcast preparations include two dry runs with the customer's production team, testing stream health, quality, stability, captions, multi-audio, failover, speed, and packet loss. A live encoder review is also conducted to suggest the best configuration. Pre-recorded broadcast preparations involve testing the pre-recorded sessions against the scheduled agenda, spot-checking video quality, and reviewing features like captions and audio channels. Event content must be provided at least one week before the event.
  - **Kaltura Events training:**
    - **Intro to Events (basics):** This session introduces event organizers to Kaltura Events, guiding them step by step on creating, managing, and editing events. The training lasts up to 90 minutes.
    - **Private training session (recommended for event organizers):** Private training sessions tailored to your knowledge and needs, conducted in your environment. Sessions are customized based on a discovery session with a trainer and can be basic, advanced, or refresher courses for admins, end users, trainers, or support teams. Each 2-hour workshop includes:
      - Discovery session to determine training needs
      - Custom session development
      - A follow-up summary with on-demand learning materials
- 

## Add-ons

### REACH services

Kaltura REACH helps ensure content accessibility and inclusivity so that everyone can enjoy and understand with: human captions, automatic captions, transcription, translation, and enrichment services including audio description, chaptering, in-video, and cross-library search and discovery, deep-linking capabilities, metadata, and keyword extraction.

Before your next event, consider adding one of the following REACH services:

- **Live human captions:** Human captions for live webcast type sessions.





**Make sure to order caption in advance, 5 days before the session starts.**

- **Machine captioning (live and VOD):** Also known as ASR, this algorithm-based service offers 85% accuracy with a two-hour turnaround, providing searchable video content with editable transcripts, and improves over time with custom vocabulary support.





**Make sure to order caption in advance, up to  
15 mins before the session starts**

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- **Human or machine translation services (live and VOD):**
    - Professional: Professional translations by native speakers. You can add notes for the person who is doing the translation.
    - Machine: This requires an automated captions file of the source language. Recommended for transcripts that are time-sensitive or needed within minutes of uploading.
  - **Human or machine chaptering (VOD only):** This AI-based video service creates chapters, reviewed by professionals, and adds them as content metadata, available in English only.
  - **Advanced audio description (VOD only):** Pauses the video to provide detailed descriptions, ensuring key visual information is accessible to people with visual impairments.
  - **Alignment (VOD only):** Alignment services convert a text file (word-for-word transcript) to captions.
  - **Dubbing (VOD only):** Dubbing (aka. Voice-over) is the process of adding new dialogue or other sounds to the soundtrack of a video.

## Integrations

Kaltura offers integration to marketing automation platforms and CRM providers. If you're interested in adding one of these to your next event, please check with your Kaltura SME listed above. Available integrations:


- Adobe Marketo
  - Salesforce
  - Hubspot
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## Branding guidelines

Events echo your organization's core values and culture, and so, we want to make sure every small detail is reflected in the way your events look and feel. Please review the following considerations for your next event:

- Homepage banner guidelines:
  - The image may be cropped. We recommend avoiding texts and placing the subject at the center of the image.
  - Recommended banner size: 1920x1080 px.
- No text should be on the edges of the banner to avoid overlapping with the event navigation area.
- Event logo guidelines:
  - We recommend that your logo has adequate contrast on dark backgrounds.
  - Recommended size: max height 200px.

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- In-session branding (interactive or DIY live broadcast session): Customize your session's room with virtual stage backgrounds, speaker's personal background, lower thirds, and a layout. Learn more about branding [here](#).

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## Content uploading and management



### Storyboard

When preparing for your next session, use Kaltura's Storyboard to upload your session's content (slides, videos, files, and images) in advance. Next, organize the content chronologically according to your session's flow and schedule in pre roll, breaks, and post roll (using **interludes**) to simplify the session's management.

Storyboard feature is available when hosting an interactive session or DIY live broadcast. To learn more, click [here](#).

### Media tab

Manage VOD content needed for your event in the Media tab, in the event setup area:

- Upload media and publish to your event site or the organization's Video Portal (Please check if your organization is using this product).
- Edit, download, and delete media.
- Order captions.
- Add downloadable attachments to the media.
- Includes all interactive sessions recordings.

To learn more click [here](#).




### Content engagement

Take an item off your list by scheduling audience engagements ahead of your event. Create notifications, announcements, reminder emails, polls, and crowd reactions in advance, right from the event setup area. To learn more, click [here](#).

### Attachments

#### Upload public attachments to session

Add downloadable content (like videos, images, and documents) and attach it to any session in your event. Session viewers can access the content anytime located in the 'Attachment' tab in the session description area. To learn more, click [here](#).





# During the event: for the moderator

## Q&A moderation

Throughout the event, other than connecting with each other, attendees can engage and ask the speakers questions over the live stage chat or the event moderators on the chat's Q&A tab.

Questions from the audience can be managed from the moderator app, or in the chat area of the session:

### Moderator's app

What's the moderator's app?

The moderator's app is a robust, separate, application where moderators organize, manage, and answer Q&A threads. The app facilitates different actions that help manage the event like publishing polls, public session Q&A, and private chats.

When should you use the app?

For sessions where you expect to have more than 3 moderators.

### In-session moderation

In-session moderation is where moderators engage with attendees, using the same chat interface as the attendees. Moderators manage and respond to questions posed in both the Q&A tab and the Chat tab.

When should you use in-session moderation?

For sessions where you expect to have up to 2 moderators.

### Tips and tricks:

- Share link to Moderator's app with your moderators in advance: Every event has the same link.
- Double check that the moderator and speakers are assigned to the event AND the session.
- Prepare polls and announcements in advance, ready to go with a click.
- Familiarize your in-session moderators and speakers with the backchannel chat.

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### Chat and collaboration

The chat and collaboration area provides a place to:

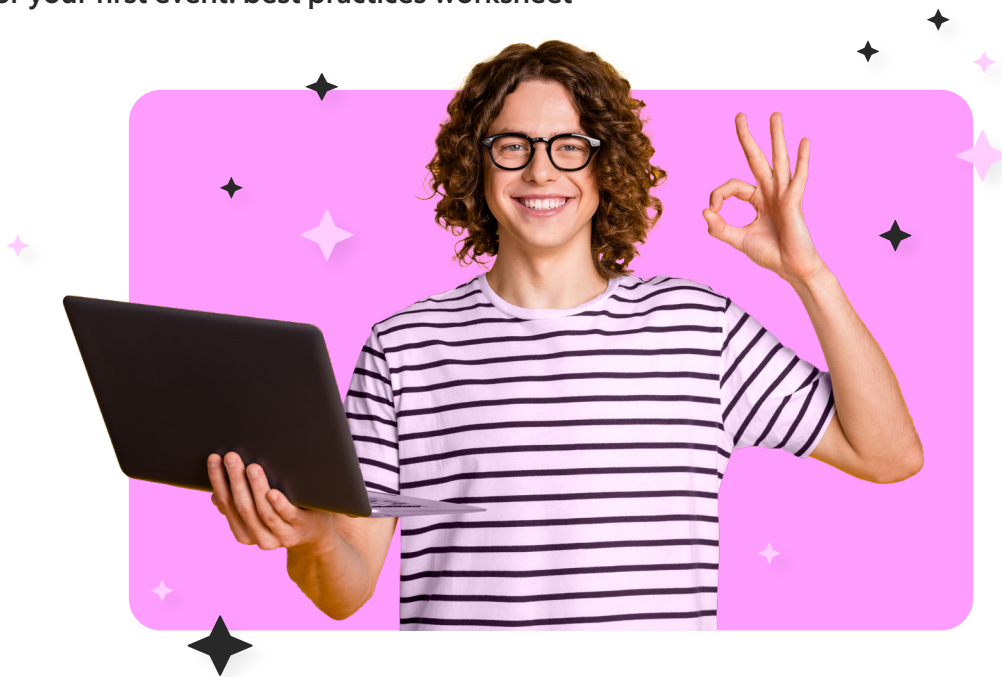
- Connect and network with each other: Attendees will have the opportunity to connect privately with likeminded individuals or publicly in the group chat (if enabled on your template, please contact your Kaltura SME listed at the top of the page).
- Connect with event hosts: As an event host or speaker, connect with attendees through the chat to see what's on their minds and ask questions.
- Add an interactivity layer to you session: A place to engage audience will polls, questions, announcements, and Q&A
- Moderate the session: Moderators have a set of capabilities to help run and manage the event smoothly.
- Speak privately in the backchannel area: Moderators can chat and stay on top of their session in this private chat tab.

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### AI Assistant: in-session helper

The Assistant tab offers moderators and event managers a single location to learn, manage time, and take actions that help boost the event's engagement and increase ROI, all in real-time. Using an interactions recommendations mechanism, The AI Assistant leverages the session's data to suggest immediate actions that moderators can take to grow attendance, boost content discovery, enrich the end-user experience, and increase engagement.

To learn more, click [here](#).



## After the event + preparing for your next one

- **Analytics report:** Our comprehensive analytics dashboards provide trends and drill down analysis on previous, current, and future events. Before your next event, make sure to go over the collected data and determine what you're interested in learning about. Learn more [here](#).
- **Video Portal integration:** The Video Portal centralizes curated content from events and marketing materials, allowing visitors to discover and interact with videos, recorded sessions, and marketing collateral on a fully customized site. It simplifies content management, organization, and repurposing, enabling you to highlight and create new assets from top content to maximize your investment. Learn more [here](#).
- **Keep your event site open:** Your event site and content you choose will still be available after the event has ended. Guests will be able to enjoy the event, and you will continue tracking and gaining data on your VOD recordings. Our 360-degree lifecycle event approach takes care of everything from the welcome landing page, event promotion, registration, the big day, and lastly, the post-event site.
- **Showcase your content:** Use Showcase feature to boost engagement and promote upcoming, past events, and video-on-demand, on one landing page. Decide which events you'd like to include and create a "Showcase page" event organizers can customize, share, or embed on any website. Event organizers can choose the specific events they want listed on their Showcase page, as well as those events they want to highlight and promote at the top of the page. Visitors can browse to view a list of events coming up, register for them, and watch past events on demand. Learn more [here](#).



- **Landing pages:** Build custom pages, using a variety of graphic building blocks like a hero banner, speaker gallery, free text, clickable images, and more.
- Make the pages public: To attract new registrants/leads and include special content and promotional material.
- Make the pages restricted: offering exclusive content accessible only to registered and authenticated attendees.

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## Helpful links

- Knowledge Center <https://knowledge.kaltura.com/help/kaltura-virtual-events>
- Best practices when sending a support ticket <https://knowledge.kaltura.com/help/how-to-capture-network-traffic-logs-for-kaltura-support>
- Whitelist KME for speakers & audiences <https://knowledge.kaltura.com/help/connectivity>

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## Other use cases for Kaltura Events

Please read data sheet below for more information.







LIVE



# Kaltura Events

Create, manage, and track one-of-a-kind experiences that will expand your reach, strengthen your brand and build a strong pipeline, all in one comprehensive platform

## We do things differently



### Create extraordinary experiences

Bring any branded journey to life—registration to VOD, while keeping attendees focused and engaged in your event. Leverage our suite of engagement and gamification tools to spark networking between participants and build a real community with your audience.

Cater to anyone and everyone with our accessible player, live captioning, translations, and much more.



### Keep cool with comprehensive event management

Build a portfolio of events for every size, agenda, look & feel, audience, or locale. Any team member can create an event with your branded templates, then re-create it again and again, changing the content and scale to their needs.

Next, promote future and on-demand events anywhere your organization is—corporate website, landing pages, or partners' websites.

The session is starting soon! It's time to join!

Join Now

Hello from NYC!! 🙌

Hi everyone!

What are you primarily seeking in a webinar?

Learning	60%
Networking	20%
Fun	10%
Other	10%



## Learn how to plan an event that counts, with fortune telling analytics

Survey past, current, and upcoming events, across all events, in one dashboard. From there, learn about your audience, gauge content performance, and turn insights into action to reach any goal, whether it's increased pipeline, reach, and even brand recognition.



## IT will thank you. Give them enterprise grade peace of mind

Designed to grow with your business, compliant with the highest security, performance, and redundancy standards. Scale your events in size and number with smooth and high-quality content delivery.

← All events

Virtually Live!

- Overview
- Main details
- Branding
- Registration
- Agenda**
- Speakers
- Media
- Users
- Interactions
- Analytics
- Integrations
- Settings

### Agenda

5 Sessions

Date and Time	Name
10:00 AM - 10:30 AM Tue, December 14	Opening Keynote Live Webcast
10:30 AM - 11:00 AM Tue, December 14	Marketing for Interactive R
1:00 PM - 1:30 PM Tue, December 14	Demystifying Marketing Automation Pre-recorded Large Broadcast <span>Unlisted</span>
1:00 PM - 1:30 PM Tue, December 14	Video Experience Delivery DIY Live Broadcast <span>Published</span>

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## What's on your event bucket list? Check all that apply:

### Get ready for the event

- Create a new event or duplicate a successful past event.
- Design a custom event template or just have an out-of-the-box option.
- Flexible agenda- multiple days, single day, or anything in between for any number of attendees.
- Connect to existing workflows with marketing automation, analytics, SSO, and BI.
- Share the live event on social media or embed it to my website.
- Accessibility is a priority: live captions, translation, dubbing, localization, or dual screen.

### It's show time

- Networking opportunities for attendees, event hosts, and speakers through chat, moderation, booths, meetings, and workshops.
- Live, prerecorded, meetings, VOD, live to VOD sessions in 4K broadcasting quality.
- Add fun with badges, leaderboard, certifications, live reactions, quizzes, and polls.
- Real-time live session engagement analytics to keep everyone in the know.
- Sponsors booths, meeting rooms, event promotions, resources, and lead reports.

### Can I get an encore?

- Create an immersive post-event video hub that collects leads and tracks engagement.
- Leverage my recorded sessions into marketing & training resources with content creation tools
- Cross-event analytics: learn how an event performed compared to others.
- Integrate Kaltura's event reports and analytics into marketing automation and BI tools.



Learn more about Kaltura events

Learn more