



[Excerpted from the book, "A Guide to Virtual Meetings and Events" by Debi Scholar to be published 2011]

Virtual Meetings and Events ("VME") Roles and Responsibilities					
VME Owner/Requester	VME Meeting Planner	VME Content Designer	VME Presenter(s), Facilitator(s) or Subject Matter Expert(s)	Information Technology (some responsibilities may be transitioned to the VME technology provider)	Procurement
	This may be the same person if the VME Meeting Planner has the skills				
<ul style="list-style-type: none"> <li>• Accountability for overall success</li> <li>• Often holds the budget</li> <li>• Often will be the requester of services and the "client" of the service providers</li> <li>• Often knows the content, objectives and can identify the audience</li> <li>• Provides approval and sign-off of the designed VME content</li> <li>• Participate in VME</li> <li>• Participate in debrief and use information to improve current or future VME</li> </ul>	<ul style="list-style-type: none"> <li>• Receives request; adds to VME calendar</li> <li>• Consults with the VME Owner/requester on the best virtual meeting technology based on objectives, audience size, locations, playback requirements and budget</li> <li>• May act as the project manager and develop project plan</li> <li>• Confirm VME budgets, route for approval, and pay suppliers using a centralized payment system</li> <li>• Identify resources (content, presenter(s), etc.)</li> <li>• Team with face-to-face meeting planners if the VME compliments a face-to-face meeting</li> <li>• Determine compliance requirements</li> <li>• Check technology availability</li> <li>• Send a "Save the Date" and prepare communications with instructions that will be sent to the presenters and attendees</li> <li>• Manage, monitor and support the registration; respond to pre-and post-VME questions</li> </ul>	<ul style="list-style-type: none"> <li>• Establish VME requirements and confirm target audience</li> <li>• With VME Meeting Planner and stakeholders, determine the best technology that will meet the VME objectives</li> <li>• Create agenda and design content materials by using engaging activities (storytelling, polling, peer-to-peer chat, whiteboard, application sharing, emoticons, breakout rooms, and varying types of visuals, e.g. AVI, Flash, PPT, etc.)</li> <li>• Participate in VME</li> <li>• Participate in debrief and use information to improve current or future VME</li> </ul>	<ul style="list-style-type: none"> <li>• Provide content knowledge to the VME designer</li> <li>• Practice and prepare to lead or facilitate the VME</li> <li>• Answer verbal and text based questions during the VME</li> <li>• Provide expertise to attendees after the VME ends, if applicable</li> <li>• Facilitate or present content during VME</li> <li>• Participate in debrief and use information to improve current or future VME</li> </ul>	<ul style="list-style-type: none"> <li>• Often begins and sometimes owns the relationship with the technology supplier</li> <li>• Actively seeks different technologies to serve various VME purposes although may be with the same supplier</li> <li>• May participate with VME Meeting Planner and stakeholders to determine the best technology to use that will meet the VME objectives</li> <li>• Monitor and support VME</li> <li>• Monitor and respond to support tickets</li> </ul>	<ul style="list-style-type: none"> <li>• With stakeholders (often from Education and Development, Human Resources, Marketing, Travel/Meetings, and Information Technology) lead the procurement initiative to secure unified communications or virtual communications technologies</li> <li>• Negotiates contract, key performance indicators and service level agreements with input from stakeholders</li> <li>• May lead the quarterly reviews with technology</li> </ul>



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	<ul style="list-style-type: none"> <li>• Plan a back up strategy in case the technology fails (technology may be videoconference equipment, Internet, computer, etc.)</li> <li>• Plan the rehearsals</li> <li>• Interface with virtual meeting technology company and all virtual meeting sites/participants to ensure they are prepared technologically and psychologically</li> <li>• Prepare presenters (and technology supplier if involved) with information for pre-call</li> <li>• Test question database, teleconferences, equipment, links, etc.</li> <li>• Upload presentations into webcasting tool if applicable</li> <li>• Manage live VME; record program</li> <li>• Conduct a debrief; and use information to improve current or future VME</li> <li>• Prepare content for on-demand viewing</li> <li>• Distribute VME evaluations to attendees to collect meeting feedback</li> <li>• Run reports; manage compliance requirements</li> <li>• Provide VME metrics to leadership</li> <li>• Act as the liaison with IT, Education &amp; Development and Marketing and</li> </ul>			<ul style="list-style-type: none"> <li>• Participate in debrief and use information to improve current or future VME support requirements</li> </ul>	suppliers and participation from stakeholders



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	<p>other stakeholders to develop VME process and procedures best practices.</p> <ul style="list-style-type: none"> <li>• Strategically manage the direction of virtual meetings in an enterprise-wide environment, with of course, meeting stakeholders and IT</li> </ul>				

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