

# 8. Platform Promotion

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# Promotion Best Practices:

## Video Tutorial

**Important:** Please make sure you have completed these [Essential Tasks](#) and you have carried out a [QC check](#) before platform promotion. Failure to do so, may impact the promotion and wider user experience.

We recommend a multi staged promotion plan to maximise adoption of your event app, virtual or hybrid platform. This can be broken down into three stages, pre event promotion, during event promotion, and post event promotion.

The key with any successful comms plan is to consider the purpose of your event, and who your audience are. Your comms plan should be built around these considerations and leaning into the value your invited audience will get from downloading / accessing the platform.

Pre Event Promotion	During Event Promotion	Post Event Promotion
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<p>Multiple rounds of email comms</p> <p>Two primary focuses:</p> <ol style="list-style-type: none"> <li>1. How users access the platform and login</li> <li>2. Highlight the benefits to the attendee.. what's in it for them!</li> </ol> <p><b>Recommendation:</b> Create exclusive app / platform content:</p> <ul style="list-style-type: none"> <li>• By making your documents, videos and more only available on the platform, you create urgency for invitees to access and benefit from the wider content and features.</li> </ul> <p>Example comms plan:</p> <p>Three rounds of emails, using platform analytics to target logged in / not logged in with different comms.</p> <ol style="list-style-type: none"> <li>1. Invite users to the platform highlight key features and benefits.</li> <li>2. Follow up to remind people to update profile to prepare for networking and get some points as part of the wider event game - highlight any prizes.</li> <li>3. Reminder that the event is starting soon, download the app / platform as this will be crucial to maximise your event experience.</li> </ol> <p>Example highlights:</p> <ol style="list-style-type: none"> <li>1. Pre event reading / videos to watch in advance</li> <li>2. Explore the agenda and plan your day</li> <li>3. Personalised agenda</li> <li>4. Only place to access the latest event info</li> <li>5. Networking</li> </ol>	<p>Onsite and digital signs showing how to download the platform and <b>WHY</b></p> <ul style="list-style-type: none"> <li>• Pop up banners and event branding around the venue, build in QR codes or details linked to downloading the app</li> <li>• Display screens / TVs around the venue, promote the app</li> </ul> <p>Concierge: Leverage your hosts / hostesses</p> <ul style="list-style-type: none"> <li>• Train your team in advance so they are comfortable with downloading the app and showing people how to do so.</li> <li>• When welcoming attendees remind them of how to download the app and why its important to do so. Help them if they need support.</li> </ul> <p>House keeping: Your speakers hold the keys to great adoption!</p> <ul style="list-style-type: none"> <li>• Make sure you have house keeping slides ready for the opening session so your key note speaker can introduce the app, how to access and key benefits.</li> <li>• For sessions with live engagement, slides should be included at the beginning and before any engagement to encourage participation.</li> </ul> <p>Alerts and notifications:</p> <ul style="list-style-type: none"> <li>• This is to drive those logged in to specific areas of the app. Promote sponsors, upcoming sessions, live engagement and more.</li> <li>• If you have a native app, leverage push notifications.</li> <li>• Pre schedule as many of your alerts as possible in advance to reduce workload during your event.</li> </ul> <p>Incentivise behaviour with games and</p>	<p>Multiple rounds of email comms or email alerts &amp; push notifications</p> <p>Example areas to highlight:</p> <ul style="list-style-type: none"> <li>• Access exclusive post event content only shown after i.e. highlights video, lessons learnt document etc.</li> <li>• Survey, help us improve and win prize</li> <li>• Documents and videos on demand</li> <li>• Post event networking</li> <li>• Book meeting with our sponsors that you missed</li> <li>• Be the first to hear about our next event</li> </ul> <p>Consider upgrading and converting your event to a 12 month community / event series platform</p> <ul style="list-style-type: none"> <li>• Take advantage of your captive audience</li> <li>• Regular content updates</li> <li>• Ongoing community networking and sponsorship exposure</li> <li>• Regular webinars, internal meetings, and events all housed in one platform</li> </ul>
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# Platform Quality Check

Whilst you can make real time changes once the platform is live, it's imperative to the project success to get everything right before launch.

With this in mind, a thorough quality check of the setup is needed so that you have confidence everything is working as intended, and to ensure your invited audience have a great experience from the get go.

## Important: Help is available

- If you struggle with any of the below checks, you can request guidance on live chat on the [CrowdComms Admin Dashboard](#) as to where and how to test the specific point
- CC Support Pack, or Review Call can be added to your package (if this isn't already) to give you enhanced service to include going through this QC process with a CrowdComms expert.

## Highlights:

- Test accessing the platform via the custom url and native app options depending on platform you have gone with
- Review the security settings to make sure these are fit for purpose
- Is the branding and look and feel representative of your desired output on desktop and mobile
- Do all the home screen options, menu options (both on desktop and mobile), link to the correct areas
- Is all the engagement setup and working in line with your project requirements
- If relevant: Have you applied customisation for live displays for engagement features
- Is the content fit for purpose and includes images and videos where appropriate to elevate the user experience
- For any group related content, are groups setup correctly and relevant areas showing depending on group. You can add and remove yourself from groups to test this.
- Are any hidden areas of the platforms setup and ready to be shown at the correct time
- Are the platform comms that can be scheduled ready to go

## Detailed step by step QC

The below QC test involves a full check of the platform build on both desktop and mobile, ensuring completion of all modules, full functionality testing, GDPR/Security compliance checks and testing for Live Stream production if required.

### General Checklist

- Platform Access - as standard, please check on both Android & iOS devices
- Web access - URL check on desktop (PC/MAC)
- Web access - URL check on iPhone/Android
- CC portal - iOS & Android
- Native - iOS & Android (if applicable)
- Access via Client portal - iOS & Android (if applicable)

#### Platform Setup Checklist

- Confirm time and date
- Confirm security settings
- Confirm managed platform access (2FA, SSO, Passcode/Email validation) (if required)
- Confirm privacy settings (including any custom text)
- Confirm access to RH sidebar, including My Profile and Account Settings
- Emails in for profiles
- Speaker profile images provided
- GDPR compliant
- Company profile booths populated (if applicable)

#### Specific Feature Checks (if applicable)

- Check CSS has not affected/broken any features
- Test session chat
- Test Live Q&A
- Test Live Polling. Check Polling screen is branded.
- 1-2-1 Video calls
- CC breakouts rooms
- Zoom Integration - linked to agenda sessions
- Check requirement for PWA Functionality
- Check Business Cards has been enabled and Card Sharing has been toggled ON
- Check Meeting Booking has been enabled. Check room opening times
- Smart Sessions
- Gamification - verify game information and points allocation

#### Alerts Checklist

- Check delivery across web browser
- Check delivery onto CC portal app (iOS and Android)
- Check delivery onto Native app (if required)

#### Live Streaming (if applicable) Checklist

- Live streams linked to sessions
- Holding poster provided for sessions

#### Platform Modules Checklist

- Are all links working on the platform?

# Promotion Guide

The platform promotion is an essential step to ensure project success. The promotion plan should vary depending on the type of event, content and audience. For internal events and webinars with a straight forward format, a simple one time email invite followed up by a reminder email might be the way to go. For a global congress with pre event engagement, schedule planning and more, this format warrants a multi stage promotion plan.

## Important

- If you already have an email marketing tool that you are comfortable delivering communications to your target audience, we'd highly recommend sticking with what is already working. This might be Mailchimp, or your preferred CRM.
- Introducing new mailing systems can require your organisation to whitelist the sender information. Read more on whitelisting [here](#). For external audiences, there is always the risk of new email senders going into spam.

## Before you start

Consider who your audience is, why they are attending and the value the platform provides to them. Promoting the benefits of downloading an app or logging into a web based platform, will drive up adoption rates.

- Access your personalised agenda
- Receive real time updates from the organisers
- Sign up for sessions and plan your day
- Network with peers
- Book meetings with sponsors
- Take part in interactive sessions
- Have your say, provide feedback
- Maps, event information and more



# Exploring new Horizons

## Accessing Your Event App

Exploring New Horizons is fast approaching and we want to make sure you're prepared to enjoy your event to its fullest.

We're excited to provide you with your event app which will give you all the information and tools you need to maximise your time on site.



## Essential information

How to access the platform is the single most important information. If you have native and web, we recommend providing both options to allow your audience to access via their preferred method. This will help to increase adoption.

Web based platform: Hyperlink the custom url

*Access our event platform across any device with a modern browser. Simply click the link or type [www.crowdcomms.com/virtual](http://www.crowdcomms.com/virtual)*

CrowdComms Container App: Hyperlink the app and highlight the event code to access your event.

*Download the container app here: [Apple App Store](#) / [Google Play Store](#). Or search 'CrowdComms app' in Apple or Google Play Store. Once you have installed the app enter event code 'virtual' to access our event*

Standalone Native App: As above, hyperlink your custom app available in the app stores and highlight the app name to search.

*Download the container app here: **Apple App Store** / **Google Play Store**. Or search '**YOUR APP NAME**' in Apple or Google Play Store. Once you have installed the app enter event code 'virtual' to access our event*

Portal Native App: As above, hyperlink your custom portal app available in the app stores and highlight the app name to search. If there are multiple events listed in the portal, you need to

highlight the event that attendees should

*Download the container app here: **Apple App Store** / **Google Play Store**. Or search '**YOUR APP NAME**' in Apple or Google Play Store. Once you have installed the app enter event code 'virtual' to access our event*

#### Add to Calendar

Option1: Choose your calendar:



Option 2: Choose your calendar:

[Apple](#) [Google](#) [Office 365](#) [Outlook](#) [Outlook.com](#) [Yahoo](#)

#### Get The App

Download the app from your store of choice by tapping the link below:



Then sign in with the email address used to register for the event.

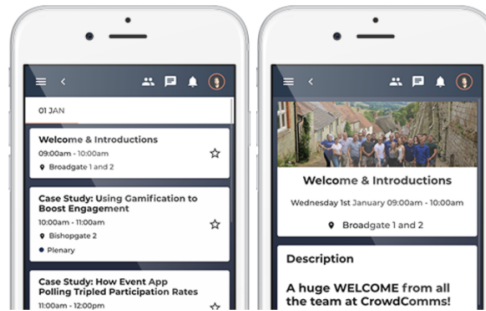
## Elevate your platform promotion

- Go for a multi stage promotion with adjusted messaging to promote everything great about your event.
- Include a short video recorded on Vidyard or similar showing how to access the platform and use key features.
- Include images of your branded platform to get the audience excited.
- Include step by step instructions for key features and use cases to maximise uptake on the areas of the event that are the most important.

## Agenda

Browse sessions by time and date. Select a session for more information and to view speakers.

Add sessions to your personal schedule to plan your time at the conference.



## Live Polling

Get involved and have your say during interactive sessions by taking part in live polling.



## Example Email

- [View here](#)
- This is a html email template that can be uploaded to Mailchimp or similar and edited to replicate your brand so that it is relevant to your event

## Essential Final Step

- Before sending the promotion email to your audience, send a test to yourself and at least one other person, ideally 3-5 colleagues or stakeholders.
- This gives the chance to check everything works as expected, to make sure the information is accurate and the guidance is user friendly.