

Event Driven

How to Run
Memorable Tech
Conferences



by Leah Silber

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Leah Silber

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Sample Introduction

Hi!

Thanks so much for checking out my book, *Event Driven*. It's designed to give you a top to bottom overview of running small to medium sized conferences, along with all the gotchas, dos and donts along the way.

This sample contains a small subset of the book; a few random snippets collected together. This is the table of contents for the full book:

- Preface
 - Testimonials
- Introduction
- Branding
- Design
 - Signage
 - Website
- Organization
 - Legal and Accounting
 - Sales and Marketing
 - Staffing
- Venue
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– The Speaker Experience

- Parties
- On-site Miscellany
- Overall Quality
- The Intangibles
- Vendors
- Closing
- About the Author

As you can see there's a **lot** more than in just this sample. Hopefully you'll fall in love and purchase the book; I really appreciate the support.

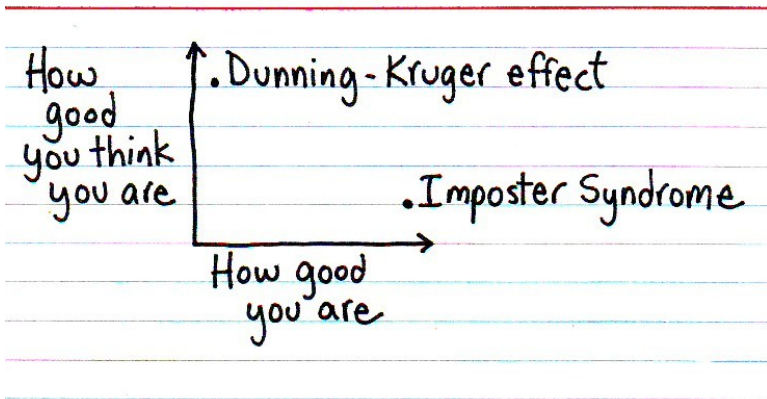
Best of Luck!

—Leah

1. Introduction

Events are complicated, and like all complicated things, you'll want to ask a million and one questions to ensure best results. When in doubt, ask, and then ask again. Collect every bit of info you can along the way, and you'll have the best chances of avoiding problems down the line.

The best thing about the best organizers is that they know what they don't know. Actually, I can probably replace the word *organizers* in that sentence with almost anything, and it'd still be true.



Saw this in a talk at a recent conference and had to track it down. It rang painfully true. (<http://www.ritholtz.com/blog/2012/05/10-thursday-am-reads-28/>)

The worst organizers I've worked with are those who fail to ask questions and recognize their own lack of knowledge. Surround yourself by people who know more than you do, and reach out to experts whenever and wherever you can.

Events are complicated, intricate beasts, and to treat them any other way reveals a less than flattering naiveté.

Accompanying Spreadsheet

When you purchased this book it likely referenced access to a spreadsheet to hopefully help get you off to a running start, if that's a mode of organization that works well for you. [Follow this link to access it](https://docs.google.com/spreadsheet/ccc?key=0AumeMFI8GPLCdGtBOWFWbk4tSHRmYWptVGvVnejVSTkEusp=sharing)¹.

Make a copy for yourself, and tweak away.

This Book

I'm going to go through a bunch of functional areas of running a small to medium sized conference, and I'm going to do most of it rapid-fire informational style.

When I started, this was a blog post. Then it was a blog series. Next it was a short PDF, and now it's a book. Originally, it was intended to be a hit list of important things to remember, mixed with a bunch of pro tips. By now, it's much more than that.

All that being said, I'm not certain a "How to run your first technical conference, steps 1-50" is the best idea for getting the message across. The order of operations on organizing a conference can vary dramatically based on circumstance and preference.

As far as I'm concerned the main function of this advice will be as a reference guide. Read it all at once, definitely, but keep it around and review each relevant section as you deep dive into that bit of the work. That will likely deliver the best results, and the most information retention.

It's also definitely aspirational. I'd love for existing organizers to use this to help optimize their events, but I'd *also* love for aspiring

¹<https://docs.google.com/spreadsheet/ccc?key=0AumeMFI8GPLCdGtBOWFWbk4tSHRmYWptVGvVnejVSTkEusp=sharing>

organizers to use it to fully understand the scope of their undertaking. Should they proceed, to then, of course, do an amazingly solid job.

These are all things I've learned over the last seven or eight years; larger points, and a lot of the smaller ones that help contribute to an overall detail-oriented well-put-together-feeling event. If I'd had a reference guide like this in year one, life would've been a lot easier, and the quality of my events a lot better.

I should add that I lack the fancy event-planner-related certifications you might find in a job requirements list for the role of Events Manager at Giant Acme Corp Inc.. I won't comment on the quality or value of any of those, but I will say that most of the best event people I've worked with in tech haven't had them either. Take that as you will.

Lastly: lots of people organizing smaller events, say, 80-200 people, think of it like a larger meetup. They think they can just wing it. In theory, I suppose you can, but why would you? If you're going to do something that involves this much hard work, do it well! Do it so people will remember it, and so the chances of failure and disappointment are as small as possible.

Take a deep breath... and dive in :)

2. Legal and Accounting

Venue contracts can be scary. Have a lawyer review them. Pay specific attention to your minimum spend, your schedule of deadlines and payments, the cancellation policy, and your liability. Even better, find a friend or colleague whose primary professional responsibilities involve reviewing venue-specific contracts, and have them take a look too.

On to the details:

If at all possible, have your guaranteed spend be as vague as possible. Venues will push you into guaranteeing a specific amount on room rental, and another specific amount on catering minimums. If you can instead agree on an overall spend, something like selling fewer tickets than you'd planned for can be better managed (by, say, renting less space, and reallocating that spend to getting better food).

Avoid the venues that nickel and dime you. If you can, anyway. In addition to resulting in an overall higher spend, they'll be the ones that annoy you along the way and make sure you have an unpleasant experience.

Know this: BEOs (Banquet Event Orders) are *basically* designed to be confusing. Tricks of the trade include such gems as:

- Spreading your event over 42,000 pages
- Neglecting to provide a clean list of all charges culminating in a total charge, so you have to re-do all the math on your own to understand where the check their asking you for even comes from
- Including blank pages for “nothing happens in this room on this day”

- Listing *agreed upon numbers* and *guaranteed numbers* AND a separate *quantity*, so again, you can't figure out which number they're using
- Prominently listing your event date right beside the print date of the particular piece of paper, maximizing the chances of confusion for multi-day events
- Separating the numbers from the specifics of what you ordered entirely
- ...and other such fun things

In general, go small, but aim big. Find a venue that can support, say, 500 people, but build a contract that guarantees whatever absolute minimum they need, so maybe only 100 people.

When you sell up to max, they'll have no trouble taking your extra money (assuming adequate notice of course), but you'll be in a significantly less risky position if by chance your goals have overshot. Keep them apprised along the way, but realize that even if they try and get you to sign a bigger contract, there's rarely any reason to, unless they're going to be cutting you some sort of break.

Get insurance! Your venue contract will typically specify a minimum amount, and considering what that is, you might want to go the extra mile and get *more*. The extra mile is pretty cheap as far as these things go.

The good news is that buying event insurance is super easy. There are a number of online brokers that specifically target events, and the whole transaction will take you under 10 minutes. Expect this to cost a couple hundred dollars, not thousands.

3. Sales and Marketing

There are two halves of the equation here: the logistics of *selling* your tickets, and the more creative side of things: making sure people *buy* them.

So we'll start with the easy part: selling them. First, this is a *prime* example of an area where you do *not* want to reinvent the wheel. Do not build this yourself, I say, assuming you don't have unlimited time and funds. Instead, go with one of the already existing vendors who will do this for you. Yes, they'll charge you for this service. Yes, it's worth paying for.

I use [Eventbrite](http://www.eventbrite.com/r/wifelette)¹ for most of my shows. They've been around a while, have a vast feature set, and like [Wufoo](http://www.wufoo.com/)² (another vendor I recommend), are one of the few companies I consistently see making user-facing progress. There are of course still features I'd like, but over the years that list has gotten shorter and shorter at a pace I can be okay with.

Eventbrite has a wide feature set, so it's a must for my larger events. For smaller things, I've occasionally used other tools, like [Tito](https://ti.to/home)³, for example. It's built by great people in the Ruby community, and they're also iterating pretty quickly.

I'm uncertain how much detail to go into here, because while I *can*, it seems like rewriting my version of their docs wouldn't be the best use of time. So let's instead jump into talking a bit about marketing, and we'll get back to registration in a bit.

¹<http://www.eventbrite.com/r/wifelette>

²<http://www.wufoo.com/>

³<https://ti.to/home>

Marketing Your Show

First, let me say that if you're the right person to run an event in your space, you probably already have numerous concrete thoughts on this topic. If you don't, consider that your skill set might not be wide enough to get the job completely done; consider finding a partner who's specifically good at the parts you don't excel at.

First and foremost, the most valuable marketing asset you have is your personal network. People you can talk to who will help you spread the word, whisper in the ears of popular influencers, and push come to shove, also open their own wallets to be your first sign ups.

We're running *tech* conferences, so tech is the way to go. I want to say that means using *all* your social networks for promotion, and by all means do, but honestly, Twitter has been the only one with reliable success in my communities.

You can't just Tweet once and expect money to fall into your lap. You need to tweet lots, and you need to keep your tweets focused on the merits of your shows, so you don't start sounding like a corporate marketing machine.

Every time you announce a new speaker, it's a new opportunity for a tweet. Talk about them, talk about their topic, and leverage *their* network and influence.

Every time you announce a new sponsor, that's yet another opportunity. The sponsor will be grateful for the tweet, but more importantly they'll likely *retweet*, and their accounts will often have much wider and larger reach than yours does.

If you care about tracking (and you probably should, albeit not obsessively so), remember to use links that facilitate this. Even something as silly as a differently bitly link for different purposes might help get the info you're looking for. Once you tweet *without* using a tracked link though, you're out of luck on the tracking front.

Most of the events I've run have been in communities where I was already well networked, and where the community was already large enough to *warrant* an event existing. This means the marketing has been relatively easy, in that people were hungry for what I was selling. Conferences are an important step in the evolution of any community. People will want you to succeed so these forums for face-to-face fun times will continue to exist.

As part of building buzz, you might want to give your speakers and sponsors badges to put on their websites proudly telling people they'll be joining you. If you have any hope of these being used, make sure they look nice. Similarly, encourage your sponsors to write blog posts announcing and promoting their sponsorship.

Lastly, like in all things, I prefer the route of creating content to the route of waving your hand around until people give you attention. With a conference, the best bet is efforts with speakers and members of your program committee.

Work with them on blog posts, either on their own blogs, or on the conference website, that tie into the technical topics presented at your talk. Get them to tweet about why they're talking about what they're talking about. The importance and the objectives. And so on and so forth.

Marketing Hacks

The long and short here is that I don't like the sorts of Marketing that feel like hacks. I've occasionally gotten cold calls for tech conferences, emails on lists I never signed up for (clearly purchased or scraped) and spammy fliers in the mail, and mostly those talked me *out* of attending those shows.

Less spammy (but only by a bit) are things like Google Adwords, formal PR and other advertising. I'm all for a banner advertising your event on the homepage of, say, the related open source project, and maybe your company (if there is one). I'm less enthusiastic about *normal* internet advertising.

The best advice I could give you here is to think long and hard about your audience, and how they'd feel if they saw these ads. If there's a chance it might turn them off, you want to skip this route.

Registration

No matter the tool you use, some things you don't want to forget to ask for on your registration form:

Meal preferences

Ideally this is a short list of most common requests (Vegetarian, Vegan) and an Other field where people can hand-write their requests. Yes, having it be a text field means you need to read through it all rather than have your system tally the responses, but it's worth it; you don't want to plant ideas people don't have on their own.

I err on the side of shorter list because special meals are expensive: people who need them will ask, but there are entire categories of people who don't *need* them... but might decide to *want* them if presented with the explicit option (I'm talking to *you*, people who randomly think the Kosher meals are better. P.S.: They're not. Not by a long shot.)

(We'll talk a *lot* more about how to do a killer job providing awesome special meals for folks who need them—that'll be in the [catering section](#). Gluten-free, nut allergies, lactose intolerance...if you work just a little bit you can keep all these people happy as clams.)

Badge data

As for *everything* you'll need to put on your badge. In many cases this is simply name and company, but if there's a chance you want to include something like GitHub usernames, Twitter handles, etc., ask for it here. Worst case, the info goes unused.

Demographic data

If there's any info you'll need for demographic details later, say for sponsors, collect this now. Typical examples include a drop-down of possible job titles, category of employee and location.

T-shirt size, or any specific swag-related details

Consider listing the exact product you'll be using for your shirts, ideally even with a link to the manufacturers sizing page. If your attendees have better info up front, there should be less "this didn't turn out to fit me, can I exchange it?" requests on-site.

Not everyone *wants* another t-shirt, either. Consider having a "no thanks, I'm good" option and possibly needing to order fewer shirts. Just be sure you have access to this info on-site if you ask it: people can easily forget they opted out and accidentally grab someone else's items. You don't want to get extra, but you also don't want to run out.

If you're using the right registration tool, it should allow you to customize questions based on ticket type. You likely have additional questions it would be helpful to ask people like speakers and your volunteers (say, about travel details, speaker dinner preferences, availability, etc.)—this is one of your best opportunities to ensure responses.

The right registration tool should also let you do group ticket sales, so you can automate the process of discounts for folks buying more tickets (if you choose to do this, that is).

With Eventbrite, the easiest way to do this is to set up a Group Ticket type that is only valid for quantities of X or more, where X is the minimum number needed to qualify. You can then price each of these tickets at whatever your group discount rate is.

4. Parties

Evening events and parties can really round out a conference nicely. If you can afford it, or have sponsors who can afford it, make it happen!

Do make sure your parties have more than just alcohol. For one thing, not everyone drinks (so be sure you have a plan for attendees who aren't 21 yet). For another... isn't everyone tired of *just* drinking? Don't answer that, but assume that even if *you* aren't, lots of folks are.

Examples of activities that go great at parties: bowling, shuffleboard, karaoke, ping pong, arcade games. We had all of the above at EmberConf 2014, and people loved it. At GoGaRuCo 2013 [two sponsors ran a Maker themed party](http://blog.carbonfive.com/2013/09/21/gogaruco-2013/)¹, complete with a vinyl sticker-making station, electronics soldering, LED badge assembly, and Lego derby racing.

¹<http://blog.carbonfive.com/2013/09/21/gogaruco-2013/>



The soldering station at the 2013 CarbonFive and Sharethrough sponsored GoGaRuCo pre-party. Photo Credit and blog post: <http://blog.carbonfive.com/2013/09/21/gogaruco-2013/>.

If you're going to serve drinks, serve food. This seems like common sense, but food can be expensive, so it's often forgotten. In Oregon, it's illegal for bars to serve hard alcohol without also serving food. We should make this law for parties. It'll help people keep from overdoing it.

I always advise people to limit the alcohol. This might fly in the face of current conventional wisdom, but no one likes a sloppy drunk. Events with super drunk people also tend to have more issues with harassment, since folks are less inhibited and less careful.

Hosting parties with free-flowing unlimited alcohol makes it too easy for those who might over-indulge, to do just that. If you can, talk your sponsors into instead providing drink tickets—either at the door, or help them out by sticking them in the attendee bags in advance. You can even walk around with a stack of extras in case some folks want some more. That gives you the opportunity to politely decline if someone appears to be too drunk, but to also feel

like Santa.

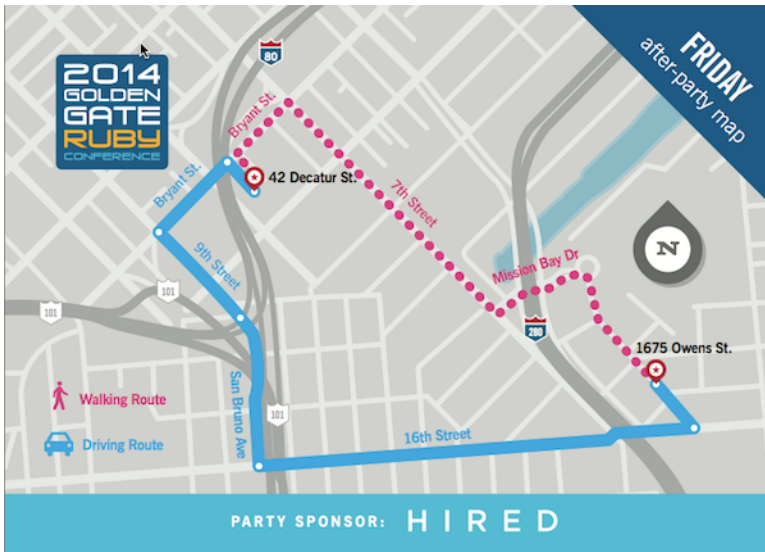


Drink Tickets from EmberConf 2014. They expressed what they were, felt like keepsakes, and provided another great opportunity for sponsor shout outs.

You should pay attention to the noise level. Now that our college rage days are over, most of us don't want to be straining our voices

to shout over blasting music at parties. Keep the volume at a level that still allows people to hear each other speak. If you have to be loud (say, at an event with a band) try and make sure there's a separate quieter space for those who don't deal well with the loudness.

Lastly, think about transportation. If your party is far from your conference, you're going to have tremendous attrition as people get tired, lazy, or even just find more interesting things or people to shift to along the way. If it's affordable, get a bus. If it's not, make sure your attendees have clear directions to get where they're going.



We handed out 4x6 postcards at GoGaRuCo 2014. Each side was a map with directions to one of our evening parties.



GoGaRuCo 2013 attendees on the magic themed bus to the Square-hosted after party.

If your party is sponsored, see the Party section under [a la carte sponsorships](#)

5. The Intangibles

Set the tone for your event right up front. Have whoever does your opening announcements talk about how you want your event to feel, and what you hope to accomplish.



In the first few minutes of the EmberConf 2014 opening Keynote, project creators Yehuda Katz and Tom Dale talk about the environment the conference wants to be fostering. Watch the first full 5 minutes, they did a great job: <https://www.youtube.com/watch?v=pON2erqemDY#t=73>

Safety, respect and comfort

Be sure you specifically call out your code of conduct, general standards, and make sure people know how to escalate a problem if they have one—at every prudent opportunity, including the previously mentioned opening announcements. Make it clear to your attendees that their comfort and safety is a top priority, and that harassment or other bad behaviors will *not* be tolerated. If at

all possible, do this in a way that doesn't make people feel on edge, but instead makes them feel protected and respected.

So yes, your conference should have a Code of Conduct. People often debate the utility of these policies (is a page on your site specifically telling people *not* to harass others actually going to stop would-be harassers from harassing?), but what *can't* be debated is that they do make people who might otherwise be worried feel a bit more comfortable.

It lets folks know you care, you're going to do whatever you can to protect them, and that it's actively on your mind. It also costs you nothing, so there's no excuse not to do it.



*Do a Twitter search if you're having doubts. People really **do** care about Codes of Conduct; some people go so far as to refuse to attend shows that don't have them.*

If you're unsure about how to write the Code of Conduct, worry not: this is a solved problem. There are numerous creative commons and open source variants online that are more than happy to let you borrow their language. The most popular one in tech seems to be

the one posted by Geek Feminism¹.

Pick and choose the language you like, and tweak as needed—since your code of conduct should be a reflection of your actual values, standards and concerns, you really want to meaningfully customize your variant, rather than simply pulling it off the shelf and publishing.

Make sure your code accurately paints a picture of the environment your event aims to have, and be sure you plan on enforcing anything you write here. Try to avoid promising specific action on things that you don't actually have the power to enforce.

If you're unsure about what you can enforce or even how you might prefer issues be handled, I recommend running through some potential scenarios with your fellow organizers and discussing how you'd work through them. If you're having *severe* doubts, talk to your lawyer and know what rights you have to keep your attendees safe—that's what the lawyer is there for.

Similar to what we talked about on the [program](#) side of things, make sure you're making specific efforts to market your event to minority groups. If there are fewer of X person in your community, you're going to need more efforts than the regular to make sure enough of X people get the message and ultimately decide to attend. A more diverse attendee pool means more perspectives in the mix, and an overall better and better-rounded experience.

I mentioned this in the [Parties](#) section, but it's worth bringing up again here in a larger context: pay attention to the alcohol levels and alcohol culture you might be promoting.

For one thing, if there's any drinking happening, make a point to keep it limited, and to encourage responsible behavior. For another, any time you serve drinks, think about how the non-drinkers are going to feel. Think about what other things will keep

¹http://geekfeminism.wikia.com/wiki/Conference_anti-harassment/Policy

them occupied at the same time, and have a plan for dealing with attendees who aren't 21+.

This is even *more* code of conduct stuff, but I want to be specific. Make sure you have additional responsible hands on deck to handle issues when alcohol is present. Reduced inhibitions can lead to having a great time, but also to people taking liberties they shouldn't.

Have sober (not just sober, but dry—no drinking at all) staffers in attendance, and make sure they know how to escalate any problems. Also make sure they have the number of cab companies for any attendees who might overdo it, and that in the unfortunate event that someone is too drunk to make it home, they may even need to act as an escort. If someone drinks too much on your watch and bad things happen, people will absolutely hold you responsible, and they should.

The newbie experience

If you can afford it, offer scholarships. These can be for minorities, students, folks with specific financial need—think about who in your potential audience might need them. If you *can't* afford it, try and seek out sponsors for this specific purpose. Have a simple but targeted application process to make sure you're getting the spots to the right people, and do your very best to think holistically about the experience your scholarship recipients will have.

Conferences can be scary for first-time attendees: do whatever you can to make it *less* scary for them. I've as of late become a fan of having a mentor/mentee program, where you pair newbie attendees up with experienced attendees/community folk. Introduce them to their pairs in advance (either online or better yet, in person before the conference) so they have a chance to get comfortable with each other, and encourage them to discuss what they're hoping to get out of the experience, as well as which things they might be nervous about. It's typically an extremely rewarding partnership on *both* sides of the relationship.



Kasper Tidemann
@KasperTidemann



Following

So, @blangslet arrived at #EmberConf not knowing a single person. Tonight, we're talking and having a great time. That's community.

↩ Reply ↻ Retweet ★ Favorite ... More

Tweet from a first-timer

All the other things

It's impossible to make a comprehensive list of all the human-oriented edge cases there can be, but as a rule of thumb, if you discover one, try and cater to it.

It's easy, as an organizer, to convince yourself you're too busy with the overall experience to pay attention to the one-offs, and it's probably even true. There are *always* going to be legitimate excuses to avoid going the extra mile. The trick is to ignore the excuses and go that extra mile anyway.

We talked lots about the folks who need special meals, and I mentioned making sure you have a (clean and comfortable) room for nursing moms to attend to their needs. Those are just two of the more obvious cases. Learn about your audience, and do your best to take care of them—all of them.

And the little things

Before show day, spend some time thinking about what small qualitative things you can do to make *your* on-site experience better. These might be tangible *or* intangible.

This could mean making yourself some note cards for reference, or deciding where you'll sit all day for people to find you, or even packing your favorite pick-me-up candybar into your bag. One of my personal favorite self-care reminders is to wear comfy shoes! I'm on my feet for 12-15 hours on a conference day, and ohhh, how my feet can ache.

Whatever it is, take some time to (admittedly selfishly) think through what's going to keep *you* happiest and most productive on the big day. It can make a world of a difference, and if you're happy, your team is happy.