

IN-PERSON

Foster comfort so in-person meetings are meaningful.



LOGISTICS & SETUP

Can rooms be set to ensure social distancing?
And when they are, can enough engagement
happen to accomplish the meeting's goals?

How will you feed everyone? Buffets and
break or water stations become much more
challenging when staying distant.

What is the venue's cleanliness and
disinfecting plan? Consider washrooms,
entryways, coat and baggage check, guest
rooms, gym facilities, etc.



CONTENT & EXPERIENCE

Can you rely on attendees, guests, and
presenters to participate by any safety rules
you've set?

Truly social events (receptions, dinners, etc.)
and other activities quickly lose their intimacy
when staying six feet apart.

Will presenters feel comfortable presenting in
face masks? How about your attendees?

VIRTUAL

Create engagement, excitement, and purpose in virtual gatherings.



PROGRAMMING & EXECUTION

Keep sessions and modules shorter than if in person – attention spans are shorter online.

Use the same host throughout - particularly in multi-day settings.

Have family office staff use the same visual background to distinguish between family members.

Use audience engagement tools for polling and feedback.



INFUSING FUN & ENGAGEMENT

Send invites that build excitement and anticipation - just as you would for an in-person meeting.

Make it feel like an event, and not an endless Zoom chat. Feature fun breaks using music, video, etc.

Get creative. Deliver gathering-specific goodies in advance to create moments of engagement - such as workbooks, cocktail kits, craft sets, or family-labeled happy hour beverages.