**SBC LIVE APPEARANCE PROCESS**

**LIVE APPEARANCE EVENT PROCESS** - Thank you for coordinating with us thus far. The following information is set to outline and guide you and your team in confirming the process, expectations, and next steps. Please read over the following information to ensure you are aware of our next steps and guidelines in working with our speakers and us.

**SBC AGREEMENT POLICIES** - we do not accept verbiage edits that produce the same outcome of a clause. We also hope that the agreement representative of the host will take an approach to edits, treating the agreement as low risk.

* SBC and our speakers do not commit to an event without an agreement in place to protect all parties.
* SBC reserves the right to deny suggested edits on behalf of the speaker related to cancellations, intellectual property & recordings.
* We aim to have the agreement fully executed by all parties within 14 days of us sending the first draft.
* If you have your own agreement, SBC will request that we create a master service agreement for the current and future engagements as we work on the process for this engagement.
* SBC uses electronic signature software Zoho Sign (same as DocuSign) which will automatically circulate the agreement to all parties and send a final copy of the agreement to each party upon execution. We will also send a PDF version of the agreement for your reference.
* The host is able apply their signature to the agreement via digital signature on the Zoho Sign software, or PDF.

**AGREEMENT PROCESS** - Once you have selected your speaker, we will be sending you a booking information form for you to fill out for the purposes of the agreement. It will also contain a breakdown of the speaker fee, travel & total cost.

* We will then send the first draft agreement as a PDF copy in the email trend. We will also send the same version via Zoho Sign.
* Once we have confirmed we are able to move forward and the event details have been finalized, we will then send the final draft of the agreement via Zoho Sign for electronic signature. We will also send a physical PDF version attached to the email trend.
* All parties will automatically receive the executed copy of the agreement after the final party applies and submits their signature.
* We will also attach the executed agreement to the invoice.

**PAYMENT PROCESS –** SBC prefers to be set up as a vendor in your system for Electronic Fund Transfer (EFT) payments. Please send us any EFT/vendor applications or provide us with what we must fill out for your organization.

* Please send us any vendor application form for us to fill out and send over asap.
* Our business information and banking details will be in the appendix of the agreement.
* The SBC agreement representative will be responsible to manage all processes involved to invoice and collect payment.
* We are required to receive payment and pay the speaker within 7 days of the event date.
* We also accept payment by cheque or email transfer. We do accept credit cards with a 2.9% processing fee because we operate on slim margins.
* SBC is PST-exempt in BC, SK, and MB.
* If you are GST/PST exempt, we will require an exemption letter from your organization.
* All invoices will be sent out and communicated through invoicing@speakerscanada.com

**GUIDE TO ASSIST YOU FOR ALL NEXT STEPS**

**CONNECTION EMAIL BETWEEN HOST ORGANIZATION & SPEAKER**

* We will be providing you with the promotional materials and the speaker’s contact information in the connection email.
* Speakers usually prefer that have an Agreement in place before they connect with organizers.
* If the event is coming up within 60 days, we will connect you with the speaker asap.
* If the event date exceeds 60 days, we must have an executed agreement in place before you connect with the speaker.
* If your event is approaching within 7-14 days, we suggest responding to the connection email and placing a WhatsApp, text message, or call to reference the email communication to assure they will connect quickly.

**DISCOVERY CALLS -** The purpose of the discovery call is to outline:

* Background of the event and your organization.
* Session requirements – speaking time duration and audience Q&A duration.
* Creative content discovery discussion for potential topic themes.
* Virtual software & speaker technical set up.
* Audience information.
* Outstanding deliverables & deliverable deadlines.
* Schedule future meetings for virtual test run.

**PREPERATION FOR DISOCOVERY CALLS**

* We encourage organizers to invite any team members, decision-makers, or executives to participate in the call.
* It is important for organizers to have a final meeting before and after you connect with the speaker, to ensure full alignment with the speaker and the content of the session.
* It is a standard that our Speakers all research, customize, and tailor their presentations for your group based on the discovery call.
* Be prepared to provide the speaker with the contact information of your team members involved with the production or will be introducing them in the session.

**PROMO MATERIALS** - If you require a specific topic description for the promotion of the event, the speaker may provide a topic description after they have connected with you for the creative discovery call.

* SBC will provide the promotional materials in the connection email.
* Host organization is permitted to promote the event once there is a mutually executed agreement in place. Special permission must be granted by SBC to promote before the agreement is complete.
* SBC and our speaker permit you to use and edit any of the approved image, bio, and topic descriptions we will be providing you in the connection email.
* SBC will collaborate with you to provide all promo materials so please discuss your needs and any targeted dates on when you plan to promote the event.
* If you require a customized topic description, we recommend that you request the speaker to provide after the discovery call and you have had the opportunity to discuss topic themes and outcomes.

**VIRTUAL ACCESS LINK FOR SESSION**

* The Host organization is responsible to set up and deliver the virtual software and is responsible to inform/guide the Speaker of the technical requirements for the session.
* It is recommended that the host organization create the event link a minimum of 7-14 days before the event and provide it to the speaker.
* Please provide the link to the Speaker directly via email. *The email address for the speaker will be provided within the agreement and the connection email.*
* Please create a calendar invitation to invite the Speaker accurately to the time, date, and duration of the session with the virtual access link included in the calendar invitation.
* If possible, place the event link in the video conference section of the invitation, and provide it a second time in the notes section with the link and all other access information.

**VIRTUAL TEST RUNS** -With virtual events, it is recommended to run two separate test runs of the software with the speaker.

* If possible, it is efficient to run the first test run during the discovery call with the speaker.
* The first test run should be a larger overview of the software, the Speakers set up, the technology to support the speaker, slide controls, etc.
* The second test run should be within 30 minutes before the start time of the session.
* Please provide the speaker with the IT/production contact for the event who can support the speaker in the agreement, connection email, or the discovery call.

**INTELLECTUAL PROPERTY, RECORDINGS/LIVESTREAMS & PRODUCTION -** It is critical that SBC and the Speaker are informed if you plan to record the session, if you hope to reproduce the recording in any way and how long you hope to have the video available on your internal channel as we negotiate the terms and conditions for the Agreement.

* The agreement will outline the permission granted for the intellectual property and the recoding.
* Speakers have their own guidelines, policies, and comfort levels with recorded sessions.
* We function as a mediator to try to align all parties and their processes for recordings and live streams.
* SBC and our speakers hold all rights to the Intellectual Property of their session after the event.
* The host organization, productions teams, event contributors and organizers must inform SBC and the speaker of any strategy or intention of recordings taking place at the event.

**ZOOM BEST PRACTICES**

[**https://support.zoom.us/hc/en-us/articles/205347605-Managing-and-sharing-cloud-recordings**](https://support.zoom.us/hc/en-us/articles/205347605-Managing-and-sharing-cloud-recordings)

[**https://support.zoom.us/hc/en-us/articles/209743263-Meeting-and-Webinar-best-practices**](https://support.zoom.us/hc/en-us/articles/209743263-Meeting-and-Webinar-best-practices)[**https://blog.zoom.us/best-practices-for-hosting-a-digital-event/**](https://blog.zoom.us/best-practices-for-hosting-a-digital-event/)

**MS TEAMS BEST PRACTICES**

[**https://support.microsoft.com/en-us/office/meetings-1f8862a1-48f2-4869-863d-564123343d38**](https://support.microsoft.com/en-us/office/meetings-1f8862a1-48f2-4869-863d-564123343d38)

[**https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a**](https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a)

[**https://support.microsoft.com/en-us/office/produce-a-live-event-using-teams-591bd694-121d-405c-b26d-730315e45a22**](https://support.microsoft.com/en-us/office/produce-a-live-event-using-teams-591bd694-121d-405c-b26d-730315e45a22)

[**https://support.microsoft.com/en-us/office/produce-a-teams-live-event-using-an-external-app-or-device-b0026c9d-fd37-4bb3-bffc-6961f221fbe9**](https://support.microsoft.com/en-us/office/produce-a-teams-live-event-using-an-external-app-or-device-b0026c9d-fd37-4bb3-bffc-6961f221fbe9)

[**https://support.microsoft.com/en-us/office/best-practices-for-producing-a-teams-live-event-e500370e-4dd1-4187-8b48-af10ef02cf42**](https://support.microsoft.com/en-us/office/best-practices-for-producing-a-teams-live-event-e500370e-4dd1-4187-8b48-af10ef02cf42)