



**x = independently organized TED event**

## Best Practices

On March 23, 2009 the University of Southern California hosted the first-ever TEDx event, where "X" equals 'independently organized TED event' - a new TED program for select organizations around the world.

USC considered this event to be a grand experiment – one where new ideas, dialogue, and conversation were delivered to the USC community through a wide array of thought-provoking and innovative content. And boy, did we learn a lot!

As the first university to pilot the TEDx program, USC and TED agreed that a key outcome from the first TEDx event would be a set of “best practices” that could be shared with other organizations seeking to host a TEDx event.

So, here it is. We put this document together to share some of the challenges we faced, the decisions we made, and the outcomes that resulted.

Admittedly, TEDx USC was a much larger event than most future TEDx programs. (We had nearly 1200 people attend, with more than 8 live presenters, 3 musical performances, and short films, etc.)

But we hope that many of the lessons may be relevant to you as you plan your own TEDx event.

## ***Program & Format***

### **We tried to choose our speakers carefully**

This might seem like a no-brainer, but this was one of the toughest choices we faced as TEDx organizers. In the keeping with the spirit of TED, we tried to focus on inviting the most interesting, inspiring, dynamic, and charismatic speakers with a unique, relevant and captivating story to tell.

As a major research university, we have many illustrious alums, many of whom would be a huge marquee name for our event. But instead of reaching for the biggest name we could get, we really thought about WHY we wanted a particular speaker: What story would they share? Will the USC audience be inspired by this speaker? Will they learn something new and unexpected? We wanted to ensure our audience was surprised and delighted by the content – not hearing the same stories they may have heard before.

This meant that for TEDx USC, we sometimes chose speakers from our faculty that were working on breakthrough research, are passionate presenters, and had a unique perspective on a current issue or debate. We also looked to our network of innovative individuals from outside the USC community who had made major societal impact through their ideas. And because of this deliberate decision, our guests left the event feeling surprised, delighted and inspired.

Once we selected our live speakers for our TEDx event, we made sure to communicate with them as early as possible, and as few times as possible. We found that having one point person handle all communications helped us negate confusion prior to the event. We were specific in every detail provided and in the questions we asked.

### **We tried to choose our audience wisely, too!**

Being invited to TEDx USC felt like gaining membership in a special and well-curated community. And our audience understood they were expected to actively participate in the event.

Of course, the purpose of the TEDx program is to expand the TED experience beyond the annual conference. But a major challenge we faced was that the demand for tickets to our event far exceeded the space available in our venue.

USC managed ticket demand by asking the guests to fill out a short application for their ticket. This ensured we could better manage the quality and quantity of guests. By creating just a small barrier to entry, we were able to sort through the folks that were serious about attending TEDxUSC. Specifically, we asked all potential guests to fill out a short online form and answer three simple questions:

- What are some of your passions and achievements?
- Why do you want to attend TEDx USC?
- Is there anything else you'd like us to know?

This allowed us to invite the people who demonstrated they were serious about attending and actively participating in the event. It also helped us gauge expectations, and provide an open communication loop with all attendees.

### **We aspired to produce a well-paced program**

We aspired to make sure the TEDx USC program was well-paced, varied and moved quickly, so that our guests would continue to be engaged in the content throughout the duration of the event. (Dark auditorium + boring speakers and long-winded content = sleeping audience!) To do so, we considered the flow of our presentations, and programmed the day so each presentation naturally flowed into the one before and after it.

For example, we knew one of our live speakers, Jane Poynter, was going to speak about the cycle of carbon in our biosphere, and then ask everyone in the audience to take a breath. So, immediately following Jane's talk, we played a short student film called BREATHE which was about the life changing

events that can happen in the space of just one breath. (Jane Poynter's talk can be seen here: [http://www.ted.com/talks/jane\\_poynter\\_life\\_in\\_biosphere\\_2.html](http://www.ted.com/talks/jane_poynter_life_in_biosphere_2.html))

Because we had both live speakers and video presentations, we staggered the different types of content throughout the event. In this way, our program did not become too heavily loaded on either side with videos or live talks. (Full run of show can be found here: <http://stevens.usc.edu/tedxusc>)

At TEDx USC, we also provided a variety of 3 minute, 5-7 minute and 18 min presentations. Some of our faculty members provided a 7 minute overview on their research, and some our short films ran only one minute long. Plus, we had live musical performances, and short films to break up the sessions.

We carefully timed the event to fill the afternoon, leaving enough breathing room for a mid-afternoon break, and a 20% cushion of time as a "safety net" in case of technical issues. (Turns out we needed the 20% cushion time for applause, stumbles, glitches, and a general slowing that naturally happened.)

Since breaks are extremely important to a well-paced program, and happy guests are well-fed and hydrated, we provided breaks every 2 hours, and kept the water, coffee, and tea and snacks readily available. Some of guests later told us that in addition to the cookies and punch, they'd like some healthy snacks like carrot sticks and apples during the break. We will be incorporating healthier snacks for next year.

## We insisted on polishing and rehearsing all live presentations

Since we choose to have live speakers at our TEDx event, we insisted on having advance discussions with each of them on possible topics and working through AV development. We held discussions with each speaker on their topic, and hashed out the main speaking points. We also urged them to write out the talk and rehearse several times with a timer, and offered to help coach them – and a few took us up on it!

### ***AV / Slide Development***

The hardest challenge for our invited speakers, especially those who are used to giving long-form presentations, was the 18-minute time limit. It helped to remind our speakers more than once that 18 minutes was not a goal, but an absolute limit. For some speakers, we suggested that they aim for a length less than 15 minutes, to ensure that if they went over the time limit, the overall program would still run on-time.

Providing guidelines helped our speakers prepare engaging and dynamic visual accompaniment to their presentations. Here are some tips we shared with the speakers at TEDx USC. (These tips came from TED, and more detailed tips are included in the TEDx Licensee Toolkit.)

- Each slide should make only one point, using large text, diagrams or images.
- **The absolute minimum font size is 24.**
- In an 18-minute presentation, speakers should have no more than 60 slides, and even that large number requires practice and can be tough to pull off.
- All images should be properly licensed for use in worldwide video and web distribution.
- Make sure to develop your slides with the proper projector resolution and aspect ratio. (We told them in advance what the resolution and aspect ratio would be.)

For TEDx USC, we sent speakers examples of great TED presentations, to help them conceptualize their own talk. Some TED talks with great visuals include Hans Rosling, John Doerr, and Richard St. John. But then some of the best ones do not have visuals at all, like Ken Robinson.

It helped us to get a copy of speaker slides in advance. (TED usually asks for slides one month in advance.) When receiving slides, we immediately checked compatibility with the laptop we used during the event and looked for places where slides could be improved. This included removing extra text, making fonts bigger, using more visuals, and generally simplifying.

### **Speaker Rehearsals**

One of the best decisions we made was to mandate **REHEARSALS** for all live speakers. Through an onsite rehearsal, we were able to get speakers comfortable with the lighting, layout, flow and feeling of the event. One day before our event, we scheduled times for our live speakers to see the space, get a feeling for the technical set up, understand the flow and movement of the room, and have an opportunity to run through their talk a few times.

As it turned out, this was more important than we anticipated. The stage lights were extremely bright, making it nearly impossible for the speakers to see the audience from the stage. Also, on the stage, we had a timer for the speakers to reference, and a confidence monitor<sup>1</sup> they could see to keep their place on their presentation. This meant there were various wires and cables running along the stage that could have caused a speaker to trip or stumble. Having an on-site rehearsal prepared our speakers regarding where they should stand, areas on stage to avoid, and managing the bright lights.

### **Que-to-Que**

Often in event planning, this process is called a “que-to-que” – where you literally run through the entire event from start to finish. So, we also ran through all media files (ppts, videos, films) start to finish, in order of appearance, at least three times before the event started.

We also made sure to have back up technology, including a back-up DVD player and backup computer, to ensure all our presentations played. (This back-up thinking proved quite valuable, as during the formal program, our first TEDTalk video crashed, and the back-up DVD player also stopped working. Were it not for the back-up MAC we brought to the technical booth, we would have had a disaster on our hands!)

### **We “knew” what our event would look like before we even got to the rehearsal**

We took a little bit of extra time upfront to draw out the physical location for every venue used during the TEDx USC event. By using “to-scale” schematics to describe placement of staging and presenters for all venues we planned to use, we were able to know what TEDx USC would look like, even before the event happened! We knew where every power source was in the venue and thus we were able to plan for the power needs in our formal program and reception.

This helped for a number of reasons. First, there was a very small group of us who worked on planning TEDx USC, but many more people who would help us execute day-of. We had student staff, caterers, and site-managers that all needed real-time information. So, when we were deciding how to spend our resources, we determined that drawing out a schematic would help us easily and succinctly communicate tactical “to-dos” day of, and we instead could focus on overall event management.

Second, having a schematic helped us plan for the flow of the foot traffic. We choose to host the interactive reception in a separate venue from the formal program. Having a map in place helped us plan for 1200 people walking across campus at the same time. We were able to station directional signage, and position student staff to answer questions.

Third, and perhaps most importantly, a schematic helped us save money. We were able to identify rental needs early, and eliminate a lot of the last minute emergency rentals that plague large-scale events. (Of course we had our fair share of last minute emergencies, but realizing too late we hadn’t created enough signage wasn’t one of them!)

We met with our lighting and audio crew well in advance of the event to define the aesthetic we wanted for our TEDx USC event. We also visited the venues regularly and asked our stage managers and stage hands a lot of questions, especially those regarding the size of the venue. By meeting early and often with our venue staff, garnering a deep understanding about in-house capabilities, we were able to save money on the set design, lighting, and only needed to rent a podium and a placement carpet.

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<sup>1</sup> A confidence monitor is a small screen or computer monitor placed at the top of the stage in front of the speakers so they do not need to look back at the projector screen behind them. The audience does not see what appears on this screen.

## ***Connecting the Audience***

### **We encouraged discussion, debate and networking**

Many of our guests were familiar with TED, and thus they knew one of the greatest values of attending an event like this was the opportunity to meet other guests, discuss the presentations, discover something new, and maybe even meet a future collaborator. In fact, during the formal presentation, one of our speakers (Dave Logan) gave the audience tips on how to network at the reception.

USC achieved this in a number of ways. We hosted a mid-afternoon break between the first session and the second session to provide guests and opportunity to stretch their legs, talk to each other about what they had just experienced, eat some light snacks, and digest the morning's program. We learned after the event that while our guests definitely appreciated the break, they would have preferred to have healthier snacks available. (We offered cookies and brownies; they requested carrot sticks and apples for next year.)

In the evening following the formal program, we hosted a cocktail reception that included eight interactive demo stations for guests to explore. The demos showcased some of the cutting edge research at USC. Overall, this provided an opportunity for USC researchers to share their work with a broader audience of curious people, and created great talking points for guests. For example, during the formal program, Associate Director of Graphics Research at USC's Institute for Creative Technologies (ICT) Dr. Paul Debevec presented technology to capture face of a real person to create a photorealistic digital computer model, seen from any angle, in any lighting, and delivering any virtual performance. In his 7 minute demo, he showcased ways USC technology is creating photoreal digital actors in Hollywood films, such as *Spider Man 2* and *Superman Returns*. Then later in the evening, ICT had interactive demos on display during the reception, so guests could get an up-close and personal look at the technology.

At the reception, we furnished the party only with standing cocktail tables, and had no regular seating available. This encouraged the flow of energy throughout the room. It made it easy for guest to move throughout the reception, chat with a wide variety of fellow attendees, and improved the chances for a serendipitous interaction. And because our guests had been with us all day, we made sure to provide protein rich food. (Although, we did learn that our guests requested more vegetarian options, and wanted all food choices clearly labeled.)

### **We encouraged our guests to connect with the outside world during the event**

At TEDx USC, we enabled our guests to communicate with the outside world during the event through blogging and Twitter. Because our guests shared their experience with cyber-friends and social networks, it ramped up buzz about our event, and allowed those who did not attend to feel more connected to TEDx USC.

Because we encouraged blogging and tweeting among our guests, we made the USC WiFi network available. We also asked that guests use the "#tedxusc" tag<sup>2</sup> on all their tweets from the event, so that we could monitor the Twitter-sphere. We also asked guests to notify us and share their URL with us in advance of the event if they planned to blog. This way, we were able to monitor the feedback of the guests immediately after the event. In fact, our Twitter strategy was so successful that TEDx USC was the #1 trend on Twitter throughout the conference. (We briefly dropped to #2 because Jennifer Aniston and John Mayer broke up.) Because we allowed blogging, we were sure to make a power strip available for bloggers in the back two rows of the auditorium.

However, some of the guests were annoyed by the bloggers, and felt it was disruptive to their experience. Next year, we plan to keep the bloggers in a separate section of the auditorium, to be more respectful of the shared experience.

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<sup>2</sup> This means, with every twitter entry, guests included "#tedxusc" as part of their update. It creates a searchable record for all tweets about the topic / event.

## **We asked our attendees what they thought**

We kept careful lists of everyone who registered for TEDx USC, and sent them a survey afterward. During the event, we let them know to expect a post-event survey, and that we would really appreciate their input and feedback. By doing so, we saw a 40% response rate on our survey.

In the survey, we didn't just ask if attendees liked the event. Instead we were specific to ask about the program, the format, the flow, the reception – basically every detail that could have made an impact on the attendee experience. We also provided an opportunity for sharing suggestions for improvement.

## ***Promotion & Production***

### **Professional graphic designers helped us set the right balance for the brand**

As both a major research university and a TEDx licensee, we were responsible for maintaining the integrity of both brands. This meant that every brand decision we made was filtered through the lens of “Is this the right thing to do for TEDx and USC?” We constantly thought about how the TEDx brand and the USC brand aligned and made marketing decisions that played up our joint missions.

There were times when this meant we had to make tough decisions about the branding of the event. For example, the “TED” brand red is different from the USC Cardinal red, and the two shades clashed. So, we decided to use a design firm to help us balance the two brands in such a way that both were honored. We decided to move forward with “TED-red” throughout our TEDx program, but Cardinal on most of our signage. The overall effect created a collaborative feel.

The graphic designers also created our [programs](#). Having a professional designer work on the brand elements helped us create a polished and slick feeling to the event. When creating our signage, website and printed materials, we did not recreate brand elements or logos provided by TED. We did this because we understood that consistency will help the program flourish, which will help all TEDx licensees in the long run.

### **We enlisted the help of a professional video production crew**

We secured the help of a professional production company to handle the video capture for TEDx USC. Although a one camera shoot may have been acceptable for internal use and record-keeping, we knew that if USC or TED wanted to host any of the talks online, we would need to capture video via a three-camera shoot, and spend the time developing an advanced video production.

For TEDx USC, we used a highly recommended university vendor. The company handled all pre-production, production and post production of event videos and reels. We did this by giving them an explicit shot-list<sup>3</sup> and communicating with them about what we want our end-product to look like. This included detailed list of different shots we wanted: Close-ups, audience shots, medium shots (waist-up), long shots (entire stage), etc.

After we decided to go with advance production to record TEDx USC, we made sure to also have a handheld cameraperson and video producer roving through the breaks and reception to capture broll<sup>3</sup> and soundbites from the event. These video elements have come in quite handy for putting together a short video overview of the event.

We've also spent a lot of time on the post production phase developing the videos. At the request of TED, we provided the RAW footage of the talks so that TED could edit the talks as appropriate for TED.com. We initially did not factor this into our production schedule or budget, but will make sure to do so for TEDx USC 2010.

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<sup>3</sup> Broll is supplemental or alternate footage intercut with the main shot in an interview or documentary.

## **A little mystery went a long way**

Instead of promoting the complete program in its entirety, we choose to surprise our guests with unexpected films, performances, and talks. We found that our guests attended on the promise of being inspired and delighted by the program as a whole.

For example, we surprised our guests with an unannounced performance by Melissa Etheridge. This came about because one of our confirmed performers, muslim rockstar Salman Ahmad, had an existing relationship with her and thought it would be valuable to perform a song he and Melissa wrote together. Salman performed his first song, and then introduced Melissa Etheridge. In another example, we showcased the first student film produced by USC alum George Lucas – a rarely seen film not even available on Youtube.

In order to surprise the audience, we had to give up some advance promotion. We couldn't advertise that Melissa Etheridge would perform, or that we would be showcasing George Lucas' first student film. But by keeping it close to the vest and unveiling the surprises, we gained a tremendous amount of buzz, and contributed to the excitement and anticipation for TEDx USC 2010.

## **We sought out sponsors that add to the overall experience, in addition to providing financial support**

USC choose to secure sponsorship for our event, and in doing so, we tried to find sponsors that contributed to the overall tone and experience of our TEDx event. Because TEDx is about bringing the TED experience to as many people as possible, we wanted to be careful to select supporters that made a meaningful impact on the lives of your guests.

For example, TEDx USC was in part sponsored by USC's Office of Student Affairs. This meant that we were able to invite hundreds more students to the event. As a university, this was an important goal of ours. The students greatly appreciated the opportunity to attend, and the Office of Student Affairs received visibility for their programs among other guests in attendance.

In another example, TEDx USC was also sponsored by CNN. As part of their sponsorship, CNN.com posted blogs from student bloggers, made it possible for guests to file their own "CNN iReport" on site, and hosted a breakfast with some enterprising and bright students the following morning to discuss the future of news. We were careful to work with our sponsor to ensure there would be no conflicts with TED. For example, CNN covered the event on their blogs, but we did not allow news cameras to tape the formal program.

## **We knew it would be hard, but boy, was it a LOT of detail work!**

It's not easy to produce an event, and the devil is in the details. Before committing to TEDx USC, we had to make sure we had the resources, support and funding to produce the events. We anticipated last minute scheduling conflicts, technical issues, and other unexpected roadblocks, and our key to success was remaining flexible, positive, and having a person on our team who understands the ins-and-outs of event planning.

### ***Employee Manpower***

For TEDx USC (which admittedly was a large-scale event with 1150 people), it took the man-power and resources of two full-time employees for 4 months to pull it off. (This does not include the part time work from other team members.) Keep in mind that while your event might be considerably smaller, the expectations of your guests will be the same.

### ***List Management***

One of the biggest challenges we faced was list management. We had different lists for different types of guests (students, trustees, university administration, etc) and manually managed the lists in excel. The problem was that we had no trusted and seamless method for managing the lists, and the demand for tickets far exceed our available space. So, for TEDxUSC, we kind of had to "wing it by manually tagging

each applicant in our excel database with different notes: “approved”, “notified of approval”, “registered.” Needless to say, with nearly 1200 guests, tracking and managing the lists became a full time job.

We are still trying to work through a better (automated, web-based) solution for TEDx USC 2010, and we would appreciate any suggestions from other TEDx licensees!

***Directions / Parking / Signage***

Some of the guests at our TEDx USC event were not familiar with our event venue. We tried to provide a positive experience by providing advance information regarding parking, line-up times, timing for event, and information about what people can expect on the day-of your event. Some people used a GPS for driving directions, so we found it helpful to provide a street address for guests to put into their machines. We also had a great deal of directional signage throughout the campus, and students positioned at all parking structures to help direct guests.

## ***Conclusion***

In conclusion, USC saw a great deal of value in hosting a TEDx event for our community. It enabled us to inspire a culture of innovation throughout our campus and beyond. We look forward to producing TEDxUSC 2010, and would be happy to share our thoughts with all TEDx licensees. Please feel free to contact us anytime.

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### **A brief overview of the TEDx USC “Ideas Empowered” Conference**

The TEDx USC “Ideas Empowered” conference stayed true to the spirit of the TED conference – hosting some of the world's most prolific thinkers and doers, and challenging them to give the talk of their lives in 18 minutes or less. (

TEDx USC presenters included:

- Salman Ahmad - UN goodwill ambassador and Muslim rock star
- Markus Nordberg - Large Hadron Collider
- [Jane Poynter](#) - Biosphere 2
- Kellee Santiago - Videogaming innovator
- Paul Debevec - Digitally recreating photoreal people
- Mark Humayun - Restoring sight to the blind
- David Logan - Tribal leadership
- Donal Manahan - Blue Revolution
- [Qi Zhang](#) - Masters candidate, USC Thornton School of Music

There were more than 1150+ registered guests; 8 live speakers; 4 TED 2009 talks, 4 musical performers, including surprise guest, Melissa Etheridge; 4 films from USC students, including first student film ever produced by alum George Lucas; 2500 tweets, making TEDx USC the #1 trend on Twitter during the event; 7 interactive installations and demos at the reception; and 8 student bloggers for CNN.com.

To learn more, please visit: <http://stevens.usc.edu/tedxusc>

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