



Planning a Successful Webinar: timelines, checklists, tools and tips

e-Kit

PLANNING A SUCCESSFUL WEBINAR

During the past five or six years more and more companies and organizations – both large and small – have begun using web presentations, otherwise known as webinars, to generate qualified sales leads, conduct education and training programs, launch new products and generate revenue. In fact, most managers receive 2-3 invitations a week to attend these events. Obviously, when they work they work well.

But while the good ones appear seamless and calm, there is a lot of behind-the-scenes work that goes on to produce a successful webinar. And those are the ones that work well. Chances are, you've either been on or heard about your share of them that didn't. Not only does that experience create a bad impression which can cause attendees to lose confidence in ability of your company or organization to provide a quality product or service, but personally, you may not want to BE that company and that fear is preventing you from doing webinars of your own.

This system is designed to help new and experienced webinar planners with checklists, tools and tips to take the guesswork out of hosting webinars. With this whitepaper, learn to:

- Identify who does what, when, why and how
- Take a webinar from first ideas to follow-up
- Build a simple project timeline that allows for lots of practice, editing and interruptions from the real world
- Generate more revenue, faster
- Look like a big player in the field, even if you're a one-person shop

For those already doing webinars, this will be a great way to identify what's already working and improve what isn't. In addition, it will help new planners avoid many of the common pitfalls and stresses that are endemic to most webinar presentations.

We want to make this process as painless and profitable for you as possible. Have fun and good luck!

WEBINAR PLANNING TIMELINE

8 WEEKS PRIOR TO THE EVENT: PLAN THE EVENT

- Select webinar topic
- Select moderator and speakers(s)
- Confirm Time and Date of session(s)
- Choose technical vendor
- Delegate technical tasks

6 WEEKS PRIOR TO THE EVENT: DESIGN THE EVENT

- Determine the entertainment value of the event
- Determine need for professional moderator
- Determine the content and outline for the presentation
- Decide if session attendance should be limited
- Decide whether the session should be billable and then decide amount
- Determine methods to invite participants
- Develop registration procedures
- Develop invitation creative content
- Determine how materials will be made available to participants and others
- Select evaluation method and tools

Determine the type of interaction desired with the audience

- Application sharing
- PowerPoint slides
- Annotations
- Chat functionality
- Polling used for follow-up, to guide the direction of the presentation, or simply to engage the attendees

Prepare the event introduction

- Decide who will deliver the technical introduction
- Decide who will deliver the content introduction
- Prepare the presenter introductions including pictures and biographies

Prepare Question Management Strategy

- Decide whether questions will be operator assisted (recommended in most situations) or an open forum with lines open (this can be dangerous and awkward)
- Decide whether or not to save questions for the end or address questions throughout
- Write canned questions in case live questions are not asked

Determine the audio requirements

- Define technical assistance needed during webinar set-up
- Select audio method - audiocast or teleconference
- Determine if the event will be recorded

4 WEEKS PRIOR TO THE EVENT: MARKET THE EVENT

Concentrate on Event Marketing

- Find target audience
- Assemble lists – targeted opt-in and in-house
- Determine which channels will most likely generate ideal webinar participants. Think about partners, industry newsletters, lists, print and online publications, etc.

WEBINAR PLANNING TIMELINE

4 WEEKS PRIOR TO THE EVENT: MARKET THE EVENT (continued)

Develop and Prepare Communication Plan

- Write customer contact content and schedule (email, newsletters, journals, newspapers, magazines, direct mail, press releases, telemarketing, etc.)
- Decide which registration content information to collect (name, and email address required)
- Write registration confirmation notice content
- Create reminders – send out multiple reminders, including an email 1 hour before the event
- Create registrant and attendee follow-up materials

Develop Landing Registration Pages

- Complete title, subtitle and brief description of session
- Include:
 - Logo
 - Time and Date
- Complete and test landing page and registration sign up process, edit as needed
- Assign unique URLs for marketing tracking

Create and Send Email Invitations

- Test both HTML and Text versions
- Create link to registration page
- Send invitations

ONE WEEK PRIOR TO THE EVENT: PREPARE THE EVENT

Complete a prep session and dry run of the event with the presenters

- Schedule speaker training times
- Upload presentations and position polling slides and supporting materials
- Choose delivery strategy—practice transitions and handoffs
- Practice virtual body language with annotation tools, polling questions and voice fluctuation

Send out additional email and login reminders

- One week before
- A day before
- An hour before the event

DAY OF THE EVENT: HOST THE EVENT

- Distribute joining instructions to appropriate support staff
- Presenters dial in to teleconference 15 minutes prior to call
- Presenters log into web conference 15 minutes prior to presentation
- Conduct pre-conference review
 - Manage speaker rights
 - Test Q&A chats
 - Test audio for clarity and volume
 - Review script and call flow
 - Discuss order of presentations with multiple speakers
 - Discuss how Q&A will be conducted (chat w/ audio or chat only)
- Watch the roster as people sign in – start when ready – if late make announcement

WEBINAR PLANNING TIMELINE

DAY OF THE EVENT: HOST THE EVENT (continued)

- Manage Helpdesk for attendees with last minute questions
- Make sure attendees are muted and presenters are not—do not rely on attendees to mute their own phones
- Introduce event and basic housekeeping issues including FAQs, asking questions, handling technical difficulties, etc...
- Conduct Event Intro, including presenter biographies and pictures
- Begin presentation
- Conduct Q&A
- Post survey, questionnaire or polls at end of conference—ask attendees what could be done better, possible topics for future webinars
- Close the call

ONE HOUR TO ONE WEEK AFTER THE EVENT: FOLLOWING-UP ON THE EVENT

- Perform post event analysis
- Review event polls and questions
- Review attendance and compare to registrants
- Review reports - assign follow-up responsibility
- Email follow up to attendees
- Email follow up to non-attendees
- Post and distribute recordings of the event (consider fees per viewing) – send participants access to the recording and presentation and market the Archives Library to generate more interest and further revenue from the viewings.

WEBINAR PLANNING TASKS

The following checklist will help you track the completion of tasks necessary for planning a successful webinar. Some tasks may be completed concurrently.

Task	Due Date	Date Complete	Owner
Select webinar topic			
Select moderator and speakers(s)			
Confirm Time and Date of session(s)			
Choose technical vendor			
Delegate technical tasks			
Designate professional moderator			
Determine the content and outline for the presentation			
Decide if session attendance should be limited			
Decide whether the session should be billable and then decide amount			
Determine methods to invite participants			
Develop registration procedures			
Develop invitation creative content			
Determine how materials will be made available to participants and others			
Select evaluation method and tools			
Determine the type of interaction desired with the audience			
Decide who will deliver the technical introduction			
Decide who will deliver the content introduction			
Prepare the presenter introductions including pictures and biographies			
Decide whether questions will be operator assisted or an open forum			
Decide whether or not to save questions for the end or address questions throughout			
Write canned questions in case live questions are not asked			
Define technical assistance needed during webinar set-up			
Determine if the event will be recorded			
Assemble contact lists			
Write customer contact content and schedule			

WEBINAR PLANNING TASKS

Task	Due Date	Date Complete	Owner
Decide which registration content information to collect			
Write registration confirmation notice content			
Create reminders			
Create registrant and attendee follow-up materials			
Develop Landing Registration Pages			
Complete and test landing page and registration sign up process, edit as needed			
Assign unique URLs for marketing tracking			
Create Email Invitations			
Test both HTML and Text versions			
Create link to registration page			
Send invitations			
Schedule speaker training times			
Upload presentations and position polling slides and supporting materials			
Choose delivery strategy			
Practice virtual body language			
Send out email and login reminders – one week before			
Send out email and login reminders – a day before			
Send out email and login reminders – an hour before the event			
Distribute joining instructions to appropriate support staff			
Presenters dial in to teleconference 15 minutes prior to call			
Presenters log into web conference 15 minutes prior to presentation			
Conduct pre-conference review			
Watch the roster as people sign in			
Manage Helpdesk			

WEBINAR PLANNING TASKS

Task	Due Date	Date Complete	Owner
Make sure attendees are muted and presenters are not			
Introduce event and basic housekeeping issues			
Conduct event intro			
Begin presentation			
Conduct Q&A			
Post survey, questionnaire or polls at end of conference			
Close the call			
Perform post event analysis			
Review event polls and questions			
Review attendance and compare to registrants			
Review reports - assign follow-up responsibility			
Email follow up to attendees			
Email follow up to non-attendees			
Post and distribute recordings of the event			

WEBINAR PLANNING TOOL

Webinar Name _____

State Objectives _____

Presenter(s) _____

Introduction and Housekeeping (3 minutes total)

- Welcome, names of presenters
- Topic, expected outcomes, logistics including how long they'll be on
- Introduce technology, test chatting, polling, etc.

Agenda and Polling/Assessment (2 minutes)

- Introduce exact agenda for webinar
- Ask a polling or assessment question

Content (35 minutes)

- Use an inductive approach
- What conclusions should the audience draw?
- Why is the webinar important to audience?
- Fulfill promise to the audience for quality information
- Quick recap, ask for questions

Q&A (10-12 minutes)

Encourage questions. This provides a chance to remove objections, go deeper into detail and explain anything that could be confusing or get in the way of moving the sale forward.

- Start with planted questions to get the ball rolling
- Tie all answers to desired outcomes

Wrap-Up and Call to Action

Don't try to wing it or try to close too fast and forget to specifically tell the audience what the next step is.

- Summarize the main points
- Repeat action items
- Thank presenters/partners as appropriate
- Remind the audience about the recording, tell their friends, fill out the evaluation form

EVENT DAY CHECKLIST

Time	Task	Owner	Complete
15 minutes prior	Log into meeting	Producer/ Presenters	
15 minutes prior	Check technology Functionality	Producer	
10 minutes prior	“Cycle Slides” uploaded and running	Producer	
10 minutes prior	Polling questions created and loaded	Producer	
10 minutes prior	10 minute announcement	Producer	
5 minutes prior	5 minute announcement	Producer	
	Begin recording	Producer	
	Introduce webinar	Producer	
	Presentation	Presenter(s)	
	Monitor time	Producer	
	Monitor Q&A	Producer	
	Introduce live Q&A	Producer	
	Close presentation	Producer	
	Turn off recording	Producer	
	Copy Q&A log	Producer	
	Save presentation with polling data	Producer	
5 minutes after	End the webinar	Producer	
10 minutes after	Debrief the presentation	Everyone	
15 minutes after	Check the recording	Producer	
30 minutes after	Send attendee follow-up emails, include takeaway	Support Staff	
35 minutes after	Send non-attendee follow-up emails	Support Staff	
Next Morning	Check and collate survey results	Producer	
Next Morning	Divide leads between sales people	Support Staff	

WEBINAR PLANNING TIPS

Concentrate on Event Marketing

- Base marketing decisions on the relationship with audience members and the quality of campaign lists.
- Generally, expect between 1/4% to 2% register, meaning 1 to 8 people will register for every 400 contacted.
- Of the registrants, approximately 75% of registrants show for fee-based events and 40-50% for free events, so plan for that with follow-up contact with attendees and non-attendees.

Registration Process - Keep registration concise and simple. Save the giveaways for attendees to the webinar rather than offering whitepapers or giveaways ahead of time

Send out additional email campaigns and login reminders - We recommend calling participants of events with paying attendees to ensure they are prepared

Determine the audio requirements – Be aware of entry and exit tones and name announcements – shut them off by contacting the service provider.

Determine type of interaction desired with audience - Always avoid silence, read questions and answers, discuss polling results and move on in less than 20 seconds

Presentation Preparation

- Determine if you would like a rotating slide set - 3-7 slides that rotate every 10-12 seconds prior to the start of the conference
- Slides can incorporate an overview of the company, client list, agenda, meeting objectives, bios and/or headshot of presenters.
- Stay away from scripts
- Have a moderator and 1-2 speakers
- Consider ice breakers or light hearted material to supplement the content
- Much of this is determined by the demographics and the nature of the event.

Prepare the event introduction - Keep the bios short—just a few bullets

Prepare Question Management Strategy - Have a few prepared to jumpstart the audience

Complete a prep session and dry run of the event with the presenters - Always remember that your temperament determines your audience's mood. Remember this if something goes wrong. Keep a smile on your face until you hang up.

Determine if you would like the event to be recorded - Do not start the recording until just before the conference begins.

Day of the Event - Use headsets and avoid speaker phones

FOLLOW-UP EMAIL SAMPLES

ATTENDEE FOLLOW-UP

Dear (contact name)

Thank you for attending our webinar on **"Planning Your First Webinar"**. I hope it met your expectations and that you came away with a better understanding of the webinar delivery process. As promised, here is the [link to download today's PowerPoint presentation](#) and the link to download your copy of the ["Planning a Successful Webinar" eKit](#).

Later this month, we will also be hosting a webinar entitled, **"Learn How to Generate Quality Sales Leads Using Webinars"**. If you'd like more details - [click here](#) .

As you heard, ConferTel specializes in delivering a complete turn-key professional webinar solution. Here is a [short presentation](#) which provides an overview of our services and how we can help you deliver your webinars stress free through a financially risk-free payment model.

Finally, we have a host of webinar-related resources (including whitepapers and checklists) that I would be happy to share. Please let me know if you are interested.

I look forward to helping you achieve your webinar goals!

Regards,
(Owner)

NON-ATTENDEE FOLLOW-UP

Dear (contact name)

Thank you for registering to attend our webinar, **"Planning Your First Webinar"**. I'm sorry you were unable to attend. However, we have emailed a link to a recording of the webinar and I hope you can take a moment to watch it. It will help you better understand each step in the webinar delivery process.

Later this month, we will also be hosting a webinar entitled, **"Learn How to Generate Quality Sales Leads Using Webinars"**. If you'd like more details - [click here](#) .

As you may or may not know, ConferTel specializes in delivering a complete turn-key professional webinar solution. Here is a [short presentation](#) which provides an overview of our services and how we can help you deliver your webinars stress free.

Finally, we have a host of webinar-related resources (including whitepapers and checklists) that I would be happy to share. Please let me know if you are interested.

I look forward to helping you achieve your webinar goals!

Regards,
(owner)

WEBINAR CALCULATOR

This calculator can help determine a ballpark cost of a webinar program. It is intended to serve as a general guideline - exact costs may vary depending on individual circumstances and added services/features. Also, enter extra expenses and one-time costs to get a rough idea of the true total costs.

Cost Per Person	
Number of People	
Vendor Cost per Event	
	\$ -

Per Event Extras	
Speaker Fees	
Travel Expenses for Speakers	
Reporting Fee	
Recording Fee	
Audio/Video Fees	
Copywriting	
Location Rental	
Equipment Set-up/Rental	
Other Extra Charges	
Total for Per-Event Extras	
	\$ -

Total Cost Per Event	
	\$ -

One Time Expenses	
Software Purchases	
Equipment Purchase	
Other One-Time Expenses	
Total One-Time Expenses	
	\$ -

About ConferTel

ConferTel is a leading provider of fully managed webinar services, delivering educational programming, training and lead generation webinars for corporations, associations, government agencies and non-profits. In addition, ConferTel is a software developer of IVR and web-based information services and communications solutions. Providing a range of event driven communications applications, including telephone, web and video conferencing, on demand record/replay, voice/fax broadcast, teleseminars, webinars, webcasting, online training, e-commerce, event management services, and other custom IVR and web-based applications.

ConferTel's innovative products and application development capabilities have helped thousands of clients save costs, generate income and increase productivity. We offer a consultative approach to assist you in developing the right solutions for your specific application and budget.

Fully Managed Webinar Solution

Online Registration - Bearing your company logo and accessible from your web site or email invitation, ConferTel will handle the event registration process for your e-Learning seminar, leaving you to focus on the marketing and content.

Payment Processing - ConferTel securely processes credit card charges through our merchant account. Our per-registrant fee includes all fees associated with participant payment up to \$100.

Verified Admission - Attendees are verified by a ConferTel operator to protect against unauthorized participants.

Registration Reminders - Each registrant receives reminder emails to enhance attendance.

Branded Greeting - Attendees are greeted with a pre-recorded greeting before being placed into the e-Learning seminar.

Professional Host - Each call will be handled by a courteous and professional meeting specialist who understands the importance of your e-Learning seminar.

Q&A and Polling - With interactive question and answer sessions and participant polling you can gain immediate feedback from your attendees. Polling can also be used as an attention monitor.

Recording and Archiving - Digitally record your webinar for immediate playback —24/7. Your call is available to those who missed it live or for those who want to hear important content again.

Optional Integrated PowerPoint Web Presentation - A high impact browser-based presentation tool visually enhances your conference with PowerPoint. Control of the presentation and video window can be passed among speakers.