

# **A Webinar Organizer's Checklist**

Key concepts and guidelines on how to produce  
and manage business web seminars

*A Webinar Success White Paper  
By Ken Molay*



# Table Of Contents

<b>Introduction</b>	<b>4</b>
Overview And Goals	4
Make The Information Your Own	4
<b>Planning Your Event</b>	<b>5</b>
Define Purpose And Expectations	5
Pick An Audience Goal	5
Identify Team Members	5
Choose Event Dates And Times	6
Plan Recording Needs	6
Plan Associated Collateral	6
Set Fees And Budgets	6
Plan An Audience Contact	7
Draft Timelines And Responsibilities	7
<b>Setting Up The Technology</b>	<b>8</b>
Configure The Web Conference	8
Build Feedback/Survey Pages	8
Verify Audio Headphones And Headsets	8
Configure The Conference Call	9
Configure Third Party Systems	9
<b>Scheduling The Event</b>	<b>10</b>
Choose The Title	10
Write A Description	10
Decide On Registration Fields	10
Create The Confirmation Email	10
Create Reminder Email(s)	11
<b>Working With Presenters</b>	<b>12</b>
Communicate In Writing	12
Share The Background	12
Share Your Goals	12
Agree On The Audience Value Proposition	13
Clarify Time Commitments	13
Work Out Timings	13
Set Clear Deadlines	13
Communicate Access Information	14
Run A Concise Technical Orientation	14
Plan The Session Flow	14

<b>Managing Content</b>	<b>15</b>
Recommend Per Slide Timing	15
Promote Consistency	15
Reduce Animations	15
Add Polls	16
Plan For Questions	16
<b>Promoting The Event</b>	<b>17</b>
Build A Landing Page	17
Use A Multi-Channel Approach	17
Track Source Effectiveness	18
<b>Supporting The Presentation</b>	<b>19</b>
Have The Session Ready	19
Have The Conference Call Ready	19
Confirm Speaker Information	19
Run A Pre-Show Checklist	20
Give Audience Instructions	20
Backup And Contingency	20
<b>Following Up With Your Audience</b>	<b>21</b>
Follow Up Quickly	21
Send Promised Materials	21
Drive Participants To The Next Step	21
Triage Inquiries For Fast Response	22
Publish Your Recording	22
<b>Analyzing Your Success</b>	<b>23</b>
Gauge Promotional Effectiveness	23
Check Conferencing Statistics	23
Collect Feedback	23
Quantify Results	24
<b>More Information</b>	<b>24</b>
<b>About Ken Molay and Webinar Success</b>	<b>25</b>
<b>About Citrix Online</b>	<b>26</b>

## Introduction

### ***Overview And Goals***

I have written this paper for the benefit of webinar producers, administrators, moderators, and facilitators who bring in others to speak during the online presentation.

You may call upon presenters within your own organization or invite guests from outside your company. There may be one presenter or several. No matter what the specifics, there are things you can do to make your speakers more comfortable and effective at accomplishing your webinar goals, while also giving them confidence in your professional competence and support for them.

Your attention to detail and management of attendee communications also affects the way your target audience perceives your web event and your organization.

And finally, the way you prepare and run your webinar impacts its success in attracting new leads, influencing decision makers, furthering the sales process, building customer loyalty, or any of the other ways you might measure the return on your web conferencing investment.

### ***Make The Information Your Own***

As you read through the following tasks and guidelines, remember that the way you approach them will vary based on the purpose of your webinar, the presenters you are working with, your own expertise and comfort level with webinars, the technology you are employing, and the resources you have available. For instance, very large enterprise organizations might delegate responsibilities to dedicated departments such as IT, marketing, and corporate communications. If you work in a smaller organization, you might end up doing everything yourself.

**Don't be afraid to adapt these guidelines to match your practical work** considerations. While I always think about each of these topic points as I begin supporting a new webinar, I also make decisions about how formal I need to be in my planning, scheduling, and documentation based on the needs of my team and the criticality of the event. To quote the motto of the international Round **Table club**, I encourage you to **"Adopt, Adapt, Improve!"**

## Planning Your Event

When you first decide to give a webinar or are handed the responsibility for **supporting someone else's event**, you need to quickly define the big picture. The planning you do up front is a basis for all the tactical steps that come later. This section defines the most important tasks during the planning phase.



### ***Define Purpose And Expectations***

This is the first and most important agreement point in setting up a webinar. Unfortunately it turns out to be the most frequently skipped or ill-defined step in most organizations. You should be able to write down in no more than three sentences the **reason** you are holding the webinar. What are your **organization's goals for the webinar? How will you be able to tell whether the event was a success or not when it is finished? Don't cheat on this step.** Make it explicit, make it succinct, and get it written down. **You'll be** referencing this summary again and again throughout the lifecycle of the event.

### ***Pick An Audience Goal***

Following on directly from your event's purpose, you should write down an explicit statement about what an audience member should do, know, or believe at the end of the webinar. This gives you a clear objective to be moving towards at all times in the webinar. It also helps you define action items, surveys, or follow-up steps to create as part of the post-webinar process.

### ***Identify Team Members***

Determine who will be working with you on the webinar. At this point you may have specific names or you may just reference internal departments and external partners. Writing down your collaborators helps to make sure **you don't overlook anyone in communications and planning agreements.**

## ***Choose Event Dates And Times***

Picking the dates and times for your webinar forces you to start thinking about your target audiences in more detail. Can you cover all the geographies in a single webcast, or will you need multiple sessions? Are you trying to reach business audiences in their offices, or consumer audiences at home? Have potential dates and times ready to propose before you contact your speakers.

## ***Plan Recording Needs***

Most business webinars are recorded for later access and review by additional audiences. You should know ahead of time how you will make the recording available. Do you need to list it on a company web page? Make arrangements ahead of time with your webmaster so that all you need for taking it live is the URL. Will you be editing the recording file? Making it available for download from your servers? Distributing it on CD-ROM? Set up arrangements ahead of time so that you can make the recording available as soon as possible after your event.

## ***Plan Associated Collateral***

Decide up front whether you will make the presentation slides available to attendees and non-attendees. What format will they be in? PDF or PPT or PPTX? Will you include slide notes? Are there other documents you want to distribute in conjunction with the webinar? Make sure they are completed **and queued up for distribution so that attendees don't have to wait to get** the promised materials.

## ***Set Fees And Budgets***

If you are working within a set budget for webinar expenses, know that number and whether there are predefined limits on various items. How much are you willing to spend on promotional activities? Is there a budget to pay external speaker fees? How much is allocated for technology costs?

## ***Plan An Audience Contact***

Identify who is responsible for answering pre-event questions about the webinar from registrants. Who will handle login and access problems on event day? Who will be the designated representative to respond to praise, complaints, or questions after the event? You need to provide your **registrants with specific contact information in all communications. Don't force them to call your company's main information number in the hopes of finding someone who knows about the webinar.**

## ***Draft Timelines And Responsibilities***

If the complexity or importance of your event justifies the extra work, build a spreadsheet or project plan outlining key tasks that must be completed by milestone deadline dates. Identify who is responsible for each task and track completion of each item. As the central coordinator, you need to remind responsible parties of upcoming deadlines and push people to complete their assigned tasks.

## Setting Up The Technology

The next major step in your management process is to make sure all technology aspects are configured properly. The specifics vary based on your choices for the webinar, but at a high level you need to consider the web conferencing software, audio needs, and integration with third party systems.



## Configure The Web Conference

Your web conferencing software may allow you to brand your registration pages and/or conferencing console. If so, make sure you have logos in the proper formats and sizes. You should make other choices as well, such as deciding whether you will allow open chat or moderated chat during the webinar. Know whether you will use computer audio (VoIP), a separate teleconference call, or integration of phone and streaming audio.

## Build Feedback/Survey Pages

If you want to capture feedback from your attendees, create a survey page or feedback form. **Decide how you will get attendees to see it... Your webinar software may be able to show the survey automatically at the end of the event or you may choose to send a link in a follow-up email.**

## Verify Audio Headphones And Headsets

If you are using computer audio for the presentation team, make sure all speakers have good quality USB computer headsets. If your presenters will call in, advise them of the need to use a telephone headset or handset. Avoid cell phones and speakerphones.



## ***Configure The Conference Call***

If you make use of a teleconference call for your event, print out the conferencing controls and practice using them as you will in the live webinar. Your conferencing system may allow you to set defaults for whether the audience is automatically muted or whether you hear tones as people join and leave the call. Work with your teleconferencing vendor to make sure you know the options and to set up your call the way you want it. If you plan to take questions over the phone, you may want to pay for operator assistance to manage the question queue and announce each question.

## ***Configure Third Party Systems***

You may need to configure and integrate other software systems that will work in conjunction with your web conferencing software. If you are charging a fee, make sure you have set up the payment processing site and have decided how you will manage attendee communications and attendance tracking with your conferencing software. If you plan to transfer registration and attendance information into a CRM or telemarketing system, work out the file formats and column mapping ahead of time so you can quickly make use of the live information after your event.

## **Scheduling The Event**

The mechanics of creating your webinar in the web conferencing system is usually not difficult, but includes many choices that are influenced by your initial planning. Here are some of the most important items to consider.



### ***Choose The Title***

I prefer webinar titles that are short, clearly descriptive of the content, and imply value to the attendees. That is a lot to ask of a title! Avoid “cute” titles that have no intrinsic meaning. An example might be: “Buttons And Toggles And Switches, Oh My!” Instead, try a more value-oriented approach such as “The Impact Of Device Controls On Consumer Acceptance.”

### ***Write A Description***

Write an event description that clearly and explicitly states the value proposition for attending. Make sure you appeal to your audience’s interests rather than your own.

### ***Decide On Registration Fields***

Decide what registration information you will ask for. Determine which fields will be mandatory and which will be optional. In general, adding registration fields increases “abandonment” of the registration form before finishing.

### ***Create The Confirmation Email***

Customize and test the email confirmation that gets sent to registrants. Make sure the date, time, time zone, and login information are clear and unambiguous. Give registrants a contact for questions about their registration.

## **Create Reminder Email(s)**

Decide how many reminder emails you will send and when they will go out. I often send one reminder 24 hours before the event and another 3 hours **before the event. I don't like sending reminders closer to the event time, as** people may not check their email and there is the possibility of delivery delays. Make sure your reminder email restates the value proposition for attending, since your audience may have forgotten why they signed up a month earlier!

## **Working With Presenters**

Now that everything is planned and set up from a technical perspective, you can engage your webinar speakers. This is the area where you can stand out as an organized and efficient coordinator. If your presenters see you as reliable, competent, and working to make their lives easier, it helps them alleviate the tension and uncertainty that often comes with having to create and deliver public presentations.



### ***Communicate In Writing***

Put all communications in writing. Never rely on memory of telephone calls and vocal agreements. Have a planning document or email correspondence handy for reference by all parties. After planning calls, send an email summarizing what was agreed.

### ***Share The Background***

Give speakers the background of your event. Is it part of a series? What topics have come before and what comes later? Give them links to recordings of earlier webinars in the series. Is it part of a larger marketing or promotional/educational campaign? Let them see the other materials and summarize for them the main thrust of the campaign.

### ***Share Your Goals***

Let your presenters know your goals for holding the webinar. What are you driving the audience to do, know, or believe? What will be your criteria for judging whether you succeeded or not? A good presenter will help you accomplish your objectives. And if you have a presenter who submits material that is off topic or poorly focused, you can reference this information when asking for revisions.

## ***Agree On The Audience Value Proposition***

Collaborate with your presenters to define and approve the promotional pitch and key take-aways for the session. Create a summary value proposition and benefits you will promise the audience. Work with your presenters up front to create a marketing/promotional cheat sheet that will **be used to drive registration/attendance. "You will learn..." and "You will see..." statements tell the presenter what** content must be included, because they have been promised to the audience.

## ***Clarify Time Commitments***

Solidify time commitments up front. Book your speaker for a half hour before the scheduled start time of the event and make sure they know the pre-event time is a scheduled part of the session time that they are committing to. Also inform them that rehearsals will be a required part of their involvement. If you keep adding unexpected additional demands on their time as you go along, you will end up with a frustrated and uncooperative team.

## ***Work Out Timings***

Tell each speaker their expected presentation duration. Figure out how many **people are speaking, how much time you will spend on "wrapper material"** and whether you will include a distinct Q&A session. Based on that, tell your speakers how long they should be prepared to talk for. Make it clear that you expect them to come in on time.

## ***Set Clear Deadlines***

Give presenters a clear and unambiguous deadline for submitting their slides. Give yourself enough time to collate, edit, and test the slides in the web conferencing system.

## ***Communicate Access Information***

Schedule rehearsals and event day activities with electronic calendar appointments. Include the web and phone access information. Make sure it is correct. Include passwords and access codes. Put a 10-15 minute reminder alert on the appointment.

## ***Run A Concise Technical Orientation***

Have a clear and easy to follow technical familiarization orientation planned for your first rehearsal. Tell the speakers what they need to know to be effective in using the web controls. Be organized, having thought through what you will show them and how you will present it in a concise manner that does not overwhelm them. Remember that you do not have to show every feature and capability of the conferencing software. Concentrate on the features they will use during the session.

## ***Plan The Session Flow***

Work out the flow of the presentation ahead of time and present it clearly during your rehearsal. Discuss and agree on whether presenters introduce each other or hand back to the moderator for introductions between speakers.

## Managing Content

As your speakers submit their content for use in the webinar, you can provide valuable editorial assistance and help to ensure a better experience for your attendees. Here are a few items to look for when reviewing slide presentations.



### ***Recommend Per Slide Timing***

As a very rough rule of thumb, start with an expectation of about one slide per minute of presentation time. This is not a hard and fast obligation, but staying within that general speed ensures that presenters are not flipping **rapidly from one slide to the next, faster than the audience's computers can keep up.** If you see slides with a great deal of text or factual data on them, suggest splitting the information onto multiple slides to add visual changes while discussing the information. If a speaker spends five minutes on a static slide, you will lose audience attention.

### ***Promote Consistency***

If you have multiple presenters, try to encourage the use of a single template so the entire webinar feels cohesive instead of a collection of unrelated presentations. If presenters demand the use of separate templates, try to build a sense of continuity through standardized section header slides or framing graphics. Speaking of graphics, watch out for mixtures of simplistic clip art and full color photographs. Concentrating on one type of artwork creates a sense that the information belongs together.

### ***Reduce Animations***

Make sure that PowerPoint animation effects and slide transitions can be replicated smoothly and reliably within the web conferencing environment. Watch out for smooth movements of large areas on the slide. These can easily overwhelm the ability of the network to transmit and redraw fast enough to let the effects be seen on attendee computers. They could see jerky or pixilated movement. Simple appear/disappear builds tend to work best for webinars.

## ***Add Polls***

Suggest to your speakers that they look for an opportunity to bring the audience into the presentation as active participants by adding polls during their talk. Make sure to account for the time needed to wait for responses to come in and for discussion of the results. Your presenters should always have a point to make about poll results so the polls **aren't seen** as meaningless time fillers.

## ***Plan For Questions***

Speakers may wish to plan short breaks in their talk to address audience questions while they are still in context. If you plan to run a Q&A segment at the end of the entire presentation, ask each speaker to provide you with three or four **"seed questions" to stimulate the conversation and get people** into an interactive frame of mind.



## Promoting The Event

Marketing any business event is a major undertaking, and webinars are no different. You are vying for attention among an avalanche of business communications and **marketing messages**. I don't plan to go into specific tactics here, as the subject is too broad for this paper. But here are a few high level pointers.



### ***Build A Landing Page***

A landing page gives people more information about your webinar when they **see a brief mention or advertisement along with an invitation to "click here for details."** Landing page design decisions greatly affect the click-through rate to registration. Make the registration call to action large and compelling. Spell out the value points for attending. You may want to give people a way to forward the information to colleagues as well so they can expand your marketing reach.

### ***Use A Multi-Channel Approach***

Explore a combination of traditional and current generation marketing **channels to spread your message**. A bold display banner on your company's home page will attract people drawn to your area of expertise and costs nothing. Issue a press release to get the event indexed in search engines. There are many online wire services, ranging from free to hundreds of dollars.

Advertising in newsletters or online publications can be cost effective if it **reaches a highly selective and targeted audience you couldn't otherwise identify**. Sponsored search advertising on sites like Google and Bing can be effective if your desired keywords are not overbought by other businesses.

Look for affinity groups on social media sites like LinkedIn and Facebook that can help you reach people interested in your topic. And of course email continues to be the most widely used marketing channel. Make sure you are familiar with anti-Spam legal requirements such as opt-out lists and contact requirements.

## ***Track Source Effectiveness***

As you promote your event on different communication channels, look for **ways to identify the source of a registrant's interest**. **Different versions of the landing page** for each channel is one way to see relative interest levels from different sources.

## Supporting The Presentation

By the time you get to the live webinar, you and your speakers should already be comfortable with the event planning, presentation content, and technology. You can make sure your event goes smoothly for the presenters and the audience by managing the following details.



### ***Have The Session Ready***

You should be in the online conference room before your speakers join. Make sure everything is configured properly and have the slides ready to display. Be prepared to communicate through typed chat if a speaker has audio problems.

### ***Have The Conference Call Ready***

If you use a teleconference dial in, be on the conference call at least 3 minutes before your scheduled pre-show time. You should be ready and waiting for your speakers to arrive so that they have support immediately upon joining.

### ***Confirm Speaker Information***

Your last minute preparations as a moderator include confirming each **speaker's desired form of address (Ken, Kenneth, or Mr. Molay?) and desired job title** for use in your introduction. Check pronunciation of all names. Write down the names of everyone on the call (phonetically if necessary) and **keep the paper next to your computer. Briefly forgetting a speaker's name or pronunciation is embarrassingly easy to do.**

## ***Run A Pre-Show Checklist***

Check audio volume and clarity from each presenter. Remind them to turn off distractions, mute computer sound if appropriate, close their office door, have a slide printout, and have liquid handy. Go over handoffs between speakers once again and remind them of end of call procedures.

## ***Give Audience Instructions***

Write out a word-for-word script of your opening remarks and technical instructions to the audience. Keep the instructions as brief as possible. You **don't have to mention every feature** of the conferencing software. Just give them the most critical basics and quickly get to your speakers and the topic content.

## ***Backup And Contingency***

If your speakers are advancing their own slides, follow along closely and be ready to take over if they have a technical problem. If you are advancing slides for everyone, it is safest to have a secondary computer set up and logged in with presenter control in case your primary computer dies. If using a teleconference call, try to dial in on a muted backup line so you can quickly switch if your primary phone cuts out.

## **Following Up With Your Audience**

After your webinar ends, there is still work to do to extend and solidify the relationship you have started with your audience. By quickly meeting their expectations and following through, you position your organization as reliable and responsive.



### ***Follow Up Quickly***

You have a very short window of opportunity after your webinar to engage your audience. If people get something of value from you, they briefly lower their defenses and are willing to talk to you or follow up in some other way. But that feeling goes away quickly, and within a week or two they mostly forget about the benefits they received from your session.

### ***Send Promised Materials***

Make use of your pre-event planning and production by having your handouts or extra materials ready for distribution or download while interest is still high. That is when people are most likely to look at the materials and possibly forward them to other interested parties.

### ***Drive Participants To The Next Step***

If you have other events planned, make sure the next one has already been scheduled in your conferencing system and that you can direct your audience to the registration page for it. Make websites easy to reach by registering a short domain name and using a redirect or by using a URL shortening service such as bit.ly or tinyurl.com. This lets your audience help you to virally spread the information to their colleagues.

## ***Triage Inquiries For Fast Response***

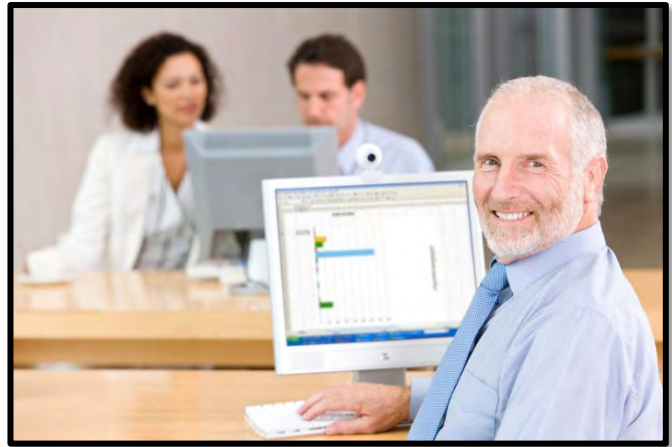
If you are engaging in a lead generation activity, tell your sales team about it ahead of time, and tell them you will be farming out hot leads immediately afterwards for quick follow up. Then do it! Cherry pick attendees who asked for additional information or submitted questions about your products/services and get a salesperson to contact them right after the webinar. This has much more power than adding the names to a CRM system at the bottom of a contact list. Schedule time on your calendar for the afternoon or evening of your webinar. Use that time to immediately respond to submitted questions that needed additional follow-through.

## ***Publish Your Recording***

Publish your webinar recording as quickly as possible so attendees can forward it to friends and colleagues while it is fresh in their mind.

## **Analyzing Your Success**

There are several sources for gauging the effectiveness of your webinar. Effectiveness comes back to the purpose and audience goals you defined in your earliest planning phases and is different for each webinar.



### ***Gauge Promotional Effectiveness***

You want to concentrate future promotional activities on the channels that garnered the most attention and registration. Track the number of links to your various source-specific landing pages to judge initial interest levels from each channel. If your landing pages track views versus click-throughs to the registration page you will be able to define whether your landing page design was effective at moving visitors to the registration step.

### ***Check Conferencing Statistics***

Your web conferencing software should provide reports of registration versus attendance as well as statistics such as join and leave time for each attendee. More advanced systems can provide indications of audience attention and participation to help you judge involvement in your topic.

### ***Collect Feedback***

If you gave attendees a post-event survey or feedback form, collect the data for both quantitative and qualitative analysis. Review comments carefully and share them with members of your team to help you refine your processes, speaker choices, and topics for future webinars.

## ***Quantify Results***

Look for ways to quantify and analyze whether your webinar produced the results it was created to achieve. This might be something as simple as counting the number of new sales contacts you generated, or it could require longer-term tracking to match attendees to future qualified sales prospects and eventual sales. If your goals were to influence opinions and perceptions of your company and products, you might need to conduct pre- and post-webinar surveys to evaluate attitudes and knowledge. Whatever your goals, **there should be a way to measure your webinar's effectiveness.**

## **More Information**

Here are some additional web sites that can offer you tips, guidelines, and assistance in creating better webinars.

***The Webinar Blog*** – [www.TheWebinarBlog.com](http://www.TheWebinarBlog.com)

I keep this blog updated with information related to webinars. I include reviews of technology, announcements, best practices, and opinions.

***Webinar Wire*** – [www.WebinarWire.com](http://www.WebinarWire.com)

This blog includes articles submitted by professionals across the entire web events industry. You can submit articles as well if they are of general interest and educational value for the webinar community.





## About Ken Molay and Webinar Success

Ken Molay has been producing and delivering business webinars since 1999. His background in public speaking, stage acting, and corporate training has given him a unique perspective on what it takes to create and deliver compelling and effective presentations.

In more than 25 years of professional experience, Ken has presented public sessions at numerous industry conferences, as well as presenting information to customers, sales prospects, industry analysts, and the press.

Ken served time in the corporate trenches as product marketing manager and director of marketing for a Silicon Valley software company that went through three acquisitions, one IPO, and five name changes in the space of five years.

Ken offers consulting services through his company Webinar Success. He is also a prolific blogger on the subject of web conferencing and its applications in The Webinar Blog and Webinar Wire. He has been quoted in the Wall Street Journal and industry publications as well as making frequent public presentations on the topic of more effective webinars.

Webinar Success ([www.wsucess.com](http://www.wsucess.com)) assists companies in all phases of web seminar preparation, delivery, and follow-up. Services include webinar coordination and production, presenter training, on-air moderating, and creation of on-demand lead generation presentations. Webinar Success is headquartered in North Carolina with services conducted via remote communications throughout North America. For more information, contact [info@wsucess.com](mailto:info@wsucess.com) or call (919) 372-1937.

## About Citrix Online

Citrix Online, a division of Citrix Systems, Inc., is a leading provider of easy-to-use, on-demand applications for Web conferencing and collaboration. Its award-winning services include GoToWebinar®, a complete collaboration solution that satisfies all Web conferencing needs from large Webinars to small online meetings.

With GoToWebinar, organizations of all sizes can increase market reach, generate more leads and enhance customer contact by conducting easy, do-it-yourself Webinars.

For a free evaluation of GoToWebinar, please visit [www.gotomeeting.com/fec/webinar](http://www.gotomeeting.com/fec/webinar).