10 Steps to Planning a Successful Webinar

ON24

INTRODUCTION



PRODUCER
Responsible for the registration process and technical infrastructure.



PROMOTER
Responsible for driving registration.



PRESENTER
Responsible for the content.

Webinars have become an important tool for companies for communicating with their customers, partners and employees. Whether you are creating a webinar to train new employees or delivering a thought leadership presentation to new prospects, great webinars require about an eight-week workflow and planning cycle involving 10 key steps. In this paper, we will walk you through those 10 steps, giving you the action items and timeline you need to ensure that all of your webcasts are a success.

Webinar planning and execution involves three functional roles:

PRODUCER – responsible for the registration process and technical infrastructure. For the producer, webinar planning is largely about leaving plenty of time for testing, including testing the registration experience using multiple browsers; testing the email flow after people have registered; and testing that the registration data is integrated with back-end systems.

PROMOTER – responsible for driving registration. The promoter's planning centers around maximizing audience size.

PRESENTER – responsible for the content. The presenter will spend his or her planning time honing the message pushed out in the marketing materials. It is up to the presenter to deliver on the promises made by the promoter and to maximize audience participation during the event.

WEEK ONE

HINT
Host your plan on a shared drive so everyone on the team can see in real time where things stand in the planning process

STEP 1: CREATE THE ACTION PLAN

The action plan is the foundation for the entire planning process. It lays out everything each team member must do from day one of the planning cycle through post-presentation follow-up to ensure your event is a success. At a minimum, the plan should do the following:

- DEFINE YOUR GOALS FOR THE WEBINAR. What do you want to accomplish? Is it to train your sales team on a new product or selling technique? To give existing customers a demonstration of the latest release of your software? To share your company's thought leadership content with potential new clients in a specific industry? Spell out your goals in writing.
- SCOPE OUT AND FRAME THE TOPIC. Bearing in mind your goals for the webinar, define what you can realistically and effectively communicate to the audience within the time frame allotted for the presentation.
- IDENTIFY THE PRESENTER. The person (or persons) can be internal or external, but it is critical to identify them as part of the action plan.
- ESTABLISH THE PRESENTER FORMAT. Will screen sharing be used? Will you use a webcam to show your speaker? Sketch out the format which will best support your goals, your topic and your speaker.
- DEFINE THE AUDIENCE. Will you be presenting to a multi-national audience or one from a single country? Could language be an issue? What about time zones? All these elements will define the promotion mix and drive how you organize the webinar console.



Identify the presenter, establish the presenter format and define the audience.

- DEFINE THE TEAM. Who will help produce the event? Who will promote it? Will you need additional presenters? If so, who are they? Depending on the type of presentation and your company culture, you may need to bring in additional players as well, such as the legal department to review content or the marketing department to review branding and messaging.



Define the team and set up an initial meeting in the appropriate environment.

STEP 2: FIRST TEAM CALL

Once the action plan is set, it is time to get everyone together for an initial meeting. The team should include those identified in Step 1, typically three to 10 people. Whether you hold an in-person meeting or a teleconference, your aim is to get a commitment from everyone on the topic and the timeline. Lay out when you are planning to host the event, when you expect presentations to be ready, when you are going to host the dry run and other key dates. Also, make sure everyone understands not only their own roles but the roles of others so they know who to contact if they have questions during the planning cycle.

Once you get a commitment from everyone, immediately send meeting invitations for the key dates/times in the planning cycle. By blocking out calendars early, team members won't schedule anything to conflict with important milestone events, especially the dry run and the live presentation.

Following the meeting, send out an email with a short re-cap of all the verbal agreements you just gained. This important step prevents scope creep later in the cycle. In particular, make sure everyone receives written documentation of the presentation topic and scope. When written commitment to the topic is not established at the outset, all too often different opinions can emerge five or six weeks into the planning cycle.

WEEK TWO



CREATING A COMPELLING MESSAGE CHECKLIST

- Exciting Title
- Key Benefits
- Presentation Abstract
- Creative Direction

STEP 3: CREATE A COMPELLING MESSAGE

Now that you have consensus from the team on what the upcoming presentation is all about, it is time to begin crafting the foundation of the presentation. In this step, done during week two of the planning cycle, you will:

- CREATE AN EXCITING TITLE. The title of your webinar can make the difference between a decision to register and a decision to delete. People will respond either positively or negatively to your title, so make it compelling.
- HAMMER OUT THE KEY BENEFITS of attending your webinar. Why should someone attend? What will an attendee better understand or do after sitting through your presentation? These benefits should be defined in writing.
- WRITE A PRESENTATION ABSTRACT. What is the core of this presentation all about? The abstract, capturing the essence of the presentation, gives direction to the copy writer and, if applicable, the creative agency as they further develop content.
- PROVIDE CREATIVE DIRECTION for those responsible for crafting the presentation content and visuals.

WEEK THREE

HINT
Create a template for social posting, including a sample tweet, to broaden your reach through registrants' social channels.

STEP 4: MARKETING DELIVERABLES

Whether you have an internal creative service team or an external agency or rely on a do-it-yourself approach, in week three of your planning cycle you'll need to create the key marketing deliverables that will drive registration for your event. Those deliverables include four must-have and two nice-to-have items, all of which should reflect consistent creative elements.

Must Have:

- PROMOTIONAL EMAILS. These are the workhorses that drive audiences to your event. We recommend developing two to three different emails to reach out to your database two to three times, thereby maximizing the opportunity to catch a potential attendee in a moment of receptivity. Frame the topic and position the webinar slightly differently in each email you create to broaden the presentation's appeal.
- LANDING PAGE. This is where registrants will land when they click to register for your event. It needs to capture some very basic registration information and provide additional details about the presentation. But don't provide too much information – if you do, prospects will close the page and move on.
- CONFIRMATION EMAIL FLOW. Once people have registered for your webinar, they will need a confirmation email with details about the date, time and topic as well as how to join the event. It is also valuable to send out one or two reminder emails, on the day before and day of the event, to maximize attendance.



EMAIL COMMUNICATION

Recap your post-webinar meetings via email to all parties involved.

- POST-WEBINAR EMAILS. After the event concludes, you'll need to send out an email thanking people for attending the event and providing a link to the archive. You'll also need to create an email to send to everyone who registered but didn't attend the live event, directing them to the event on demand.

Nice to Have:

- HOME PAGE BANNER. If possible, create a banner you can put on your company's home page, alerting visitors to the upcoming presentation.
- 1-TO-1 SALES EMAILS. Great success can result from 1-to-1 emails for sales. The sales team has a vested interest in getting people to show up for webinars, and these types of emails can dramatically increase registration.

WEEK FOUR

HINT

As you are setting up the webcast environment, consider branding it. You have your audience's attention for up to an hour; rather than forcing them to stare at a plain vanilla console, use today's tools to immerse them in your key messages and company branding.

STEP 5: INFRASTRUCTURE SETUP

With the copy and creative elements in hand, it is now time for the producer to incorporate them into the webcasting platform. To do this, you'll need to create the event. Typically, this means selecting an event type and setting a live date for it. From there, you can import the creative elements, import copy to the landing page and design the email confirmation and reminder flow.

At this point, you'll need to request tracking codes for all your marketing programs. A growing number of companies are also setting up integration with their CRM or marketing automation systems, making importing of registration data a snap.

Once all this is complete, test, test and test again. This is critical. Do a lot of sample registrations to make sure you are getting the right confirmation emails. Test the landing page in multiple browsers to make sure it works consistently. Don't leave it to chance – your presentation could be derailed by a simple technology hitch before it ever gets started.

WEEK FIVE



SOCIAL CHANNELS
Promote externally through social media channels such as Facebook and Twitter.

STEP 6: EXTERNAL PROMOTION

External promotion begins in week five and continues all the way through the event. Where should you promote your webinar? Here are seven places to start:

1. PROSPECT DATABASE. Emailing this group is key, as it will be your most effective tool for driving registration.
2. COMPANY WEBSITE. Ideally, you want to place a banner or display ad on your home page so all visitors to your site are alerted to the upcoming webcast. Also include it in the site's events section.
3. PARTNERS. If you have partner companies, develop separate emails they can blast to their own databases.
4. SPEAKERS. Get your speakers involved in promotion. If they have Twitter followers or their own databases, they can push out announcements.
5. SALES. Your sales reps often have a list of people they'd like to invite to the webinar, so get them involved in promotions. A personal invitation from a rep with whom a prospect has a relationship will get a better response than a generic email from the marketing department.
6. SOCIAL CHANNELS. Tweet it. Post it on Facebook. And make it easy for registrants to do the same. Leverage all the social media tools at your disposal to promote your event through these channels.
7. EMPLOYEES. Granted, this isn't an external promotion, but don't forget to let the whole company know you have a webcast coming up and invite employees to register.

Once you have done all this, it is a good idea to go in and review your registration data. Are you hitting the right target audience? Are you drawing in people with the right titles from the right industries? If not, you may need to tweak upcoming promotions.

WEEK SIX



FIRST DRY RUN
The purpose of the first dry run is to review the drafts of the slides. Are all speakers supporting the same story?

STEP 7: FIRST DRY RUN

An initial dry run two weeks before the live event forces presenters to create their slides and scripts earlier in the cycle than they otherwise would. Left alone, most presenters delay slide preparation until the last minute, leaving little time to address problems. By scheduling an early dry run, the team can catch problems while there is still plenty of time to fix them.

The purpose of the first dry run is to review the drafts of the slides. Are the speakers supporting the same story? Are there overlaps between the presentations? Are the presentations delivering on the promises made in the marketing materials?

The dry run is also where the producer and presenters should start looking at interactive tools like polls – where they should be included and what questions should be asked – and evaluating the additional supporting content that should be available to attendees.

Following the dry run, it can be helpful for the producer to update everyone on the audience demographics. At this point in the preparation cycle, you have probably been promoting your event for seven to ten days. Share the results so speakers know the kinds of numbers to which they'll be presenting, along with attendee titles and the industries represented.

WEEK EIGHT



FINAL DRY RUN
Slides and content should be finalized and locked down. Make it clear that no changes will be allowed.

STEP 8: FINAL DRY RUN

At the final dry run, held two to three days before the live event, the team should be operating very tightly. Presenters should know how and when they will hand off to each other. Slides and content should be finalized – and then locked down. Why lock it? We have seen too many instances where presenters get a last-minute idea before the webcast and insert three or four additional slides, dramatically impacting the webinar timeline. Make it clear that no changes will be allowed.

Following the presentation run-through, producers should hit the following points with their team:

- PLATFORM TRAINING to ensure everyone is very familiar with the webcasting technology being using to deliver the presentation.
- AUDIENCE INTERACTION TRAINING. Gain consensus on how and when you will be pushing out polls, who will be responsible for managing the Q&A, how group chats will be monitored and who is responsible for them.
- OFFLINE COMMUNICATION METHODS. Review how team members will communicate with each other during the live presentation. It could be via the webcasting platform, instant messaging or even texting with cell phones – whatever works best for the team. Test whichever method you'll be using.
- REVIEW FINAL REGISTRATION NUMBERS, noting whether there are specific people, titles or companies registered to which the presenter needs to be sensitive. Also note if the registration base has shifted from where it was during the dry run and how it has moved.

STEP 9: LIVE DATE

After two months of planning, the date of the live event has arrived. To help ensure the event's success, everyone on the webcasting team should call in 30 minutes before the presentation begins. That way, if there are last-minute glitches or questions, you have time to address them.



LIVE DATE
Everyone on the webcasting team should call in 30 minutes before the presentation begins to address any last-minute glitches or questions.

That 30-minute window also gives you time to ensure that presenters are in a quiet room on a good land line and that you can hear them very clearly. Do not let anyone present from a cell phone or speaker phone, as the audio quality in these devices is typically not suited for webcasting. Also ensure each speaker has placed a "Do Not Disturb" sign on their door so that no one pops in unexpectedly, distracting the presenter and the audience.

During the live event, it is a good idea to have one or two sales people help manage the live chat or Q&A. Very often, audience members will send out buying signals such as asking for pricing information or feature details, and it is helpful to have a member of the sales team there to chime in and set up a meeting as the webinar is taking place.

Step 10: Post Event

Now that the presentation is over, it is time to sit back, relax and move on to the next event, right? Not yet. While this is often what happens, there are actually a number of post-event to-do's that must be accomplished to boost the return on your investment in the webcast and continue driving prospects to your presentation. Here is a post-event checklist that we have developed as a result of working with 1,000+ webcasting customers every year:

- Send out a "sorry we missed you" email to people who registered for the event but did not attend and include a link to the archive of the webinar. This is very important, as one in four webinar registrants will attend on demand.



THANK YOU
Send out a "thank you for attending" email to everyone who attended the presentation.

- Send out a "thank you for attending" email to everyone who attended the presentation. Include a link to the archive of the webinar and suggest next steps in the buyer's journey. Is there a white paper that might interest them? A link they can click to set up a meeting with a product expert? Use this email to nudge them forward in the buying cycle.
- Have a post-event promotion strategy and put it into action. Update your landing page to read "on demand" and list the event there. Tweet out an interesting poll result or fact from the presentation with a link to the on-demand presentation. Webinars can generate leads for months after the live date, but you need a strategy to make this happen.
- Score your leads before you load them into the CRM system for downstream follow-up. Identify the best prospects using information such as how many minutes they attended, what content they downloaded and how they responded to polls. Load your best leads first for immediate follow-up by the sales team.

SUMMARY

Great webinars are well planned, well organized and well executed. Following these "10 Steps to Planning a Successful Webinar," you can increase the effectiveness of your events – from driving registration to delivering impactful presentations and extending the value of your content. The better the planning and execution, the higher the return on your webinar investment.

ABOUT ON24, INC.

ON24 is the global leader in webinar-based marketing solutions that drive demand generation and customer engagement. Its patented cloud-based platform features an interactive and immersive user interface and industry-leading webinar analytics for events, campaigns and benchmarking. Providing one-click access from any computer or mobile device, ON24's award-winning solutions are integrated with leading CRM and marketing automation platforms, enabling marketers to optimize demand generation, enhance lead qualification and accelerate opportunities in their sales pipelines.

Additional applications for the ON24 product portfolio include virtual training, talent development and town hall meetings. More than 1,000 enterprises of all sizes rely on ON24, including IBM, CA Technologies, Merck, JPMorgan Chase, Deloitte, Credit Suisse, Ernst & Young and SAP.

For more information on the benefits of the ON24 platform, contact us at 877.202.9599 or visit www.ON24.com.

ON24, INC.
201 THIRD STREET
SAN FRANCISCO, CA 94103
877.202.9599
WWW.ON24.COM

ON24

© 2014 ON24, Inc. For more information on the benefits of the ON24 virtual environment, contact us at 877-202-9599 or visit www.on24.com.