











10 STEPS TO PLANNING A SUCCESSFUL WEBINAR



SIMPLE RECIPE FOR SUCCESS

Webinars are the best tool we have for driving leads and delivering content – as long as everything goes smoothly. Fortunately, you can ensure webinar success with a little bit of planning and 10 simple steps.

Whether you are delivering thought leadership, launching a new product, or conducting a live demo to bottom-of-the-funnel prospects, the process is the same. Great webinars call for an eight-week planning cycle involving 10 key steps. By following the advice in this paper, you'll get everything you need to set yourself up for webinar success.

WEEK ONE	2
STEP 1 The Action Plan	
STEP 2 First Team Call	
WEEK TWO	5
STEP 3 The Message	
WEEK THREE	7
STEP 4 Marketing Deliverables	
WEEK FOUR	8
STEP 5 Infrastructure Setup	
WEEK FIVE	9
STEP 6 External Promotion	
WEEK SIX	10
STEP 7 First Dry Run	
WEEK EIGHT	11
STEP 8 Final Dry Run	
STEP 9 The Big Day	
STEP 10 Post-live Strategy	

WEEK ONE

STEP 1 THE ACTION PLAN



THE ACTION PLAN

A webinar can have a lot of moving pieces, so you want to start planning early. A solid action plan outlines who does what, so nothing gets overlooked. And don't skimp on the documentation: more than one webinar has suffered because the only person with the critical information caught a badly-timed cold. Write everything down and post it in a shared document or folder that everyone can access.

At minimum, your plan should do the following:

DETAIL YOUR WEBINAR GOALS. What do you want to accomplish? Whenever possible, pick concrete, measurable goals – and spell those goals out in writing.

FRAME THE TOPIC. What can you effectively communicate within the time allotted for the webinar? Get the broad strokes down now, and you can fine-tune it later.

IDENTIFY THE PRESENTER. Who's hosting your webinar? The person (or persons) can be internal or external, but you should decide who they will be as early as possible.

COLLABORATION TIME

Host your plan on a shared drive, internal wiki, or Google Doc so everyone on the team can see where things stand in real time.

DESCRIBE THE AUDIENCE. What does your audience hope to get from this event? Could language be an issue? What about time zones? The more you know about your target audience, the more effective your promotions and presentation will be.

ESTABLISH THE FORMAT. Will you have any guests? Are you delivering a business presentation, or hosting a more informal chat session? Will you use on-camera presenters or screen sharing? Sketch out the format that will best support your goals, your topic, and your audience.

DEFINE THE TEAM. Who will handle the technical details? Who will promote the webinar? Will you need additional presenters? Do you need to bring in additional players, such as legal or marketing, to review the content and messaging? Identifying your team in advance will save you last-minute hassles later.



WEEK ONE

STEP 2 FIRST TEAM CALL



Now the plan is set, so it's time to get the team together. At minimum, it takes three people to manage a successful webinar:

PRODUCER Responsible for the technical infrastructure.

PROMOTER Responsible for driving registration.

PRESENTER Responsible for crafting the content and delivering the presentation.

If you have guest speakers or additional technical requirements, you may have up to 10 people on the team – in rare cases, even more than that.

Whether you meet in person, over the phone, or in an online meeting, the aim is the same: get a commitment from everyone on the topic and the timeline. Agree on a date and time for the webinar, when presentations need to be ready, when you'll hold the dry run, and other key dates. Make sure everyone understands not only their own roles, but the roles of others so they know who to contact if they have questions later.

Once you get a commitment from everyone, send meeting invitations immediately. By blocking out calendars early, you ensure that team members won't schedule conflicts over important milestone events, such as the dry run or – worst of all! – the live presentation.

After the meeting, send out a short recap. In particular, make sure everyone gets written documentation of the webinar topic and scope. It's a small step, but it will prevent scope creep later.

INVITE, OR IT WON'T HAPPEN

Send out calendar invites for all your key dates as early as possible – before everyone's calendars fill up!



WEEK TWO

STEP 3 THE MESSAGE



THE MESSAGE

You've got your groundwork in place. Now you can focus on the foundation of your webinar: the message. The work you do here will inform everything that follows, from the promotion to the presentation itself, so it's worth a little extra time to craft a message that really resonates.

Ideally, you should draft your message in the same shared file or drive you're using to host the action plan, since everyone will want to refer back to it. Your message needs to include the following components:

AN EXCITING TITLE The title of your webinar can make the difference between a decision to register and a decision to delete, so make it compelling. Use action words or numbers (e.g., "10 tips") to show that your webinar is packed with valuable, actionable information. And put the focus on the benefit for the audience.

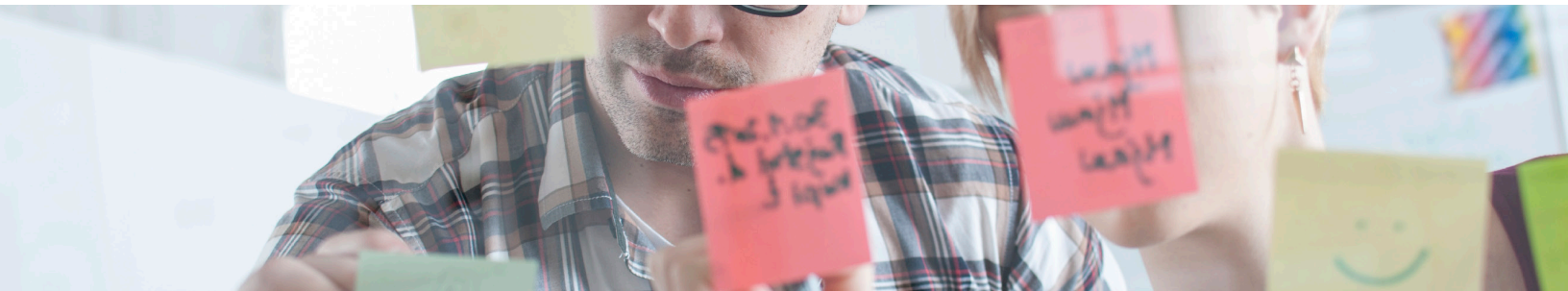
KEY BENEFITS Why should someone attend your webinar? What will they understand or do better after your event? Detail these benefits in writing so the team can use them in landing pages, emails, and other event promotions.

THE ABSTRACT What is this webinar all about? The abstract should be one or two short paragraphs that capture the essence of the presentation. Combined with the key benefits you just drafted, this will give the copywriter and creative team the direction they need and help the presenter build a better presentation.

CREATIVE DIRECTION The people responsible for crafting the presentation content and promotional visuals need to be on the same page. Briefly describe the kind of imagery they should use to appeal to your audience and support the webinar topic.

WHAT'S IN A NAME?

The best webinar titles solve problems and address pain points, letting the prospect know they'll get useful, valuable advice that will help them solve specific problems.



WEEK THREE

STEP 4 MARKETING DELIVERABLES



MARKETING DELIVERABLES

It can take some time to create marketing assets to promote your webinar, so don't leave it till the last minute. This is where the creative direction you drafted in Step 3 comes into play. Make sure your copywriters and creative team keep it in mind, and aim for a consistent look and feel across all your marketing deliverables.

Must-have marketing deliverables

LANDING PAGE Your webinar landing pages should give people exactly what they need — no more and no less. The page ought to include an image or short video that encapsulates the webinar theme, a brief paragraph that summarizes the abstract, and 3–5 bullets on the key benefits. Include a registration form that captures basic information (most registration forms ask for first name, last name, email, company, and job title).

PROMOTIONAL EMAILS Email is the workhorse that drives event registration. To maximize your chances of catching a potential attendee in a moment of receptivity, plan to send at least two or three different emails to your database. Send both HTML and plaintext emails, and position the webinar slightly differently in each email to appeal to the largest possible audience.

CONFIRMATION EMAIL FLOW Once people have registered for your webinar, they should get a confirmation email with details about the date, time, and topic along with a link to attend the event. One or two reminder emails, sent the day before and day of the event, will help drive more webinar attendance.

POST-WEBINAR EMAILS After the webinar, send out an email thanking people for attending and providing a link to the on-demand version of the webinar. People who registered but didn't attend the live webinar should get an email, too, directing them to the event on demand.

AMPLIFY THE MESSAGE

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

Nice-to-have marketing deliverables

DISPLAY ADS FOR WEB AND SOCIAL Online ads can be a great way to reach new audiences that aren't already in your database. Create display ads in a range of sizes for web pages and sponsored posts on social media applications such as Facebook, Twitter, and LinkedIn.

HOMEPAGE BANNER. If you have space on your homepage for featured events and campaigns, that's a great place to promote your upcoming webinar. Create a banner for your homepage to let site visitors know about the event.

1:1 SALES EMAIL TEMPLATE Nothing delivers results like the personal touch. The sales team has a vested interest in getting people to show up for webinars, so arm them with a simple text template they can adapt for their prospects.

WEEK FOUR

STEP 5 INFRASTRUCTURE SETUP



INFRASTRUCTURE SETUP

With the copy and creative elements in hand, it's time for the producer to start setting up the event. They should start preparing the console in the webinar platform so that everything is ready well in advance of the agreed-upon date. From there, they can import creative elements like the console background, place copy and visual elements on the landing page, and design the email confirmation and reminder flow.

At this point, you should 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. Submit sample registrations to make sure you are sending the right confirmation emails at the right time. Test the landing page in multiple browsers to make sure it works consistently. Don't leave anything to chance — or your presentation could be derailed by a simple technology glitch before it ever gets started.

PUT YOUR BEST FOOT FORWARD

When you deliver a webinar, you have your audience's attention for up to an hour. Don't force them to stare at a plain vanilla console! Instead, use background images and prominent logo placement to immerse the audience in your key messages and company branding.



WEEK FIVE

STEP 6 EXTERNAL PROMOTION



EXTERNAL PROMOTION

To give yourself the best chance to bring in a big crowd, start your external promotion in week five and keep it going all the way through to the event. Use every channel available to reach out to the widest audience possible. Here are seven places to start:

PROSPECT DATABASE Emailing this group is key, as it will be your most effective tool for driving registration.

YOUR WEBSITE Ideally, you want to place a banner or display ad on your homepage so all visitors to your site are alerted to the upcoming webinar. You should also include it in the site's events section.

PARTNERS If you have partner companies, develop separate emails they can blast to their own databases.

SPEAKERS Get your speakers involved in promotion and remind them to push announcements to their own Twitter followers or contact databases.

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 may get a better response than a general email from the marketing department.

SOCIAL CHANNELS Tweet it. Share it on Facebook. Post it on LinkedIn. Make it easy for registrants to do the same. Use all the social media tools at your disposal to promote your event.

EMPLOYEES Don't forget to let the whole company know you have a webinar coming up. Invite employees to register and encourage them to share it with their professional networks.

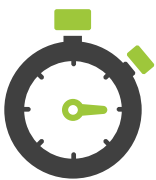
DIVERSIFY YOUR SOCIAL CALENDAR

If you tweeted on Monday morning, schedule your next tweet on a Tuesday afternoon. Spreading out the timing of your social posts gives you a better chance to catch a larger audience.

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

STEP 7 FIRST DRY RUN



FIRST DRY RUN

Left to their own devices, most presenters would put off preparing their slides until the very last minute, leaving little time to address problems. By scheduling an initial dry run two weeks before the live event, you force presenters to draft their slides and scripts earlier than they would otherwise. That way the team can catch problems while there is still plenty of time to fix them.

The primary 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? Do the presentations deliver on the promises made in the marketing materials? Besides reviewing the slides, the dry run is also where the producer and presenters should start looking at interactive tools like polls and surveys. Decide where moments of engagement should be included, plan your polls and what questions they should ask, and evaluate the additional supporting content that will be available to attendees.

THE PARTY LINE

The purpose of the first dry run is to find spots where the message feels disconnected and smooth them out. Does the language feel right? Does it match the message you defined in Step 3?

At this point in the preparation cycle, you have probably been promoting your event for a week or so. After the dry run, the producer should update everyone on the audience demographics. Sharing the results lets your speaker or speakers know the kinds of crowd they'll be presenting to.



WEEK EIGHT

STEP 8 FINAL DRY RUN



FINAL DRY RUN

It's the week of the event, and your team should be operating like a finely calibrated webinar machine. Two to three days before the live event you'll want to do a final dry run, just to catch any potential loose ends. Presenters should know how and when they will hand off to each other. By this time slides and content should be pretty much finalized. Use this as a last opportunity to make any minor tweaks — and then lock the presentations down.

After the final dry run, producers should cover the following points with their team:

PLATFORM TRAINING Make sure everyone is very familiar with the webinar technology you're using to deliver the presentation.

AUDIENCE INTERACTION TRAINING Agree 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: via the webinar platform, instant messaging, texting — whatever works best for the team. Whatever method you'll be using, test it out to make sure it's reliable and effective.

REVIEW FINAL REGISTRATION NUMBERS Note whether there are specific people, titles, or companies that the presenter needs to be particularly aware of. If the registration base has shifted from first dry run, and discuss where it is now and how it has moved.

LOCK DOWN

We have seen too many presenters get a last-minute idea before the webcast and insert three or four additional slides, throwing off the established webinar timeline. After the final dry run, make it clear that no more changes will be allowed.



WEEK EIGHT

STEP 9 THE BIG DAY



THE BIG DAY

After two months of planning, the day of the webinar has finally arrived. To ensure the event's success, everyone on the webcasting team should call in 30 minutes before the presentation begins. That way you have time to address any last-minute glitches or questions.

That 30-minute window also gives you time to make sure that your presenters are in a quiet room with good audio equipment and that you can hear them very clearly. Do not let anyone present from a cell phone or speakerphone — the audio quality in these devices is not good enough for a webinar. Remind each speaker to place a "Do Not Disturb" sign on their door so that no one pops in unexpectedly.

During the live event, it's 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; it is a great customer experience to have sales rep chime in and set up a meeting right away, while the webinar is taking place.

LAST-MINUTE MIC CHECK

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



WEEK EIGHT

STEP 10 POST-LIVE STRATEGY



POST-LIVE STRATEGY

Now that the presentation is over, it is time to sit back, relax, and move on to the next event — right? Not so fast! There are a number of post-event to-do's that will boost the return on your investment in the webinar and continue driving prospects to your presentation.

Working with over 1,000 customers every year, we've put together this essential post-live checklist:

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 webinar on demand. If you forget to send this email, you could miss out on the one in four webinar registrants attend on demand.

Send out a **"THANK YOU FOR ATTENDING"** email to everyone who attended the presentation. Include a link to the on-demand 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.

Put your **POST-EVENT PROMOTION** strategy 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. Look at behavioral signals to identify the best prospects: How many minutes did they attend? What content did they download? How did they respond to polls? Load your best leads first for immediate follow-up by the sales team.



THE PROOF IS IN THE PUDDING

There are a lot of ways to measure the success of a webinar: quantitative metrics such as leads and engagement scores, or qualitative measurements like how well it supported your message.

A good webinar can be an incredibly valuable marketing tool. But a great webinar? That is the best marketing tool in your arsenal.

Great webinars are well planned, well organized, and well executed. With a little extra planning, — and some help from the 10 steps outlines in this guide — you can increase the effectiveness of your events, from driving registration to delivering high-impact presentations and extending the value of your content. The better the planning and execution, the higher the return on your webinar investment. And who doesn't like that?

