

# A Webinar Organizer's Checklist

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



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## 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 guidelines, remember that the way you approach them will vary based on the specifics 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.

Don't be afraid to adapt these guidelines to match your practical work considerations. You may not need to be as formal with planning, scheduling, and documentation based on the needs of your team and the criticality of the event.

## Planning Your Webinar



When you first decide to give a webinar or are handed the responsibility for supporting someone else's class, 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.

### 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 Class Dates And Times

Picking the dates and times for your webinar forces you to start thinking about your target audience in more detail. Can you cover all the geographies in a single webinar, 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 presenters.

### Plan Recording Needs

Do you want your webinar to be recorded for later access and review by additional audiences? Will it be password protected? 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. Every decision you make before the webinar allows you to move more quickly afterwards to get attendees the proper materials.

## 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, such as reference materials or a training workbook?

Remember that multimedia files can also be used as reference materials. You may wish to give your students access to prerecorded training videos or audio recordings after your live session. There are many considerations for multimedia, such as the playback format and the dimensions of a video window. 640x480 pixels is the most conservative sizing to use, which should be playable without scaling on any modern screen. Decide how much compression you will apply to your audio or video to get the best tradeoff between file size and playback quality.

Whatever materials you decide upon, make sure they are completed and queued up for distribution so that students don't have to wait to get them after your live session.

## 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 instructor fees? How much is allocated for technology costs?

## Plan An Audience Contact

Identify who is responsible for answering pre-class 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 webinar? 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.

Some web conferencing systems, such as omNovia, allow you to select modules that show different types of content. So you might elect to swap between slides, recorded video, and live video in your webinar. Or you might want to simplify the interface by removing unused modules.

Another type of configuration option is integration with third party systems such as Learning Management Systems or platforms that allow advanced quizzing and interactive

gaming. For instance, omNovia allows integration with Flash-based applications such as AllPlay Web from LearningWare.

## 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. I recommend using both methods for the best chance at soliciting responses.

## 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.

## Scheduling The Webinar

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.



## Decide On Registration Fields

Decide what registration information you will ask for. Determine which fields will be mandatory and which will be optional. Most web conferencing systems let you add your own custom questions, and the more advanced systems give you a choice of answer formats, such as text, drop-down menus, checkboxes, and radio buttons. In general, adding more registration fields increases the risk of “abandonment” of the registration form before completing the registration process. But if you are working with a highly motivated audience that wants or needs the information, they will be more willing to supply additional data.

If your web conferencing software lets you customize the look and content of the registration form, don't forget to add your branding and additional descriptive information of use to prospective students. You might include pre-course requirements or suggested reading materials for instance.

## 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 instructors. 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.

If you will be giving the presentation yourself, you should still go through these items and make sure you can answer all the preparatory questions.

## 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.

## Agree On The Content

Collaborate with your instructors to define and approve the description 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 descriptive summary that will be used to drive registration and 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.

Make sure you clarify the amount of detail expected in the content and whether the information should be presented at an introductory or advanced level. If you know your audience makeup, communicate that to the instructors so they can prepare materials that are most appropriate for that audience.

## **Clarify Time Commitments**

Solidify time commitments up front. Book your speaker for a half hour before the scheduled start time of the class 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. 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.

## Maximizing Attendee Engagement



People want to be engaged, but more often than not they end up receiving information passively. Presenting your webinar as a long uninterrupted dissertation reinforces their inactiveness. To promote the best comprehension and retention of your material, you need to find ways to make the audience more engaged in the process. This can be done by designing more effective presentation material, thinking about

your presentation style, using specialized web conferencing features, or incorporating audience participation activities

## Presentation Materials

Don't treat PowerPoint slides as virtual pages in a textbook. Receiving, compiling and understanding a lot of data during a relatively short onscreen presentation is very difficult. There is a natural tendency to want to show depth and detail supporting your points. However, these specifics should be presented as reference material for offline viewing.

Audiences are not engaged by facts but by feeling a connection to the material. Build

emotional triggers that help attendees want to learn and remember the information and use graphics to highlight key concepts. The best presentation slides complement your vocal presentation rather than duplicate it.

## Presentation Style

Vocal technique is even more important in a virtual presentation than an in-room session. If the audience cannot see you, your voice carries the entire burden of communicating your message along with holding their attention. The most effective tool you have is your natural enthusiasm and passion for your subject. Your interest is infectious. If you sound like you have given the information many times and are tired of it, your audience will be bored. Remember to repeatedly stress the relevance and value of your information for your audience.

A monotone lets your audience drift away from you, so include repeated changes in inflection, tone, volume, and speed to continuously refocus the audience on your voice. You'll need to go "bigger" than you are comfortable with in a normal personal conversation.

A key difference between in-room and web presentations is that the former creates an automatic sense of community. A person sitting at his or her computer does not feel connected to other audience members... just to you. Take advantage of this by phrasing your remarks to speak to the individual as if he or she was the only person on the line. The fact that you know there are 300 people listening is beside the point.

Instead of "Can anyone tell me the answer?" try "Do you know the answer?"

Instead of "I'd like everyone out there to type their first name into the console" try "Please type your first name into the console."

The change is subtle yet powerful.

Make use of first names in your audience. When a comment comes in, say the name of the person who asked it. Make reference to comments that people enter.

Another trick of engagement is to invite the audience to mentally participate in the talk.

Instead of simply listing a set of facts, ask them if they have ideas about the topic and can make suggestions. Web conferencing is much better for this than in-room presentations, as your audience can contribute through chat without slowing you down or pulling focus from your talk.

## Live Video



Adding live video of the presenter can result in greater attention and interest from your audience. Students have the ability to pick up cues from the presenter's body language, taking some of the burden off the vocal presentation style of the instructor. Live video is particularly helpful in a hybrid event, where the instructor has to create an engaging and interactive experience for both on-site and remote attendees.

When the web audience knows they are seeing the same things as the local audience, they feel as though they are being treated equally and getting the same value as the in-room students.

Obviously, video is most effective when the image is of high quality (some vendors label this as "high definition" or "HD video"), but bandwidth requirements are an important consideration. Make sure your web conferencing technology has an optimized streaming capability that will work for a wide range of connection speeds. Ideally, everyone should be able to see the video at lower or higher quality settings most appropriate for their Internet connection.

## Web Conferencing Features

Audience chat is one of the most useful features of web conferencing and gives you advantages that are impossible with in-room meetings. You can quickly check the comfort level and comprehension of your attendees all at once. You can make your presentation more interactive by inviting students to type in their answers to questions you pose, rather than simply listening to you recite bullet points. If you choose to use "open chat" where

attendees can see comments from other participants, it can stimulate discussion and competing viewpoints, or it can give attendees the opportunity to help other students by contributing their experiences or specialized knowledge.

For more formal examining of audience comprehension or opinions, you can offer multiple-choice polls. This creates an engaging experience while also allowing you the ability to receive and share inputs from the entire audience at once. It is important that you let participants know why answering the question is valuable and beneficial to them. Never announce polls as a way for the audience to help you, instead find a way to make participation seem like it serves some self-interest of theirs.

Screen sharing lets you show operation of computer applications as a part of your presentation, which can be much easier to follow than an abstract discussion of features and functionality.

Annotation tools let you highlight key concepts or pieces of data as you present your materials. These help to focus the audience's attention on the topic of interest and keeps them synchronized with your presentation speed.

While video clips are a helpful aspect of webinars, you should be careful not to put your audience into a "watching TV" frame of mind, which is extremely passive. Try combining the video with a poll or chat about its content. Keep video clips short – ideally 30 seconds or less per viewing segment so you can quickly bring the focus back to live give-and-take.

If your web conferencing software allows other special modes of operation, make sure you take advantage of them where appropriate to improve your audiences' attention and comprehension. In omNovia for instance, you can split the display screen to show multiple content pieces simultaneously. This can let the live image of a presenter be seen at the same time as slides or a screen share, or you could show a recorded video clip along with slides and a poll. Having additional communication channels and types of content often helps to overcome audience complacency and inattentiveness.

## Participatory Activities

omNovia allows you to incorporate special features in a webinar session which can help bring the audience even more into the online meeting experience. With advance planning, you can add a custom Flash application into your session and invite attendees to interact with it.

A partnership with LearningWare's AllPlay Web gives omNovia users the option to create and incorporate "game shows" into the presentation, where participants can compete in teams to show their knowledge of the subject material.

You can also place a link to a web page on a presentation slide or in a resources section. This opens up the entire World Wide Web for interacting with online resources, looking up information, or participating in activities such as "treasure hunts" to find facts that you want people to remember.



## Supporting The Presentation

Webinar moderators or facilitators can make sure the webinar goes smoothly for presenters and audience alike with attention to details pertaining to support. This section is intended for support personnel working “behind the scenes” on webinars.

### 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.

### Upload Documents/Links For In-Room Availability

If your conferencing software allows you to distribute electronic documents during your session, you should have the materials uploaded and ready for download and use during the class. Some programs, such as omNovia, allow you to also store useful web links for rapid access by students.

Letting students download reference documents relieves you of the need to fill up presentation slides with dense text or subject data. You can place handouts, reference sheets, a syllabus, or other materials at the disposal of each student. Having links ready shows students where resources exist on the web and lets you refer to them during your session.

### 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.

## Send Promised Materials

Make use of your pre-event planning and production by having handouts or extra

materials ready for distribution or download while interest is still high and 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 webinar sessions 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. 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.

## Triage Inquiries For Fast Response

Schedule time on your calendar for the afternoon or evening of your webinar. Use that time to respond to questions submitted during the session that needed additional follow-through.

## Analyzing Your Success



There are several sources for gauging the effectiveness of your webinar. You want to check whether you improved comprehension of your subject, but you should also look for indicators of success in your planning and production of the webinar.

## Measure Comprehension

A post-session quiz or survey should help you gauge whether attendees retained the most important facts about your subject. This can also give you the opportunity to reinforce key concepts. If you want to be able to prove the effectiveness of your webinar, you can run a pre-test and compare the results to a post-test.

## 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.

## 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, presenter choices, and topics for future webinars.

## 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.

*The Rapid eLearning Blog* – [www.articulate.com/rapid-elearning](http://www.articulate.com/rapid-elearning)

Many practical tips for designing eLearning courses and content.

*E-Learning Queen* – [elearnqueen.blogspot.com](http://elearnqueen.blogspot.com)

Interviews, social concerns, and technologies. Lots of links and references.

## 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 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. 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 omNovia Technologies

omNovia Technologies was founded in 2003 in Houston, Texas, with the clear vision of bringing the power of high-quality online communication to every business. omNovia is a leading global provider of collaborative online meetings, interactive webinars, engaging online trainings and live event webcasting solutions for small business meetings and large-scale enterprise conferences. Ease of use, focus on quality, innovative technology and above all dedication to create long-lasting customer partnerships are integral parts of omNovia's DNA.

Today, omNovia's high quality web conferencing platform offers the best online meeting experience with a unique capacity of 5,000 simultaneous participants in an interactive web-based environment. omNovia's live event webcasting solution, StageToWeb, provides HD live-video streaming integrated voice and interactive tools. omNovia's unique Recast feature enables replays of recorded events in a fully interactive environment. For more information please visit <http://www.omnovia.com>.