act-on

Best Practices for
Planning and Executing Webinars

Webinars are dynamite lead generation machines.

People who sign up and show up are motivated to solve a problem or fill a need, and they already trust you to some degree. You want to make sure that the webinar you produce meets their expectations – while maximizing your opportunities for conversion.

Webinars have much in common with real-world events and can deliver a similar quality of leads, at a lower cost per lead. Producing a webinar provides its own set of unique challenges, but with strategic planning, a project approach, and attentive execution, you'll find yourself creating thoroughly professional webinars.

Contents

Plan your webinar

The topic

Ideas for a webinar can come from anyplace, including your own prospects and customers. When deciding whether the topic is the right one, consider your audience and what they need to know. Take a look at what your competitors are doing, and sit in one a few of their events. Look at trade show agendas to see which topics are on the agendas. Then ask these questions:

- Would this webinar satisfy a business goal?
- Can you attract enough people, and generate enough value, to justify the time and expense?
- Do people care about the problem enough to spend their time listening to a webinar about it?
- Do you have a speaker who can address the topic with originality, expertise, and credibility?
- Can you deliver an engaging presentation (allowing time for a Q&A) in 60 minutes or less?
- Can you get the buy-in and internal support you need?

If you can answer all these questions with a firm "yes," start recruiting your speaker(s) and a support team.

The people

In addition to planning and marketing staff, you'll need people to execute the webinar:

- **The organizer** is usually an employee of your company. This person organizes the logistics and coordinates all the details, including setting up registration, managing the event, and communicating with participants.

- **The presenter** may or may not be an employee. You could use a practice leader from your sales or marketing department, or you could hire an analyst, consultant or industry leader. This person should be an expert on the topic and a good speaker. If you pick someone very well known and respected, that person's reputation could help draw attendees. Make sure the presenter knows what your business and execution goals are for the webinar, including how you want the Q&A to be run and whether you want audience involvement earlier (e.g., in a poll).

- **An assistant** is usually an employee of your company. It's nice to have one, although many organizers run webinars by themselves or with live support from their webinar service provider. Consider having an assistant if you're working with new webinar software, if you sometimes experience technical glitches, if you plan to encourage ongoing questions and audience interactivity, if the audience will be large, or if you're going to be an active participant.

The structure

Your topic may lend itself to a variety of formats; here are
a few possibilities:

- **One presenter**
  - This is the simplest format
  - The speaker needs excellent presentation skills;
    a single speaker can be boring, or didactic
- **Two presenters**
  - Two speakers handle different parts of the
    presentation
  - More interesting to the audience than a single
    speaker
- **Interview**
  - This could be a Q&A or give-and-take session
- **Panel discussion**
  - A panel discussion needs to be moderated by
    one of the speakers or by the organizer
  - Allow more time and coordination for managing
    multiple speakers

All other things being equal (including number of
registrants), you'll usually get more attendees to a
webinar with a single presenter than to a moderated
panel discussion.

Webinar content

- Decide what story your presentation will tell. Make an outline or use a diagram to clarify for yourself the one main idea, key supporting points, and validation or proof points. Bear in mind that people don't watch webinars to buy something, but to learn something. Fulfill that expectation.
- A very general webinar will draw a more top-of-funnel audience. The tighter the focus of your webinar, the likelier attendees are to be looking for a solution to a specific problem and a bit further along the buyer's journey.
- Don't overwhelm slides with too much text; make sure to leave plenty of white space.
- Do pay close attention to slide titles. If later you post your slide deck without narration, the titles will help the reader through the presentation.
- Add speaker notes to your slides. They help keep you on track and ensure that you cover all the points you want to make. Be sure to print out your webinar slides with speaker notes, so you're covered if the technology fails. You can also make notes on it during your presentation and the Q&A session.
- Get short biographies from your speakers well ahead of the webinar. When you do the introduction, have a concise and powerful message about your speaker; this makes you both look more professional.
- Consider crafting a script the presenter can read for certain portions of the presentation – e.g. a company overview, biographies of speakers, etc.
- Make sure the slide number is clearly indicated. Make sure the presenter has a chance to practice this several times in a quiet room where they can speak out loud; this will make it sound conversational instead of rote.

- At the end of the webinar, have a closing slide that offers contact information. When you speak to this slide, be sure to cover next steps for the audience to take, thank the presenters for their time, and thank the attendees as well.
- Make sure the contact information includes varied methods, such as an email address, URL, phone number, or other ways people can take the initiative to get in touch.

Visuals

Webinars are not just glorified teleconferences – the ability to share visual content can tremendously enhance your message. But weak visuals will literally cause your audience to avert their eyes; once that happens, it will be difficult to regain their attention.

- Create images that are easy to read and engaging to look at. Whenever possible, make your point with pictures, not words.
- Avoid the trap of designing your images for a large projection screen. Your audience may be watching the presentation in a window on a small screen – even a tablet or a smartphone.
- That also means a presentation that works very well in a conference room or auditorium needs to be revised for the webinar format. Slides look very different in a 5-inch window than they do on a 15-foot projection screen.
- Make sure your visuals complement the material rather than repeating it.
- Keep the slide template simple so the audience focuses on the content
- Use a single template even if there are multiple speakers
- Use common fonts so you can have confidence that they display correctly.
- Use the footer to remind people about hashtags and who the sponsor of the event is.

Audio

Audio is the main communication vehicle of a webinar; use the correct technology and test to ensure that the sound is clear and without interference.

- Use a handset or headset – never a speaker phone.
- Be on a landline rather than a cell phone.
- Mute the lines of speakers who are not actively presenting to avoid confusion and unnecessary noise.

Duration

No matter how vital or valuable you feel the information you're sharing is, remember that your audience's time is valuable and should be treated accordingly. Even if you feel the invitation and confirmation pages or emails made this information clear, state clearly the objectives for the webinar when you begin as well as the estimated runtime. If possible, tell the audience how much time will be set aside for a Q&A. Most webinars top out at an hour long; any longer, and a webinar might start to seem onerous and will likely be difficult to fit into a busy schedule.

Establish clear and unique takeaways for your webinar content – simply putting your own brand on information available anywhere on the Web will waste your viewers' time. Create a call to action that helps the audience realize value from your advice in the short term. Instant gratification builds loyalty, helps your brand identity, and encourages your audience to come back for more.

Familiarize yourself with the quirks and glitches of your webinar platform. That will make it easier for you to recover from the occasional bug or error without losing minutes of precious time to tech support.

Registration

- Keep the registration form brief. The shorter the form, the more people will complete it. Cap the registration form at eight to ten fields.
- The registration form should go on its own landing page and have a recap of what it offers. Make it colorful and interesting.
- The best registration process offers one-click registration or one-click access to a simple registration form. Requiring two or more steps to register, or making it hard to register in any way, could lower your registrations.
- If the registration form is consistently abandoned, reexamine it and try to cut out all but the fields you think are most important. For example, requiring registrants to enter physical mailing addresses is usually unnecessary.
- Use the data you collect from the registration form for segmentation. For example, you can send emails suggesting certain products, webinars, or demos based on the type of organization a person selected that they belong to. (Of course, it's best to make such emails opt-in only.)
- A good target for attendance of the live event is 30-40% of registrants.

Promotion

Use as many different promotional channels as you can, and link them to your registration page so people can get there in one click. Use different URLs for each channel, so after the event you can track which channels delivered the most (or best) registrants.

Consider asking people in your organization to add a line to their email signatures that promotes your event, including a link to register.

Also consider prizes or incentives ("First 50 to sign up – "... "Enter a drawing for – ").

Email design

- Your subject line should be short (70 characters, including spaces) and compelling, with a benefit.
- Make your invitation copy as short as possible, and use images, including a headshot of your presenter.


- Review your entire invitation and include benefits where possible. Make it utterly clear what's in it for the attendee.
- Make registering for the event your only call to action, and use a button or graphic to make it obvious.
- Put this call to action at the beginning and end of your message, so people don't have to scroll up or down to get to it.

Email distribution

- **Choose your list thoughtfully:** If you can segment by a factor, do so. You'll probably use your in-house database of customers and prospects, but you may choose to buy a targeted list or pay a third party to mail to their list. In the latter case, consider having the email invitation look like it comes from the third party. If you're working with a partner organization, plan how you will email invitations so you don't duplicate.
- **Plan invitations:** According to recent research by ON24, promoting a webinar more than seven days before the event can increase audience size 36%, even though most registrants sign up within a week of the scheduled date. Sending a final invitation within 24 hours of the start time can increase registration 37%.
- **Timing:** Plan to accommodate registrants in as many time zones as practical. In the U.S., an 11 a.m. Pacific time garners the most attendees, followed by 10 a.m. The least popular time is 8 a.m. Pacific time .
- **Days of the week:** For most companies, a Tuesday time slot appears to get the most attendees, followed by Wednesday.

- **Confirmations:** Use an autoresponder email so the registrant gets immediate acknowledgment. Add a calendar blocker to the confirmation email to allow registrants to easily add the event to their calendars
- **Reminders:** Multiple reminders work best. Send a reminder the day before the webinar, and again a few hours in advance on the day of the event.
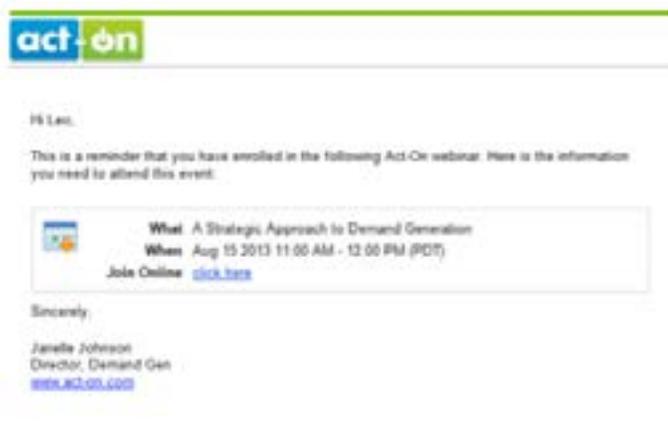
- **Post-event follow-up:** Send a thank-you within 24 hours or less, and include any content that was promised. Be sure to include a link to the archived webinar; close to 25 percent of webinar attendees will watch the recorded, on-demand version, and many people who skipped the live event will watch the recorded version on their own time.

Social media

Set up event pages on sites such as Facebook and LinkedIn, and promote the webinar on Twitter and on your organization's blog.

- On Facebook, Google +, and LinkedIn, follow a similar time frame to what you would use for email notifications – create the event pages roughly two weeks in advance, and a day or two before the event, post a reminder that the webinar is coming soon.
- On Twitter, the two-week warning probably will not be effective. Tweet about the webinar a day or two before and a few hours in advance.

- Create a custom hashtag for the event and put it on your slides, perhaps in the footer. Encourage people to tweet questions and comments using that hashtag during the event.
- Ask your presenters to promote the social media URLs you create.
- Include "invite a friend" links to the webinar on all emails, blog posts, and social media announcements of the webinar.
- On every platform you use to promote your webinar (with the possible exception of Twitter), be sure to include instructions for how to join the web and audio portions.

Your website

- If you have a section listing upcoming events, be sure to list your webinar here.
- Consider a colorful promotion on your home page.
- Write a blog post about the topic, and make learning more at this webinar the call-to-action.
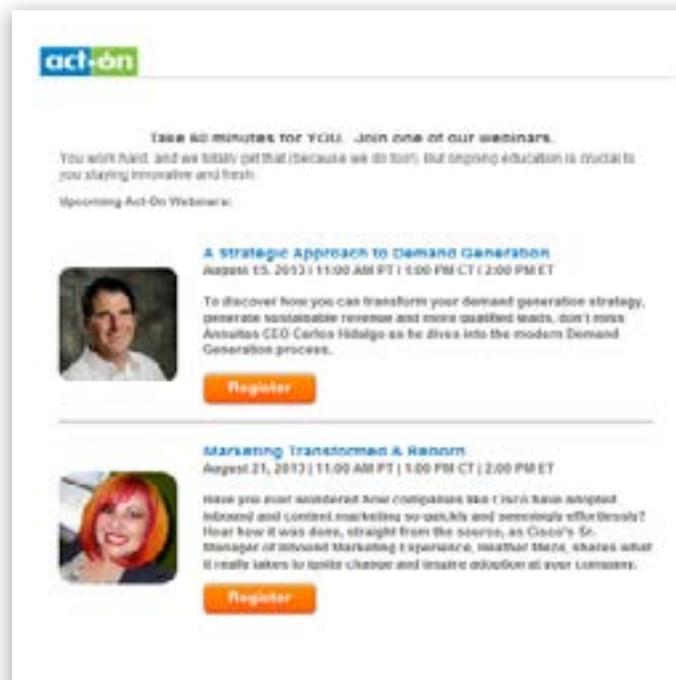
Presenting

Practice

It's not easy to sound confident, informed, friendly, and intriguing all at the same time, so don't leave it up to chance by skimping on practice. The world's best and brightest speakers didn't get to be that way by accident, and rehearsing your webinar is the best way to polish your presentation.

- Practice delivering the key points of your presentation until you have purged every stammer, "uhh," and "err" from your vocabulary. Even the most skilled expert sounds amateurish when meandering around the message with no focus or drive.
- Being authoritative and focused does not mean becoming robotic or scripted. Practice with a listening partner and direct everything you say to them. If possible, do the same during your live presentation. This will allow you to sound more natural and help the audience feel that the message is directed personally at them.
- Time yourself during your practice sessions. Don't fall into the trap of coming up on the end of your scheduled time and having to rush through the last ten slides. Your audience will sense your haste and tune out.

The moderator and presenter(s) should do a dry run a day or so before the event.

- Introduce people who don't yet know each other.
- Review the agenda and visuals.
- Practice with the webinar technology. Make sure everyone knows how to change slides, read attendee questions, and adjust microphone levels.
- Check all the other equipment as well: browsers, headsets, power cords, network connections, anything that will be used.

- If there are multiple presenters, they should practice together or, at the least, have a clear agreement on who will present which slides.
- Reiterate starting times and ask presenters to show up early.

Execution

Get off to a good start

- Set up early. Have the room or workspace arranged and ready to go 30 minutes before the webinar is scheduled to start.
- Have presenters come in at a prearranged time, usually 15 minutes ahead of time. Know how to reach them in case they are late.
- Make sure your voice is warmed up. You could sing, hum, or read something you enjoy out loud.
- Think of one specific person as your audience. Whether you have an actual person in the room or just a picture in your mind, have someone to aim your presentation to.
- If you will show your desktop, make sure it's clear of personal items.
- If you're doing the webinar from your home office, don't do it in your sweats. Wear your usual business attire, and smile. People can hear it in your voice.

Start on time. As a courtesy to those who are there on time, don't delay starting more than a minute or two.

- Begin by welcoming the audience and cover housekeeping items, such as how to use chat or polls, whether there will be a Q&A, and so on.
- Show the agenda, so people's expectations are correctly set.
- Tell people who the moderator and the presenter(s) are.

Keep the ball rolling

Keep the self-promotion to the barest minimum. The presenter may need to talk about their company to give context to the information, but it shouldn't be a sales pitch.

Encourage interaction during your webinar. Lectures are boring, but dialogues are interesting; interaction will give your content legs long after the webinar hour is over. You can develop interaction before opening up to audience questions by having a dialogue between two or more presenters. As long as the discussion is natural, the give-and-take between two presenters will be far more engaging than a sustained monologue.

- Take polls and comments during the webinar and discuss the results in real-time. This will keep your content fresh and the audience actively engaged not only with what you are saying, but how they and their peers are reacting.
- Don't rush the audience to participate. State clearly how long polling, commenting, and questioning will be, and make occasional reminders to create a sense of urgency.
- If you use polls, keep them relevant to the discussion and be sure to use the real-time results to reinforce your topic and/or talking points. Avoid a sales pitch question and keep the number of questions to a minimum – no more than three. Polling responses and questions during the Q&A can generate prospect-specific information that can be shared with your sales team as potential conversation starters.
- If your webinar platform tells you when viewers are multitasking, block or tune out that information. It will only distract you. Instead, remember at all times that your top goal is to be engaging and informative.
- Multiple presenters should be working with an agenda that makes it clear which one is presenting at any given point in the event, so they don't talk over each other.
- Simple courtesies go a long way towards building

true dialogue. When reading out a comment or answering a question, be conscious about using the audience member's name. Genuine, personalized responses will spur more engagement.

- To jumpstart the Q&A portion of the event, be prepared with three to five seed questions that set the tone for the session and fill in gaps between questions from participants. Speakers can review these in advance and formulate answers, which will help the Q&A flow smoothly.
- Consider asking the presenter ahead of time if they would like to have a question or two thrown in during the presentation. This helps break things up and grabs the listener's attention.
- Encourage questions throughout the event, even if you will be answering them at the end of the event. This will keep the audience engaged.
- Tell the audience that if you don't get to all the questions within the allotted time, you will follow up with the questioners directly. Then be absolutely sure to do it.
- Use Twitter as a Q&A platform; this will generate buzz for your brand and webinar, especially if those tweeting remember to use your hashtag.

End gracefully

- End at the publicized time, or before it.
- Close with thanking your presenter and your audience, and show a "Thank You" slide that offers a call to action, such as contact information, or next steps to take.

Follow-up

With prospects

- A day after the webinar (or sooner), email all those who attended it to thank them for their time.
- If a recording of the webinar is available, include it.
- Send a "Sorry we missed you" email to people who registered but didn't attend, and provide a link to the recorded webinar.
- Reward people who attended the webinar by sending them exclusive offers or previews. This will encourage them to attend more webinars in the future, and may also get them interested in your product.
- End with a call to action. Include an opt-in option for promotional emails and updates about your organization. Those who opt in can then be included in nurture marketing campaigns.
- Give attendees an opportunity to evaluate the webinar with an optional questionnaire. Not only will this help you improve your webinar experience in the future, it will also increase your credibility, as you will appear open to criticism and willing to learn.
- Use metrics to track which topics are relevant to your audience, and tailor future presentations accordingly.

Follow up on your return on investment

Be sure to include webinar attendance in a prospect's activity history, so you can track conversions and follow them through to revenue.

With your team

Debrief with your team and evaluate what was done well and what could have been better.

- Did you get the number of attendees you hoped for?
- Which promotion channels worked best?
- Did the calls-to-action in your follow-up emails work?
- How many conversions did you get, of what kind?
- Did your speaker deliver?
- Look at your performance reports. Were people interested and engaged? Did they stay for the whole presentation? Can you pinpoint where the content held or lost viewers?

On-demand webinars

An informative, entertaining webinar shouldn't be a one-time event – recorded webinars can provide education and lead generation for months or even years after the initial broadcast. On-demand webinars are also extremely convenient for people who are interested in a webinar but might have other obligations at the time it's scheduled.

The beauty of the on-demand webinar format is that it has the energy and personalization of a live event but can also serve as persistent promotional content on your website and a rich mine for future presentations.

- In your promotional emails, it's a good idea to mention that a recording of the webinar will be made available after the fact; this will encourage people to sign up even if they have other commitments.
- Consider gating the on-demand webinar if it's downloaded, or require people to provide their email addresses and send a link to their email.

- Leverage webinar content again and again, in multiple formats. Consider transcribing it and formatting the transcript into a white paper.
- Make sure to record and save the webinar in a few different formats to avoid technical difficulties that result in a failure to produce even one recording.
- Test the recording before you put it up.
- You can make the recording available for a limited amount of time (e.g., a few months); this may encourage people to view it before the time runs out.

About Act-On Software

Act-On Software's integrated marketing automation suite is the foundation of successful marketing programs, from simple and direct, to sophisticated and globally executed campaigns.

Act-On is a cloud-based marketing platform that enables marketers to tie inbound, outbound and nurturing programs together in a single dashboard. Scalable and intuitive, Act-On supports sales as well as marketing and is fast to implement, easy to use, and powerful.

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