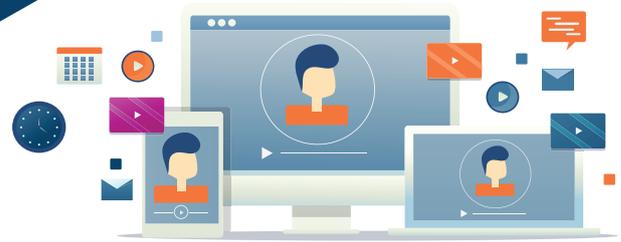


# 11 Steps to Organizing a Successful Webinar



Webinars are a key instrument in the toolkit of a marketer. The reason is simple: when organized well, they are engaging, work across all phases in the buying cycle and allow you to reach hundreds or even thousands of people across the world. They are very cost effective and can be tightly integrated into your marketing automation initiatives.

As many of you know however, pulling off a great webinar is hard. There are many moving parts that need to come together to result in that great and seamless webinar experience. Furthermore, with increased competition for your audience, you will need to work harder to reach your attendance goals. Engaging and interacting with your audience during the event is key.

**To help you with that, we have pulled together a no-nonsense overview of steps to take and points to consider in organizing a successful webinar and creating a great experience for your audience.**

## The steps to take

1. Define the goals of your webinar
2. Be clear about who this webinar is for
3. Select the topic of your webinar
4. Decide on the format of your webinar
5. Realize a webinar takes a team
6. Plan your promotions and communications flow
7. Execute on the plan
8. Prepare and practice
9. Go live
10. Steps to take straight after the webinar
11. Analyze and follow-up

### *plus:*

An example webinar script to help you start and finish your webinar

## 1. Define the goals of your webinar

- What are your objectives for the webinar? What do you hope to achieve with the webinar?
- What phase in the buying cycle are you focusing on?
  - Awareness → identify new leads
  - Consideration → identifying opportunities
  - Justification → progressing opportunities
  - Purchase → closing opportunities
  - Adoption → driving usage
  - Retention → driving engagement
  - Expansion → driving upsell and cross-sell
  - Loyalty → building brand advocates
- What goals do you have for the webinar? How many attendees are you targeting to have?
- What metrics will you need to capture to support your goals? For example:
  - Registrations
  - Attendance
  - Attendance duration
  - Asked questions
  - Viewed Recording
  - Answered polls
  - Signed up for demo
  - Scheduled an appointment
- What do you plan to happen after the webinar? Is your webinar a one-off activity or is it going to be embedded in continuing program or funnel process? In this early phase already think about the follow-up and link to other campaigns and initiatives to guide your audience through the buying cycle.

## 2. Be clear about who this webinar is for

- Who is the your audience for the webinar?
  - Prospects
  - Customers
  - Influencers
  - Partners
  - Staff
- Identify what needs, pain points and interests your audience may have. If you have defined your Personas as part of your marketing strategy, these can be a source of insight.
- What geographic, demographic and firmographic criteria will your webinar be focused on? Consider country, industry, organization, job title, etc.

- What information do you already have and what information do you need to capture to follow up on your webinar after the event?
- Are you able to reach your audience to invite them? Make sure to review the channels you have available to invite your audience, for example through:
  - Email invites using lists and segments in your CRM or Marketing Automation Platform
  - Social and Search Engine Advertising
  - Promotions on your website
  - Channel Partners

### 3. Select the topic of your webinar

- Is your webinar part of a wider campaign or marketing program? If so, this will influence the direction for your topics and promotions.
- Is your webinar going to be a stand-alone session or is it going to be part of a series? If it is part of a series, you'll have to consider the wider theme, description and timing of the series.
- Choose a topic that aligns with your strengths and the needs and interests of your audience:
  - Look at what blog posts, articles, whitepapers or videos are popular
  - Use existing survey results or send a survey to narrow down content ideas
  - Review social media interactions to help identify topics
  - Look at questions and comments from previous webinars

Make sure your topic is focused on solving a problem or providing insights rather than focusing on just a sales pitch for your product or survey. The more recent your content, the more interesting it will be for your audience.

- Create a short description of your webinar.
- Describe clearly what your audience will get from the webinar so that it is clear for them why they should attend.
- Determine a Call to Action for your webinar. What is the hook for someone to register and attend?
- Pick a webinar title. Make sure it is short and action orientated.
- Set the date and time of your webinar(s) and put them on your schedule.

## 4. Decide on the format of your webinar

- What format will your webinar take?
  - An interactive live webinar
  - A webcast or live stream over social media (YouTube, Facebook, Twitter)
  - An automated simulated live webinar (sometimes also called an 'evergreen' or 'simulive' webinar) in one or more time-zones
  - Straight to video on demand
- How long will your webinar be? Most webinars are between 45 and 60 minutes including Q&A
- What format will your session take?
  - Just slides with audio
  - A webcam
  - Multiple webcams
  - Broadcast quality video with a stage
- How will your presentation take place?
  - Just a presenter with slides
  - A live demonstration of a product
  - A moderated panel discussion
  - An interview with one or more subject experts
  - An informal discussion
- Timing: determine what day and time you will be running your event.
  - Research has shown that the best days to host webinars are Tuesday, Wednesday and Thursday. Best time in the day is between 10:00am and noon local time but varies for webinars spanning multiple time zones.
  - With automated simulated live webinars you have the option to webinars according to your attendee's time zone. For live events you'll have to consider how to reach most of your targeted audience. You could for example consider:
    - US: 11am PST (San Francisco) and 2pm EST (New York)
    - Europe and US east coast: 4pm CEST (Amsterdam), 5pm BST (London) and 10am EST (New York)

### Popular Webinar Platforms

- ▶ BigMarker
- ▶ Cisco Webex
- ▶ Clickmeeting
- ▶ Demio
- ▶ Easywebinar
- ▶ EverWebinar
- ▶ GoToWebinar
- ▶ JetWebinar
- ▶ Livestorm
- ▶ ON24
- ▶ WebinarJam
- ▶ WebinarNinja
- ▶ Zoom Webinars

## 5. Realize a webinar takes a team

### Roles and responsibilities

Depending on your webinar and its complexity, you will likely have multiple people involved in your webinar. An overview of the roles and responsibilities:

- **Webinar project manager or producer:** the person who owns the webinar project, keeps an eye on the schedule and the to-dos to make the webinar a success
- **Host or moderator:** Introduces the presenter(s) and moderates the chat and questions during the session. A moderator can also help with muting and unmuting guest speakers and potential audience members during Q&A.
- **Speaker(s) or presenter(s):** One or more persons who will be presenting your webinar
- **Technical support:** for some webinars it may be good to have someone available that can provide technical support during the session. When you are dealing with multiple webcams or are doing a product demonstration it is good to have someone with technical knowledge available.

Some webinar platform providers provide technology and moderator support services for a fee.

- **Promotion:** The person(s) who are responsible for promoting the event through inbound and outbound channels
- **Social media:** The team member(s) responsible for promoting the webinar on social media
- **Video team:** in case you are organizing a broadcast quality webinar with a stage or multiple cameras, you will often need the help of a video team that looks after the cameras, audio and lighting.

### Working with speaker(s)

- Pick a presenter who is knowledgeable, has a solid reputation and has good presentation skills.
- Make sure the presenter is available not just for the webinar itself but also for the prep and answer questions from the webinar as part of the follow-up.
- Choose the presentation format that aligns best with your presenter's skills and experience: Some presenters do better in an interview or panel discussion.
- Don't keep your presenter in the dark and provide a speaker brief that includes:
  - The webinar title, description and intended audience
  - Tone of the webinar
  - How long the webinar will take
  - Explain the topic and subtopics you want them to cover
  - Any Call to Actions you want them to include
  - Any topics to avoid
  - Provide a presentation template
  - Dress code in case of webcam / webcast / broadcast session

- Give them clear dates on when:
  - The slides are due
  - The rehearsal date and time
  - The go-live date and time
  
- Plan B:** always have a backup plan just in case your speaker can't make it at the very last moment. If you have built up a large audience, you may not want to cancel. Is another member of the team able to take over the presentation? Can you switch the live session with a recording?

## 6. Plan your promotions and communications flow

- Create a campaign brief for your webinar promotions. This will help align across your team, external contributors, partners and other stakeholders within the organization.
- Align the theme and creative elements for your webinar across all promotions and channels – and stay on brand.
- Create UTM tracking codes for your links in emails, website and social media so that you can track the effectiveness of your promotions.
- To drive more interest, consider creating a simple short video (30 seconds to 1 minute) that you can use in your promotions.
- **Email invites**
  - Determine the best schedule for your automated email invites (for example: #1: 2-weeks-out, #2: 1-week-out, #3: 1 day before)
  - Define the lists and segmentation for your CRM / Marketing Automation Platform
  - Create templates for invites that you and your wider team can use for personal invites
- **Social media invites**
  - Create a series of messages / creatives that you can use to invite people to your webinar via social media channels. Best practice is to use 3 different creatives
  - Schedule a regular cadence for the invites or use organic promotions
  - Leverage paid advertising and retargeting to drive more registrations
- **Emails to registrants**
  - Registration confirmation with a link to a save-to-calendar option and link to share and promote the session details on their personal social media channels
  - Reminder of the upcoming webinar the day before the session
  - Reminder of the upcoming webinar an hour before the session

- To drive interest for the audience and insights for you as organizer, invite registrants to answer a few questions a couple of days before the event via a survey or an email. For example: *“our speaker would like to know more about you prior to the event. Please answer this very short survey. We will aggregate all responses (anonymously) and go over the results during the webinar.”*

- **Landing page with registration form**

- Make sure the look-and-feel of the landing page is aligned with your brand and other webinar promotions
- Use title, description and reasons for attendees to join
- Explain when the webinar will be taking place, keeping timezones into account
- Add a countdown timer on the page to create a sense of urgency
- Use a short form with progressive profiling if available

- **Your website:** Plan to promote the webinar on several key locations on your website such as your home page, your blog and events page

## 7. Execute on the plan

- **Set up your webinar solution:**

- Set up the webinar in your webinar tool
- Review and adapt the look and feel of your webinar tool to align with your brand and session
- Ensure your webinar solution has an integration with your Marketing Automation Platform or CRM system
- Create the links to the webinar registration for use in the promotions. Don't forget your UTM tags

- **Build the presentation:**

- Start with an outline
- Ensure your webinar has an agenda that will make people interested in attending the session until the end
- Incorporate interaction
- Build to the style of the presenters
- Practice timings. The ideal length of a webinar with Q&A is between 45 and 60 minutes with the last 10 minutes for Q&A.
- Add housekeeping slides if necessary
- If your webinar is going to be an evergreen or automated webinar that you want to use for longer (and not just a recording) make sure that you don't mention dates in the session or presentation

## ■ Plan for interactivity and engagement:

- Optimize your session and script for interactivity
- Ensure you understand how you can use and track interactions during and after the session
- There are many different options for interaction:
  - Chat: plan some standard chat questions that you or your host can ask
  - Polls: set up 2-3 poll questions that you can ask and review during the session
  - Q&A: hold a Q&A during or at the end of your session. Plan some seed questions in case you are working with a shy audience
  - Survey: plan for a survey directly after the webinar
  - Social Media: engage on the topic before and during the webinar.
  - Content downloads: prepare and promote content that the audience can download when attending the conference
  - Appointment setting: promote scheduling an appointment in your webinar
  - Demo or trial requests: promote demos or trials options in your webinar
- Set goals for audience engagement, such as attendance, % of time they joined, and number of other interactions

## ■ Scheduling: plan your milestones in your calendar and that of others involved

## ■ Prep your technology:

- Make sure you have the right technology to host your session: make sure you have a good webcam, microphone and internet connection. Don't rely on speakerphones or use dial-in audio.
- Don't forget about power cables for your laptop(s).

## ■ Location:

- Make sure you reserve the right space or room you need to host your session.
- Make sure your room is not too noisy and, if you use a webcam, has good lighting

## ■ Get ready to follow-up: Work on the follow-up before the event so you don't waste valuable time after the event when you should be following up with your attendees.

- Prepare a sales cheat sheet for your sales team with:
  - description of the webinar
  - follow-up email template
  - call script
  - qualifying questions

## ■ Promote: Create and execute on your promotional plan

## 8. Prepare and practice

- Rehearse 3-5 days before the event, doing a dry run with your presenters and any other planned guests. This is also a good time to get to know your presenter(s) if you haven't worked with them before.
- Rehearse the webinar flow and interactions
- Practice using the webinar solution and recording the session
- Test the mute and unmute of the solution and handling of any slides. Try to avoid the multiple 'can you hear me now?' and 'can you see the slides' situations.
- Test all the other equipment you may need
- Work through any tech issues before the big day
- Create or update your webinar script
- Refine your slides
- Share the webinar show flow and any changes with your webinar team

## 9. Go live

- Make sure you and your presenters arrive at least 30 minutes early
- Are you using a more complex webcast or livestream then make sure you arrive 60 minutes early to set everything up and work through any tech issues
  - For webcam presentations, ensure your webcam is at eyeline level and ensure you are in a well-lit room with a good background
  - Upload your presentation and other materials
  - Test cameras and microphones
- **Important:** don't forget to record your session. We have seen missed opportunities where webinars have not been recorded or where the recording started mid-presentation.
- Avoid last minute changes in setup or presentation. Many webinars have seen lower results due to problems caused by last minute changes.

## 10. Steps to take straight after the webinar

- Share your webinar recording within 24-48 hours
- Send follow-up email with link to recording immediately to everyone: those who attended and those who could not join
- Publish the recording for on-demand viewing
- Send a survey to get feedback
- Implement your follow-up promotions. You have captured their attention, don't let it slip
- Send a thank-you note to all those who have helped with the event, this will help you with future webinars

## 11. Analyze and follow up

- Make notes of your experience of running the webinar and any issues you may have encountered
- Capture and review audience registration, attendance, drop-off and engagement information
- Verify that your webinar metrics have been captured in your CRM or Marketing Automaton Platform
- Qualify your audience members:
  - Registered and attended
  - Attended for more than x minutes
  - Took one or more actions:
    - Questions asked
    - Content downloaded
    - Key CTAs
    - Requests for information
- Give sales an overview of qualified attendees with interaction details plus the sales cheat sheet that you developed earlier

### Need help with your digital events?

If you have any questions or would like to know more about driving marketing results, go-to-market strategies, going digital and leveraging marketing technology let us know. We would love to hear from you.

Let us know **how**  
**we can help** you

---

+ 31 85 06 06 789

hello@restlessmarketing.io

**restlessmarketing.io**

## Example Webinar Script

### Start of the Webinar

#### Type in the chat

“Welcome to today’s session. Feel free to post any questions in the chat window”

#### Announce:

“Welcome everybody and thank you for joining today’s webinar.”

“Today we will be talking about [topic]”

“My name is [your Name] and I will be your [host/moderator] [presenter] for today’s session.”

[If you are presenting: describe your experience in the industry, how long you have been focused on the topic, and how you have helped people similar to your audience]

[If you have a speaker]: “Our webinar today will be presented by [name of speaker], [title] at [company].”

[If you have guest(s)]: “We will be joined today by [name of speaker], [title] at [company] who has [highlight experience / background / relevance of your guest].”

“If you have any questions for us during today’s session, do please put them in the chat window. We will try to answer them at the end of the webinar. If we do not have time for your question today, we will try to answer them after the session.”

“Today’s session will last for approximately [time] minutes and will be recorded.”

[If you are moderating]: “With that of the way, I’d like to hand the session over to [speaker name].”

[If you are presenting]: “Let’s jump right in.”

## Q&A at the end of the session

### Host/Moderator to announce:

[If you are moderating]: “Thank you [speaker name]. We now have 10 mins to answer any of your questions. Please type your questions into the chat window if you haven’t done so already.

[If you are presenting]: “We now have some time to answer any questions you may have. Please type your questions into the chat window if you haven’t done so already.”

[go through the questions and repeat relevant ones for you and speaker to answer]

[if you haven’t been able to answer all questions or if you are using setting up an evergreen automated webinar]: “Thank you for the great questions. We will be going through the questions you asked and if we have not been able to answer yours yet, we will make sure we will send you an email with an answer to your question in the next day or so.”

## Closing the session

### Announce

[If you are moderating]: “With that we have come to the end of today’s session. Thank you [speaker name] for today’s webinar and thank you to all of our guests for joining this session.”

[If you are presenting]: “With that we have come to the end of today’s session. Thank you to all of you for joining this session.”

[if you have an offer or call to action for your audience, repeat it here]

“You will all automatically receive an email with a link to the recording and short survey in the next days.”

“If you have any further questions following the webinar, please email us at [email address]”

“Thank you again to everyone joining us and enjoy the rest of your day. Bye!”

### Type in the chat box

“Thank you all for joining the session. Have a great day. “