

# Producing a High-Quality Webinar

Webinar 101:

“A portmanteau of web and seminar, meaning a presentation, lecture or workshop that is transmitted over the Web.”

– *Wikipedia*

Wallace Best Practice Guides  
Guide One, 2014



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Should I Hold  
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## Producing a High-Quality Webinar: Overview

### Wallace Best Practices Guide #1

Use of webinars has grown exponentially—more and more of us rely on the convenience of online conferencing technology to do what only in-person events could accomplish in the past. Unfortunately, as good as this technology is, it is not always used effectively. For all the virtual sessions that are interesting, seamless and well-attended, many fail to engage audiences due to technical difficulties and dull or uncoordinated presentations.

Based on the experiences of The Wallace Foundation, its grantees and its communications firm, The Hatcher Group, this *Best Practice Guide: Producing a High-quality Webinar* is designed to help organizers avoid missteps and produce well-staged and well-promoted online events that offer relevant, useful content in an engaging way to targeted audiences.

Before planning begins, however, it makes sense to check whether the webinar is the right delivery system for what you want to accomplish (see *Should I Hold a Webinar?* on page 2). If you go ahead, we recommend using a system such as WebEx Assist, with an expert on hand for technical support to insure a smooth webinar.



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## Should I Hold a Webinar?

Whether you want to reach a group of 20 or 200, you should only choose webinar technology when it is the best or only way to meet your objectives. When visuals aren't needed or events are smaller and/or less formal, webinars can be less useful; at those times, it can be more cost effective and easier to use conference calls or free screen-sharing services, such as Join.Me

Webinars are a good choice when your audience would benefit from seeing slides. Examples:

- Connect target audiences to specific ideas or insights in new reports;
- Describe a complex process to a group of individuals who would benefit from visuals;
- Bring multiple perspectives to an in-depth discussion of a specific topic;
- Review reports, financial documents or other materials in which everyone needs to look at the same page at the same time; or
- Demonstrate a new tool.



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## Planning: 6 to 8 Weeks in Advance

High-quality webinars don't just happen. Instead, you need to begin preparing and promoting at least six-to-eight weeks before the live event. Ask yourself:

What do I want to accomplish? What audiences am I trying to reach—and why?  
What are my learning goals for these audiences?

The bigger the audience and the more public the event, the further ahead you'll need to plan.

### Organizing Content:

- *Drafting a Rough Outline:* Before inviting speakers, define your preliminary learning goals and main themes, knowing they will sharpen and be refined. Think about what you want to achieve.
- *Setting a Timeframe:* Most webinars should not exceed an hour—already a significant request of busy people's time. Plan for 15 minutes of Q&A (see Engaging Audiences on page 7).

### Inviting Speakers and the Moderator:

- *Inviting the Moderator:* Select a moderator thoughtfully, someone who is comfortable in the online environment and able to introduce speakers, smooth transitions, facilitate Q&A and navigate glitches—all in a conversational style. Involve your moderator in framing the event and helping to prepare speakers by determining the speaking order, the relevant points and the handling of visual material. (Occasionally, one person will take on the role of both moderator and presenter.)



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## Planning: 6 to 8 Weeks in Advance, Cont.

- *Inviting Speakers:* Think first about the kinds of speakers to help you achieve your learning goals. While it's important to get different perspectives (in terms of point of view, experience or expertise), limit it to two or three speakers. (If more, they will need to be highly scripted.) Several voices in short segments will keep it lively. Create a priority list of potential speakers. Have you heard them speak before? If not, do you know someone who has?

### Inviting Audiences and Scheduling:

- *Inviting the Audience:* Determine the size and scope of your target audience and create a plan to invite them, promoting the event more frequently as you get closer to the event.
- *Scheduling the Event:* Consider the best times for the audience you're seeking to reach, check relevant calendars to find the best day and time and schedule the webinar. You also need to schedule prep activity: including one or two advance calls with the speakers and one tech session a day before. It is helpful to draft a timeline of action items leading up to the event date.



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## Preparing: 1 to 4 Weeks in Advance

- *Holding Advance Planning Calls:* Three-to-four weeks in advance, the moderator should lead a planning call with the speakers to identify the webinar's purpose and central themes. The moderator should ask the speakers what key points, ideas and examples they would like to share. During this call, the moderator should share the outline for the webinar and discuss the allotted time for each speaker.
- *Producing the PowerPoint Presentation:* At least two weeks in advance, ask speakers to submit slides that make the points they raise in the planning call. The moderator and other relevant staff should approve slides to ensure quality and make sure the content flows logically, draws on credible evidence and is engaging and clear.

Add an introductory slide, with webinar title, organizers' logo and website URLs; slides for each speaker, with a headshot, title and organization or short bio material; and ending slides with presenters' contact information. (For Wallace-sponsored webinars, a final slide should include the Wallace logo and text: "For more information, visit the Wallace Knowledge Center: [wallacefoundation.org](http://wallacefoundation.org).")

- *Guiding Moderators:* The moderator needs to provide context for insights or arguments made by the speakers. If someone is talking about how to improve principal preparation, for example, the moderator may prompt the speaker to explain why such training needs to improve. Moderators should have a few questions and answers prepared in advance. We recommend the moderator asking a few questions after each speaker's presentation.



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## Preparing: 1-4 Weeks in Advance, Cont.

- *Holding a Content Dress Rehearsal:* At least a week in advance, the moderator should hold a call with all the speakers during which they all run through their slides.
- *Holding a Technical Dry Run:* At least a day or two before, the moderator should lead speakers through a technical run through with final slides. If you use a webinar service with a live assistant/ producer, they will manage the technical dry run. The moderator or producer will script and rehearse transitions between speakers and practice with the technology so there won't be awkward silences between speakers. Other considerations:
  - 1) During the dry run, you can decide whether one person will forward all slides or whether the panelists will forward their own slides; and whether the moderator will introduce the speakers or the speakers will introduce themselves.
  - 2) Assign someone (preferably the moderator) to manage questions and run through a sample Q&A session.
  - 3) Ask presenters to use the same tech equipment, including phones, for the rehearsal that they will use during the live webinar.
  - 4) Ensure that the webinar platform is correctly installed on all participants' computers.



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## Engaging Audiences through Q&A and Polls

A well-planned webinar values audience participation, not only to answer questions but also to learn what captured their interest. Plan on a full 15 minutes for Q&A:

- The moderator should have a list of questions ready to ask speakers.
- The moderator can collect questions throughout the webinar via the chat function and select the best ones to ask.
- Use the technology to collect questions in advance by allowing people to submit questions during the registration process.
- Assign someone to look at participation rates to see if people leave the webinar at certain points. This can help improve the structure for future presentations.

### Try Instant Polling as a Way to Engage the Audience:

- Polls are easy to create. Using the webinar software, the webinar host should set up the poll in advance. Questions for the audience will appear on their screens.
- Polls can be taken at any point in the presentation. Because participants can see live results, they're an especially good conversation starter.
- Just be careful not to overdo it. Here's one possibility: Ask two questions at the beginning to get a sense of the audience, one in the middle to see what is resonating and one at the end to see how the audience will use what they learned.





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## Promoting: 1 to 4 Weeks in Advance

After you have determined the size and scope of your desired audience, follow the plan you created to invite them. Even with great speakers and content, you need to market your event competitively...and, expect attendance to be only half of registrations!

- *Using E-communication:* About a month in advance, promote through e-blasts and newsletters. Follow up with additional e-blasts as the date gets closer.
- *Network Outreach:* Promote your webinar by asking network members and other colleagues to share with their lists.
- *Promoting through Media:* If your event is tied to a new study or newsworthy event and also open to the public, issue a media advisory a week or so before the webinar.



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## Presenting: Day of Webinar

Before you begin, remember to do the following:

- Ask presenters to **log in 30 minutes before** the webinar starts.
- As the start time draws near, **let people know the webinar** will begin soon either through a welcome slide or simply by telling them.
- **Start 2-3 minutes** after the hour and always end on time.
- **Give technical directions** at the beginning, such as how participants can troubleshoot their audio, who to contact for technical support, and what to do if they get disconnected and how to use the webinar software, including how to ask questions. Remind people how to ask questions several times throughout the presentation.
- **Speak slowly and in a conversational tone.** Watch the “ums” and “you knows.” Get comfortable with your content.



# Managing the Technical

Technology should enhance the participant's experience, not distract from it. Follow the tips below to avoid technical glitches:

- *Take Advantage of Technical Assistance:* By using a webinar system such as WebEx Assist, you get live assistance throughout. Regardless, practice beforehand to gain comfort with the technology.
- *Determine Who Will Advance the Slides:* This should be done during the dry-run, not the day of the webinar.
- *Have Help Available:* Organizers and speakers should lean on assistants and IT staffers for help logging on.
- *Manage Timing:* Keep speakers muted until 15 minutes before the webinar begins and then check to make sure all the speakers are present. Do a time-check to remind presenters when the webinar will begin.
- *Hold a "Listen-Only" Event:* We recommend keeping attendees muted during the presentation. It's easier to take questions from the audience via the chat function. Opening and closing phone lines for questions can be very distracting.

## Presenter Tips:

- 1) For the audio portion, presenters should use a landline, not a wireless Internet connection.
- 2) Give presenters alternate phone numbers, including your cell phone number, in case of problems. They should also take note of the conference line numbers if disconnected.
- 3) Obtain presenters' email addresses and alternative phone numbers in case they are cut off.
- 4) Thirty minutes prior to start, presenters need to log-in to avoid technical problems.
- 5) Make sure presenters have a printed copy of their slides in case their Internet access fails.

# Managing the Technical, Cont.

## Feedback and Metrics: Post-webinar

It is important to gather feedback to incorporate into future planning:



- *Finding and Archiving Webinar:* To archive a webinar, you must record it through a webinar platform. It will be automatically, temporarily archived and then you can download the webinar to your own files and post it or distribute it.

Don't forget to let attendees know where to find the recording, slide deck and related materials.

- *Conduct a Post-webinar Survey:* To gauge success of the webinar and future interests, conduct a brief survey through the webinar service or third-party service, such as [surveymonkey.com](https://www.surveymonkey.com). Keep the survey to three to four questions.
- *Conduct an After-action Review:* In such a review, ask yourself what you did set out to do, what happened, what lessons you learned and what might you do differently to help improve future webinars.

**Good luck with your webinar!**

## DOs

### *Things to Try*

- **DO** use simple language and visuals, such as bullets, graphics, photos and charts. Use JPEG images and links to relevant reports.
- **DO** determine who will advance the slides in advance—the presenters or the person running the webinar.
- **DO** use a white board feature, if available, as a way of taking and referring to notes.
- **DO** insist that the moderator and speakers log-in 30 minutes before the webinar starts.
- **DO** plan for transitions between speakers. Never try to wing it. This creates a lot of awkward “ums.”
- **DO** try using polls—sparingly—at key moments to engage the audience.
- **DO** have a back-up presenter on call in case the main presenter gets disconnected due to a power outage.

## DON'Ts

### *Things to Avoid*

- **DON'T** use jargon and text-heavy slides.
- **DON'T** leave dead air. If there's a glitch, the moderator should communicate promptly with the audience.
- **DON'T** read your presentation or your slides.
- **DON'T** use a headset, speaker or mobile phone during your presentation.
- **DON'T** run over the scheduled time.
- **DON'T** use video as it often comes out choppy and the sound stutters.