

Managing Successful Webinars: A Marketer's Must-Have Checklist

Introduction

Webinars are a critical component of most B2B marketers' program mixes. This is because webinars have the ability to attract new prospects to your website, while helping move those you are already in touch with further down the sales funnel. Provided you do your own promotion, webinars also hold the advantage of being relatively inexpensive, and when they are sponsored they often add up to an excellent cost per lead.

That said, webinar production should not be taken lightly. Even though online events have now established themselves as a staple in the marketer's diet, managing a successful webinar has to go way beyond the usual meat and potatoes. The audience is granting you their time and attention, two of the most valuable things a busy executive can offer. In exchange, your event needs to provide significant value to those who have chosen to participate.

Two of the best ways to provide excellent value in a webinar are to facilitate social connections and to give the audience actionable tools they can make their own.

How does a webinar differ from a webcast? According to SiriusDecisions:

- **Webinar.** Short for Web-based seminar, this is a presentation, lecture or workshop that is transmitted over the Web. A key feature of a webinar is its interactive element – the ability to give, receive and discuss information.
- **Webcast.** This is a Web-based event where the data transmission works only one way and does allow for much -- or any -- interaction between the presenter and the audience.

What goes into producing a successful webinar? Read on for a checklist of steps to follow pre-, during- and post-webinar for engaging, flawlessly executed events.

Before the webinar:

1. Identify the topic and speakers.

At Marketo, we often launch an entire series of webinars at once. This means identifying the topics months in advance. If you are launching your webinar individually, 8 weeks is usually plenty of time to plan and implement your event.

2. Write an executive summary of the event, including goals.

This will be used to remind the speakers of what content to create, as a means to quickly share information about the event with executive staff, and as a starting point for the press release, emails and landing pages that will promote the event.

3. Create the event in your webinar platform.

There are numerous webinar platforms available, covering a range of features. Some now also integrate with next-generation APIs and connectors, allowing them to easily sync registration information with select marketing automation platforms.

4. Build a webinar landing page.

This is the main interface between your potential attendee and your webinar’s value proposition. Choose a catchy title, and in the messaging, focus on how this will specifically benefit the person deciding whether they should register or not. Make the registration process as simple as possible. Don’t ask too many questions on the form. Consider giving users the option to only get the slides without attending. From tests we’ve conducted at Marketo, we’ve found that 1/3 of registrants like to choose this option.

The screenshot shows a landing page for a webinar titled "Event Marketing Secrets - Webinar". The main content area features a dark blue header with the title "The Business Marketer's Formula for Successful Events" and the date "June 28, 2011 - 11:00 a.m. PT". Below this, it lists speakers: Jon Miller (Marketo), Rachel Thornton (Salesforce.com), and Tamara Mendelsohn (Eventbrite). A prominent orange "REGISTER NOW >>" button is visible. The page includes a detailed description of the event, a list of topics to be covered (e.g., creating events, social media use), and a list of speakers. At the bottom, there are logos for Salesforce, Eventbrite, and Marketo, along with a "Register today" button.

On the right side of the page, there is a registration form titled "Event Marketing Secrets: The Business Marketer's Formula for Successful Events". The form includes a sign-up prompt for a live webinar on June 28, 2011, at 11:00 a.m. PT. The form fields are: First Name, Last Name, Work Email, Job Function (a dropdown menu), and Company. A "Register Now" button is located below the form. A small note at the bottom of the form states: "* Required: We value your privacy".

5. Create the registration flow.

A typical registration flow involves the user getting a follow-up email with instructions on how to access the webinar. Don’t forget to set up a lead scoring campaign to measure this engagement. Depending on the type of webinar, registering for the event could be a mild or strong sign of future buying intent.

6. Enable social sharing.

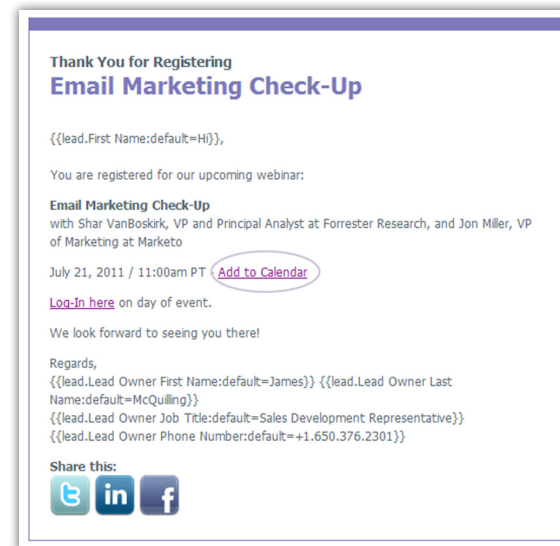
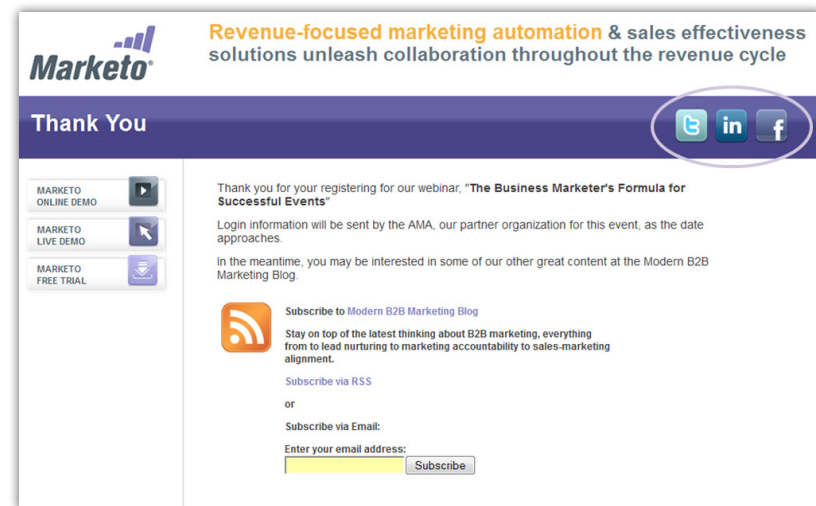
The follow-up email and the “thank you” page that appears after the registration form should both allow for social sharing. At this moment, you have the full attention of the newly registered lead. Let them help you promote the event to their peers, who will likely be just as qualified as they are.

7. Make it easy for registrants to add to their calendar.

Using Outlook or your preferred email/calendar client, create a Calendar (.ics) file that contains the date, time, login information, plus a quick summary of the webinar. This file should be included in the registration follow-up email and/or “thank you” page. A lot of marketers forget that this calendar event description is a decisive factor in whether a registrant will ignore the calendar reminder on the day of the event, or attend.

8. Create email promotional schedule.

We find that 2 to 3 emails, spread out over around 8 – 10 days, are most effective in generating registrations from an email database. A typical email schedule is T – 8 days, T – 4 days, and T – 2 days.



9. Build promotional emails.

The promotional emails, like the webinar landing page, should quickly and clearly communicate the value of attending the event. Explicit targeting tends to work well, e.g. “This webinar is recommended for (name job titles, industry, etc.)” When sending out emails, use the opportunity to A/B test your subject lines, messaging, and images. Consider adding incentives for registering and/or attending, such as a prize drawing during the event.

10. Build reminder emails.

Even though a lot of registrants will choose to add the event to their calendar – either by clicking on a calendar link you send them, or adding it themselves – a reminder email in advance of the webinar is an easy way to help solidify attendance.

11. Promote the event through press including a press release.

You may want to use a press release to announce and help promote your webinar.

12. Promote in social media.

Leverage your existing social networks – and your webinar presenters – to get the word out on Twitter, Facebook, LinkedIn and any other relevant channels. Especially here, where you’re limited to a sentence or two, it is important that you keep the message concise. When sharing the registration

link, use URL tracking parameters so you can later measure exactly where registrations came from. Also, don’t forget to promote more than once prior to the event. Consider creating a social media promotion calendar to ensure you get the greatest possible lift from social media.

13. Promote through search engines and directories.

Once the landing pages are created, an often-missed step is optimizing the page so it ranks in search, then submitting the page to directories that promote events in your industry. In addition, promoting your webinar through relevant terms using pay per click advertising may be an efficient way to drive additional registrants to your event.

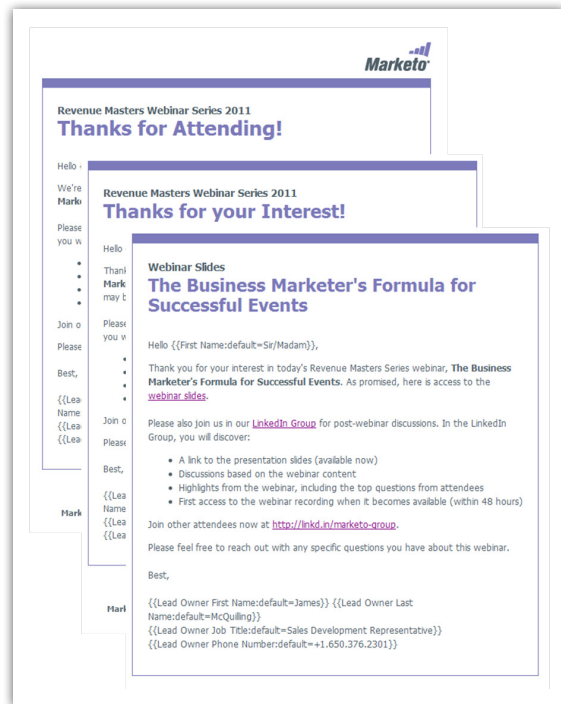
14. Arrange a calling campaign.

Increase engagement with your potential audience by using different mediums to reach out. [This blog post](#), which looks at ways to increase webinar attendance, includes results from a test Marketo conducted with automated voice mail reminders to boost attendance.

15. Design follow-up emails.

A successful webinar experience doesn’t end after the last slide. Prepare your follow-up emails well in advance of the event so you can move quickly once the webinar is done. Create three different versions: one for those who attended, one for those who couldn’t make it, and one for

the group that was interested but requested “slides-only.” The content of the emails should include the presentation take-aways, a link to the slides/recording, and access to further information on your website related to the topic.



16. Build webinar slides.

The topic of slide presentations could be a whole separate blog post, but in short, don't forget these details: include a strategically named Twitter hashtag for your event, and a clear call to action on the last slide.

17. Conduct a dress rehearsal.

Use the webinar dress rehearsal to become comfortable with the webinar platform. Perform a sound check, advance through slides, and practice sending chat messages amongst the presenting team.

18. Build a poll into your webinar.

Most webinar platforms allow you to build custom polls into your presentation. Use this as an opportunity to a) make the event engaging through audience participation, and b) gather aggregate information on your audience.

19. Build an exit poll.

Use this to ask attendees what they thought of the content, how they liked the speaker, and what they're interested in for future webinar topics.

20. Upload slides to SlideShare.net.

SlideShare is ideally suited to host webinar slides. When posting your content, set privacy settings for the time being to: [Private Only me], and check "Allow embedding outside SlideShare". Remember to optimize the SlideShare post, title, and description for SEO. For more information, see our [SlideShare cheat sheet](#).

21. Prepare a new page to house the archived asset on your site.

Your archived webinar, and its related online assets, will need a home base. On this page, you can embed the SlideShare presentation. Prepare this page and keep it private for now.

22. Build a lead scoring campaign for the archived webinar.

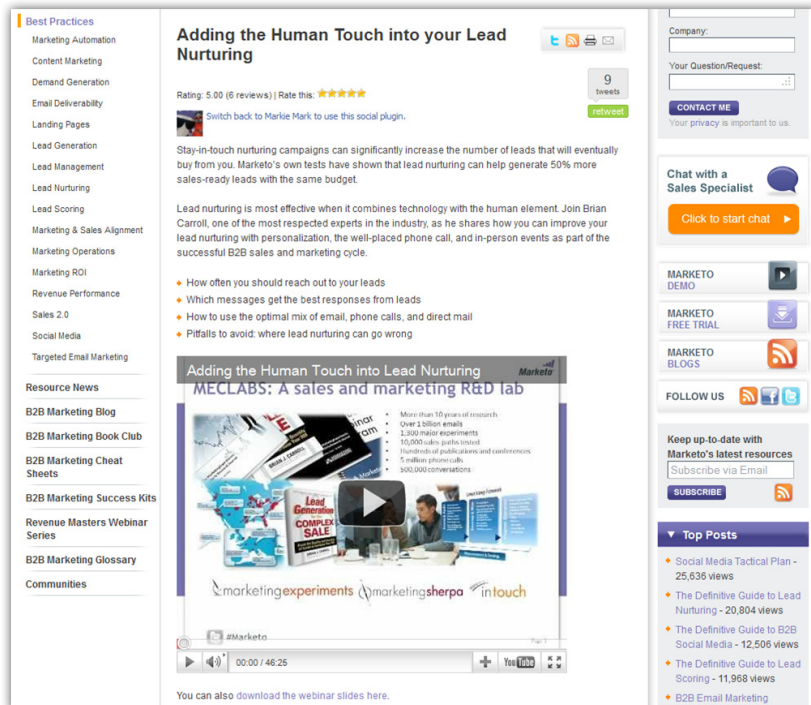
In your marketing automation platform, set up a lead scoring campaign that measures engagement with the new archived asset page.

23. Prepare moderator notes.

With all of the details you need to take care of on the day of the event, a set of moderator notes gives the added security you need. Prepare a few seed questions in advance for the webinar’s Q&A. And write out, word-for-word, the first and last few sentences of the webinar script. It is usually these parts that make a speaker the most nervous.

24. Print out a hard copy of the slides.

Have a paper copy of the slides ready for the event. If your Internet connection ever goes down, a co-presenter can still move forward the slides while you speak from your printed copy.



Day of the Webinar

A big part of webinar strategy is to change the event from a one-to-many to a many-to-many communications medium. Your attendees will likely have a lot in common, and they will get much more out of your event if they can interact with each other.

For the purpose of this checklist, we'll assume the event takes place at 10:00 a.m. Pacific, a time that makes it possible for viewers across North America and night owls in Europe to attend live.

8:00 AM: Prepare to incorporate LinkedIn into the webinar experience. This is part of our webinar follow-up strategy. Prepare a shortened, easy-to-share link to your LinkedIn group, e.g.: <http://linkd.in/marketo-group>

8:30 AM: Have a hard copy of the webinar slides, webinar checklists and moderator notes ready. Write down the dial-in # on the hard copy as a backup. Add notes in your hard copy slides about where you want to mute and un-mute your phone line.

8:30 AM: Switch the archive webinar assets to “public” in SlideShare and the resource page you built for the webinar.

9:00 AM: Post a registration reminder on Twitter using the agreed-upon hashtag. Also, schedule a tweet to go out at 10:00am with the webinar access info. Have someone on your team dedicated to monitoring and engaging from your corporate Twitter account during the webinar.

9:30 AM: Dial-in. Sound check, etc.

10:00 AM: Showtime! Follow your moderator notes closely, especially for the opening few sentences. Check off items as you progress.

10:15 AM: Post a link to the webinar resource page you created (containing embedded SlideShare presentation) in your LinkedIn group as a new discussion.

10:15 AM: Place a 301 redirect from the original webinar registration page to a new resource page. This will ensure you're still capturing intent, even if it's too late for people to join the live event.

10:25 AM: Post notable content from the webinar on Twitter, as well as in your LinkedIn group. These can be drafted in advance by pulling information from the slides.

10:30 AM: Encourage questions from the audience via the webinar chat functionality and on Twitter.

10:50 AM: As you wrap up the webinar, share the link to your LinkedIn group with the audience, giving them instant access to the webinar slides.

10:55 AM: Encourage further Q&A on Twitter and LinkedIn after the webinar.

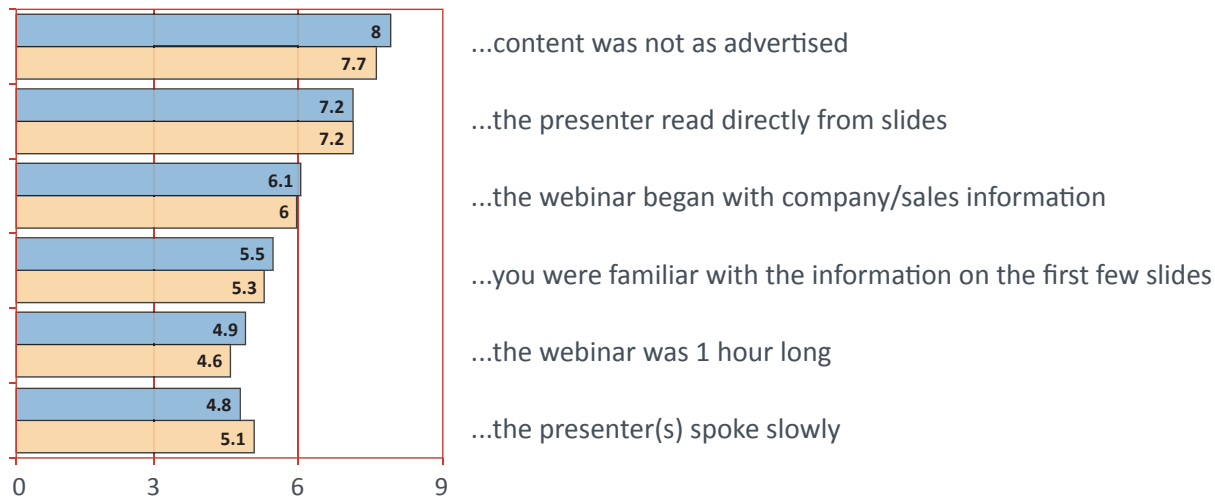
11:30 AM: Publicly thank those who participated in the online discussion, e.g. on Twitter

Any live event will have elements of unpredictability. That’s part of what makes a live event interesting and engaging. But having a thought-out plan will reduce your risks and help you – and your audience – get the most out of the investment.

Did you have a lot of drop-off during the event?

MarketingSherpa conducted research that shares the reasons attendees may drop off your webinars.

How likely would you be to leave a webinar early if...



Source: MarketingSherpa and CMP TechWeb, Business Content Study, March 2008
Methodology: N=880

After the Webinar

You've just wrapped up your online event and are relieved that everything in your webinar went smoothly. Now what?

Although a well-executed webinar gives plenty of reason to celebrate, now is not the time to sit back and relax. Post-event follow-up with attendees – done with good timing – is critical to keeping momentum and turning your B2B marketing investment into qualified sales leads.

Here is the post-event checklist Marketo has developed, based on having run dozens of our own webinars.

1. Activate a follow-up email campaign.

In the “Before the Webinar” part of our webinar checklist, we covered the campaigns that you prepare beforehand, including the emails that will get sent to your event attendees and no-shows. It's important to have these ready to send as soon as possible after the webinar. The email will typically include content related to the event, e.g. presentation slides, background information, access to a post-webinar discussion in your LinkedIn group, etc.

Our experience has shown that a quick follow-up greatly improves your chances of engaging the audience. This is also true in competitive environments, such as a trade show where attendees will be followed up with by multiple vendors. Being the first vendor to follow up leads to a much higher email click-through rate.

2. Follow-up with the prize winner(s).

Having a prize draw during your webinar is a great way to generate excitement about your event. Follow up quickly, and consider even including a hand-written note in the package thanking the prize winner for their interest.

3. Follow-up with top tweeters.

Twitter chats are a great way to enhance the webinar experience and amplify the content's message. We've used a tool called Hashttracking to identify top participants after the event. This gives you a great opportunity to reach out to these individuals directly and thank them.

4. Address live chat questions.

During the webinar, you will hopefully have received questions from the audience. Some of these can be addressed during the webinar, but don't leave it at that. Follow up with each relevant question individually after the event. It is an opportunity to build relationships with your prospects.

5. Conduct a post-webinar survey.

Some webcast platforms allow you to build a feedback survey directly into the webinar experience. With others, you'll have to build your own survey. Regardless, use the opportunity to learn about your audience and gain feedback that will improve your future events. Give room for general comments in the survey, and follow up with testimonial-worthy comments.

6. Set up a redirect from your old registration page to the new archived event page.

You've been promoting your event for the past several weeks, which means you'll still have inbound links, and get traffic to the old registration page. Remember the 301 redirect we mentioned on page 7? If you haven't already, convert this interest into traffic to your archived webinar page by placing a 301 redirect from the old page to the new one. The archived event page can contain the presentation slides, links to related resources, and the event recording as soon as it's available.

7. Update your events listings on your website.

This sounds obvious, but is often forgotten.

8. Process the webinar recording.

We take our event recording, edit it if necessary, and post it to the Marketo channel on YouTube. Once there, it can be embedded on our archived event page.

9. Build a scoring campaign for archived webinar view.

Looking at a webinar can be an indication of future buying intent, especially if the webinar content is related directly to your product or service offering. Build a scoring campaign in your marketing automation platform to track and measure this engagement.

10. Update social media channels to indicate the recording is available.

Before and during the event, you've used LinkedIn, Facebook, Twitter, etc. to promote the event. Once you have the recording, add a note linking to the archived webinar asset.

11. Launch a second email follow-up campaign.

Because it can take several hours to process the webinar recording, we opt to send a quick, initial follow up right after the webinar, linking to the webinar slides and Marketo's LinkedIn Group. A second follow up can be sent, e.g. a day or two later, once the video recording is ready and embedded on your site.

12. Upload webinar to your podcast channel.

Webinars are prime content for portable media. When processing a webinar recording, we also produce a podcast-friendly version and post it to Marketo's podcast channel.

13. Evaluate webinar results and share with the team.

Although some of the results only become evident after a few weeks or months, e.g. pipeline contribution, there are some things you can measure right away to determine how successful your webinar was. Here are some metrics to note:

- Number of registrants
- Number of attendees
- Number of relevant questions
- Number of new leads
- Number of new prospects, i.e. leads in your target market
- Drop-off rate during the event
- Number of mentions and re-tweets on Twitter
- Number of comments/likes/shares on Facebook and LinkedIn
- Minutes (or hours) between end of webinar and your follow up email
- Average ratings from the post-event feedback survey

More important than the numbers themselves is to look at the trends from previous events – this will help you learn how to optimize to improve results.

And finally, share the results with your team and thank them for helping to make it happen!

Now, that's a lot to remember, right? Keep this checklist on hand to ensure you have a successful and profitable webinar.

The Super-Successful Webinar Checklist:

Before the webinar:

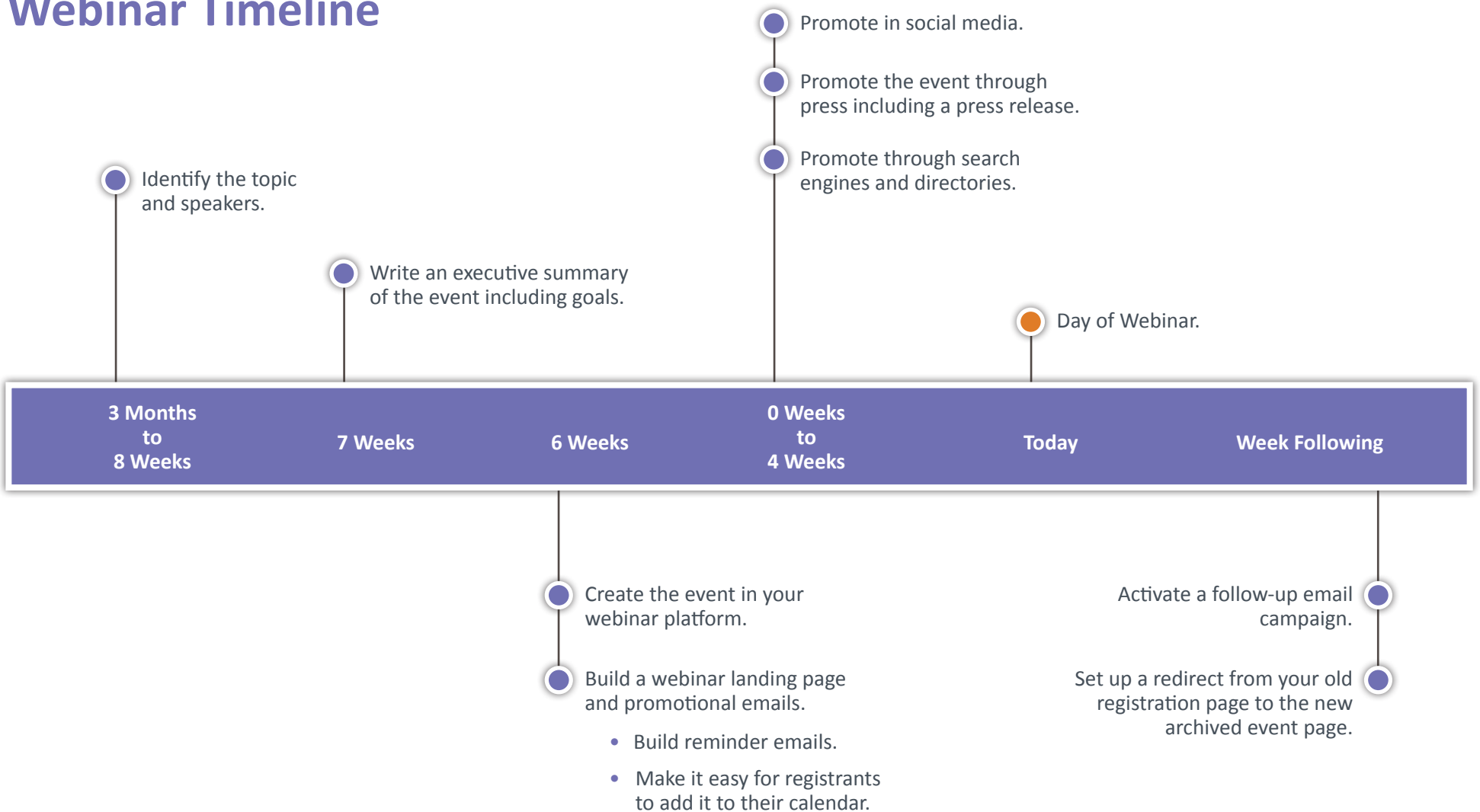
- Create the registration flow.
- Enable social sharing.
- Create email promotional schedule.
- Arrange a calling campaign.
- Design follow-up emails.
- Build poll into webinar.
- Build an exit poll.
- Upload slides to SlideShare.net.
- Prepare a new page to house the archived asset on your site.
- Build a lead scoring campaign for the archived webinar.
- Prepare moderator notes.
- Print out a hard copy of the slides.
- Place a 301 redirect from the original webinar registration page to a new resource page.
- Encourage questions from the audience via the webinar chat functionality and on Twitter.
- Share speaker contact information.
- Thank all that attended and participated. Encourage further Q&A on Twitter and LinkedIn after the webinar.

After the webinar:

Day of webinar:

- Have a hard copy of the webinar slides, webinar checklists and moderator notes.
- Write down the dial-in # on the hard copy as a backup.
- Add notes in your hard copy slides about where you want to mute and un-mute your phone line.
- Post a registration reminder on Twitter using the agreed-upon hashtag.
- Dial-in early and complete a sound check
- Follow-up with the prize winner(s).
- Follow-up with top tweeters.
- Address live chat questions.
- Conduct a post-webinar survey.
- Update your events listings on your website.
- Process the webinar recording.
- Build a scoring campaign for archived webinar view.
- Update social media channels to indicate the recording is available.
- Launch a second email follow-up campaign.
- Upload webinar to your podcast channel.
- Evaluate webinar results and share with the team.

Webinar Timeline



About Marketo

Marketo is the fastest growing provider in Revenue Performance Management. Marketo's powerful yet easy-to-use marketing automation and sales effectiveness solutions transform how marketing and sales teams of all sizes work — and work together — to drive dramatically increased revenue performance and fuel business growth. The company's proven technology, comprehensive services and expert guidance are helping enterprise and mid-market companies around the world to turn marketing from a cost center to a business-building revenue driver. Marketo also offers Spark by Marketo™, a new brand of marketing automation tailored specifically for small businesses — the fastest-growing and largest segment of today's economy.

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