

# Webinar Production 101

May 2, 2019

*Sue*

Welcome to Webinar Production 101! This is Sue Choplin, the SHIP TA Center Training Coordinator, and I'm here to help kick off today's webinar.

In this webinar about webinars, Heather Flory from the SMP Resource Center will share a behind-the-scenes look at the processes the Center uses to produce a webinar from start to finish. You'll hear about tips and suggested practices for all aspects of webinar production, including planning and scheduling, setup logistics, announcing the event, hosting, and more. We hope you also brought your own questions and tips to share during the Q&A session.

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## **Estimated Timing**

Slides 1 – 3: Sue/Intro, part 1 – 5 min

Slides 4 – 7: Heather/Intro, part 2 – 5 min

Slides 8 – 18: Steps to a successful webinar – 35 min

Slides 19 – 21: Pointer arrow activity – 5 min

Slide 22 – 24: Timeline – 5 min

Slides 25 – 27: Resources – 5 min

Slide 28: Q&A and sharing – 30 min

# Welcome!

## SMPs

- Senior Medicare Patrol



## SHIPs

- State Health Insurance Assistance Program



## MIPPAs

- Medicare Improvements for Patients and Providers Act



ACL = Administration for Community Living

*Sue*

We'd like to start today's event by welcoming the SMP, SHIP, and MIPPA networks. All three programs are grantees of ACL, and all three networks are invited to this webinar thanks to the partnership between the SMP, SHIP, and MIPPA centers.

This webinar is being recorded, and the recording will be available in both the SMP and SHIP Resource Libraries by the end of the day tomorrow. A PDF handout of the presentation is already available in both libraries and will be available for download at the end of today's presentation. Resources will also be emailed to the MIPPA listserv.

## Today's Presenter



Heather Flory,  
Training Manager,  
SMP Resource Center

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*Sue*

Our presenter today is Heather Flory, the Training Manager for the SMP Resource Center.

Heather has been presenting webinars for about 15 years, 10 years for the SMP Resource Center and 5 years in the mortgage industry, where she trained over 1,000 loan officers around the country. Heather has presented webinars on topics varying from policies and procedures to systems to new-hire training, and more. She has hosted webinars with presenters from around the country from a number of organizations, including CMS, OIG, FTC, SMP, SHIP, and MIPPA grantees, and other ACL partners. Her audience size has ranged from one-on-one training for new directors to small group training for new SMPs to large events with hundreds of participants. Heather could spend all day talking about webinars, but she has promised to keep her presentation to less than an hour. So now, I'll turn it over to Heather!


## WebEx functionality

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- 1) The **view icon** in the upper right corner changes your view in WebEx.
  - **Tip:** Select the middle option so you can see who's speaking!
- 2) The **toolbar** on the left side of the screen allows you to zoom in and out to show a closer or farther out view of the PowerPoint presentation.
- 3) The **menu** at the bottom allows you to mute your line, open the participants and chat panels, and leave the event.
- 4) The **panels** on the right show participant information, chat, and polling (when in use). Use the arrow and x to open and close the panels.
 


**Tip:** To raise your hand, open the participant panel and click the hand icon in the lower right corner.



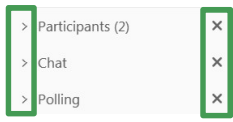
**1**



**3**



**4**



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*Heather – rest of slides*

Thank you, Sue!

Today's webinar, and all of the Center's remote training sessions and meetings, use a web conferencing software called

WebEx. Before we get started with today's orientation, I'd like to make sure you're all familiar with how to use the WebEx software.

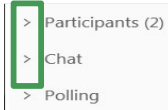
*Point out zoom in/out button on the left.*

## This training will be interactive!

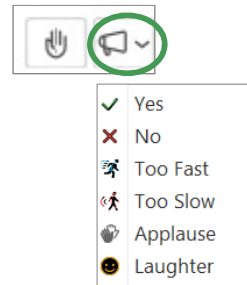
1 Click the Participants and/or Chat button in the menu at the bottom.



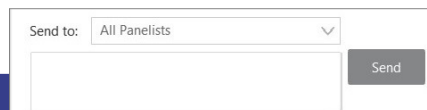
2 Click the arrow(s) to open the Participants and/or Chat panel(s) on the right.



3 Use the buttons at the bottom of the Participants panel to raise your hand or answer yes/no questions.



4 Use the chat panel on the right to chat your comments or questions.



Today's training will be interactive! Let's practice using the buttons in the Participants panel. First, click the Participants button in the menu at the bottom. Next, click the arrow to open the Participants panel on the right.

Click the hand button to raise your hand. A hand will appear next to your name. Practice raising your hand now! To lower your hand, click the hand button again.

To answer yes / no questions, click on the "feedback" dropdown arrow in the lower right corner of the "Participants" panel.

Select the green checkmark for "yes" or the red x for "no".

Feel free to "laugh" or "applaud" anytime!

**If you can't find the right menu options or they aren't working for you, don't let it stress you out! Just follow along and answer on your own. We'll review the answers together.**

**Check-in question: Yes/No: Do you help produce web events for your program, or will you soon?**

Note: This webinar is intended for those who are involved in planning for or hosting webinars for your program. If that's not you, you're welcome to leave the call now. You're also welcome to stay if you're curious, as long as you understand who this webinar is intended for.

# Agenda

Steps to  
successful  
webinar  
production

Related  
resources

Questions and  
sharing

## Poll: Is your SMP/SHIP/MIPPA currently producing webinars? (select all that apply)

- We already offer webinars to our **team members**, and we're looking for ideas on how to make them even better.
- We already offer webinars to **Medicare beneficiaries**, and we're looking for ideas on how to make them even better.
- We're thinking about offering webinars to our **team members**.
- We're thinking about offering webinars to **Medicare beneficiaries**.

When the polling has ended, click the arrow to re-open the Participants panel.

- > Participants
- > Chat
- > Polling

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INTERACTION: Poll

## Steps to a Successful Webinar

Get ready  
to host  
web  
events

Schedule  
and  
announce  
an event

Prepare  
for the  
event

Host the  
event and  
share  
resources

Follow up  
after the  
event



## Step 1: Get ready to host events

### A. Set up your technology and learn how to use it!

- Web conferencing platform: questions to consider
- Related software/programs (e.g. surveys, email program)
- Physical setup... test everything!
  - High-speed, grounded internet connection
  - Computer and backup computer
  - Landline phone
  - Headset
  - Video camera (or not)



**Tip:** See the Webinar Production Checklist for details.

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**Check-in question: Yes/No: How many of you already have a web conferencing platform?**  
The SMP and SHIP Centers currently use WebEx, and the MIPPA Center uses ReadyTalk, but I'm not here to promote any specific web conferencing platform. In Webinar Production 201, we'll hear from panelists who will share their experiences with a variety of platforms.

*See the Webinar Production Checklist for additional talking points.*

## Step 1: Get ready to host events, *cont'd*

### B. Set up your team



- Webinar host(s)
- Presenter(s)
- Webinar coordinator
- Backup/tech support for attendees
- Communications specialist
- PowerPoint developer/editor
- Quality review/second set of eyes

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### **Check-in question: Yes/No: Do you have someone else on your team who can be your second set of eyes?**

If possible, each step of the process that involves content development or data entry (e.g. event setup in your web conferencing platform, communications to attendees, and the PowerPoint presentation) should be reviewed at least twice. Two sets of eyes are best, but if you're the only one, do the work one day and perform your own review the next day, with fresh eyes. However, if you think you don't have someone else to help you, keep in mind that you might have a volunteer on your team who would LOVE to do this type of work with you, and maybe all you have to do is ask.

Tech support for attendees: E.g. the Centers provide WebEx Tips, a direct number for WebEx, plus additional support from the Centers – ideally, someone other than the event host; we also have a backup host in case of emergency; another option is to have a second computer – e.g. laptop logged in as a participant.

## Heather's rule of webinars and technology



It's not a question of whether or not something will go wrong, but what and when. Prepare for the worst and hope for the best!

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Those of you who know me probably know that I'm generally an optimist. Not when it comes to webinars and technology!

Technology's great when it works! Unfortunately, technology doesn't always work. My rule about webinars and technology is that it's not a question of whether or not something will go wrong, but rather what and when. Always be prepared with a backup plan, and be prepared to think on your feet if, or when, something goes wrong.

What's the best way to prepare? (next slide)

## Step 1: Get ready to host events, *cont'd*

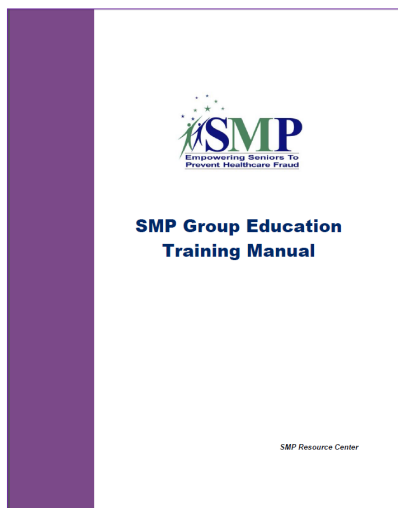
### C. Practice!

- ❑ Practice using your technology.
  - Create practice sessions using the same account and setup as the event.
  - Make sure you are comfortable using any web conferencing tools that may be needed.



Practice! The more you practice and the more you expect something to happen, the more prepared you'll be!

## Step 1: Get ready to host events, *cont'd*



Practice your presentation skills.

- Review these resources for tips on presenting and PowerPoint (PPT) development:
  - Webinar Production Checklist
  - Webinar Presenter Guide (Template)
  - SMP Group Education Training Manual

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**Check-in question: Yes/No: Are you experienced / comfortable giving presentations in person?**

**QUICK DEMO OF RESOURCES**

## Step 2: Schedule and announce an event

### A. Identify the need for a specific webinar.

### B. Determine the webinar basics.

### C. Prepare to announce the webinar.

- Announce 30 days in advance whenever possible.
- Work with the presenter(s) to develop the webinar name, description, date, and time.
- Set up the event in your web conferencing platform.
- Send a calendar meeting request to presenters and panelists.

### D. Announce the webinar.

**Tip:** See the Webinar Production Checklist and Webinar Presenter Guide (Template) for details.

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A: For example, the Centers have certain webinars in our work plans with ACL; others come to us as ACL suggestions, SMP suggestions, ideas based on current program needs, opportunities due to partnerships, etc.

C: Tips on naming your webinar (e.g. NOT How to Host a Webinar Webinar)

Scheduling tip: watch out for holidays and previously scheduled events; consider your audience. The Centers consider federal holidays, Jewish holidays, CMS events, other SMP/SHIP/MIPPA events; we have access to each other's calendars in Outlook. So, for example, I can check Ginny, Nicole, and Sue's calendars when I'm scheduling events and they can do the same.

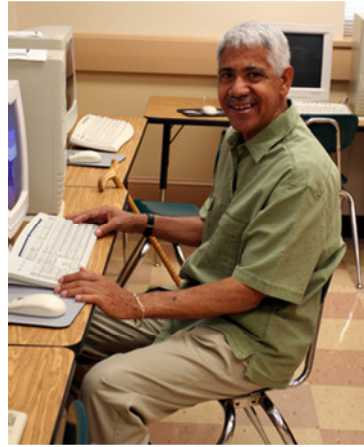
D: Two examples: SHIP TAC (separate email for each event) vs. SMPC (click here/web event calendar); Events calendar in library for both.

*See the Webinar Production Checklist for additional talking points.*

## Step 3: Prepare for the event

### A. Follow up with presenters.

- Schedule a walkthrough meeting.
- Email the presenters to request the PPT and other materials prior to the walkthrough. Include interaction!
- Get the PPT.



**Tip:** See the Webinar Production Checklist and Webinar Presenter Guide (Template).

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**Check-in question: Yes/No: Do you already include interaction in your webinars? How about your in-person training?**

For example, in WebEx we can use yes/no questions, hands, chat, poll, and more. (Talk about the importance of interaction; training vs. a presentation.)

*See the Webinar Production Checklist for additional talking points.*

## Step 3: Prepare for the event, *cont'd*



- B. Hold a walkthrough meeting.**
- C. Complete any final webinar setup.**
- D. Send reminder emails to attendees and presenter(s).**

**Tip:** See the Webinar Production Checklist and Webinar Presenter Guide (Template).

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### **Check-in question: Yes/No: Have you ever held a walkthrough meeting?**

The walkthrough is one of my top suggestions, especially when working with presenters who are new to working with you. The walkthrough allows you to test technology, talk through the flow of the event, develop rapport with presenters, develop questions for interaction, etc. In my opinion, it's the biggest trick to making the magic happen during the event.

*See the Webinar Production Checklist for additional talking points.*



## Step 4: Host the event & share resources

### A. Share resources before and/or after the event.

### B. Host the Event.

- Start the webinar 30 minutes early.
- Share/upload the PPT and any other files, polls, etc.
- Greet attendees as they join, and provide technical assistance.
- At call start time: mute all lines and start the recording.
- Start on schedule and stay on schedule!
- Follow the outline provided to presenters in the reminder email, managing interactions and Q&A.



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*See the Webinar Production Checklist for additional talking points.*

E.g. Centers post PPT/handout 1 day before and recording 1 day after.

## Step 5: Follow up after the event



### A. Hold a webinar post-conference.

### B. Perform follow-up as needed:

- Attendance lists
- Survey results
- Follow-up on unanswered questions
- Grant reporting about the event
- Post recording and additional resources
- Delete announcement templates posted on website

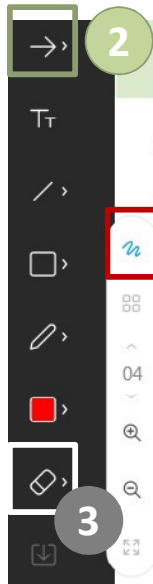
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### **Check-in question: Yes/No: Have you ever held a webinar post-conference?**

It allows you to do a quick check-in about any lingering questions, thank your presenters, and discuss any next steps needed.

*See the Webinar Production Checklist for additional talking points.*

## Annotation Tools... play while you learn!



**1) First, click the “Annotation” icon on the left to open your annotation tools.**

**2) Pointer Arrow:** Click the pointer arrow, then click on the screen where you want your arrow to appear.

**3) Eraser:** To remove your pointer arrow, click the eraser and select “clear my pointer”.

**TURN ON ANNOTATION TOOLS FOR ATTENDEES**

## Which of these is your least favorite?

- Canceling an event after it's announced.
- Announcing an event for the wrong date or time.
- Adding or changing presenters after an event is announced.
- Sending an event invitation to the wrong audience.
- Presenters who read directly from their PPT slides.

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### **POINTER ARROW ACTIVITY**

My least favorite is canceling an event!

One of the most frequent complaints the Center sees in our post-webinar surveys is about presenters who read directly from their slides. Not me, of course, and I hope not you, either!

## Which of these is your favorite strategy for a successful webinar?

- Announce each event 30 days in advance.
- Have a walkthrough meeting.
- Have a second set of eyes.
- Include interaction in your presentation.
- Invite volunteers to participate in the webinar production process.

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### **POINTER ARROW ACTIVITY**

You'll have a chance to share other strategies in just a few minutes when we get to the Q&A and sharing session.

## Webinar production timeline



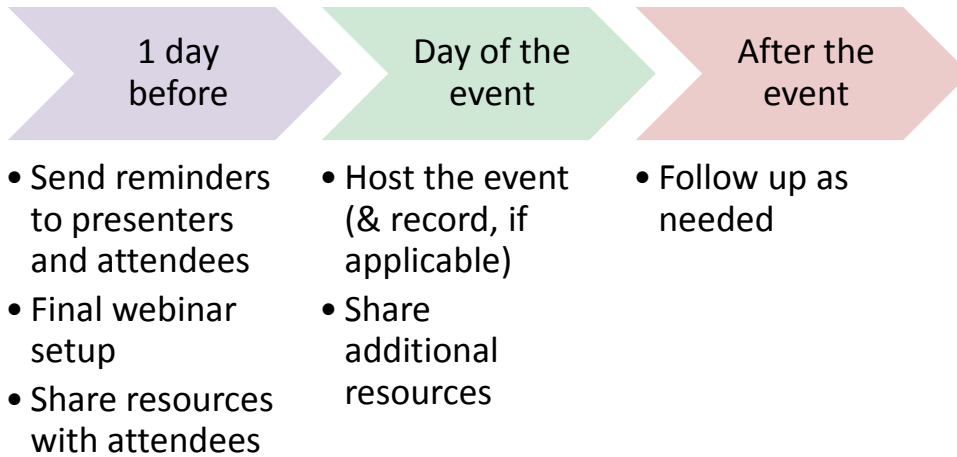
## Webinar production timeline, *cont'd*



- Schedule the walkthrough
- Work with presenters and production team to develop the presentation materials

- Finalize presentation materials
- Hold the walkthrough meeting with presenters and production team
- Send reminder to attendees

## Webinar production timeline, *cont'd*





## Webinar Production 101 resources

PDF handout of today's presentation

Recording



Webinar Production Checklist

Webinar Presenter Guide (Template)

SMP Group Education Training Manual



## Webinar resources in the libraries

SMPs	SHIPs
<ul style="list-style-type: none"><li>• Step 1: Login at <a href="http://www.smpresource.org">www.smpresource.org</a> (click the blue SMP Login padlock). </li><li>• Step 2: View the "Recent" list or conduct a search.<ul style="list-style-type: none"><li>• Tip: Search for keyword "production."</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Step 1: Login at <a href="http://www.shiptacenter.org">www.shiptacenter.org</a> (click the orange SHIP Login padlock). </li><li>• Step 2: Go to the Resource Library and view "Recent"<ul style="list-style-type: none"><li>• Tip: Search for keyword "production."</li></ul></li></ul>

**MIPPAs:** Resources will be emailed to the MIPPA listserv.

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The PowerPoint and other webinar resources for today's event are already available in both the SMP and SHIP Resource Libraries. The recording of today's webinar will be available in both libraries by the end of the day tomorrow.

## Upcoming event...



### **Webinar Production 201**

- Thursday, June 27, 2:30 – 4:00 p.m. Eastern Time
- Hear from SMP, SHIP, and MIPPA panelists, who will share their webinar tips and best practices plus pros and cons of various web conferencing platforms.

## Questions and sharing

**Thank you for participating in today's webinar!  
This presentation is now available for download.**



**If you have questions or want to  
share tips about webinar production...  
Please raise your hand!**

**If you have questions later...**  
SMPs, email: [info@smpresource.org](mailto:info@smpresource.org)  
SHIPs, email: [info@shiptacenter.org](mailto:info@shiptacenter.org)  
MIPPAs, email: [centerforbenefits@ncoa.org](mailto:centerforbenefits@ncoa.org)

*The production of this webinar was supported by grant numbers 90SATC0001 and 90MPCRC0001 from the Administration for Community Living (ACL). Its contents are solely the responsibility of the SMP Resource Center & SHIP TA Center and do not necessarily represent the official views of ACL.*

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Thank you for participating in today's webinar. Today's presentation is now available for download from the presentation window in WebEx.

You are welcome to stay for the optional Q&A session, or to leave at this time. Either way please take our brief survey about today's webinar, which you can take as you leave the event, or in your follow-up email from WebEx. Please note that if you are a call-in user, you will get an email saying we're sorry we missed you. Please follow the instructions in that email to let us know you were here so we can add you to our attendee list.