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This resource provides a suggested checklist for producing webinars in five main steps:

1. Get ready to host web events
2. Schedule and announce an event
3. Prepare for the event
4. Host the event and share resources
5. Follow up after the event

**Note:** This checklist is not intended to be all-inclusive. Update as needed for your program. For example, the processes outlined in this checklist include the possibility that multiple presenters may be involved with the webinar. If you're doing it all yourself, simplify as needed.

**Step 1: Get ready to host web events (planning and setup logistics)**

1. Set up your technology and learn how to use it!
   * **Web conferencing platform: questions to consider**
     + Does your agency already have a platform available? Do they have any guidance, requirements, or restrictions?
     + Do you want to record your events, and if so, is recording available?
     + How much does the web conferencing service cost?
       - Web conferencing costs
       - Conference call costs: dial-in vs. call-back vs. computer audio
       - Recording storage fees
       - Other costs?
     + How many attendees will you have at each event? If needed, can you offer the same event more than once to keep numbers below the maximum?
     + Is the technology compatible with your computer? Will it be compatible with your presenters’ and attendees’ computers? Will regular software updates be required? How easy will it be for attendees to access your events?
     + Is the technology accessible with closed captioning options, etc.?
     + Is technical support provided for hosts, presenters, and/or attendees? Is support provided by phone, email, and/or through an online form?
     + Is training provided for hosts and presenters?
     + What other questions do you need to ask based on your specific needs?
   * **Related software/programs: questions to consider**
     + Will you use a post-webinar survey? If so, which program will you use?
     + Will you use any special software to send your event invitations? e.g. distribution list, email formatting software, etc.
     + What other technology may be needed by your program?
   * **Physical setup: suggested best practices**
     + Internet: Use a high-speed, grounded internet connection instead of wi-fi if possible.
     + Computer: Make sure your computer is compatible with your web conferencing platform. If possible, have a backup computer (e.g. a team-mate nearby who will attend the event with you, or a laptop computer you can use to join the event as an attendee in addition to your main host computer).
     + Phone: Use a landline phone instead of a cell phone if possible. Avoid using speakerphone unless you’ve tested thoroughly, and the sound is loud and clear.
     + Headset: If using a headset, test the sound quality prior to the event and adjust settings as needed.
     + Video camera: Video cameras are not necessarily recommended for webinars / trainings since they may detract from the attendee’s focus on your presentation. They may be useful during web meetings if multiple people in the meeting have access to a camera. If using a video camera, test in advance.
     + Testing: Test all of your technology well in advance of your first event and prior to each event. (See page 3 for practice tips and page 6 for information about webinar walkthrough meetings.)
2. Set up your team! Determine who will fill the following roles, including staff, volunteers, and/or partners:
   * Webinar host(s)
   * Presenter(s)
   * Webinar coordinator
   * Backup/tech support for attendees
   * Communications specialist
   * PowerPoint developer/editor
   * Quality review/second set of eyes

**Tip:** 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.

1. 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 as needed:
       - Share/upload PowerPoint files (PPTs) and other documents.
       - Advance the PPT slides.
       - Share additional documents or desktop if needed.
       - Use interactive features, e.g. polling.
       - Monitor and address Chat and Q&A.
       - Pass control back and forth with other presenters as needed.
       - Be prepared to resolve and / or work around any technical difficulties.
     + Practice joining an event as the host/presenter and as an attendee. The views may be different!
       - Log in as an attendee using a second computer, as mentioned on page 2, or find a buddy to take turns as presenter and attendee.
     + If you will be sharing your screen/desktop, consider these additional tips:
       - Prior to sharing, close out of your email program to prevent email pop-up messages.
       - Avoid desktop clutter and inappropriate background pictures.
       - Avoid any unnecessary mouse movements.
       - If showing a website or computer system, “clear the screen” by providing a brief overview of the various sections of the screen before going into detail on any one area.
   * Practice your presentation skills! Review these resources for tips:
     + Webinar Presenter Guide (Template)
     + SMP Group Education Training Manual

**Step 2: Schedule and announce an event**

1. Identify the need for a specific webinar.
2. Determine the webinar basics, e.g.:
   * What is the webinar topic?
   * What is the goal of the webinar?
   * Who is the intended audience?
   * How much time is needed for the webinar, including the presentation, audience interaction, Q&A, and housekeeping details? For example, in a one-hour webinar:
     + 5 minutes: introductory housekeeping details
     + 30 minutes: presentation
     + 5 – 10 minutes: interactive activities throughout the presentation
     + 5 minutes: wrap-up housekeeping details
     + 10 – 15 minutes: Q&A session
   * How many participants do you anticipate will attend?
   * Who will present the information?
   * Who will host the event?
   * Will you record the event?
3. Prepare to announce the webinar
   * Announce the event at least 30 days in advance whenever possible.
   * Work with the presenter(s) to develop the webinar name, description, date, and time.
     + See the Webinar Presenter Guide (Template) for questions to ask, e.g. will you be allowed to record their presentation?
     + Watch out for holidays and previously-scheduled events.
     + Confirm the event with leadership as needed prior to announcing.
   * Set up the event in your web conferencing platform.
     + Use an Excel file to keep track of all pertinent webinar details.
     + Have your quality control reviewer confirm your data entry, especially the first few times you set up events.
   * Send a calendar meeting request to presenters and panelists.
4. Announce the webinar.
   * Prepare the announcement.
   * Have your quality control team member review your announcement invitation, and make updates as needed.
   * Send the invitation to participants.

**Step 3: Prepare for the event**

1. Follow up with presenters.
   * Schedule a walkthrough meeting.
     + The walkthrough is typically held 1 day to 1 week prior to the webinar.
     + Once scheduled, set up the walkthrough in your web conferencing platform using the same license and setup that will be used for the webinar. Send a calendar meeting request to the presenters.
   * Email the presenters to request the PPT and other materials prior to the walkthrough.
     + Provide presenters with the Webinar Presenter Guide (Template).
     + Request a brief biography (3-5 sentences) and a photo so that you can introduce each presenter at the beginning of the webinar.
     + Set the expectation up front of how much time each presenter will have for their presentation.
     + Set expectations about when the PPT will be needed.
     + Provide tips and guidance for PPT development, e.g.:
       - If a specific PPT template is to be used, make sure to provide it to the presenters when you send your request for their slides. If you have specific PPT design standards, let them know.
       - Encourage presenters to use the notes section of the PPT for their detailed talking points and keep the information on the slide basic and brief.

**Tip:** Don’t just read the slides!

* + - * Encourage presenters to include interaction in their presentation, as allowed by your web conferencing technology.
      * Ensure all documents are cleared for copyright and licensing considerations.
      * **Tip:** Make sure the PPT content can realistically be covered in the amount of time allotted for the presentation!
    - Suggested PPT outline:
      * Title slide
      * Introduce speakers with photos and bios
      * Agenda
        + Use introductory scripting for housekeeping details, e.g. set expectations upfront for Q&A and let participants know if questions will be addressed during the call or at the end, via chat or only over the phone. Mention upfront how to access resources.
      * Content slides
      * Interaction slides, including instructions/screenshots about how to use the web conferencing technology
      * Resources
      * Q&A
  + Get the PPT.
    - Prior to the walkthrough meeting, ensure that you have the PPT slides and any other resources needed for the webinar, so that you can practice using them during the walkthrough.
    - Develop your own slides, as needed. For example, if following the suggested PPT outline provided above, the host and/or production team will probably be the ones to develop all of the slides except the content slides. If the host is also the presenter, also develop content slides as needed.
    - Ask if the presenter(s) will have any other files, websites, etc. to share during the webinar.
      * **Tip:** Videos can be problematic on webinars and are not recommended.
    - Have your quality control team member review the PPT and related resources, and make updates as needed. This may be done before or after the walkthrough meeting, depending on how close the walkthrough is to the webinar date.

1. Hold a walkthrough meeting
   * Review the “Questions to Consider” in the Webinar Presenter Guide (Template) and finalize materials as needed.
   * Practice the web conferencing technology that will be used for the webinar, i.e. advancing PowerPoint slides.
   * Any technology used on the webinar should be tested using the same phone and computer setup which will be used during the actual webinar (by the host and any presenters or backup support). Make sure your phone and other presenters’ phones sound clear and all technology is working as expected.
   * If interaction is not already including in the PPT provided, discuss opportunities for interaction, work together to create polling questions and other interaction.
   * Tip for multiple presenters: discuss timing during the walkthrough and offer to send a “3-minute warning” in the chat to help keep the webinar on schedule.
   * Review and confirm Q&A session procedures. Suggested procedures and tips:
     + Hold questions until the end of the webinar, to ensure that all material is presented in the timeframe allowed.
     + Mute all participants’ lines until the Q&A session. During Q&A, participants can raise their hand to ask a question and the host can un-mute each individual line as needed.
     + Encourage participants to ask questions over the phone instead of using chat, since it’s easier to manage and easier to confirm that the question was heard and answered properly.
     + If long questions are sent in the chat, copy and send them to all participants so everyone can read the question.
     + When managing Q&A, if multiple questions are received, copy them to a Word document to more easily keep track of questions and answers.
2. Complete any final webinar setup, e.g.:
   * Finalize the PPT and complete follow-up from the walkthrough as needed.
   * Prepare any interactions, e.g. polling questions.
   * If desired, create a PPT with tips for attendees who join early.
   * Preview the number of participants registered and make adjustments if needed.
3. Send reminder emails:
   * Send attendee reminder email(s) a week before the event, a day before the event, and/or a few hours before the event.
   * Send a panelist reminder email the day before the event.
     + Include an outline of slides and interactions, with timing if multiple presenters. A sample/template is provided in the Appendix on page 9.

**Step 4: Host the event and share resources**

1. Share resources before and/or after the event
   * A suggested best practice is to share a copy of the presentation (and/or a PDF handout version of the presentation) with attendees prior to the event.
2. Host the event
   * Start the webinar 30 minutes early.
   * Change event settings as needed.
   * Share/upload the PPT and any other files, polls, etc.
   * Greet attendees as they join, and provide technical assistance as needed.
   * At call start time (if needed and available): mute all lines and start the recording.
   * Start on schedule and stay on schedule!
   * Follow the outline provided to presenters in the reminder email (see the Appendix), managing interactions and Q&A as needed.
   * See the Webinar Presenter Guide (Template) for additional tips.

**Step 5: Follow up after the event**

1. Hold a webinar post-conference.
   * Immediately following the webinar, hold a post-conference with panelists to share thoughts regarding the webinar and wrap up final details.
     + Ask presenters in advance to stay on the line when the call ends.
     + Wait until all participants have left the conference before beginning the post-conference conversation.
     + As needed/if available, remove attendees who have not disconnected.
2. Perform additional post-webinar follow-up as needed, e.g.:
   * 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

**Appendix: Panelist Reminder Email**

The following is an example/template of a panelist reminder email, which is mentioned on page 7 in step 3D. Fill in all items in (parenthesis) and update information as needed for your event.

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Hello, (panelist names)!

I am looking forward to our (webinar name) tomorrow at (time). We have (#) people registered! Please see attached for the final PPT for the webinar. As a reminder, please keep each of your presentations to (#) minutes. I’ll send a (#)-minute warning in chat when your time is almost up. See below for an outline of the slides.

Please join the event 10-15 minutes early by clicking this **panelist link** and following the prompts on your screen to join the event and dial into the call. (panelist link)

*If you have technical issues using the panelist link above, please register and join as an* ***attendee*** *using this* ***link****: (attendee link)*

*If you still can’t join, please dial in to the audio conference only: (dial-in number); Access code: (access code)*

Here’s an outline of the slides.

* Slides 1 – 5: (Host name)
  + Slide 5: Poll
  + Slide 6: (Host) to (Presenter 1) – (Host) passes the presenter ball to (Presenter 1)
* Slides 6 – 20: (Presenter 1) / 15-20 minute presentation – (Presenter 1) advances the slides
  + (Host) will send a (3-minute warning) in chat if needed.
  + Slide 10: (Host) helps with interactive check-in question.
  + Slide 20: (Presenter 1) to (Host) – (Presenter 1) passes the ball to (Host) or (Host) takes it
* Slide 21: (Host) – Poll
* Slide 22: (Host) to (Presenter 2) – (Host) passes the ball to (Presenter 2)
* Slides 22 – 31: (Presenter 2) / 15-20 minute presentation (Presenter 2) advances the slides
  + (Host) will send a (3-minute warning) in chat if needed.
  + Slide 25: (Host) helps with interactive check-in question.
  + Slide 31: (Presenter 2) to (Host) – (Presenter 2) passes the ball to (Host) or (Host) takes it
* Slide 32: (Host) – Poll
* Slides 33 – 35: (Host) / Resources & wrap-up
* Slide 36: Q&A, facilitated by (Host); (Host) makes presentation available for download

I look forward to “seeing” you all tomorrow at around (15 minutes before start time)!

(Email signature)