

Webinar planning timeline and checklist



8 weeks prior to your event



Select your webinar topic

Questions to consider: Can this topic be delivered in a virtual space? Has this topic been delivered before? If so, how will yours be different?



Select your presenter

Questions to consider: Does this person have experience with delivering webinars, or are they willing to learn the difference between webinar and in-person presentation delivery? Is this person a thought-leader in the industry? Will you be relying on this person to help attract a larger audience?



Determine your goals for the event

Goals for a lead generation event will be very different from the goals for a continuing education event. Goals can be about attaining educational credits for X number of attendees, branding your company/presenter's name as a thought leader, or simply training someone how to do something. Having a clear goal for the event will help you determine the theme and design of the event.



Identify your target audience

Something to consider: Having a broad target market can actually be detrimental to your registration because one event cannot be everything to everyone. Choose a narrow topic for your segmented audience, and prepare a presentation directly for them in mind.



Select a vendor to deliver your event

Something to consider: Its important to determine what features you need to deliver your presentation, and who on your team will be responsible for ensuring that every piece is taken care of. Check out our whitepaper on [Comparing Full Service vs DIY Webinar Providers](#).

7 weeks prior to your event



Select a date and time for your event

Always consider when your audience is available to attend a webinar. If you are delivering a lead generation webinar, try to pick a slower day, like Friday, and perhaps deliver the event during lunch time. If this is a mandatory webinar to earn continuing education credits, then select a time when Doctors or Lawyers won't be taken away from patients or clients. Also, consider the location of your audience. Are they on the East or West Coast? We generally recommend events be hosted between 11am-4pm Eastern Standard Time.

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Delegate tasks between the presenter, hosts and webinar team.

It's important to document every detail before you begin to ensure each member of your team knows who is responsible for each part of the event. You can even make a checklist with due dates to check off to show your team what needs to be accomplished.

Things to consider:

- Do you need approval from a jurisdiction or board?
- Do you need to build continuing education into the event?
- Will you be capturing the event for future viewings?



Determine a theme for your event

Will it be educational, informational, entertaining, formal, light? This will set the format of how you design the presentation to how you market the event.



Determine IF and HOW you will want to repurpose this event

With a recording of your event, you can replay it at another time, then have the presenter rejoin for a live Q&A session. Another idea is placing the recording in an OnDemand environment where attendees can watch the event at their leisure. If you are delivering a CE event, be sure to ask your vendor if they have the capability of including CE testing into the OnDemand viewing.



Determine the length of the program

Compile all of the information that you want to deliver and determine how long it will take to deliver the presentation. 30 minutes? 60 minutes? 90 minutes? Create an outline of your content to formulate your event. Find parts where you will want to engage with the audience using polls and surveys. Don't forget to leave room for Q&A.



Determine how you want your attendees to register for the event

Something to consider: While it's possible to build the registration with a third party, it's often easier to use your webinar provider to build and host your registration page on your behalf. This ensures that the attendees will receive the correct confirmation and reminder emails and their login information will integrate with the webinar platform.

6 weeks prior to your event



Compile your lists of prospective attendees

If your event is targeting a segmented group, make sure you don't email the invitation to non-relevant people.

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6 weeks prior to your event



Create a webinar promotional plan

Create a content marketing calendar. Include email schedules, press release launch, social posts, blog posts. Your plan should include when you will send email invitations, post on social media, blog about the event, and any other marketing tactic that you use to promote your event. Download our [Webinar Promotion Checklist](#) to get started.



Prepare a marketing promo kit for the sponsors, presenters and hosts

Include social media graphics, suggested posts with shortened urls and hashtags. If possible, build a clone of your registration page so you can track where the registrants are coming from.

2 weeks prior to your event



Monitor and analyze your promotions

Not all promotional plans are suited for every webinar. Analyze your webinar registration to see where registrants are coming from, and revise your marketing plan as necessary.

1 week prior to your event



Get familiar with the webinar platform

Make sure your presenters are familiar with your webinar platform. Schedule a tech/dry run of the technology, upload your slide deck to make sure the slides look good, and test different audio methods. If you plan to deliver polls throughout your webinar, pre populate the webroom with your questions.



Prepare your post event evaluations

Analyzing your event is as important and preparing for it. Create a list of questions for your attendees to answer. Questions can include reviewing the presenter, asking if the attendees want to learn more information about your company, or seeking for feedback for future events they would be interested in.



Write an introduction script for your presenter

Whether you are working with a live moderator, or having someone from your team introduce the presenter, its important to get all your facts together of what you want the attendees to know about the event.



Prepare your follow up messaging

Create an email that will summarize what was presented during the webinar, and consider providing the attendees with a link to view the event OnDemand.

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Day of your event

- ☐ **Send a final email invitation**
Statistics show that a majority of attendees will register for a webinar within 24 hours of the live production. Take advantage of this by sending a final email invitation with “today” in the subject line.
- ☐ **Joining the webroom**
Have the presenters join the webroom 15 minutes prior to the webinars scheduled time. This gives enough time to do one last sound and powerpoint check, and organize multiple presenters.
- ☐ **Check your recording status**
If you plan to repurpose your event for OnDemand viewings, ensure that the event is being recorded in the proper format.
- ☐ **Live support**
If you are delivering a webinar with a full service webinar provider, rely on the live Event Moderator to handle any issues that may arise with the audience, and concentrate on delivering the presentation. If you are delivering a webinar with a DIY webinar platform, have an additional person monitor the requests of the audience.
- ☐ **Analyze your webinar statistics**
Most webinar platforms provide you with detailed full event reports. Some of the analytics that are important to look at include how many registrants attended the event, what questions were asked during the Q&A and who participated in the post-event evaluation.

48 hours after your event

- ☐ **Follow up**
Send a follow up email to the registrants who attended the event, and to the registrants who missed the event. Include an OnDemand recording or a link to learn more about the event.
- ☐ **Answer your Q&A in a blog**
Often, if a question is asked during a Q&A session, then more than one person is wondering about the subject. Write a follow up blog or email answering some of the questions asked, and provide links for the attendees to learn more about the topic.
- ☐ **Repurpose**
Creating large pieces of content take large amounts of time, however, you can increase your events ROI by repurposing your event with OnDemand viewings and replays.