



## What to Ask a Potential Webinar Services Vendor

EventBuilder is an organization who does things a little differently when it comes to webinar program management. This paper will be different, too. It will help you make better decisions about finding a vendor to outsource to -- *even if* you do not choose us -- for two reasons.

- We all win when the world has better webinar programs and more attendees find value in showing up to webinars, webcasts, and virtual classes.
- We both win when working together the right fit for both of us. We don't have a sales team that's just going to take your money and "throw it over the fence" to some glorified phone operators. You're a pro, we're pros, and when it's right, we'll know it.

What follows distills our research and perspective into three parts, each to help you better understand and execute for the road ahead:

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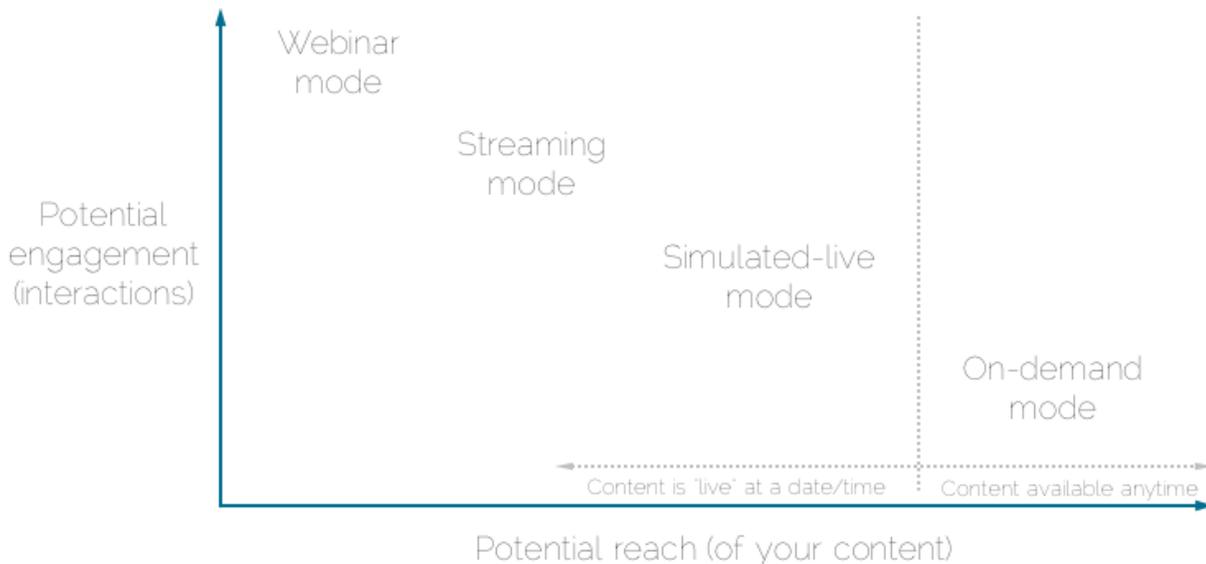
### 3 internal trends: Will you experience what others do?

Producing the occasional webinar or even a regular schedule of them isn't difficult. However, as organizations experience success and want to scale webinars from being "one offs" to programs, three shifts occur.

#### Shift #1: Rethinking the nature of audience engagement

Webinars are rightly thought of as "web seminars," opportunities for real time interactions. But as occasional webinars grow into programs, the need to engage audiences in different ways that is important *to them* becomes more important *to you*. Consequently, the webinar industry as begun to serve use cases that all get called "webinars," yet represent distinctly different solutions to engagement.

### How engagement potential changes with scale



Some webinars *must* be smaller and more interactive while others require large-scale reach. Further, they all produce an asset – a recording – and over time the opportunity to keep utilizing these emerges into a need to manage a *lot* of them for that segment of your audience that wants information on-demand. Finally, sooner or later organizations want a hybrid approach – the ability to interact in real time with audiences, but with a presentation that is pre-recorded (often called "simulated live").

## Shift #2: Rethinking the role of "webinar producer"

Producing the occasional webinar isn't difficult. However, as organizations grow from webinars being "one off" occurrences to programs, managing labor takes on a new challenge for two reasons:

- Webinars are "peak" oriented. The need for production talent is high mid-week and significantly lower on Mondays or Fridays. Further, they're seasonal, with the need for labor higher during spring and fall, lower during summer and winter.
- Webinar programs require a combination of tactical and strategic insight. Tactically, setting up and managing technology, managing rehearsals, etc. requires detailed operational knowledge, while the latter requires understanding initiatives, metrics, topic and speaker selection, etc. that are specific to your organization

What emerges, then, is that those with strategic knowledge (that is difficult to delegate or outsource) often spend much of their time "in the weeds" tactically. As success grows into the desire for ongoing webinar programs, organizations are forced to reassess how best to use their scarce, precious resource – the employee serving as webinar producer.

## Shift #3: Rethinking the value of communications intelligence

Webinar programs have the potential to gather *a lot* of intelligence for you, intelligence that will improve decisions. When you don't host a lot of webinars, you learn to live with the occasional .csv file. Over time, though, few events become more events, and every single one of them has a recording that can produce additional insight, and gaining insight from the "whole" becomes more problematic as you go. Pulling and combining reports becomes increasingly prohibitive when you want to understand the kinds of things you can only get by looking at them all together.



## 2 gotchas: What do most organizations miss?

Almost inevitably the aforementioned trends bring up two pains that, in our experience, usually go un-anticipated.

### Gotcha #1: "That's my job"

As webinars become more important to an organization, often a person in the organization begins to develop the identity as the 'go to webinar person.' Consequently, the opportunity to scale success is often torpedoed when delegating or

outsourcing is perceived as a threat. The opportunity, though, is for that person's unique knowledge to transform them into an even higher-level contributor.

## Gotcha #2: "Nickel-and-dime" contracts and people models

The telecommunications industry – the industry that "birthed" the technologies used for webinars -- became infamous for selling you a base plan that looks cheap only to deliver you with a lot of little surprises. Consequently, firms that manage services around these technologies often do the same with how they manage people. When you *do* decide to delegate webinar program production to a vendor, you not only end up with financial add-ons, but you get bounced relationally to "the next available operator" and waste valuable time with someone who doesn't know you from "contract 4842B7."



## 9 questions: What should you be asking potential vendors?

By now you are already anticipating what we think is important -- a program versus one-off perspective, taking care of people, relationships that you can trust. Still, if even some of these insights are what you value or have experienced, here is how we'd recommend approaching questions in your RFP.

### 1: "What percentage of your customers are primarily customers of professional services (versus software/product buyers)?"

It's not wrong for a software company to be a software company (or a telecommunications company to be a telecom company). What you want to know, however, is if professional services are a valued part of their business model or just something they cherry pick when the right customer shows up. (Hint: see how they position "event services" on their website. Or not.)

### 2: "Describe your process for understanding my organization and catering to our needs."

Unlike software that has fixed set of features, services can and should be malleable. Further, unless you're signing a long term contract, you're not done talking to the sales rep – you will again and again as you grow. Finally, most organizations don't want their sales reps taking the time necessary to be consultative (let alone making sure they're ex-producers who understand the nuances of what you need). Real value should be created *before* you sign a contract.

### **3: "Describe how you handle support for webinar registrants and attendees."**

"First tier support" for a software or telecom company is staffed by people who know their products (not a bad thing!). But did you know that most webinar support calls are user issues, not software problems? Look for an organization who will have support staff that is aware of exactly what client events are happening at exactly what times of the day and is ready to help your attendees – all of them – have a successful attendance experience.

### **4: "How do you guarantee me a single point of contact?"**

Nothing ever changes for you, right? No last minute requests, change-orders, or "oops-the-VP-is-now-presenting-from-a-hotel-now-what"s, right? So who do you call when this event isn't like the last one, or when you need to do something different – explain yourself all over again to a new person? You may need a whole team of people to help you scale your webinar program, but you shouldn't have a whole team of contacts.

### **5: "How do you help my presenters be successful?"**

Every vendor says that "presenter training" is part of their package, but you want to look more deeply than that. A presenter's real success isn't "how to operate a piece of software," it's having a producer who "has your back." In other words, how will the webinar producers take worry off the presenters' plates so the presenters can really focus on why they are there?

### **6: "How frequently can I get reports, and how do I get them?"**

Getting a report at the end of a webinar is table stakes. You want to know how often you can get them *in advance* so that you can monitor registration, see how registrants are responding to pre-event questions and adjust content accordingly, etc. Best: ask if you have to wait for someone to send you the report or if you can log in and get it whenever you want.

### **7: "How do you accommodate custom processes?"**

Webinar programs don't happen in a vacuum – they always intersect with other process and priorities in your organization. Do you need reports customized in different formats for different audiences inside your organization? Or an organization who can coordinate the schedules of several dozen subject matter experts who will be your guess presenters so you can focus on other things? A great vendor is an extension of your team.

### **8: "Will you train my team and run hybrid programs?"**

Webinar services vendors usually want to sell you their services, not train you how to replace them (which they perceive as "putting ourselves out of business"). In the real world, however, your needs are unique. In fact, you may run some events in-house

while delegating or outsourcing others. Ask this question to help determine if their commitment is your success or just selling you stuff.

### 9: “How do you handle security and personally identifiable information (PII)?”

In today's world, GDPR compliance is table stakes. Webinar programs, though, often have other requirements such

### 10: “Do you specialize in webinars using Microsoft products – Skype for Business, Skype Meeting Broadcast, or Teams?”

Alright, we confess this is a loaded question. Most webinar production teams do not, obviously, whereas we *live* in those platforms (we're an all-virtual company!)



## The bottom line

Webinar technology is easier than ever to use (though there are some notable exceptions), and most of the time professional services vendors aren't earning your business because you can't do it. When they do earn your business, it's more frequently for scale, peace of mind, and/or because hiring a fraction of a team of specialists with deep experience makes more sense than trying to develop an equivalent expertise in-house.

Here at EventBuilder we are interested, of course, in earning your business. We trust you will find the above questions an example of how we roll – we give before we get and we'll have the integrity to only work with you if it's a win-win relationship.