Wharton ALUMNI
UNIVERSITY of PENNSYLVANIA

New York

Webinar Best Practices

June 2020

Key Components of a Successful Webinar

Event

Pre-Event Planning	Quality Check	Event Management	Ending the Session

Pre-Event Planning
- Determine event format and objectives
- Assess presenter's skills
- Review key Zoom aspects

Quality Check
- Ensure presenter(s) are on-line and functional
- Review roles and flow of event

Event Management
- Kick-off/Admin
- Club Statement
- Introduction
- Handling Q&A and other Zoom functions

Ending the Session
- Reinforcing value of event
- Thanking presenter
- Club Statement
- Follow-up

Pre-Event Planning

❑ Determine presenter's comfort level with Zoom. If they are not experienced, schedule a a Zoom and discuss functionality together and/or share a Zoom tutorial with them.

❑ Determine type of event (webinar vs meeting) based on the nature of the event and the desired level of interaction between presenter and participants.

- Factual/Instructional, soft topic, social event

- On-going chat, polls, break-out rooms for participant interaction, or Q&A at end. If polls will be conducted, select poll questions and create in Zoom ahead of event

❑ Determine if the presenter(s) will need assistance from the MC to read and synthesize questions submitted by chat/Q&A.

❑ Set guidelines for length of presentation and time for Q&A, close-out (Assume 5-7 minutes for sign-on and introduction and a few minutes at the end for thank you and close out.)

❑ If presenter plans to share a document during the event, ensure they are familiar with it or practice the capability with them. Familiarize yourself with the document prior to event.

❑ Assign roles as necessary

- MC – Should be a club member who is comfortable with Zoom functionality, engaging the audience and talking continuously

- Club Rep – Can talk about the club allowing MC to manage people logging on and monitor progress

Quality Check

❑ Prior to event, create a group text with MC and presenter's phone numbers. Presenter's can reach out if they are having trouble signing on to the event and can communicate with one another easily during the event (aside from private Zoom chats).

❑ 20-30 minutes prior to start time, sign on with presenter(s) to verify/resolve sound, identify lagginess, lighting issues etc.

❑ Test sound and background – if laggy, presenter can try different locations in their home and dial in through phone vs using the computer audio line. Wireless earbuds can interfere with the audio from imbedded videos in presentations. In those instances, presenters must can use computer audio instead of the earbuds.

❑ Make sure presenters' names are identified on their Zoom feeds.

❑ Enable capabilities for co-hosts and set any restrictions on participant access and capabilities re: sound, video feed, etc. Load shared documents as a test to ensure presenter can set them to be viewed as desired.

❑ Review flow and roles again with presenter incl. timing of polls, breakouts and Q&A.

❑ Confirm specific topics that presenter would like you to stress from their bio e.g. book release, other webinars, relationship with Wharton etc.

❑ Ask presenter if they will make their contact info or materials available post-event.

❑ Confirm if the presenter has a hard-stop time or if they are willing to stay on a bit after the event end time to address remaining questions.

Event Management – Starting the Event

❑ Release participants from the waiting room. Assume it will take 3-5 minutes post official start time for all attendees to join the webinar. Do not wait for all attendees to sign on before beginning the event. Stragglers will continue to join.

❑ The MC can provide a play-by-play as members log on so they know there is some structure to the event as they enter and to keep existing participants engaged/entertained as others sign on. Attendees signing on will expect live action from the moment that they are on. Handle the kick-off like a tv or awards show.

   ▪ To everyone logging on, "Welcome to Wharton Club of (City)'s XYZ webinar with Presenter. So glad to have you here with us today to learn about XYZ. Let's take a moment for everyone to sign on. "

   ▪ Do some administration – "As you are signing on you will see that your video is off and your sound has been muted. Please feel free to turn on your video feed, however your sound will be muted during the event. There will be time during the event to submit questions via the Q&A function which can be found at the bottom center of your screen. There is also a chat function so feel free to share your thoughts or comments with your fellow participants during the event. "

Event Management– Starting the Event (continued)

❑ As the remaining people sign on, the MC or Club Membership Representative can share a message from the Club.

- ▪ "Hi, I am X from the Wharton Club of (City). We are so excited to have Presenter with us today to share his/her insights on (insert topic). It is so great to see so many of you joining us. We want to thank all of you for staying engaged with the club during this difficult time and we hope that you have found our programming to be helpful and informative. I'd particularly like to thank our X (dues paying) members. We couldn't do this without you. If you are not already an (X) member, please check out our website and learn about the benefits of being a member and how you can support the club." Make any other suggestions about staying in contact with the club, Facebook, LinkedIn etc. The Membership Rep can turn it back over to the MC (if the MC does not handle this statement). By now, the majority of your participants have signed on.

❑ The MC can do a quick repeat of his/her original comments – for those of you who have just signed on – "I am X and thank you for joining the Presentation with Presenter." Describe the flow of the event, instructions for Q&A and chat.

❑ While introducing the presenter, provide a bit of their background and why you are so excited to hear them speak. Mention any book that they may be promoting or any area they want you specifically to address. Share your favorite anecdote from their book or how you know them.

Event Management– The Presenter Begins

❑ This is a good time for the MC to go dark and mute their audio. They can note the number of participants and track how the participant numbers change during the event.

❑ The MC can monitor the chat for any problems during the event (e.g. participants having trouble seeing the shared slides, etc.) The MC can also chat to the group during this time. Reminding people to use Q&A to submit questions or share other instructions if a large number of people have signed on late.

❑ If the event is designed as being very interactive, the MC can keep the video feed active and manage Q&A and chats if the presenter wants the support during the event.

Time for Q&A

❑ As time approaches to end the presentation part of the event, the MC can step in and suggest "As we wind down, our discussion, everyone refer back to the Q&A function. Please feel free to submit questions, if you have not already done so. As there are usually some questions submitted during the presentation, the MC can start with those.

❑ During the Q&A the MC can provide lead ins for the questions rather than reading them outright. "As many of you know, X and Y are key issues facing the market today, many participants have submitted questions in those areas." Share the question.

❑ With 5-10 minutes left, ask for participants to submit final questions. If some are left unanswered, indicate that you have tried to get to as many questions as possible. Indicate if the presenter has agreed to answer additional questions via email after the event.

Ending the Session

❑ As you approach the end time for your event, "This unfortunately brings us to the end of our webinar. I hope everyone has enjoyed this discussion as much as I have. I would like to sincerely thank Presenter for taking the time to join us today and to share his/her insights. (Make a direct comment about the value of the insights shared/how they have helped). We look forward to having Presenter join us again in the near future. Thank you all for being with Wharton Club (X) today. Feel free to reach out to us a the club at (contact) with any questions or suggestions. We have a lot of great upcoming webinars (list a few) and hope to see you on one of these webinars in the near future. Everyone stay safe. Goodbye and see you soon."

❑ Make sure the Zoom event has been terminated.

❑ A follow-up Zoom (or Facetime using the earlier established text group) can be pre-scheduled immediately after the event so that the MC and the presenter can hold a debrief.

- ▪ Thank the presenter personally.

- ▪ Discuss the progression of participants staying/dropping off during the call.

- ▪ Handle any follow-up materials for the participants.