

Webinar Best Practices: From Invitation to Evaluation

by



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ABSTRACT

For a relatively small fee, anyone can access the software necessary to “virtually gather together” hundreds of people at any given time for an online seminar, often referred to as a “webinar.” The current economy along with technological advances and the ever-growing need to provide information quickly and meaningfully to a far-flung audience are among some of the reasons why webinars have become proliferous in the association, education, government, and industry sectors. Technologies for online presentation offer everything from PowerPoint® slides to streaming video and sideline chats.

Opportunities abound for companies and organizations to use webinars to market products, coordinate quick briefings on current events, or provide continuous education courses to members and others in a given profession. However, anyone who has attended more than one webinar probably can list a number of characteristics they liked—and didn’t like.

The researcher reviewed best practices for webinar presentations and compiled a tips sheet to aid webinar presenters in creating well-organized, engaging webinars specifically tailored to the online audience. Attention also was given to pre-webinar marketing strategies and post-webinar evaluations, as those activities are part of the complete webinar experience.

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Chapter 1: Introduction

The term “webinar” was created by Eric R. Kolb in 1998 (Yahoo! Answers; U.S. Registered Trademark No. 75478683, 2000) to describe the online meeting service his company developed. Derived from two words, “web,” referring to the World Wide Web, and “seminar,” webinars are synchronous, real-time online meeting events that gather people together at a specific time to listen to, observe, and participate in a presentation. Webinars are “virtual” seminars. Most often, individuals use a telephone to listen to the presentation and a computer to watch presentation slides; however, technology improvements and increased bandwidth have made audio streaming through computer speakers a good alternative. Attendees may be asked to pay a fee, but many webinars are free—especially those that have a marketing angle or are sponsored by the audience’s employer or a corporate partner.

Webinars provide a platform for sharing information with and receiving feedback and information from an audience without requiring that people gather in one physical location. The venue is widely used in corporate, association, and government sectors. Typically, webinars are one-time, 60- to 90-minute events; however, when topics require, webinars can be scheduled in two segments that are 60 to 90 minutes each. Webinars differ from online courses in that online courses span a greater time frame and engage students in continuous online discussion threads about topics and assignments.

Webinar technology is readily available and surprisingly inexpensive—downright cheap relative to hosting hundreds of people at a live seminar held in a high-rent hotel conference room (James 1999). However, the beauty of being able to easily schedule and conduct a webinar, gathering people virtually from far and wide, also is the presenter’s beast in that the audience is not “captive” in a room. Rather than giving their undivided attention to a presenter, audience

members might be multi-tasking in a number of ways: carrying on sidebar conversations with coworkers, folding laundry, checking email, or catching up on the latest sports scores.

Inscape Publishing surveyed 1,908 training participants about their experience with webinars. Margery Weinstein synthesized results in a short article published in *Training*, February 2010. Additional remarks were shared in an article published on *Training* magazine's website, titled, "Everything DiSC Pulse: The Three Ps of Effective Webinars" (Scullard & Sugerman, 2009). The survey revealed two key points: Overall, 66% of participants agreed the training was effective, which is about 12% lower than when the same question was asked of people in classroom-based learning.

Results seem to indicate that something is lost in the transfer between classroom-based and webinar-based learning experiences. Survey interpreters believed that presenters were not placing enough emphasis in three key areas: pre-work, post-work, and participation (Scullard & Sugerman, 2009).

Presenters are challenged to capture an audience's attention at the first "hello"—and then maintain engagement throughout the webinar. In a December 2009 article, David Godfrey aptly refers to webinars as "short attention-span theater." Not only must presenters assume an audience of short attention spans, but an audience with innumerable distractions because nearly each participant is in a different location.

Consider the changes that must be made when taking a story from book form to radio, theater, or movie screen. To be successful, each venue requires a different approach to the presentation of the same story. Moving face-to-face presentations directly to the webinar venue without considering the audience's perspectives and making the adjustments necessary to engage and hold their attention are destined to fail.

Statement of the Problem

Despite the savings webinars provide and the ease and speed with which a target audience can be reached, many are not created with the level of intention and professionalism as in-person events. Presenters forget that webinar attendees can “walk out of the virtual meeting space” at any time; presenters do not have a “captive” audience.

Different venues require different approaches. A casual approach to the webinar venue not only shows great disrespect to an audience, it can do sizable damage to a presenter’s reputation and a sponsor’s brand image.

Purpose of the Study

Professionally managed, well-planned webinars show respect for the virtual group gathered and provide relevant, useful information to both the audience and presenter. This study examines webinar tools, marketing practices, presentation preparation, and evaluation methodology so as to provide a condensed, practical list of webinar best practices that will help ensure presenters provide what the audience needs in a way that it will be well-received and retained.

Definition of Terms

Webinar: A live online educational presentation during which participating viewers can submit questions and comments (*Merriam-Webster* online dictionary).

Webcast: a transmission of sound and images (as of an event) via the World Wide Web. (*Merriam-Webster* online dictionary); provides only one-way communication, whereas a webinar enables two-way communication between the presenter and members of the audience (*Webopedia*, online resource).

Online course/distance learning: a class for which all regularly scheduled classroom time is replaced by required activities completed at a distance and managed online (Highline Community College website).

Web conference: two-way real-time communication between two or more groups to conduct a meeting. Groups may or may not be able to see each other and can share documents.

Synchronous communication: real-time communication, not delayed (asynchronous).

Webinar vendor: a company that provides the technology for the webinar event; vendors often also supply, for a fee, event moderators, who open the session, introduce the presenters, and close the event.

Limitations of the Study

This study is limited to webinars; it does not include webcasts, online courses, or web conferencing events, though the lines separating the definitions of these various online venues are smudged.

Methodology

The search for substantive journal articles and studies about the effectiveness of the webinar venue as a significant education and training medium didn't produce the number of studies or journal resources as expected. Webinars are not unpopular. In fact, Internet searches were congested with much irrelevant information—offerings to attend webinars rather than information about the structure and production of effective webinars.

It's true that many techniques and skills that are effective in face-to-face presentations also are necessary for successful webinar events, but the two venues are very different. Webinars must be organized differently to compensate for the audience and presenter not being able to see

each other and to help ensure that audience members remain engaged and not get distracted by what's happening in their individual environments.

Considerable supportive information, written by experienced webinar presenters and webinar hosting company professionals, was found in the form of white papers and online articles. It's interesting to note that, even though the authors were writing about the same topic—webinar best practices—much variation existed, and only a few provided tips that extended from the first invitation email or ad to the sending of an evaluation and materials upon an event's conclusion.

For this study, the researcher perused literature with the goal of creating a guideline for webinar presenters. The document lists high-level points, such as, “create a presentation outline,” along with minute details, such as, “silence all telephones,” in effort to help presenters remember important details while also focusing on the main goal of ensuring that participants remain engaged in the webinar experience so that they depart appreciating and remembering what presenters intended that they learn.

Chapter II: Literature Review

From its inception, the “webinar” was intended to serve as an online meeting venue (Yahoo! Answers). Soon the technology gained popularity as an economical and effective means of sharing information with an interested group of people, often numbering more than 100, in educational presentations. While webinars usually are recorded for future use, so people unable to attend the live events can later view them at their leisure, webinars are, by definition, “live online educational presentations during which participating viewers can submit comments and questions” (*Merriam-Webster* online dictionary).

Advantages of Conducting Webinars

Webinars offer many advantages to those who want to share information with a large number of people without having to gather them in one physical location:

- It is recommended that webinars be scheduled six to eight weeks in advance (“Webinar Best Practices”). However, webinar scheduling can be condensed even more, if necessary, requiring considerably less lead time than scheduling of face-to-face events.
- Corporate and educational budgets are shrinking. If a target audience extends beyond the local area, webinars don’t need funds to cover travel expenses or costs for substitute instructors (Frederick, 2011). Costs are considerably less than what is needed for face-to-face seminars (Britt, 2006). There are no travel or room rental expenses, no additional technology fees, no need to print materials for attendees, no need for event greeters to hand out materials and nametags, and no need for snacks or meals.
- Target audiences don’t need to be geographically defined (LeBlanc, Pruchnicki, Rohdieck, Khurma, & Dasta, 2007). Though time of day might be an issue for some,

webinar audiences can include people from any time zone or any location as long as the individuals have Internet access and phone connections. Note: Technology allows for streaming audio, which is less costly for large audiences, so it's not even necessary that participants listen via telephone. Streaming audio is, however, less reliable and allows for only one-way verbal communication ("Conducting a Webinar," 2003). Additionally, if the internet connection is lost, then both aspects—visual slides and audio—are lost.

- Live webinar events can easily be recorded for future use, so people unable to attend can view them at their leisure and share the recordings with others. Video recordings of face-to-face events require videographers to be present, which adds additional expense.
- Membership organizations can increase their value in members' eyes—and increase their membership, too ("An eLearning Strategy to Grow Membership and Increase Revenue").
- Corporate marketing departments find webinars to be less costly than face-to-face events.

In a 1999 article in *Marketing News*, author Dana James talks with Christopher Ryan, president of Saligent Software, Inc., who says web seminars cost his firm "\$70 per attendee and \$200 per lead, compared with \$200 per attendee and \$2,000 per lead for a traditional event" (pp. 42-43). A case study in the January 2009 issue of *B to B* quotes Lithium Technologies' director of marketing programs as saying, "Our webinar series produced the lowest cost per lead of anything we did in 2008" (Hosford, 2009, p. 24).

Webinars also offer advantages to participants:

- Employers often encourage or require employees to engage in professional development activities. Webinars offer advantages for both: convenience for employees and less expense for employers.

- Webinars sponsored by professional associations or communities often offer continuing education credit to participants. Experiences offered online rather than face-to-face make it easier for people to keep current in their field of study and maintain their licensures.
- For various reasons, many people don't like to travel. Webinars offer the perfect solution.

Companies conduct webinars to share goals and upcoming changes with employees, corporate training departments use webinars to train employees scattered in various locations, professional associations host educational webinars for members, and marketers sponsor webinars for target audiences. Case in point: Bristol-Myers Squibb, in the December 2012 issue of *Guideposts* magazine, invites readers with rheumatoid arthritis to attend a free webinar to learn how to live with the disease.

With all these positive aspects of webinars, one wonders why a survey of 1,908 training participants revealed that only 66% classified webinars as effective (Weinstein, 2010).

Presenters' Challenges in the Online Venue

Complaints about webinars, from participants and instructors, include inept presenters, light material, and the obvious absence of face-to-face encounters (Riddle, 2010). Additionally, webinars are not the best means for teaching hands-on skills or leading complicated activities (Wang & Hsu, 2008, 182). Another consideration is that while webinars do offer synchronous communication, the venue "promotes tutor-student interaction better than student-student interaction" (Wang & Hsu, 2008, p. 176), which is one of the reasons why webinars aren't as popular in the higher education community as they are in business and professional association

communities. And issues with technology will quickly frustrate any audience. For this reason, a number of articles about webinar best practices recommend that presenters not act as both moderator and presenter, but Gen Guanci stated it bolder than most dared: “Never put yourself in the roles of both moderator and presenter” (2010, p. 119).

During webinars, presenters share information with the audience verbally and by using slides to illustrate, highlight, and reinforce what they’re sharing with the audience. At first glance, this doesn’t seem to differ much from what presenters would do in face-to-face seminars, but the webinar venue challenges presenters to engage the audience in different ways and to organize their materials with the audience in mind.

According to the president of one webinar services provider: “The most significant mistake organizations make is not realizing the differences in presenting online vs. in person” (Finstein, 2007, p. 33). Nonverbal communication cues, such as eye contact, facial expression, and body movement, are lost in the webinar venue (Riddle, 2010). And the audience is not “captive” in a room. Rather, participants are scattered about—some may be at home watching children or writing shopping lists, while others are in noisy work areas having sidebar conversations with coworkers or visiting other websites (Riddle, 2010). Even when paying attention, audience members can be easily distracted if the webinar isn’t interesting or moving at a good pace.

Novice presenters find it difficult getting participants to engage in online venues (LeBlanc et al., 2007). However, it’s important to engage the audience early and often, using tools such as polling questions, quizzes, or whiteboard exercises (Godfrey, 2009). Polling questions can serve many purposes: to motivate the audience to participate, get a pulse for the

audience's knowledge of the subject matter, draw attention to an interesting fact, or calculate the percentage of audience members who have experienced something related to the topic. Questions can also be used to provide immediate reinforcement of learning (MacKeracher, 1998, pg. 13). Regardless of the reason, questions that require the audience to do something—such as click a radio button for the right answer—help engage them in their learning experience.

A study that Shiang-Kwei Wang and Hui-Yin Hsu published in 2008 discusses the value of integrating webinar technology with other technology in longer-term online learning environments. Some findings of their study include the following:

- Participants' rating, researchers' observation notes, and presenters' self-reflection revealed that topics focusing on conceptual knowledge or basic procedural skills were more effective than those focusing on hands-on skills (p. 182).
- Participants indicated that the instructors' use of polling and direct-message tools helped them feel as though the instructor was attending to them (p. 184).
- Participants felt the use of the electronic whiteboard to explain concepts was attention-getting (p. 184).
- Participants preferred learning conceptual knowledge rather than procedural (hands-on) skills via webinar. And instructors felt the webinar venue was not effective in transferring procedural knowledge because they could not observe students' performance or provide feedback (p. 184).

Pace also is a challenge for webinar presenters. If a presenter hangs on one slide too long, audience attention span wanes. Using more slides during online presentations helps keep audience members focused. This can be accomplished by including less information per slide

and by creating a new slide for each new bullet point (Fripp, 2009). One source recommends using twice as many slides as a person would for a face-to-face presentation (Mitchell), saying she used 85 slides for a 30-minute presentation (Mitchell). Depending on the topic, more than two slides per minute might be too many. The main point is to not let the audience stagnate.

Presenters also must pay attention to their voice and their vocal delivery. Webinar presenters can learn from the voice-acting industry and get up and move. Physical energy helps give power and passion to a person's voice (Alburger, 2007). Radio actors and voice actors for animated films often stand when they're working. If a headset isn't available, a longer cord on the telephone might help might provide room to move.

Good webinars are not constructed in the same fashion as face-to-face seminars. In face-to-face seminars, a presenter's presence serves as the initial attention grabber. Webinar presenters must think of another way to grab an audience's attention—through word choice, tone, etc. (Guanci, 2010). Organization must be driven by efforts to keep the audience engaged, which is why many recommend inserting a few short question-and-answer periods throughout (Guanci, 2010). Examples and stories always help personalize presentations and can be a powerful connector and memory tool in webinars (Fripp, 2009).

Pre-Webinar Efforts

From a participant's perspective, the webinar event begins with the invitation. Whether it be delivered via email or as an ad in a newsletter, magazine, or blog, it needs to be informative and tantalizing—enough to know what the webinar will be about, but not so much that a person would not need to attend.

The goal of the email subject line is to motivate prospective participants to open the email, and the headline on the email invitation must hook their attention so they read further. Text should be short, between 150 and 200 words (“Webinar Best Practices”). Word choice, especially when condensed to this degree, can either bore readers or draw them in wanting to read more. Sam Horn, in her book *POP! Stand Out In Any Crowd* (2006), says messages should be purposeful, original, and pithy. But, it’s also important to remember the basics: date, time, and title of the event (Bannan, 2010). Key words and phrases that your audience will recognize also are useful (Scott, 2007). And it’s important to avoid words that often are snagged in SPAM filters. Brand elements, such as the corporate logo or color scheme should be subdued—and that subdued look should carry through to the presentation slides. Too much brand emphasis, and audience members might suspect the webinar is more likely a sales event than an educational or informational session.

Registration forms should be brief, asking only for the information needed. Registrants should receive a confirmation of their registration that includes a brief statement about the webinar, along with instructions and links to sign on to the event (Molay, 2009). If appropriate, the registration form also can be used to ask a question of the registrant or encourage the registrant to ask a question about the presentation topic (Guanci, 2010). Registrants also should receive a reminder confirmation a day or two before the event.

Post-Webinar Efforts

After the webinar event itself, presenters have two more opportunities to connect with the audience: first, by immediately sending an evaluation to all who attended; second by sending

follow-up materials and a link to the recorded session—for their future use and to pass along to coworkers and friends.

People lack enthusiasm for completing evaluations, but the return rate is best if audience members receive the evaluation immediately following the webinar—and if they have been told it's coming (Rossett, 1999, p. 121). People also might be more likely to respond if they quickly see that completing the evaluation will take only a few moments. Deciding what questions to ask and how to ask them involves thoughtful consideration. Ambiguity, cognitive overload, and misinterpretation can lead respondents to ignore the question or answer incorrectly (Martin, 2006, p. 4). Evaluations can be programmed and ready to go the minute the webinar is scheduled to conclude. Names and contact information are needed only if participants have more questions—and it's good to invite questions. Most evaluation questions measure participants' reaction to the event, but presenters will benefit greatly—and have evidence of webinar effectiveness—if they use the Kirkpatrick Model to evaluate at least at Level 2-Learning, if not also at Levels 3 and 4-Behavior and Results, respectively (KirkpatrickPartners.com). Additionally, presenters should be sure to measure only what can be improved—there is no point otherwise (Hart, 2004)

It's common practice after webinars to send participants materials from the event, including: a link to the recorded event, a document with written responses to the questions submitted, a copy of the presentation slides, contact information, and maybe a few words about the next webinar. This is yet another opportunity to reinforce relationships and/or reiterate an important fact. It's important to do this task within 24 hours of the event (Volpe, 2007) or as close to that as possible.

Chapter III—Methodology

The intent of this study is to provide webinar presenters with an all-inclusive webinar guideline/checklist to help ensure they plan well-organized, engaging, and informative events that participants view as beneficial. To that end, the researcher reviewed webinar presentation articles written by both presenters and webinar technology providers, studies that included webinar presentations as part of the broader topic of online courses, and materials concerning pre-event marketing and post-event evaluation practices.

Data Collection and Procedures

Resources were found online using topic searches, such as: webinar tools, webinar best practices, webinar presentations, online learning, learning technologies, online seminars, online presentations, webinar use study, and the like. Books about online marketing, presentation and speaking techniques, and adult learning theory also were consulted.

A number of webinar technology provider sites include tips sheets or white papers for creating webinar presentations. In addition, webinar presenters have written articles sharing their experiences. Some live and archived webinars also were viewed for critiquing purposes.

Data Analysis

Materials were reviewed from various perspectives: what audiences expect, what presenters can do to make webinars more applicable and engaging for viewers, and ways presenters can learn from their audiences.

The researcher noted that while a number of resources listed webinar best practices, there oddly was little overlap from one resource to the next. With such variation, one could surmise

there is much to be done in effort to improve webinar quality. Some sources focused on technology, many emphasized engagement and practicing beforehand, but just a few provided an overview of the whole webinar experience from the participants' perspective: invitation, presentation, and evaluation (Guanci, 2010; Molay, 2009; Ready Talk/American Marketing Association).

An article in the *American Journal of Pharmaceutical Education* shared results of an instructional seminar for online case-based discussion, the objective being to “assess a training seminar developed to prepare pharmacy instructors to facilitate online discussions” (LeBlanc et al., 2007). The study did not specifically discuss webinar technology or best practices, but it did note, from three other studies, that: “both interactivity and instructional technique/pedagogy were cited as factors influencing students' satisfaction with e-learning. Furthermore, individual faculty members' facility with educational technology, including computer skills and software, are clearly associated with perceptions of learners' satisfaction” (LeBlanc et al., 2007).

These findings parallel recommendations by a number of webinar presenters and technology vendors, who say presenters must intentionally redesign their seminar format for the online venue in order to engage participants. The researcher's literature review also clearly reflects the conclusions shared in LeBlanc's study concerning presenters' computer skills and attendees' perceptions of the webinar experience. While it probably is essential for instructors of semester-long online courses to be adept with the software tool delivering the online instructions, most webinar presenters are subject-matter experts who present online relatively infrequently. For that reason, it is recommended that webinar presenters not also attempt to serve as their own moderators (Guanci, 2010). A webinar moderator typically is employed by the webinar technology provider and often verbally welcomes participants to the webinar, explains how to

submit questions, and briefly introduces the presenters(s). During question-and-answer periods, the moderator also can verbally ask the questions submitted by participants, and the presenter can answer. However, the moderator's main role is to ensure the webinar technology runs smoothly. That way, the presenter can concentrate on presenting without having to also manage the technology.

Limitations

Articles and white papers written specifically about webinar presentations are more readily available than seven or eight years ago, but the literature review didn't reveal many substantive studies about webinar presentation skills or the effectiveness of the webinar venue as a training or knowledge-sharing platform. Numbers of studies have been conducted about online education and learning, but those studies focus on semester-long courses, building communities for learning, the psychology of online education, and whether or not test scores prove or disprove if online courses are as effective as face-to-face classroom experiences.

While some best practices from teaching semester-long courses online are useful to note when planning a webinar event, webinars typically are not concerned with building community among attendees, which appears to be one of the main concerns with teaching courses online. Webinar participants gather for a short time, 60 to 90 minutes, to learn about a specific topic—and then they independently go about their separate lives. For audience members of a webinar, relationship is built one-on-one with the instructor; little if any relationship is built among audience members.

Articles, studies, and materials revealed significant advice and tips that, when sifted, organized, and compared with conclusions drawn from studies about the effectiveness of

semester-long online courses, could be collected into one guiding document to aid individuals as they prepare presentations for the webinar venue. This study's resulting guideline document provides solid structure for creating webinar presentations that are engaging and beneficial to participants. More studies should, however, be conducted concerning the long-term effectiveness of this delivery mechanism as it relates to adult continuing education. The venue is useful in reaching people in timely fashion, but its true effectiveness should be measured through changed behavior and memory retention of the materials provided.

Chapter IV: Results

With the best intentions, many associations, corporations, marketing firms, and others jumped into the webinar arena—to offer more learning opportunities more frequently at less expense. They did so, however, without fully considering the new challenges and opportunities of the online venue. Such lack of understanding has resulted in audiences feeling they wasted their time and, in some cases, their money participating in webinars. Challenges with the technology and boring delivery have, for some people, given “webinar” a bad name.

But the venue has its place and can be of great benefit to organizations wanting to connect with employees in different locations, professionals seeking to maintain licensures, marketing departments wanting to motivate people to buy products, or any group needing to connect for an hour or so to learn about something new. Webinar events cost considerably less than face-to-face seminars (Britt, 2006), giving air to this venue’s sails. No longer must target audiences be defined by geographic parameters (LeBlanc et al., 2007). Done well, webinars can also increase an organization’s value to its members and can increase membership, too (“An eLearning Strategy to Grow Membership and Increase Revenue”).

This project was built on a literature review of webinar presentation articles and studies concerning the broader topic of online education. While most of the materials reviewed discuss aspects of the presentation itself, the scope of this project expanded to also include pre-event and post-event activities, which, from participants’ perspectives, are all part of the webinar experience—from invitation to evaluation. The final product is a guideline to be used when planning a webinar—to help presenters stay on target and remember both the big and small tasks

at hand because each type can derail an otherwise successful event. The guideline is a compilation of the many helpful tips discovered during the researcher's literature review.

Pre-Event Activities

Even though technology has enabled people to share information online with large audiences at any given time, successful webinar events require serious planning—or, as one presenter put it, online events must be “thoughtfully tailored” (Riddle, 2010). Webinars deserve “the same amount of advance planning as you would put into any other critical business activity” (Molay, 2009).

A number of resources consulted emphasize the importance of defining the target audience and designing the presentation to meet the needs of that audience—from the title of the event to the content. An “explicit statement of intent” and definitive benefits/goals for the audience and presenter/presenter's company also are important (Molay, 2009). For a webinar to be effective, the focus must be on the audience and how to meet their needs rather than on what the presenter feels motivated to share.

When choosing a topic, webinar presenters do themselves a favor by selecting one where they'll share conceptual knowledge rather than hands-on skills (Wang & Hsu, 2008). Presenters must capture participants' attention and hold it throughout the webinar experience (Godfrey, 2009). The introduction and conclusion can be scripted, but the rest should flow conversationally (Molay, 2009). Presenters also must rethink how to organize presentations for the online, 60- to 90-minute event, incorporating ways to engage participants as a means to compensate for the lack of nonverbal cues and the innumerable distractions that can derail participants' attention (Riddle, 2010). Engagement efforts in this synchronous venue can include:

- Increasing the number of presentation slides, with each bullet point being introduced on a new slide (Fripp, 2009) and using appropriate graphics (Guanci, 2010).
- Including audience polling questions (Wang & Hsu, 2008, 184), which call participants to action during the webinar and provide both audience and presenter with a pulse on where viewers are in terms of knowledge level, understanding, recall of facts previously stated in the webinar, opinion, or belief.
- Incorporating short question-and-answer sessions throughout (Mitchell) rather than saving all for the final 10 or 15 minutes.
- Inserting memorable stories or examples (Fripp, 2009).

When scheduling the event, allow six to eight weeks for preparatory work. Typically, Tuesdays, Wednesdays, and Thursdays are best for the live event, and when choosing a time to start, it's important to remember where the target audience is located ("Webinar Best Practices). If the audience stretches from coast to coast, planning the event for 11 a.m. Eastern time might not be convenient for people in Oregon.

Choose a webinar vendor whose product includes the interactive tools you'll need, who will conduct a practice session, who can provide a moderator for the event, and who will record the session for future use ("Conducting A Webinar).

For participants, the webinar event begins with the invitation, whether it is extended via email, newsletter article, or advertisement. Invitations should include all necessary facts, such as time and date (Bannan, 2010), key words and phrases the audience will recognize (Scott, 2007), a few points the webinar will cover, and either a link to an online registration form or a phone number to call. Invitations should be limited in text, between 150 and 200 words ("Webinar Best

Practices) with considerable thought given to word choice—being informative, yet intriguing (Horn, 2006). Additionally, sending email from a person’s address rather than from a generic business address gets better results—typically a 15% to 35% better open rate (Bly, 2011).

Registration forms are best kept short, asking only for information that’s necessary (Hennegar, 2008). “Each input field...acts as an incremental barrier to completion,” says Ken Molay (2009). However, this point of contact with the audience also serves as a point of engagement, so asking a question pertaining to the topic might be appropriate (Guanci, 2010). All registrants should receive a confirmation email directly upon signing up to attend and reminder emails before the event (“Conducting a Webinar”).

While some sources consulted had overlapping best practices, most shared one vital element: the importance of practicing ahead of time. Presenters, no matter how seasoned, should not plan to “wing it.” Practice helps ensure familiarity with the material, the organizational flow, and that it can be delivered in the time allotted.

The final presentation slide deck, along with a separate set of introductory slides that can loop continuously as participants sign on to the event (Guanci, 2010), should be given to the webinar vendor at least a week in advance. This allows the vendor time to load the slides so the presenter(s) can conduct a practice run, noting exactly what the presenter(s) and moderator should do and when. Moderators typically open and close the event and often read the questions (supplied by audience members through the chat area) so presenters can respond. It’s also recommended that presenters create a few questions beforehand in case none are submitted from the audience (Guanci, 2010).

The post-event evaluation is not delivered until directly after the event, but it must be prepared ahead of time (Molay, 2009). Presentation goals can help direct post-event evaluation questions that reach to Kirkpatrick Model levels 2 or 3, and possibly 4, if desired event outcomes can be measured. Careful consideration should be given to what questions are asked, how they are worded (Taylor-Powell & Renner, 2009), if what is being measured can be improved (Hart, 2004), and if questions can be answered quickly.

Presentation Day Activities

If a presenter has practiced and prepared sufficiently, then the presentation itself can be as enjoyable for him/her as it is for participants. However, some last-minute tasks still are necessary:

- The presenter(s) and moderator should sign on to the event 15 to 30 minutes before kick-off to run through last-minute details, refresh on how to use annotation tools and chat areas, and ensure all systems are running.
- Place “Do Not Disturb” signs on all doors.
- Ensure all telephone ringers are silenced (Mitchell).
- Don’t use a speaker phone or cell phone to deliver the presentation (Molay, 2009).
- Consider having a second computer on standby with the session loaded in case the main machine crashes or the session window is accidentally closed (Molay, 2009).
- Close all unnecessary applications, such as Outlook and Instant Messenger (Volpe, 2007).
- Be sure to have a glass of room-temperature water nearby (Alburger, 2007).

- Have a printed copy of the presentation available so if the Internet fails, the webinar discussion can continue.
- Speakers should run through a few vocal exercises to ensure their vocal chords can make it through the session (Alburger, 2007).
- Have a clock nearby (Mitchell) to ensure the presentation moves at the pace necessary to complete on time with an opportunity to answer questions.
- Invite questions through a chat area rather than verbally through phone lines so as to avoid interruptions (“Conducting a Webinar”).

Begin the event on time. During the webinar itself, presenters can help keep audience members engaged by smiling when they speak or pacing to create energy and enthusiasm in their voice (Alburger, 2007). If polling questions or quick quizzes are included, it’s important to briefly discuss the results. And while an upbeat pace is important, pausing occasionally also can add value (Fripp, 2009). Additionally, throughout the presentation, thank audience members for participating in polling questions and for asking questions (InSynch Training, 2006).

Webinar events should close with a summary of the information presented (Guanci, 2010) and a sincere “thank you” to participants for joining. Ask participants to complete the evaluation they’ll receive via email immediately after the event and tell them what soon will be provided (slides from the session, link to the archived event, additional reference materials, written responses to all questions asked—even those that time did not allow for response).

Post-Event Activities

Immediately following the event, presenter(s) and the moderator should stay connected for a debriefing session to discuss what went well and what could be improved upon next time.

Confirm when the archived session will be available and ask the webinar vendor to immediately provide a list of all questions asked during the event and some basic statistics, such as how many people attended and for how long they stayed online.

Much value is added if participants receive the materials promised when they were promised. If, say, the archival copy won't be ready for a few days, the other materials still should be sent on time. This helps maintain trust. When sending these materials, consider thanking people who already have completed their evaluation and including another link to it for those who have not yet completed it. Also consider sending materials to those who registered but did not attend (American Marketing Association/ReadyTalk).

For the first week or two, evaluation responses should be reviewed at least daily, in case someone includes a question or seeks additional advice. Responding promptly shows personal interest and integrity.

A couple weeks after the event, it's important review and summarize all evaluation responses to help determine the level of success and act as a guide for future webinar events.

Chapter V: Discussion

In the past decade, the popularity of the webinar venue as a learning tool has increased exponentially. Corporations, professional associations, marketing firms, and others have found it useful in educating employees, sharing information, and increasing awareness.

Surveys and studies seem to indicate, however, that a significant percentage of webinar participants have been frustrated with the venue, citing technical delays or malfunctions, boring delivery, and lack of engagement. Technical glitches generally are not within a presenter's control, but content and organization are. Materials prepared for face-to-face presentation must be reorganized for the webinar venue.

Limitations

This study is limited to webinars; it does not include webcasts, online courses, or web conferencing events. The literature review revealed few resources that took a holistic view of the participant's perspective—from invitation to evaluation. Most resources offered tips for various aspects of the presentation itself. Studies about the values and challenges of online courses also were reviewed to determine if outcomes could be applied to the condensed webinar presentation venue, but not many parallels were found. Engagement in the webinar venue occurs mainly through presenter-to-participant relationships and is not concerned with building participant-to-participant relationships.

Conclusions

Webinars that are well done focus on the audience: what the audience needs to learn presented in an engaging, well-organized fashion designed specifically for the online venue. The

results of this study have been collected and condensed to create a guideline that webinar presenters can use to help ensure their webinar is well received. The guideline includes overarching considerations and details that, while seemingly minute, could derail an otherwise effective event.

Recommendations

In the context of one-time, 60- to 90-minute online educational experiences, there is a need for more study of the effectiveness of the webinar venue as a training and educational tool. It's convenience and relatively low cost make the venue popular, but more should be studied concerning participants' retention of information shared and whether or not they were motivated to change behavior as a result of what was learned.

Additional study might also reveal if occasional use of the venue to supplement longer-term online courses might help support the relationship between instructor and student.

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Appendix A: Guidelines for Presenting an Effective Webinar

Effective webinars require considerable planning and incorporate a number of ways to engage the audience—at the point of invitation, during the event itself, and beyond. The following guidelines represent best practices to help ensure a webinar event's success.

Pre-Webinar Activities

- ☐ Define your target audience and maintain focus on them.
- ☐ Pick a topic and write a brief outline of your presentation.
 - What are your goals? Why do you want to produce a webinar?
 - What 3-5 points do you want participants to remember?
 - What business/knowledge issues will the presentation meet/emphasize?
 - What actions do you want participants to take as a result of their time with you?
 - Is there information (something that can be asked in one, short question on the registration form) you'd like to know about your audience?
 - Will you be the only presenter? Will there be a panel of experts? A guest?
 - Is there a logical time of year when people will want to learn about this topic?
 - Who is your target audience? How will you invite them to this event?
- ☐ Contact the webinar vendor/hosting company to schedule the event—about 6 to 8 weeks in advance of when you'd like to deliver the webinar. Tuesdays, Wednesdays, and Thursdays are good days. When scheduling the time, consider where your target audience is located—don't schedule before 10 a.m. on the west coast. Pick a company that will moderate and manage the technology aspects of the webinar, so you, as presenter, can concentrate on the content of the program.

Also schedule time a week before the webinar when you, the moderator, and others involved can run through the program and the technology tools. (The webinar vendor must have our presentation slides ahead of time.) Be sure to practice on your own before this scheduled rehearsal.
- ☐ Decide how attendees will be invited to the event and prepare the invitation. Send the initial invitation about 3 weeks before the event and a reminder a week before. You may also want to send a reminder the day of the event.
 - Email invitation. The subject line is key—choose words carefully so as to draw attention without getting caught in SPAM filters. Use words and phrases that will be familiar to and resonate with your audience. The goal is for readers to open the email. Limit email content to 150-200 words. Write content from the viewers' perspective; make it personal and real to readers. For example: At this webinar, you will learn:
 - Three facts that prove earning a master's degree increases your salary.
 - How the XYZ online master's program works.

- Where to find support resources on the XYZ website.
- Newsletter article or ad. Decide how attendees will register for the event—via telephone or web page dedicated to the event.

Remember to include time, date, and information about what technology updates people might need to run the webinar program on their computers. Also include contact information and a link to the registration form or phone number to call. Consider including a link to a recent news story on the topic. Give readers enough to be interested, but not so much that they don't have to attend.



Keep the registration form brief and easy. Include the name, date, and time of the event. Ask only for information that is necessary. It's okay, however, to include a quick, topic-related question to learn about the audience (or provide space for them to ask a question of you). For example, if the webinar topic is convention disaster insurance, you could include something like: Clicking all responses that apply, please complete the following statement: I'm attending this webinar because:

- My employer purchases insurance for our annual convention, and I want to learn more about what the insurance covers if a disaster strikes.
- In the past, my employer has insured our annual convention, but is considering saving the money this year.
- Our convention venue carries disaster insurance. Do we need a supplemental policy?

Tell registrants they should immediately receive a confirmation email; provide contact information in case they do not.

Explain the system requirements necessary to ensure the webinar can run on their computer. Provide links to appropriate free downloads.



Create the slides for your presentation, keeping in mind ways to engage the audience:

- Open with an interesting fact or story to grab participants' attention right away.
- Create enough slides so they change frequently to help keep participants engaged. Each bullet in a list can be a new slide.
- Write a few polling questions or quizzes to give the audience a means to participate—and to give you some information about them.
- Build in a couple question-and-answer sessions. Show a slide when you're taking questions. Explain how to ask questions via the chat box. Have the moderator or a panel member ask the questions of you—adds variety and positions you as expert. Have a few "canned" questions ready in case no one asks questions.
- Use "you" language. While the audience might be large, each participant is experiencing a one-on-one relationship. Say things like: "During today's session, you will learn..." or "This change could affect you and your company by..."
- If possible, share a story or case study that illustrates the importance of what you're trying to convey. Better yet, invite someone who has experienced whatever is being discussed to join as a panel member.
- Be sure to summarize before you close the event.

Remember the basics:

- Dark type on a light background is easier to read.
- Slide text is an outline, not a script to be read—viewers can do that themselves.
- Include pictures and images to help illustrate, but avoid animations.
- Slide background/theme should be the same throughout. Minimize or exclude brand images and logos. Too much brand turns an educational session into a sales meeting.
- Proofread for errors.

Include an introductory slide welcoming people to the event. Some brand information can be included on this slide.

Include a closing slide. Thank participants for attending, ask them to complete the evaluation, and tell them when to expect an email from you with a link to the archived recording, answers to questions asked during the session, and slide content. (Depending on the number of presentation slides, consider condensing the content into a Word document so as to save on printing resources.) If the webinar is part of a coordinated campaign, mention what to watch for next. Include your name and contact information.

- ☐ Create a separate set of slides that can continuously loop beginning 15 minutes before the webinar begins. Welcome people to the event—state the title and what time the webinar will begin. Create a slide for each speaker, with a photograph and a short biography. Include contact information and instructions about what to do if the Internet goes down or telephones disconnect.
- ☐ Practice. You might consider scripting the introductory and closing paragraphs, but the rest should flow conversationally. Time yourself to determine if information should be added or deleted. Consider recording your voice to hear how you sound or where you might want to pause. Mark your printed slides with notes about when to use annotation tools, when to pause, etc.
- ☐ Write the webinar evaluation and program it to be sent immediately after the webinar. Keep it short, but ask meaningful questions. Review the goals of the webinar—what's measurable?
 - If there are 2 or 3 specific things you want participants to remember, include a quiz-type question to determine if they remember. (Then provide the answer in the materials you send later.)
 - Ask if the content met expectations.
 - Ask if content will motivate them to change or do something.
 - Seek suggestions or topic ideas for future webinars.
- ☐ In addition to the evaluation, can other measurement means be implemented? For example, if one of the goals is to influence participants to call for more information, buy a product, or sign up for a class, can the phone number given be a dedicated number so you know exactly how many calls were received as a result of the webinar?
- ☐ Practice more! Put enthusiasm and confidence in your voice. Know your material.

- ☐ In the week before the scheduled event, conduct a dry run with the webinar vendor/moderator and others who will be involved.
- Become familiar with the annotation tools to circle or highlight points of interest on the slides.
 - Decide who will review the questions in the chat box and pick which ones to answer. Walk through a mock question-and-answer session.
 - Discuss how to transfer from one speaker to another, such as: Now I'd like to introduce..."
 - Discuss what to do if the Internet connection is lost.
 - Discuss what to do if the fire alarm sounds and you must evacuate.

Day of Webinar Event

- ☐ Focus on your audience.
- ☐ Sign in to the event at least 15 minutes prior to the start time.
- ☐ Have someone call in to ensure the phone lines are open.
- ☐ Consider having a back-up computer ready with the session loaded in case your computer crashes or you accidentally close the session.
Be sure all other sessions on your computer are closed (email, etc.).
- ☐ Conduct the presentation in a quiet area. Place "Do Not Disturb: Webinar In Progress" signs on the doors—then lock the doors.
- ☐ Warm up your voice. Talk. Sing a few bars of your favorite song.
- ☐ Have a glass of room-temperature water nearby (not coffee, soda, juice or tea).
- ☐ Do not use a cell phone or speaker phone for your presentation.
- ☐ Have a printed set of slides available in case internet is lost. That way you can continue talking and the moderator/vendor can flip the slides.
- ☐ Turn off all telephone ringers.
- ☐ Mute audience phone lines and those of presenters who are not yet presenting.
- ☐ Have a clock in the room to ensure you stay on track.
- ☐ Begin on time.
- ☐ As part of your introduction, tell people if the slides and an archived recording will be available later.

- ☐ Smile when you talk. Relax. If you're using a headset, stand up and move a bit. Have fun!
- ☐ End on time.
 - Summarize your key points.
 - Explain what you'll provide to them (slides, link to archived recording, answers to all questions asked, etc.)—and when.
 - Ask them to complete the evaluation; briefly explain its importance.
 - Thank participants for attending. Send them off energized.

Post-Webinar Event Activities

- ☐ Immediately after the event, ask the moderator to place you and other presenters into a conference area so you can conduct a quick debriefing.
- ☐ Check to ensure the evaluation was sent immediately following the webinar.
- ☐ Ask the moderator to send a list of all questions asked during the event. Create a document to distribute to all attendees that lists all the questions and answers, regardless of whether they were answered during the session or not.
- ☐ The next day, send an email to all attendees thanking them for participating and including the information as promised:
 - Link to the recording of the event. Let them know they can share the link with anyone who might benefit.
 - A document with answers to the questions asked during the event.
 - A copy of the slides or a Word document of the content.
 - Links to other helpful information.
 - A “thank you” to those who already completed the evaluation, along with a link for those who have not yet completed it.

Send this information within the timeline promised—helps build trust.
- ☐ Check evaluation responses daily. Respond to questions immediately.
- ☐ About two weeks after the webinar event, analyze and summarize evaluation data to help improve future webinar events.