

# Webinar Planning Toolkit



As you are planning webinars for your members, please use the below information to determine your strategy. The Academy recommends utilizing a committee to plan and execute your webinars on an ongoing basis to help make the task manageable and ensure you are bringing consistent, high quality content to your members. This toolkit walks through the major items for consideration as you get started as well as provides a suggested timeline you can customize when working with your affiliate.

- Determine the platform you will be using
  - WebEx (Academy license for \$588/year for unlimited use up to 1,000 participants)
  - Zoom (<https://zoom.us/pricing>)
  - GoToWebinar (<https://www.gotomeeting.com/webinar/pricing>)
  - Demio (<https://demio.com/pricing>)
  - WebinarNinja (<https://my.webinarninja.com/plans>)
- Designate a volunteer/committee
  - Create a calendar for planning
    - Include all due dates for each webinar and assign responsibility to help with tracking
    - Make accessible to everyone on the committee
  - Work with any districts or regions to incorporate their activities as well
    - Have a way for districts/regions to submit webinars and events to the state for support and promotion as appropriate
  - Promote district/region webinars to all members
- Soliciting Speakers
  - Determine speaker honorarium – be consistent
  - Provide constant link for submission on your website
  - Engage the board and membership with soliciting ideas for topics and speakers
  - Actively solicit speakers from presentations you have attended
- Speakers
  - Every webinar speaker should sign an agreement. Ensure you include language about:
    - Recording the presentation
    - Sharing slides/handouts
    - Posting the recording
  - Items to request from speakers:
    - Webinar description (used in marketing the webinar)
    - Speaker bio (used in marketing the webinar and introduction on the webinar)
    - Resume (required for prior approval CEU)
    - Up to 4 performance indicators (required for prior approval CEU)
    - Academy ID Number (required for prior approval CEU)
  - See Speaker Agreement Template on the [Governance Management Website – Affiliate Manual; Section G – Events and Meetings](#)

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- Submitting for CEU
  - CDR requires all of the above items you requested from your speaker plus a timing outline. Use start and stop times such as:
    - 12:00 – 12:05 – Introduction
    - 12:05 – 12:50 – Presentation
    - 12:50 – 1:00 – Q&A
  - If you submit for prior approval, also submit for 175 recorded webinar activity type. This is good for three years from the original date of the webinar.
- Registration
  - Determine pricing
  - Set up registration and payment – include clear instructions and contact for issues
  - Ensure registration is operating before promoting
- Marketing/Promoting
  - Utilize all communication channels the affiliate has
  - Have at least one month between date you first publicize and the webinar
  - Use consistent messaging and graphics. Be sure graphics are tied to the topic
- Technology
  - Be sure the person moderating the technology has a clear understanding on all functionality and how to troubleshoot
  - Include clear instructions on how to join the webinar in your confirmation to attendees
  - Schedule a tech walk through with speakers to ensure their equipment is working. Have them use the same equipment they will the day of the
- Sponsorship
  - If you have sponsorship tied to webinars, establish consistent pricing and update your prospectus
  - Ensure sponsorship recognition is prior to and/or after the educational content
    - No sponsor name/logo/products can be mentioned during educational content. This includes log on the PowerPoint template.
    - Ensure a clear break from sponsor recognition to your speaker such as introduction of the speaker via a biography. Break after content using the question and answer period.
  - Incorporate other electronic benefits to sponsorship to increase value to the sponsor

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## Suggested Timeline

- At least 8 weeks out –
  - Confirm speaker, topic, date, and time
  - Work to create messaging using the speaker bio, picture, and session description
  - Establish marketing calendar via all affiliate communication platforms
  - Create speaker agreement and send to speaker with request for CEU requirements
- At least 7 weeks out –
  - Establish registration platform and cost (if any)
  - Create registration process and link
  - Update website with registration information to direct attendees to
- At least 6 weeks out –
  - Begin marketing webinar through various affiliate communication platforms
  - Work with speaker to finalize CEU requirements
- 4 weeks out –
  - Submit for CEU
  - Schedule a test webinar with the speaker
- 2 weeks out –
  - Host test webinar
  - Confirm final slides and handouts
- 1 week out –
  - Last chance messaging
  - Reminder messaging to attendees – include any relevant handouts
  - Obtain final slides, and add introduction and follow up information as necessary
  - Finalize moderator script
  - Create CEU certificate or certificate of completion if not obtaining prior approval
  - Create evaluation survey
- Day of –
  - Resend information for accessing the webinar to speaker and attendees
  - Ensure you have a quiet place to host the webinar and all technology is working
  - Start the webinar and upload slides/content as necessary – add a note on when the webinar will be starting and to keep microphone muted to the chat box.
  - Be sure to record the webinar if the speaker has granted permission
  - Establish expectations on when to expect follow up information
  - Send the speaker a thank you note after the presentation – request invoice for any honorarium
- Post Webinar Follow Up –
  - Download recording and attendee list
  - Upload recording to your affiliate platform
  - Update website with relevant information
  - Send follow up email to attendees – include link to recording, slides/handouts, CEU certificate, and evaluation