Webinar Best Practices

A SUMMARY OF EXISTING RECOMMENDATIONS

Nicole Bedford | November 3, 2016

Community First: Impacts of Community Engagement (CFICE), a major SSHRC-funded project, aims to strengthen Canadian communities through action research on best practices of community-campus engagement. We ask how community-campus partnerships can be done to maximize the value created for non-profit, community based organizations in four key areas: poverty, community food security, community environmental sustainability, and reducing violence against women.

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Introduction

Despite what the name and definition of 'webinar' might have you believe (i.e. "web-based seminar"), webinars aren't just seminars presented in an online environment. Of course, many people have jumped on the webinar bandwagon with the idea that they can easily translate an in-person presentation to a webinar platform. But the major difference between an in-person presentation and a webinar presentation is the ability to engage with a human being <u>in the flesh</u>.

We humans are much more engaged as an audience when there is a physical person in front of us. Communication through technology, on the other hand, distances us from the person with whom we are engaging. And with webinars, there are far more opportunities to become distracted. For these reasons, we need to change the way we present webinars to ensure our audiences are engaged with our content.

By summarizing the major recommendations found in the sources listed in the bibliography, this document will delve into the ways in which webinars can be designed, presented, and evaluated to maximize audience learning and engagement.

Planning your Webinar

Some Logistical Planning Tips

Regardless of the information being delivered, the platform being used, or the delivery method, preparation is everything in the world of presenting.

- Start planning your webinar at least **6-8 weeks** prior to your anticipated delivery date to ensure your webinar is as tight and engaging as possible.
- Hold your webinar on a Tuesday, Wednesday, or Thursday; more people are likely to attend!
- Pick a time that accommodates all possible time-zones (no 8am EST presentations!).
- Set some possible dates/times for practice sessions.
- Plan post-webinar to answer any unanswered questions, review participant feedback, etc.

1. Consider your Target Audience

The first step when preparing your webinar is to consider your target audience (Molay, 2009). Here are some questions to get you thinking about your audience's needs, and how your webinar will meet them:

- Who is your target audience? Describe them.
    - How does your webinar topic impact them?
    - How do they feel about your topic?
    - What problems are they facing that your webinar might help them solve?
    - What skills, competencies, or knowledge about the topic do they have already? What do they need to learn?
- Why do YOU want to educate your audience? Be specific.
    - How will it benefit you?
    - How will it benefit them?
- What needs to be learned in order to help your audience meet their needs?

By clearly understanding and describing your audience, you're one step closer to designing a webinar that will engage the audience. After all, when someone has a stake in something, they are much more likely to remember and USE the information they're given!

2. Plan and prepare the pre-webinar materials (for organizers)

a. *Craft your webinar title and description*

To properly frame your webinar before you prepare the details of the presentation, use the answers about your target audience to generate a webinar title and description (Molay, 2009). Keep in mind that your title should explain the 'What' and 'Why' (i.e. why your audience should care) of your webinar.

For example, instead of using the title "Effective community-campus engagement partnerships" to describe a webinar that will present different methods of community-campus partnerships, try using "How you can be a better partner in your CCE projects".

The description of the event should be kept short, between 150-200 words (Lande, 2011). The description should use key words and phrases your audience will recognize. It should also address: Who should attend (i.e. target audience), what your audience will learn, and why it is important for them to learn this information (i.e. the value proposition).

b. *Recruit your guest speakers (if applicable)*

Once you know what your webinar is going to be about, you're ready to recruit your guest speakers. Try to choose guest speakers who are well known and respected in their field (Zoumenou et al., 2015). If you hope to have more than one guest speaker, choose guest speakers with opposing views to make the discussion livelier.

When you do confirm a speaker:
- Collect their contact details for prior to and during the webinar (if different).
- Request a bio and photo.
- Go over your expectations for their presentation.
- Provide them with the webinar details, including the time allotted for their presentation.
- Schedule and conduct at least one practice session with them.
- Make sure they know to log into the webinar at least 30minutes early the day-of.

c. *Determine your event timings*

Most webinars run between 1 - 1.5 hours in length. How you use this time to present your content is largely determined by your audience, your guest speakers, and the information you're trying to convey.

General information webinars should not be longer than one hour, whereas webinars presenting highly technical content, or webinars for training purposes, can be up to 1.5 hours maximum (Molay, 2009).

Here is a suggested breakdown of timings for a general webinar with two speakers (from Molay, 2009):

- Start two minutes after the hour (in case people join late)
- Use one minute to introduce the technical details of the platform.
- Allot 20 minutes for the first presentation.
- Follow the first presentation with a two minute poll.
- Provide another 20 minutes for the second presentation.
- Follow the second presentation with a 13 minute Q&A session.
- End the webinar with two minutes for closing remarks.

As a tip, be sure to have your most experienced guest speaker present last (Molay, 2009). The more experienced they are, the better they will be at "winging it" if the need arises (e.g. if the first presenter goes over time).

It can also be very engaging for the audience if a discussant who is also an expert in the applicable field helps to facilitate the discussion period.

d. Build the Registration Form (and other details)

Now you're ready to put together the "promotional" side of the webinar. This means building the registration form, preparing the website/web posting and invitation emails, and sharing your webinar details widely.

First, **the registration form**. You will want to use the registration form to collect important statistical details about your registrants, so think carefully about the information that would be useful to know for planning the next webinar (e.g. how they heard about this webinar). However, if certain information is not absolutely necessary to collect, don't collect it. Remember, the registration form can act as a barrier to your attendees: the more work they have to do to fill it out, the less likely they are to bother (Molay, 2009; Lande, 2011).

Always ensure that attendees receive a confirmation email as soon as they register (Molay, 2009). The confirmation email should indicate that they are registered; it should reiterate the value statement; if possible, it should provide a calendar invitation so participants can easily add the details to their Outlook, Gmail, or other calendar client platform; it should provide instructions for how to access the webinar the day-of; and it should clearly indicate that reminder emails will be sent closer to the event.* Finally, if you want to boost the likelihood of registered attendees actually attending your webinar, it can help to include a request for registrants to submit questions for the presenter prior to the webinar (Molay, 2009).

*A quick note on reminder emails: Never send more than 2 reminder emails for a webinar event (Molay, 2009). The first should be sent the day before the event, and the second an hour before the event starts (Zoumenou et. Al, 2015). Always remember to highlight the value statement so people are reminded about why they registered!

Next, the **website/web posting or invitation emails**. This is where you can make use of your webinar description. Don't forget to include event logistics (like the date, time, and how to register). Your main focus for this material is to motivate participants to register.

Finally, **sharing your webinar details**. When you send your invitation email, you can increase the likelihood of it being received by sending it from a person's email address as opposed to a generic business address (Lande, 2011). If you built a website or web post to promote your webinar, provide your team and guest speakers with template emails and social media posts so they can easily share details about your webinar event.

3. Prepare the webinar presentation (for presenters)

a. *Use learner-centred techniques*

If we want people to be actively engaged in our webinars, and, more importantly, to take information away from our presentations, we need to understand how to maximize people's ability to translate information from their short-term memory to their long-term memory. Research in the field of "brain-based learning" has resulted in some useful "learner-centred" tips and strategies that you should consider when planning the content of your webinar (content summarized primarily from Humphrey, LeGrand, & Beard, 2013; and Pilcher & Bradley, 2013):

- Keep learning sessions to 20minutes or less.
  - o Consider hosting "mini-lectures" that feature 10minute presentations followed by a 3-5minute activity.
- Provide learners with small chunks of new information during learning sessions.
- Help learners understand and contextualize the new information by relating it to previous knowledge (e.g. as an extension of already-established knowledge: $1 + 1 = 2$ therefore $2 - 1 = 1$).
  - o Using personal stories and examples helps learners establish relatable connections to the information and enhances information retention.
  - o Relating information to a learner's personal interests and goals can also help with retention.
- Repeat the new information several times, and in several ways.
- Once the new information has been provided, solidify the learning by having learners recall the information and apply it to new contexts.
  - o This can be accomplished through an activity.
- Stimulate as many of the learner's senses as possible when presenting new information.
  - o For example, if in an online environment, present information using images, the presenter's voice, and by having them interact with an object/quiz/question-response chat using their mouse or keyboard.
- Wherever possible, use games, simulations, role-playing, and audience response systems to actively engage the learner in the learning process.

b. *Use audience engagement techniques*

Some ways to make the webinar more engaging while building on these learner-centred techniques include (summarized from Humphrey, LeGrand, & Beard, 2013; Pilcher & Bradley, 2013; Andersen, 2010; Badia & Colosimo, 2013; and Zoumenou et al., 2015):
- Using your webcam (when possible) during your introduction and conclusion.
- Starting with an ice-breaker that teaches the audience how to interact and establishes the precedent of interacting with the webinar content.

- Outlining the purpose and objectives of each agenda section to reiterate what the audience is meant to learn or take away from each section.
- Using more slides (e.g. 85 slides for a 30minute presentation, or approximately 2-3 slides per minute).
  - Though using more slides is important, remember that you should NEVER simply speak from your PowerPoint presentation. To help prevent yourself from just reading the slides, use more content-relevant images, and point-form (or no) text.
- Pausing every 6-10 minutes to ask the audience a direct question (or complete a poll) that re-lates to the webinar topic (e.g. give me an example of how you plan to use this model of CCE in a future partnership).
- Remembering to continuously bring the content back to addressing the audience's needs.
- Providing lots of hands-on, real-world examples.
- Referring to participants by name when answering their questions.
  - It's all about the audience! Audience members should feel like the presentation is being given to them alone!
- Using the annotation tools to emphasize specific points.
- Using live demonstrations where applicable.
- Summarizing the content and activities at the end of the presentation and briefly revisiting the learning outcomes.

c. *Keep the content simple*

When it comes to the content, keep it simple and meaningful (Humphrey, LeGrand, & Beard, 2013). The content should present "need to know" information and should not be too theoretical (Pilcher & Brad-ley, 2013). Script your introduction and your conclusion to make sure it is always delivered accurately and succinctly (Molay, 2009). For the body of your presentation, use a point form outline. This way, the presentation will come across as more conversational.

Always arrange the most important information at the start of your presentation and identify in advance which slides can be skipped if you are suddenly required to present in a shorter amount of time (it's bet-ter to skip content than rush through it. Also, NEVER indicate that you are skipping content. It just looks unprofessional) (Molay, 2009).

Use the last slides of your presentation for contact information, a preview of future webinars (if applica-ble) and a call to action (like completing a feedback survey!).

d. *PRACTICE!!!!*

Practice, practice, practice. Practice on your own, giving the presentation to your mirrored self. Practice with the organizers to learn how to use the technology. Heck, even practice with your grandparents! The point is, by the time the presentation comes around, you should know your content inside and out.

When you practice with the technology, make sure you're practicing in the same location, and with the same equipment, you plan to use the day of the presentation (the same internet connection, computer, headset, and webcam). Learn how to navigate the system and use the annotation, polling, and other tools. If you're not going to be the one administering these tools, make sure you know who will.

With the organizers or the moderator:

- Determine the responsibilities of the presenter(s) and the moderator
  - Know who will be introducing the presenters, dealing with technology issues, and starting and ending the recording (if applicable).
- Decide how the discussions will be managed (Will the moderator deal with everything? Will people raise their virtual hands? Will participants be unmuted? Will they use the chat box?).
- Identify any topics that you do NOT want to address during the public Q&A.

A Note on the Technology

Since webinars are run over the internet, and not all attendees (or presenters) have access to the same amount of bandwidth, be sure to follow these practices to help keep the technology working for you (and not the other way around!) (Andersen, 2010):

- Avoid using webcams throughout the presentation. Streaming video eats up bandwidth and can crash, or significantly slow down the presentation for some viewers.
  - Along these same lines, don't include videos in your presentation. Often they don't work properly and only cause delays in the presentation.
- Don't use slide animations in your PowerPoint (e.g. animated transitions between slides, text that flies into place, etc.). They tend not to work properly in webinar platforms. Instead, simulate animations using multiple slides (e.g. if you want an image to "appear" on your slide, duplicate the slide and simply remove the image on the first slide so on the second, it looks like the image is appearing.).
- Avoid using hyperlinks in your presentation. Instead, share hyperlinks in the chat window.
  - You can prepare the links in advance in a text file so it's easy to copy and paste them into the chat window.
  - Use a hyperlink shortener (like bitly.com) to ensure your links aren't too cumbersome.

Presenting the webinar

A Pre-Webinar Check List for Organizers and Presenters

- ✓ Set up your presenter environment
  - Use a quiet room with a door.
  - If presenting on camera: Make sure the background doesn't have visual clutter. Don't present with a window in behind or where people might walk past.
  - Always present using a headset or telephone handset; NEVER on speakerphone, a cell phone, etc.
- ✓ Turn off all cell phones and mobile devices.
- ✓ Mute your computer sound (if you are joining over phone) and shut down any extra applications.
- ✓ Keep water handy.
- ✓ Have a clock on hand to keep track of time.
- ✓ Have a backup computer and a backup phone (if possible).

- o Every presenter can log in on two computers. If the primary machine crashes or the presenter accidentally closes the session window, you can continue from second machine without pause.
  - o Use the backup phone to call in if the first one cuts out.
- ✓ Have a printout of all the presentation slides in case the internet connection is lost. This way the presenter can continue talking through the presentation while the moderator and co-presenter advance the slides for the audience.

Starting the Webinar

The day of the presentation, be sure to login and open the webinar platform at least **15-30minutes** early (Andersen, 2010). Ensure there is a note or welcome screen up so that audience members who login early will know the presentation hasn't yet started. It is also good practice to have some audio, like music, playing, so attendees know their audio connection is working (Pilcher & Bradley, 2013).

- Always begin the event on time.
- Only use your webcam for introductions and conclusions.
  - o You can use it during questions as well if you have a high bandwidth.
- Start by reviewing the technical components of the webinar platform.
  - o When discussing these components, post a screen shot of the platform that you can then annotate to point out where attendees can find their interaction tools (Andersen, 2010).
  - o Be aware that there will often be a lag between when you speak, and when your attendees hear what you're saying. The same goes with visuals.
- Explain how you want attendees to ask questions during the webinar (e.g. using the chat box).
- Ask attendees to introduce themselves using the chat box.
- Consider standing while you speak. It will automatically increase the animation in your voice.
- During exercises/activities, make sure you speak so attendees know the presenters are still present (Badia & Colosimo, 2013).

Ending the Webinar

- Thank your attendees for their participation.
- End with a summary of the material and a call to action.
- Remind attendees of any information they can expect to receive right after the event.
- Keep the webinar platform open for a few minutes following the closing comments in case attendees have any final questions (Badia & Colosimo, 2013).

A Moderator's Resource

The goal of moderating is to make sure both your attendees and your presenters have a great webinar experience. For tips and pointers on how to effectively moderate a webinar, check out *5 Steps to Moderating a Webinar* by James Hilliard.

After the Webinar

The time immediately, and shortly, following a webinar is also a crucial time to ensure your participants have a great webinar experience. It is also the time when participants are most likely to follow your call to action, be it filling in a feedback survey, signing up for the next webinar, etc. That said, follow these tips for making the most of the post-webinar hours (primarily from Molay, 2009; and Lande, 2011):

Immediately After the Webinar

- Send your feedback survey as soon as the webinar has finished.
  - o It's great to warn people at the end of the webinar to look out for your survey to further increase their chances of completing it.
- Spend time answering any unanswered questions that were submitted during the event.
  - o You can choose to answer the participant directly, or compiling the questions and answers into a document that can be shared when the summary email is sent.

Within 24 Hours of the Webinar

- Send a summary email to attendees.
  - o This email should thank participants for attending, remind them of the top 3 webinar take-aways, and provide recordings and additional materials, including any links that were shared during the presentation.
    - ▪ With respect to the webinar recording, it is always best to remove participant names, and edit out any activities or "dead air" that might have happened during the webinar. People will be most keen on watching the presentations, and possibly the discussions.
  - o Where possible, host all documents being shared somewhere on the internet and send links rather than sharing attachments. This increases the chances that people will be able to access the information.
- Send an email to registrants who did not attend. Invite them to review the recording of the webinar and to register for future webinars.
- Use your webinar system's analytics to review and track your event's successes and areas of improvement.

Conclusion

Creating the perfect, interactive webinar is not easy. In fact, it takes a surprising amount of work. However, with the right amount of planning, practice, and polish, you can deliver a succinct, informative, and engaging webinar that will be useful to both you and your audience.

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Appendix 1: Quick & Dirty Webinar Tips for Presenters

Here are some quick tips for presenting a great webinar.

Before the webinar

Collect the webinar details.
- Ask the organizer:
    - What are their expectations and goals for the webinar?
    - What do you bring to this presentation that another presenter cannot?
    - Who is the audience and what are their needs?
- Request a copy of the webinar details, including timing, contact details, etc.

Develop an engaging presentation.
- Keep the content simple and meaningful:
    - Identify the top 3 lessons you want the audience to learn and present on these.
    - Connect the "need to know" information with how it addresses the audience's needs.
    - Present the most important information at the start.
    - Contextualize information with personal stories and examples.
    - Script the introduction and conclusion, but only outline the middle of the presentation.
    - Identify in advance the content (and slides) that can be skipped if time is short.
- Build-in audience engagement where possible (e.g. answering questions, completing polls, etc.)
- Design a PowerPoint presentation that:
    - Changes slides every 30 seconds (approx. 2-3 slides/minute).
    - Uses complimentary, subject-appropriate images and less or no text.
    - Does not include animations, videos, or hyperlinks (these don't always work).

PRACTICE in advance of the presentation.
- Request a practice session with the organizers to learn how to use the system.
    - Use the same technology you'll use the day-of the event.
- Review the responsibilities of the presenter, moderator, and any other organizers.
- Identify topics that you will not want to address publically during the Q&A.

The Day of the Webinar

Set up your presenter environment.	*Present with enthusiasm and professionalism.*
- Use a quiet room with a door. - Use a headset or telephone handset for presenting. - Turn off all mobile devices. - Close any extra computer applications. - Have water and a clock handy. - Have a printout of all the slides available. - If possible, have a backup computer and phone.	- Present standing to increase the level of enthusiasm in your voice. - If you are asked to shorten your presentation time, quickly remove, or just skip less important slides without comment (act like it was planned!). - When answering questions, refer to questioners by name when possible. - Thank the audience and organizers for having you as a presenter.

Appendix 2: Quick & Dirty Webinar Tips for Organizers

Here are some quick tips for organizing a great webinar.

6-8 weeks prior to the event:
 • Schedule the event (mid-week, at lunch, works best), and possible practice dates.
 • Identify your target audience and their needs.
 • Outline webinar goals based on these needs.
 • Choose speakers who are well known in the field.
   o If choosing multiple speakers, pick speakers with opposing views.
   o Collect their details (bio, contact information, photo, etc.).
   o Be clear about your expectations.
   o Confirm their attendance at one (at least) practice session.
 • Determine your event agenda.
	Suggested Webinar "Agenda":
	 • Start 2 minutes after the hour
	 • Use one minute to introduce the technical details.
	 • Allot 20 minutes for the first presentation.
	 • Follow the first presentation with a 2 minute poll.
	 • Provide another 20 minutes for the second presentation.
	   o Schedule your most experienced and comfortable speaker for last.
	 • Follow the second presentation with a 13 minute Q&A session.
	 • End the webinar with 2 minutes for closing remarks.

4-6 weeks prior to the event:
 • Build the registration form.
   o Keep the amount of information being collected to a minimum.
 • Develop the promotional website, web posting, or invitation email.
   o Be clear about how audience members will benefit by attending!
 • Share the website and or invitation emails.
   o Promote weekly as possible (not weekly via email, but social media, etc.).
	1-2 weeks prior to the event:
	 • Run practice sessions with your presenters.
	   o Get comfortable with the technology.
	   o Be clear about expected roles and responsibilities.
	 • Prepare meeting supplies including:
	   o Presenter slides (print too)
	   o Contact information for presenters, technical assistance, etc. (print)
	 • Send attendees a reminder email about the event, 1 week, and 24 hours prior to the event.

The day of the webinar:
 • Set up the environment:
   o Use a quiet room with a door.
   o Use a headset or telephone handset for presenting.
   o Turn off all mobile devices.
   o Close any extra computer applications.
   o Have water and a clock handy.
   o If possible, have a backup computer and phone.
	• Start the event on time.
	 • End the event on time.
	 • Thank participants for attending.
	 • End with a summary of the material and a call to action.
	 • Remind attendees of any information they can expect to receive right after the event.
	 • Keep the webinar platform open for a few minutes following the closing comments in case attendees have any final questions.

Immediately after the webinar: • Send your feedback survey and any other "call to action" items. • Answer unanswered questions from the Q&A period.	***24 hours after the webinar:*** • Send a summary email to attendees and registrants who didn't attend. Include links to the recording, additional resources, etc. • Review surveys and analytics and determine areas for future improvement.