

A Guide to Planning a Webinar

Jennifer Martin
National Association of Student Financial Aid Administrators (NASFAA)
for
National Training for Counselors and Mentors (NT4CM)

Introduction

Technological advances have greatly expanded the options that individuals and groups have available to share information. One application of available technology is to provide training in a format that can reach a large number of participants in diverse locations. Providing training using today's technology is a form of distance education—any training or information sharing delivered to a geographically disbursed audience.

Webinars are a form of distance education that utilize the Internet to provide training in a seminar format. Providing training via Webinars has advantages, including the ability to reach a large number of people, the relative ease of distributing documents, and the ability to archive presentations. The drawbacks of the use of Webinars include less interaction with participants, limited flexibility to change presentation order and flow, and restrictions on managing questions.

The goals of this document are to provide some general information about platforms that support Webinars and to present issues that should be discussed when planning a Webinar.

Webinar Platforms

There are a number of platforms available that support Webinar production, including Live Meeting, ON24, and Go to Meeting/Webinar.

Live Meeting

Live Meeting is a contracted delivery platform hosted by Microsoft. It supports a variety of Microsoft applications, including PowerPoint, Word, and Excel. The audio portion of presentations is provided through conference calls or participant computers. Live Meeting has the capacity to join participants using both forms of audio delivery. It can support both small and large audiences. Available audience interactivity tools include video, live chat, question and answer boxes, audience polls and surveys, virtual white

boards, and desktop application sharing. Live Meeting supports technology to address audience questions using either an audio link or a text tool.

Live Meeting may be purchased as either a standard or professional license. Standard licenses can accommodate a meeting capacity of up to 15 participants. Professional licenses support meetings for up to 1,250 participants and also include the ability to store unlimited shared meeting recordings for a year. Both license types require a minimum number of users, and the purchase price is calculated based on the number of users. For a fee, Live Meeting Event Services will provide event management, including production planning, Live Meeting seats, toll-free domestic audio, custom registration materials, and post production reports. For more information about Live Meeting, go to <http://office.microsoft.com/en-us/livemeeting/default.aspx>.

ON24

ON24 is a contracted delivery platform hosted by the ON24 Corporation. Like Live Meeting, it supports a number of Microsoft applications such as PowerPoint, Word, and Excel. ON24 can be run using any browser. Participant audio is provided through the Internet; participants must have speakers or headphones connected to their computer. ON24 audience interactivity tools include video, live chat, question and answer boxes, and audience polls and surveys. Materials and scheduling can be coordinated by ON24 staff. ON24 can provide archives of Webinars.

ON24's Webcaster Center offers a wide variety of services, from pre-planning to post-event follow up, to ensure broadcasts are successful. For more information about ON24, visit <http://www.ON24.com>.

GoToMeeting and GoToWebinar

GoToMeeting and GoToWebinar are platforms provided by Citrix Online. Both platforms are compatible with Microsoft applications such as PowerPoint, Word, and Excel, and provide the capacity for presenters to share their computer desktop with participants.

GoToMeeting and *GoToWebinar* are also integrated with Microsoft Outlook, allowing organizers to initiate events with a single click. *GoToMeeting* is a useful platform for small meetings of up to 10-15 participants. *GoToWebinar* is designed for larger events of up to 1,000 participants. Audience interactivity features include polls and surveys, chat, and questions and answers. *GoToWebinar* allows audience members to ‘raise their hand’ to indicate when they have questions. The question and answer feature is not available for *GoToMeeting* since it is designed for small groups. *GoToMeeting* also features drawing tools that allow participants to point to or highlight items being displayed. Both *GoToMeeting* and *GoToWebinar* use audio provided either through computers or telephones.

Citrix Online offers monthly and annual plans for *GoToMeeting* and *GoToWebinar*. The pricing structure allows users to present an unlimited number of meetings or Webinars for a flat fee. Integrated voice conferencing is included. Users do not have to purchase separate licenses for participants. *GoToWebinar* plans include unlimited use of *GoToMeeting*, as well as self-service planning, registration, and delivery tools. To learn more about the platforms offered by Citrix, go to www.gotomeeting.com and www.gotowebinar.com.

Available Webinar platforms offer a variety of services and features. When selecting a platform, consider how large the potential audience could be, the level of audience interaction desired, the best way to manage participant questions, the need for post-production reports, the availability of staff to manage Webinars, and available financial resources. Many institutions and associations have existing contracts with Webinar platforms; a new agreement may not be necessary.

Issues to Consider When Planning a Webinar

Selecting a technology platform is only one of the issues to discuss when planning a Webinar. Additional issues are addressed below.

Registration

As noted above, some Webinar platforms provide registration support. If the selected platform does not support registration, develop a registration process early in the Webinar planning phase. Depending on available resources, registration could be managed through an on-line form, a paper form, or another medium. Decide what information to collect as part of the registration process, if a deadline is necessary, and if cancellation procedures need to be detailed. Other topics to consider when setting up a registration process are follow-up communication with participants and how to relay last-minute information such as technical delays or cancellations. One or two individuals should be responsible for monitoring and managing the registration process.

Webinar Length

One decision to make early on in the planning process is the length of the Webinar, which would include any time allowed for questions. Webinars often include an introduction, the presentation, a question and answer period, and a conclusion. Webinars often range in length between one and two hours. Remember that audience members will be sitting in front of their computers for an extended period of time and be mindful of their ability to stay focused on the material being presented.

Development of Materials

Providing training via a Webinar is different from traditional classroom style training. The reliance on an audio presentation means that care should be taken when developing materials to maintain audience interest by including anecdotes, examples, or places where audience interaction is required (such as a poll). When developing slide presentations, create a presentation that is long enough that participants won't feel as if they are viewing the same slide for several minutes. Presenters should not give participants the impression that they are reading the slides; the spoken portion of the Webinar should enhance the information provided on slides. Creating handouts for audience members to refer to during the Webinar is also advantageous. Referring to handouts can break up the presentation and highlight information that may be difficult to

present on a slide. Webinars can include live or recorded video. While video creates variety for the audience, it also requires additional planning for video production and rehearsals for presenters. The use of video can also impact the time available for material preparation.

Selection of Moderator and Presenters

In addition to selecting the presenters for the Webinar, it is also helpful to select or designate a moderator. The moderator does not also have to be a presenter. The role of the moderator is to welcome participants, introduce speakers, moderate live question and answer periods, and provide closing remarks. As with the development of materials for the Webinar, be mindful of Webinar technology when selecting a moderator and presenters. Speakers should have good voice quality that conveys well in an audio lecture format and should speak without unnecessary pauses. It would also be helpful to locate presenters with experience in presenting via Webinars.

Publicity

After the basic details of a Webinar are decided, it is time to develop a strategy for publicizing the event. Efforts should be targeted to the audience that the Webinar is intended to reach. The information included in publicity should not only be basic information, but also why the Webinar will be valuable to participants. The benefits of Web-based training should also be highlighted.

Question Management

Good question management is critical for a successful Webinar. If at possible, allow time during the Webinar for a live question and answer period as a way to encourage audience interaction. Live question and answer periods may be held at multiple points during a production, or just at the end. Providing multiple Q&A periods can keep the audience engaged. It is also a good idea to designate in advance who will be available to answer questions, possibly by subject area. Registrants can also submit questions in advance of the broadcast. Soliciting questions beforehand has a couple of advantages.

It gives presenters (or others) time to research responses. It also ensures availability of questions at the start of a question and answer segment. The planning process should also address how to handle questions after the Webinar. One possibility is to provide participants with a compilation of “frequently asked questions” or to provide personal follow up on individual questions.

Making Materials Available

Due to the nature of Webinars, it is important to make material such as handouts and copies of slide presentations available to participants before the production begins. Materials may be posted to a Web site or e-mailed directly to participants. Some platforms allow handouts to be accessed directly from the Webinar Web site. Depending on which technology platform is used, vendors may request files of all materials well before the date of a scheduled event. Also consider whether or not materials will be available, and for how long, after a Webinar.

Practice Session

Regardless of which technology platform is used, consider having a practice session with all speakers before the event. A practice session will familiarize presenters with Webinars in general and the specific features of the platform being used. Practice sessions will also give presenters an opportunity to refine material and presentation style. They are also a good opportunity to time presentations to ensure that enough time will be allowed for questions. Work with the technology platform being used to schedule a practice session.

Evaluation

Evaluation is an important part of any training effort, and Webinars are no exception. Depending on the technology platform being employed, a variety of evaluation options are possible, including on-line surveys and polls. If the platform does not support an evaluation tool within the Webinar, follow up with a separate feedback form or survey

sent via e-mail to participants or posted to a Web site. Analyze the results to ensure that training provided through Webinars meets the needs of the intended audience.

Follow Up

There are several issues to consider after a Webinar is presented. One is whether or not an archived recording will be available, for both historic purposes as well as making such a recording available to audience members or others who were unable to join the event live. The availability of archived recordings varies by vendor, as well as the length of time a vendor will store a recording. Additionally, a decision should be made about the availability of materials, such as handouts. Another important component of follow up is the management of questions, including posting common questions on a Web site, or following up on an individual basis with audience members.

Conclusion

The Internet has revolutionized the way many people access information, including training. Webinar technology provides a valuable tool to make training available to people located in geographically dispersed areas. Thorough research and planning will result in successful Webinars that relay needed information to the right people at the right time.