

WEBINAR CHECKLIST

PROCESS/TIMELINE TO REQUEST SCHEDULING/HOSTING OF A LIVE WEBEX SESSION

Webinars can be overwhelming if you don't know where to begin. There are also quite a few steps in making an awesome webinar. Don't miss any steps on your next webinar production! Use this checklist to make sure you do everything you need to conduct a webinar with lots of value!

(Please note: The timeline shown below is a suggested guideline)

1. PRE-WEBINAR (6-8 weeks prior)

- PDA roles:
 - Determine the topic
 - Select speaker(s)/presenter(s)
 - Pick a date/time--confirm availability w/speaker(s)/presenter(s)
 - Complete **WebEx Request Form** and submit to LTLTI to reserve date (*via 'Submit Form' button located directly on form*)
- Host (P4A/LTLTI) roles:
 - Responds to PDA to either confirm availability of selected date/time or arrange/determine alternate date/time
 - Once a date/time is selected/confirmed, schedule webinar and provide WebEx connection information to PDA

2. PRE-WEBINAR (4 weeks prior)

- Host (P4A/LTLTI) roles:
 - Reach out to speaker(s)/presenter(s) to provide WebEx-compatibility test instructions, WebEx connection information, and request the following by a specified date:
 - Webinar outline/description/agenda
 - PPT file
- Speaker/Presenter roles:
 - Create webinar outline/description/agenda & bio--provide to PDA and P4A/LTLTI by specified date
 - If using visuals, create webinar PPT 'draft' file (<https://blog.hubspot.com/marketing/webinar-planning-list>)
- PDA role:
 - Promote Webinar—send announcement distribution to intended audience/network (*include WebEx connection information previously provided by P4A/LTLTI*); 'cc' webinar 'Host' on email (mtroutman@p4a.org)

3. PRE-WEBINAR (2 weeks prior)

- Speaker/Presenter roles:
 - Perform a WebEx-compatibility test on computer that will be used to conduct webinar

4. PRE-WEBINAR (1 week prior)

- PDA role:
 - Send reminder email to intended audience (*include connection information*); as a courtesy, webinar 'Host' cc'd on email (mtroutman@p4a.org)
- Speaker/Presenter roles:
 - Provide 'final' webinar slide deck to Host/LTLTI (mtroutman@p4a.org)
- Host (P4A/LTLTI) role:
 - Send a follow-up/reminder email to speaker(s)/presenter(s) to again provide WebEx connection information and to request any items previously requested but not yet received (*webinar outline/description/bio/final PPT file*); 'cc' requestor (PDA) on email

5. DAY OF WEBINAR

- Speaker/Presenter roles:
 - For webinars being conducted 'remotely';
 - Find a quiet room to login and present from
 - Log into webinar at least 30-40 minutes prior to start time
 - Dry Run of Webinar--Test audio, visual, and slide progression
 - For webinars being conducted at the P4A/LTLTI Office
 - Arrive a host location at least 30 minutes prior to start time
 - Bring a copy of webinar PPT slide deck on a flash drive
- PDA roles:
 - Prior to start time:
 - Login to webinar at least 30 minutes prior to start time
 - At start time:
 - When prompted by Host, begin welcome, announce topic, and introduce speaker(s)/presenter(s)
- Host (P4A/LTLTI) roles:
 - Prior to start time:
 - Mute all webinar participants on login
 - Activate 'Chat Panel' for participants to submit questions
 - Display visual/whiteboard at start of session (welcome / topic / speaker(s) / agenda / description)
 - Open/display WebEx-compatible slide deck
 - At start time:
 - Provide verbal welcome/review of webinar housekeeping rules; turn over to PDA for introduction of speaker(s)
 - During webinar:
 - Monitor session
 - Record session (for on-demand downloading purposes)
 - Q&A Session—Review chat panel entries at close of presentation(s)
 - Provide technical assistance

6. POST-WEBINAR

- ☑ Host (P4A/LTLTI) roles:
 - Download/save webinar recording from WebEx & convert to LMS-compatible format
 - Download/save 'participant list' from WebEx (names and email addresses of participants)
 - Download/save 'chat transcript' from WebEx (chat questions submitted to chat panel during webinar)
 - Upload converted webinar recording to LTLTI training portal, along with webinar slide deck and any provided accompanying handouts.
 - Test materials uploaded to LTLTI training portal to assure accessibility.
 - Send a follow-up email to webinar requestor (PDA), to provide a direct link & path to the webinar materials posted to the LTLTI training portal, and to provide the 'participant list' and 'chat transcript'.
 - As a courtesy, send follow-up email to non-PDA speaker(s)/presenter(s) to thank them for their presentation and to provide them with a temporary WebEx link to access a recording of their presentation (*link only active until recording deleted from WebEx—appx. 2 weeks*).
- ☑ PDA roles:
 - After receipt of follow-up email from Host--log into LTLTI training portal to confirm accessibility of webinar materials
 - Respond to Host to acknowledge receipt and confirm ability to access webinar materials.
 - Send an email distribution to 'network' to inform that webinar materials are available for viewing via LTLTI training portal.
 - ***NOTE:** The 'chat transcript' provided by Host (P4A/LTLTI) is a great source for creating an FAQ document, which can also be posted to the LTLTI training portal along with the initial webinar materials—if you'd like to go this route, please send the completed FAQ document to LTLTI (mtroutman@p4a.org), requesting that it be posted to the LMS along with the initial webinar materials.*