

# Webinar Best Practices Guide

Webinars and virtual events are a great tool to move someone in your audience from awareness to engagement with your organization or campaign. They can be used to share the expertise of your organization with your network, generate prospective partnerships, or educate the media about a particular issue. The Water Hub hosts webinars to debrief [campaign reflections](#), share [new resources](#) and [research](#), or offer [skill building sessions](#) to our community. We also use them to educate and engage reporters through [media briefings](#).


## Scoping

We typically plan webinars 1-3 months in advance, depending on the amount of time we need to coordinate with partners, develop the program agenda, confirm panelists, and do promotional outreach.

This [scoping and outline template](#) is a guide to help your organization agree on the goals, framing, and format on your planned event. The best webinars focus on timely topics, have a tight program that keeps the event moving, and offer something of value to the audience. This means harnessing the [power of storytelling](#) to connect topics to real life harms and benefits people are facing, while using visual aids like videos, photos, and interactive elements. The outline will help keep track of your planned content. We also recommend creating a [run-of-show](#) that covers timing, roles, and the content each speaker will talk about. It's the behind-the-scenes guide to your webinar and is typically shared with all participants in advance (while the outline may be internal to only your organization).

## Promotion Registration

- Whether using Zoom or another virtual event platform like StreamYard or Riverside, you will need to set up the back-end of your virtual event including a registration page. There are so many variables that go into platform decisions so here are a couple of considerations:

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- What is the ultimate goal of your event? You may have cost considerations such as utilizing a platform you already have access to or is integrated into your email program or you may want to use a platform that easily streams across social media platforms and YouTube for high visibility.
  - Draft copy of the registration page for your event describing what it is, the date, and the time. In most cases, you can add branding, photos and bios for speakers, and other elements to this page.
  - Build your list! You can also set up custom questions on a registration page like asking participants to opt into your newsletter or future communications.
  - If possible, set up a built-in Thank You email plus automatic reminders 1 week and 1 hour before your event.

## Tracking links

Trackable links can be created within Zoom, a third-party service like bit.ly, or many marketing platforms. Create trackable URLs for different emails, social media platforms, or any in-real-life signage to better understand where your promotion is most successful.

## Media outreach

If this is a virtual press event targeting journalists, you will need to create a list of journalists to invite and draft a media advisory to pitch reporters on registering and attending the webinar.

Here are some template and example media materials:

- Template [media advisory](#)
- Example Water Hub media advisories for virtual media briefings ([here](#) and [here](#)).

## Materials checklist:

- Webinar description (blurb)
- Tracking links
- Zoom (or other) registration page
- Promotional graphics
- Recruitment email copy
- Recruitment social copy
- Follow up email
- Follow up blog


## Planning and promotion timeline:

- 1-3 months out: Draft scope and schedule event date. Determined roles and responsibilities. Invite speakers.
- 3-6 weeks out: Finalize speakers and outline.
- 1 month out:
  - Finalize webinar tech and registration page.
  - Draft [run-of-show](#).
  - Finalize promotional materials like social media posts, [create social media graphics](#), draft recruitment emails, finalize invitation lists.
  - Draft [media advisory](#) and build media list (if applicable).
- 2-4 weeks out:
  - Send recruitment emails and schedule social media promos.
  - If possible, schedule a practice session to finalize and refine the program.
- 2 weeks out: Send media advisory to reporter lists (if applicable).
- 1-2 weeks out:
  - Send second recruitment email and publish second push on social media
  - Confirm speakers and address any technical needs.
- 1-3 days out: Last recruitment push.
  - Send media advisory to journalists who did not RSVP (if applicable)

## Day-of-event

### Tips for smooth virtual events

- Practice: Before the event, we like to do at least one rehearsal of virtual events to get a sense of timing and offer feedback to speakers.
- Join early: We ask that speakers join the event link 15 minutes before an event is live. This helps troubleshoot any technical difficulties or lighting and sound issues and foster a stress-free experience.
- Screenshare: To share your screen during a workshop, it's best to use two monitors or use . Open your Google Slides or PowerPoint deck and select "Presenter view." Keep the presenter view with the stop watch and slide notes on the screen you will be looking at and move the screen you want participants to see to the second monitor. Now expand to full screen and select the second monitor and audio (if you will be playing sounds).
- Have a technical assistant on hand: We usually dedicate a behind-the-scenes staff person to manage any technical issues with screensharing, speaker spotlights and



manage the Q&A (if applicable). An extra set of hands frees up speakers and moderators to focus.

- Hit record: Don't forget to press that record button as an event is beginning!
- Live-post: For events where we want a lot of public attention, we may also have a staff person live sharing highlights from the event.

This can include posting screenshots and graphic elements alongside words of wisdom from speakers. Though, we've found this tactic gets less traction than it once did so your mileage may vary. If you're lacking staff support, it may be better to focus on creating good post-event content instead.

## Follow-up

When an event is over, the work is not done! Now is the time to continue building relationships with event attendees and registrants and leverage the event into additional content for your website and social media channels.

## Recording

You can often share a recording from the event platform. For example, Zoom allows you to share a password protected link to an event recording that also includes a transcript and event chat. Make sure to download a copy of the recording so it's not only stored on the platform cloud. We like to download and trim videos and host them on our YouTube channel.

## Survey

When appropriate, provide a survey at the end of the event and in the follow-up email to ask people for their feedback. This can include questions about what was helpful, what questions they still have following the event, and how they would like to continue engaging with your organization.

## Email

Quickly following the event (1-5 days after) send a follow-up to all registrants thanking attendees and cluing in those you who couldn't make it. In this email, we include a link to the recording, a follow-up blog post, a survey, plus any other resources that were mentioned. You can also include a call to action like following the organization on social media or sharing about the event. For media events, it's important to turn around the follow up email even more quickly (day-of is best practice). Be sure to include a transcript of the event alongside the recording and

any contact information for speakers. Most platforms have built in transcript generation that can be downloaded. It does take a little bit of people power to clean up the transcript into a usable document — think an hour of work for an hour-long event to make sure names and proper nouns, in particular, are accurately transcribed.

## Re-purposing content

A recorded event can create a lot of follow-up content for your organization! Here are some ideas:

- Blogs: We write a blog post following almost every event (within 2-5 business days) to recap what was covered and key takeaways with an embedded recording. Some examples include a [Roundtable on messaging nature-based solutions](#) and a [Colorado River media briefing](#).
- Social media content: You can turn the content of your event into a variety of social media content to re-promote and get more mileage out of your content and programming.
  - Share your recap blog on your social media channels or in your newsletter.
  - Create still graphics [sharing highlights](#) or quoting speakers.
  - Create a highlight reel with the best bits from the event.
  - Trim soundbites from speakers into [short videos](#) or audio grams ([like these](#) from a past [artists panel](#)).