SUCCESSFUL WEBINAR BEST PRACTICES

Engage your Clients and generate leads

1. PLAN

a) Audience
b) Timing
c) Technology
d) Team

The first step is a strong plan. Think about who you want to target. When will you get the most attendees? What technology do you require, and how will you leverage your team?

2. PROMOTE

a) Landing Page
b) Email Campaign
c) Social Media
d) Blog Post

Promote your webinar. No launch, no results. Use online platforms to connect with Clients and prospects. Encourage them to register and share. You don't need fancy marketing software to spread the word.

3. PRESENTATION

a) Create
b) Practice
c) Present

Develop your content and be strategic with your topic. Front-load your presentation with value-add content and only mention products and services where it makes sense. Practice the presentation with your team to test the technology as well as your tone and speed. Finally, present your webinar!

4. POST-WEBINAR

a) Call to Action
b) Materials
c) Survey
d) Results

Turn attendees into prospects and prospects into Clients. Tell participants what to do next. Follow up and provide webinar materials and recording. Conduct a survey for feedback and contact information. Track your results and make note of the top registration sources.

For more ideas on how advisors can grow their business, visit sunlife.ca/advisorbestpractices

We Help. You Grow.

Sun Life

Sun Life Assurance Company of Canada is a member of the Sun Life group of companies.
© Sun Life Assurance Company of Canada, 2020.
810-4978-03-2020