



Webinar planning tool

Follow this 12-week plan to help make sure your webinar goes off without a hitch. For more information on running successful webinars, visit [Connecting through webinars and seminars on Advisor Best Practices](#).

Target audience: _____

Topic: _____

Month/time of day: _____

12 weeks before

Step	Notes	Responsible	Complete
Identify roles	Host/Moderator Presenter Other		
Create the presentation <i>(see the Presentation Outline section below)</i>			
Create follow-up resources <i>(e.g., presentation summary, workbook, tool)</i>			
Plan your commitment factor <i>(e.g., meal, gift, donation¹)</i>			
Request guest speaker(s)			
Confirm you have the right equipment <i>(see the Equipment section below)</i>			
Other			



Presentation outline

Plan to present your topic in 30 minutes to one hour, leaving 5-10 minutes for a question and answer period. Focus on value-add information and only include product pitches where it makes sense.

Introduction: A story or compelling fact to hook the audience's attention followed by the agenda.		
Key Messages: What 3 things (max) does your target audience want to know about this topic?		
1	2	3
Conclusion and call-to-action: What should the audience do with this information?		

Looking for a ready-made webinar?

[Access webinars-in-a-box](#) for 30-minute presentations complete with follow-up resources and email templates.

Equipment

Technology	Location	Audio (pick one)	Lighting (pick one)
Webinar platform	Free of interruptions	Smartphone mic	Facing a window
Registration page	No background noise	Headphones	Lamps behind you
Strong/steady internet	Tidy background	External mic	Ring or LED light



8 weeks before

Step	Notes	Responsible	Complete
Create registration landing page			
Create promotion plan <i>(see below)</i>			
Begin webinar promotion			
Other			

Messaging by audience

Prospects & public	Clients	COIs ²
<ul style="list-style-type: none"> Focus on the educational value. Connect with your target audience's concerns. 	<ul style="list-style-type: none"> Personalize the email to the Client segment. Include a referral request. 	<ul style="list-style-type: none"> Ask your COI to share the invitation. Include the benefit to the COI.
<ul style="list-style-type: none"> <i>"Too many people miss the opportunity to..."</i> <i>"Do you struggle with..."</i> <i>"Have you ever wondered how..."</i> <i>"Given the time of year, you might be thinking about..."</i> 	<ul style="list-style-type: none"> <i>"As your kids return to school you may be thinking about..."</i> <i>"It's time to start business planning for the new year..."</i> <i>"Please invite your colleagues or family members who could benefit from this session."</i> 	<ul style="list-style-type: none"> <i>"I'd like to extend the invitation to your Clients."</i> <i>"I think this complements your offering because..."</i>

Include a description of exclusive content and your commitment factor.

"Everyone who attends this webinar will receive..."¹
"In addition, I pledge to donate \$50 per attendee to..."



Your promotion plan

Use the previous examples to create compelling invitations to your webinar. Consider the best channels to use, like email marketing², social media or personal invitations.

Audience	Channel(s) & key message	Invitation date	Follow-up date	Reminder date
Clients				
COIs				
Prospects				

Visit [Marketing yourself on Advisor Best Practices](#) to learn more about using video marketing, LinkedIn and email marketing to promote your webinar.

4 weeks before

Step	Notes	Responsible	Complete
Create a feedback survey			
Draft a follow-up email			
Do a dry run of the presentation with everyone involved			
Continue promotion ²			
Other			



Follow-up emails

Follow-up is key to deepening relationships with Clients and converting prospects.² The goal is to schedule 1:1 meetings with attendees who expressed a strong interest. You can offer no-shows an opportunity to learn more about the topic. Include the link to your feedback survey in your email to attendees.

Audience	Key messages
Attendees	
No shows	

Week of webinar

Step	Notes	Responsible	Complete
Send last minute reminders and login details ²			
Deploy the commitment factor (e.g., phone registrants, arrange meal delivery/pick up)			
Practice presentation			
Other			



Day of webinar

Step	Notes	Responsible	Complete
Before			
Dress to impress			
Setup camera and microphone			
Test technology			
Turn off cell phone and laptop notifications			
Other			
During			
Record webinar			
Introduce the presenter and objective of the webinar	Host/Moderator		
Let the audience know you're recording	Host/Moderator		
Provide instructions for participation	Host/Moderator		
Speak clearly and naturally (avoid reading from the script)	Presenter		
Conclude with next steps	Presenter		
Run Q&A	Host/Moderator		
Other			
After			
Send the follow-up emails ²			
Other			



1 week after webinar

Step	Notes	Responsible	Complete
Review webinar results: <ul style="list-style-type: none">• Number of attendees• Feedback			
Share a brief snapshot of webinar content on social media			
Continue nurturing prospects through email ²			
Other			

Additional notes

¹ Assuming this is within acceptable limits, so as not to influence or imply any obligation on the attendee's part.

² Always respect your CASL obligations.