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) Topic/Title
b) Format
c) Products/ Services

Develop your content and be strategic with your topic – think behavioural finances. Use video and animation to engage attendees. Teach and sell at the same time. Front-load your presentation with value-add content. Only mention products and services where it makes sense.

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.

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