

Webinar Strategy



Elements of Webinar Strategy:

- [Stages to Execution \(Delivery\)](#)
- [Use of Webinars Plan](#)



Webinar Stages to Execution:

- **PRE-EVENT**
 - **Conceptualization** - what and when
 - Ideation sheet
 - **Schedule** - which, who and how
 - Webinar details sheet
 - **Presentation** - platform, style, and deliverable
 - Live vs. Recorded
 - Recorded is recommended
 - MC, host, interview style, panel, slides, no slides
 - Live Q&A, mock Q&A recorded with post-Q&A live (chat roll), chat Q&A
 - **Registration** - systems, process, and methods
 - **Campaign** - promotion, messages and channels
 - **Pre-Event Communication** - reminders
- **DURING**
 - **Execution** - content delivery
- **POST-EVENT**
 - **Post-event landing page** - CTA page
 - **Reconciliation**
 - Until we have systems in place we may have to manually reconcile registrants versus attendees
 - **Post-Event Communication** - access
 - **Analytics** - how was attendance and how was engagement?
 - **Archiving** - where and how
 - Recommend a Showcase with forced registration like OE.TV

Questions and Recommendations

- Do we want a consistent webinar format and style?
 - Host and Presenters?
 - Recommendation: Yes, although it is another individual that needs to be involved. If needed I'd be happy to do this role but it would be better to be someone who is more customer facing. That individual would require coaching on their role. They would also need to coordinate with marketing and the presenter(s). Another option is to rotate the hosts among the AMs. This could work well. They could choose the appropriate topics.
- Recorded or Live?
 - Recommendation: Recorded and preferably Simulated Live for all except special events. This provides us the ability to edit, enhance, and fix (if required).
- Do we want to use Zoom or Knovio?
 - Recommendation: Use Knovio whether live or recorded. We should show off our technology.
- Should we have a consistent Knovio template to standardize our webinars?
 - Recommendation: Yes. Our webinars should be branded not only with the intro and outro (stinger) but in other ways. This means developing a standard look and feel. This should be built sooner rather than later, assuming we'll use Knovio.
- How do we deal with registration management?
 - Assumption: Zoom webinars with integration into Hubspot - eh I hope.
 - Note: I have not been able to get access to a Zoom webinar account to examine how they deal with registration and reminders and postevent notifications. Sign-ups are easy - they just get normal reminders. Separating did not attend versus attendees is a little more challenging unless you force registration
- If we record event how will we handle Q&A?
 - Recommendation: We do live Q&A throughout the event using chatroll. This needs to be tested but Brooks told me it should work as it's simply an iframe. Those presenting can even say, "Feel free to type your questions as our team can answer your questions throughout our presentation."

- Post webinar page
 - With zoom you can send someone to a post page. This can be a schedule a meeting or contact us page or even a custom page.
 - Recommendation: We might want to create a post webinar page. It is a bit tacky to send people to our home page or blog after the webinar is over. It's a bit better to send them to an intentionally designed page associated with a solid CTA for the event! So, if the event is about IR Days - we should consider making a page specifically about our IR Day special and have a form there or calendly type functionality to schedule with Rob, Julia, or another person for a call.
- Should We Use Lower Thirds?
 - Recommendation: Yes, we should try to leverage all functionality that we desire our clients to use. Because of this we need to have a standard design for our lower thirds. This may require us tapping Tribal Vision....if they have experience making these. Then we can have a standardized template for OE employees. If we are using recorded Zoom it can be added in post to the recording or if we leverage Broadcast Studio they can assist with the lower third. To use effectively the individual on camera must be properly placed on the screen (framing).

Conceptualization

- Solicit from various individuals (Glenna, Ben, Gib, Rob, Herb, etc.) in the organization, and continually develop a list of webinar topics. These will be kept here: [webinar topics](#). This has objectives, targets, etc.
- Webinars will go through a vetting process to make it onto the marketing queue/calendar. This ensures there is sufficient momentum, support, and utility to make the webinar effective in achieving its objectives.
- Webinars will be prioritized by the internal leadership group as well.

Schedule

- Marketing will place 1 webinar for Q4 on the calendar (IR Mag. Oct/Nov)
- The goal will be to have 2-3 webinars per quarter, starting in Q1 2021.
- Document Webinar
 - Short webinar event spreadsheet that will be updated from start to completion with the following items addressed (https://docs.google.com/spreadsheets/d/1SVVTlvQYsaKL_klWZmuVi yNOuVwgDhhivVCr6GH1yMk/edit#gid=0)
 - Title/Concept
 - Purpose of the Webinar
 - Target Audience(s)
 - Target Date/Time for Broadcast
 - Distribution and Promotion
 - Social
 - Emails
 - Personal invites
 - Paid marketing/promotion
 - Other (describe)
 - Registration Process
 - Landing Page
 - Technology to be Used (Zoom, Knovio, etc.)
 - Describe Webinar Elements/Style (recorded, live, mix)
 - Broadcast Center Support needed?
 - Initiator(s)
 - Contributor(s)
 - Speaker(s)/Presenter(s)
 - Backup presenter(s)
 - Committed (Yes/No)
 - Pre-Event Production Work
 - Presenter Preparation(s)

- Dry Run Requirements and Schedule
 - Your Name and Department
 - Name of Management Approver and Department
- Discuss with Marketing - simply coordinate with the marketing team via email or meetings. Determination will be made who will lead the effort, coordinate, assist, etc.
- There will be regular reviews with stakeholders on the status of the event. This is in addition to any planning and coordination meetings that are required.

Presentation

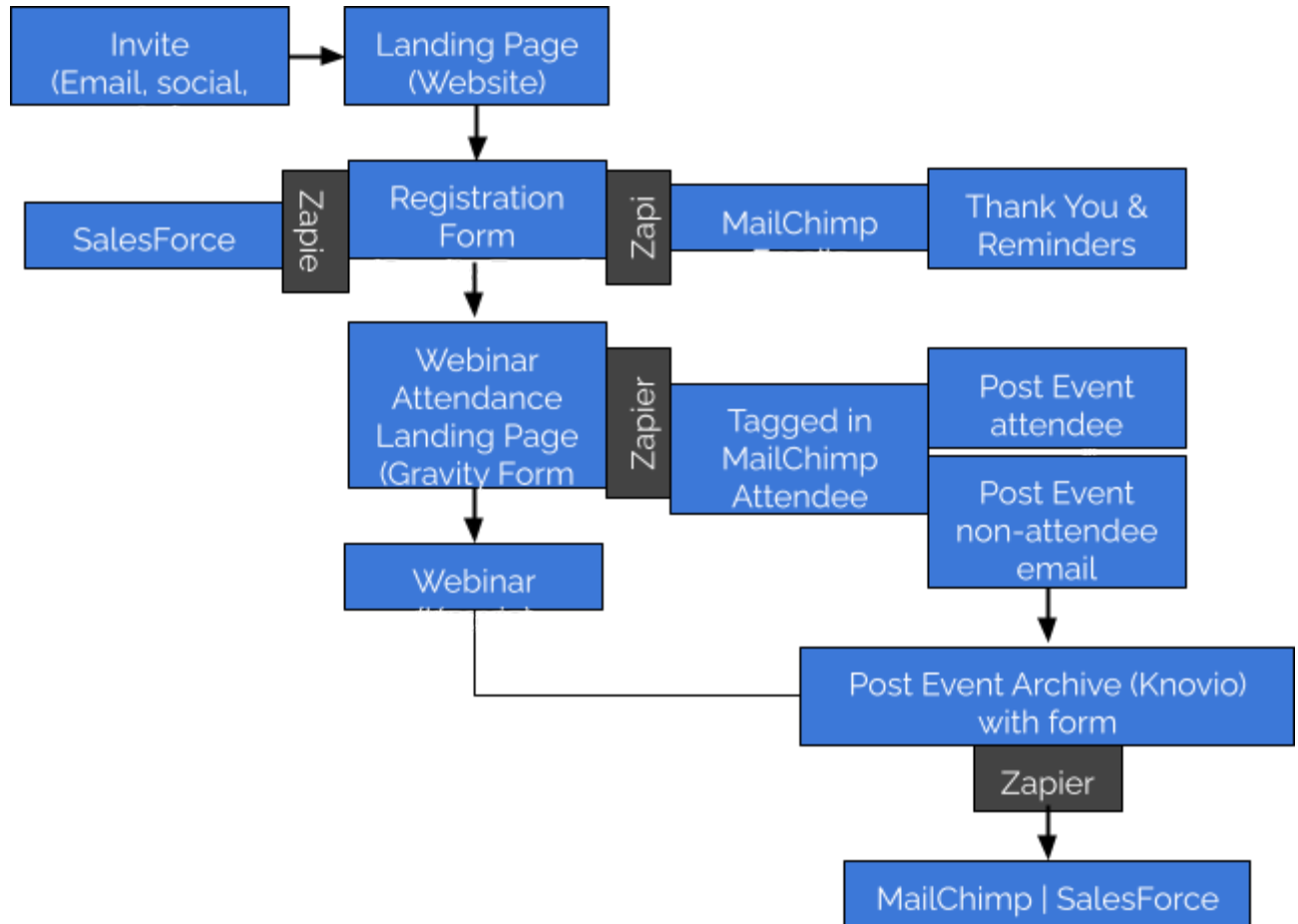
Webinar Presenter Guide

- Purpose of the webinar (this will be filled in based upon previously developed information)
 - *Explain why you are hosting this webinar and what you hope attendees will learn, take away, or what action you want them to take afterwards.*
- Outline of the webinar
 - *Typically, webinars will hit upon a series of topics pertaining to one larger subject. Walkthrough the topics you'll be covering in the webinar, once by one, and what the key talking points and takeaways will be.*
- *Topic 1*
- *Topic 2*
- *Topic 3*

Registration

- Until we have a marketing automation system there are various things we have to do:
 1. Use Zoom for a webinar system
 2. Use website landing pages and Gravity forms for registration
 3. Registrants will have to be passed to Mailchimp so that we can email (see below the various emails)
 4. Need to require attendees to enter their name and email address
 5. Then reconcile to determine attendees versus non-attendees for reporting purposes

Event Workflow and Automation



Marketing Automation

Without Marketing Automation (custom solution)

- Mailchimp - email system
- WordPress - landing page
- Zapier - passing form submissions to
- Gravity Forms - list building
- Zapier - passing Mailchimp submissions to Salesforce
 - Need to determine if the attendee can be passed/denoted in SF

With Marketing Automation

- Hubspot - email, landing page, and forms with
 - Direct integration to SF to pass registrants and to mark attendees

- Hubspot also can integrate with Knovio (has to be constructed) to pass Showcase/post-webinar attendees
- Automatically add to nurture campaign (unless run through previously) based upon job title/role

Web Pages (current or future)

Template needed for WordPress/Hubspot:

1. Webinar Landing/Registration page
2. Post Registration Thank You Page
3. Webinar Entry Page with Attendee Form
4. Post-Webinar Thank You Page with CTA

Campaign

Standard Marketing Promotion Plan/Process for a New Webinar

Pre-Webinar

1. The webinar is approved and scheduled
2. Create a cover (image with text) to be used throughout the promotion
3. Landing Page with registration constructed (any required campaign)
4. Determine if desired in the mix with paid campaign
 - a. Create ad assets
 - b. Will be a short ad campaign
5. Create social media promotions (min 2 per week)
 - a. Run LinkedIn promotion (2 weeks prior) and request organizational posting

Post Webinar

1. Adjust the landing page as appropriate
2. Pull image from webinar itself and add a play button over the top
3. Edit the webinar as appropriate
 - a. Add stinger front and back of the webinar
 - b. Add any music as appropriate (need to identify what is available - would be used in run up and then at the end)
4. Determine if desired in the mix with paid campaign
5. Use image and write up on archive location for webinars
6. Create a blog post about the webinar (seeking SEO)

Pre-Event Communication Emails

- Emails will have to be sent from Mailchimp
 1. General invitation email to database segment
 2. Confirmation email - add to calendar invite with details
- Reminder emails - how will they be sent...what system
 3. 1 week
 4. 1 day
 5. 1-2 hours before
- Who should they come from?
- Need to setup campaign(s)
 6. Thank You for attending email
 - Link to see recording (no registration required)
 7. Did not attend email
 - Link to see recording (no registration required)

Use of Webinars Plan

- The planned webinars will be primarily targeted to achieve:
 - Lead Generation
 - Demand Generation
 - Sales Enablement

Webinar Execution

There are two types of webinars:

- Recorded - utilize Zoom meetings and create the "webinar" with the participants. The meeting is recorded. Post recording it is edited and lower thirds and any transitions are added. Utilize Knovio to upload. This doesn't leverage the production team.
- Live - in order to place this into our standard/desired Knovio template we'd stream using Zoom with it injected into Knovio. This has to be coordinated with Shawn/the video production team.

Webinars Topics and Utility

Webinars can be used for the following primary objective:

- Lead Generation
- Lead Nurture
- Sales Enablement
- Demand Generation

Secondary objectives include:

- Campaign Specific Content
- General Use

Tertiary objective:

- Recurring - same topic over and over (often done as recording but not always)
- Reuse - create and record for reuse
- Specific Limited Use - limited use over time and often tied to a specific event or timeframe. Any references to Covid could fall into this category.
- Special event

Types of webinars:

- Live
- Simulated Live (recorded)
- Recorded Video - available on demand
 - Past live event or intentional recording

Each webinar should be identified as the primary objective

- Top of Funnel - Highly strategic broad webinars potentially with partners to enlist into our lists for nurture.
- Mid Funnel - Support marketing campaign as content
- Bottom of Funnel - Assist in closing with specific information to either drive to sale or close deal.

