



10 Steps for Planning a Successful Webinar

Tips for organizing and producing online seminars for your nonprofit organization

By: Kami Griffiths and Chris Peters
January 27, 2009

Online seminars, or webinars, are a dynamic, engaging way to convey information to a geographically dispersed audience on a budget. If your nonprofit faces an ongoing need to share information long-distance but has limited education and travel funds, webinars can help you save money --- and reduce your carbon footprint --- while providing a valuable service to your constituents.

Nonprofits use webinars for a variety of purposes, including software training, sharing information about a new product or service, or promoting a program. Moreover, new online tools are making it easy for any organization to host a webinar, even with limited technology expertise. Below, we'll outline some of the major steps you can take to plan quality, affordable webinars at your nonprofit.

1. Ask yourself (and others) whether a webinar is the right tool for your needs.

Webinar software can be a powerful training and outreach tool, but, like all technologies, the decision to use it should be subordinate to your strategic objectives and the needs of your audience. While webinars work well for some topics, they're not suited to every training need.

When determining whether a webinar is the best medium for your needs, consider your audience, the subject matter, and the time you'll need to cover your topic. If you're addressing a small, internal audience of colleagues about a new organizational goal, for example, a webinar may be a less appropriate option than it would be for, say, a training seminar for a large audience of clients and funders. Likewise, a daylong course on effective interpersonal communication might not translate well to an online seminar. Most online audiences tend to lose interest after about two hours, so organize your topics and information so they can adequately be covered given this time constraint, or break your curriculum into chunks of two hours or less. When you're breaking a large topic into smaller chunks, leave at least 15 to 30 minutes between sections. However, if your audience is busy, or if they're unaccustomed to online learning, it's usually best to leave a day or more between sections. In other words, few of us can spare more than two hours a day for training, and even that is difficult to manage.

When evaluating whether a webinar meets your needs, you may also wish to solicit the feedback of subject matter and webinar tool experts, other nonprofits in your field that have conducted their own webinars, and even the audience you plan to address. Informal conversations, formal interviews, and surveys and polls can all help you assess whether a webinar is the right medium for your --- and your audience's --- needs.

2. Recruit speakers and a support team.

Once you've decided that a webinar is the right tool for you, you'll need to assemble a team of staff members or volunteers to help you run it. In general, there are four main players in a webinar: the organizer/facilitator, the presenter or presenters, and assistants. You might fill all three of these roles yourself, you might assign them to three different people, or you might need more than three. Bear in mind, though, that while some presenters can handle all of these roles on their own, we only recommend the going-solo approach for an experienced trainer addressing a small audience. In most cases, you should at the very least divide up the organizer and presenter roles, and for large, complex webinars you'll often need one or more assistants.

Organizer/facilitator. The organizer is the person responsible for developing the webinar topic, locating a speaker, marketing the event, setting up the registration, and communicating with participants. The organizer usually participates in the webinar itself somehow: introducing speakers, interviewing the subject matter experts, moderating audience questions, and encouraging audience participation. The organizer also monitors the overall situation and helps to troubleshoot logistical and technical problems. In other words, the organizer does most of the hard work, and most of the steps outlined in this article. *Time commitment: roughly 10 to 20 hours per webinar.*

Presenter(s) (also known as subject matter experts). Ideally, presenters should concentrate their efforts on preparing their demonstration and their PowerPoint slides. During the webinar, their main focus should be the

presentation itself, as well as fielding questions from the audience. Worrying about the webinar software, event registration, troubleshooting, and other logistical details detracts from the presenters' ability to give an engaging presentation. In certain formats (for example, a panel discussion), you might have more than one presenter. *Time commitment: four to six hours per hour of webinar.*

Assistants. Experienced organizers often produce webinars without any assistance, but there are at least three scenarios where you should consider asking for help: When you or your audience is unfamiliar with webinars and webinar tools; when you plan to play a large role in the conversation (either as an interviewer or participant); and when you expect a large audience. Assistants can help by answering questions that the organizer and the presenter don't have time for. Often, assistants focus entirely on answering technical and logistical questions ("I can't hear the audio," for example). In this case, you can recruit and train the assistant yourself, and anyone moderately tech-savvy will do a good job. However, for webinars where you expect a large audience and where you anticipate more audience questions than the presenter alone can answer in the time allotted, you may need an assistant who understands the subject at hand to help with answering chat questions. (An alternate approach would be to refer all unanswered questions to an online forum where the presenter can respond at a more leisurely pace.) *Time commitment: one to two hours per hour of webinar.*

3. Determine the format.

A webinar can be structured in a variety of formats to suit different purposes. Below are some popular formats you may wish to consider.

	Description	Pros	Cons
One Speaker	A single presenter speaks, demonstrates, and answers questions from the audience.	Fewer people to coordinate and train on the webinar tool.	A lone presenter is more likely to become the authority at the "front of the room," which might make some in the audience reluctant to participate and ask questions.
Interview Style	Interviewer asks a set of predetermined questions.	<ul style="list-style-type: none"> • More engaging to hear multiple voices. • The fact that the interviewer is asking questions of the expert(s) often encourages the audience to do the same. 	<ul style="list-style-type: none"> • More people to train and coordinate. • Scheduling the run-through and the actual webinar may be more difficult.
Moderated Panel Discussion	Multiple people on the line at the same time, with a moderator facilitating the discussion.	Offers a variety of voices and perspectives.	<ul style="list-style-type: none"> • More people to train and coordinate. • Scheduling the run-through and the actual webinar may be more difficult. • Can be challenging to keep panelists from talking over each other.
Interactive	Audience members participate fully via instructor-led exercises and facilitated conversations.	If done well, participants receive a deeper understanding of the topic because they're fully engaged in the dialog and the exercises.	Can only accommodate a small group. Requires a very skilled, experienced teacher/facilitator.

4. Plan your visuals.

Since webinars rely on audio and visuals to get the message across, both should be engaging. Plain slides with a lot of text don't work as well as interesting visuals that illustrate the topic being discussed.

Some visuals you may wish to include with your presentation are:

- An introductory slide reminding your audience how to log in to the audio and what time the webinar will begin.
- A slide introducing each presenter, including job title, affiliation, and a photograph if available.

- A quick overview of the webinar agenda and the topics to be covered.
- Screen grabs of websites or tools you will be discussing --- but, if possible, try to show the sites and tools in action (rather than just the image stills) for a more dynamic experience. Most webinar tools allow you to share your desktop, displaying in real time your interaction with programs and websites.

5. Pick a tool.

There are dozens of Web conferencing tools out there, offering a variety of features tailored to different needs. Idealware's article [A Few Good Online Conferencing Tools](#) offers a roundup of affordable software options, and in TechSoup's webinar [Getting to Know Online Conferencing Tools](#), Idealware founder Laura Quinn describes how online conferencing tools work, how you can use them to help your organization, and the variety of software options out there. Eligible and qualified nonprofits and libraries can request donations of [ReadyTalk](#) and [GoToWebinar](#) from TechSoup.

Pay close attention to this decision and give yourself some time to try out various Web conferencing platforms. Once you get started with a particular webinar tool, it's hard to switch to a new tool, for a few reasons: you and your colleagues have learned to use the software; your regular participants are familiar with this tool; and you've already paid for a subscription to this program (unless you're using a free tool).

When weighing your software options, here are a few questions to ask yourself:

How many people will the tool accommodate?

Most tools and pricing plans set a cap on the number of participants. Once you reach that number, new participants find themselves locked out, or the tool lets them in and charges you a fee for each person above the cap. For free and low-cost Web conferencing packages, the cap is often as low as 15 or 20 participants. Other plans top out at 50 or 100, while enterprise-level packages allow as many as 1,000 participants per webinar.

How much does it cost?

While some packages are free, others vendors charge for Web conferencing and audio separately, some charge per participant per minute, and others charge a flat fee per month or per year. When you add in the fees for hosting recorded webinars and the cost of a toll-free phone bridge (when applicable), the pricing schemes can be complicated.

Which features will you need?

Do you want to just show a presentation or demonstrate how to use a specific piece of software? Would you like your participants to be able to take control of your desktop? Do you want a live video feed of the speakers? Make sure you choose a tool that allows you to do what you want.

How is audio handled?

Some products offer integrated, *Web-streaming audio*, which allows participants to listen to the presentation through their computer speakers or their computer headsets. With this arrangement, if participants plan to talk, they'll need a microphone for their computer, or a headset with a built-in microphone. If they work in close proximity to their colleagues, they will also need computer headphones or a computer headset to avoid bothering their neighbors. A headset with microphone that plugs in via USB or standard audio ports is well-suited to this type of webinar and costs between \$20 and \$40.

Other webinar platforms require that participants and presenters dial in to a special phone number, often referred to as a *phone bridge*. You usually have two options for this: a toll number, in which case the participants have to pay the fees charged by their long-distance or cell phone provider; and a 1-800 number, in which case you or your organization will pay five to ten cents per minute for each participant. If you absorb the costs of these calls, be aware that they can add up quickly during webinars with a high turnout: for example, 53 participants times 60 minutes times six cents per minute is \$191.

Finally, many webinar platforms offer you both Web-streaming audio and phone-bridge options, and you can choose to enable one or the other, or both. Enabling both types of audio gives you and your audience some flexibility in the event of a technical problem.

Do you want to record the webinars and make them available for later viewing?

If so, ask how the software handles recording and whether the vendor charges extra to make that recording available on the Web. Most vendors charge for the Web hosting, rather than the recording feature itself, but you should always check to be certain. Monthly hosting fees can be as high as \$15 per month per recorded hour. If you feel the fees are excessive, you can download the recording and make it available yourself, but serving or streaming

the recording from inside your network might put a strain on your bandwidth or your technical expertise.

When evaluating software, you will also want to ask what exactly gets recorded. Some tools, for example, only show the slides along with audio, but don't record the chat conversation or the desktop sharing. Vendors also vary in terms of how long they save the recording: some delete it after a month, while others save it until you delete it yourself.

6. Create an agenda.

About three to four weeks before your webinar, hold a conference call with the speaker or speakers and determine what questions will be asked and the order in which the speakers will present. If you are using a format that enables visuals, ask each speaker to furnish the graphics and images to accompany his or her section of the presentation well ahead of time. (If speakers are demonstrating software, only a few slides will be necessary, as most of the webinar will likely be spent on the application itself.) You may also want to ask speakers to send a photograph and brief biographical description that you can use for registration and outreach.

Follow up this initial call with an email containing notes from your discussion. These notes may include:

- **A list of topics and questions you came up with during the conference call.**
- **Deadlines for materials.** If your presenter plans to use PowerPoint slides or other visual aids, ask her to send you their graphics and visuals at least two to three days before the run-through so you have time to proofread and merge their materials with your own. For example, you may have a PowerPoint template you use for all presentations and webinars. You may have introduction and conclusion slides you want to add. And you should double-check each slide for typos.
- **An agenda** with the order of the speakers and the duration of each segment. The agenda for a moderated panel discussion about two different blog platforms with a nonprofit blogger and a tech author, for example, might appear as follows:

11:00 Moderator introduces speakers and provides an overview of the tools being discussed.

11:05 Moderator talks to blogger

11:15 Moderator talks to tech author

11:30 Blogger demonstrates tools

11:40 Moderator opens questions to audience

11:55 Moderator gives a brief description of your organization and its work.

11:58 Moderator wraps up webinar, thanks participants, and tells audience where they can go for more information.

7. Schedule a dry run.

A few days before your webinar, you should schedule at least one 30- to 60-minute run-through with all participants to work out any unresolved questions or technical issues.

Your dry run should cover the following:

An introduction to the participants. If speakers haven't met during the initial call, now can be a good time to introduce the people who will be present during the webinar, both online and behind the scenes. Make sure that your participants know who they should turn to if they have questions during the webinar --- and how they can reach them.

An introduction to the webinar tool and its features. Discuss how to use the tool, what features are available to the presenters, and where participants can go to get extra practice in using the tool on their own before the event. This may include:

- **The chat feature** if there is one and you'll be using it; this tool gives presenters and participants a space where they can type questions and comments to one another during the presentation. Or you might need to demonstrate the
- **The drawing tools.** With this feature, presenters can write notes, draw simple images, or point to particular places on their slides.
- **A demonstration of how presenters can forward their slides and share their desktops.** Keep in mind that if your Web conferencing vendor has unresponsive servers, or if your participants have bandwidth problems, your audience might experience a one- to 10- second lag. In other words, when the presenter advances to the next slide, some participants may need to wait for 10 seconds before they see it. Presenters should therefore watch for this issue and be prepared to advance slides more slowly if they receive complaints.

This is a good time to ensure that all of your presenters' operating systems, Web browser, headsets, and other equipment are compatible with the Web conferencing tool. Fortunately, most webinar tools let presenters and participants test their computer for compatibility before the event itself. Usually, this can be done by directing them to a Web page where they can launch a wizard that tests for the necessary components and plug-ins; or, they may be prompted to step through the wizard after they register. Be sure to include instructions for this with your registration information. While you can't force attendees to check their computers, do follow up with your presenter to ensure that she has all of the downloads and plug-ins she needs.

A review of your agenda and visuals. Go over the agenda and move through the presentation to ensure slides are in the right order and that speakers know where they come in. Before the run-through, compile your presenters' visuals and load them into the conferencing tool. This will help presenters understand what the attendees will see, as the presenters' view is different from the attendees' view.

A dry run is also a great opportunity to generate enthusiasm for the upcoming event and rally your presenters.

8. Reserve your equipment and space.

By and large, the webinar tool you choose will determine the type of equipment you'll need to run it. In general, you will want to have the following:

- **Headsets.** The organizer and all presenters will need headsets: *telephone headsets* if your webinar tool uses a phone bridge; or *computer headsets* if your tool uses integrated Web audio. Technically, you can use the telephone handset if your webinar package has a phone bridge, but it's distracting and tiring to lift a phone to your ear for an hour or more, especially when you're using a mouse and keyboard. Never present a webinar using a speaker phone: even in a quiet location the audio quality is often poor, and in noisier spots a speaker phone will pick up background noise.
- **A power cord** if you're using a laptop, as a backup for your battery.
- **A network cable** to connect you directly to the network if you aren't using a wireless connection.

Regardless of the equipment you use, you will need a quiet space from which to conduct your webinar. In addition to using a headset, you should reserve a conference room or place where there won't be background noise or interruptions. In addition to keeping out background office noise, you'll also want a space secluded from outside distractions, such as construction din or sirens.

9. Set up a system for registering attendees and determine your price structure.

Before you begin marketing your webinar, determine what tool you will use to register attendees. Some online conferencing programs, such as [ReadyTalk](#), offer built-in registration tools. Signing up participants using free event-registration tools is another option, but bear in mind that free tools frequently lack the advanced features that you'll want if you manage a lot of events.

Idealware's article [A Few Good Event-Registration Tools](#) offers a roundup of registration options for a variety of needs, as well as a list of guidelines for choosing the right tool.

Choosing an event-registration tool is a good time to make a decision on whether or not you will charge for your webinar --- and if so, how much. While most fee-based webinars are offered in the \$25 to \$40 range, others can go for upwards of \$200 per attendee.

Keep in mind that while organizations that invest significant time and energy into a regular series of high-quality webinars might recoup some of their costs by charging, nonprofits that only produce a few webinars a year may drive away potential participants with a fee, not to mention creating extra work for themselves for very little profit. On the other hand, charging a modest fee (\$5 to \$20) to recoup the cost of your time and expenses might be acceptable, depending on your audience. As you assess your audience's needs (see Step 1) you can determine whether they might pay for the type of webinars you'll be offering. If you're unsure, you can always ask for an optional donation until you get a better sense of your audience and their willingness to pay.

If you plan to charge a fee your audience will see as significant (for example, more than \$25), make sure most or all of the following are true:

- You have a wealth of hands-on experience, an especially deep knowledge of the subject, or something else that makes your advice especially valuable to potential participants. Do some Web searches on your topic. If you find a lot of high-quality, user-friendly resources that contain the same information you plan to present, think twice about charging for your webinar.
- You have a lot of experience with training in general and online communication in particular. Keep in mind that

participants have higher expectations when they pay; the more money you charge, the greater the expectation that you will deliver an engaging, well-produced webinar.

- You have the capacity to collect payments easily using a tool such as PayPal. (For more payment-collection options, see Idealware's article [A Few Good Online Payment Multitaskers.](#))
- You plan to conduct webinars on a regular basis.

One advantage of charging for your webinar is that it provides an incentive for participants to show up. If everyone pays beforehand, you'll have fewer no-shows; with free webinars, you can expect that roughly 50 percent of the people who sign up will fail to attend.

10. Publicize!

It is important to get the word out far and wide about your upcoming webinar, especially if you're planning to charge for it. You will want to begin sending out information two to three weeks before the event. Create an engaging, succinct description and convey clearly who the webinar is for: for example, beginners or advanced, executive director or accidental techie.

Good places to advertise your event include your Web site, online event calendars such as Upcoming.com, relevant listservs, newsletters (online and printed), Twitter channels, Facebook groups, local events for nonprofits, and Web pages that promote nonprofit webinars. TechSoup's [Online Learning Spotlight Events](#) is one such page, and instructions for including your webinar can be found on the right-hand side. Don't forget, too, to promote future online seminars at the end of current webinars.

For more information on TechSoup's free technology webinars for nonprofits and links to previously recorded presentations, visit our [TechSoup Talks](#) page.

Share Your Feedback

Was this article helpful? Yes No

About the Authors:

Kami Griffiths is TechSoup's Training and Outreach Manager, where she holds local and international trainings and delivers weekly online seminars that help nonprofits manage their technology to better serve their community. Previously, she helped manage dozens of computer labs in New York City, taught computer classes, and managed volunteers.

Chris is a technology writer and technology analyst for TechSoup for Libraries, which aims to provide IT management guidance to libraries. His previous experience includes working at Washington State Library as a technology consultant and technology trainer, and at the Bill and Melinda Gates Foundation as a technology trainer and tech support analyst. He received his M.L.S. from the University of Michigan in 1997.

Copyright © 2009 CompuMentor. This work is published under a [Creative Commons Attribution-NonCommercial-NoDerivs 3.0 License](#).



<http://www.techsoup.org/learningcenter/training/page11252.cfm>