

This step-by-step checklist is designed to aid in planning and hosting a successful webinar and is based on best practices and lessons learned producing more than 30 EvaluATE webinars.

### Webinar Details

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Topic: \_\_\_\_\_

Objectives: \_\_\_\_\_

Conference Call Date: \_\_\_\_\_ Time: \_\_\_\_\_ (4 weeks prior)

Rehearsal Date: \_\_\_\_\_ Time: \_\_\_\_\_ (2 weeks prior)

Draft Slides Due: \_\_\_\_\_ Time: \_\_\_\_\_ (2 weeks prior)

Final Slides Due: \_\_\_\_\_ Time: \_\_\_\_\_ (1 week prior)

Presenter (1): \_\_\_\_\_

Presenter (2): \_\_\_\_\_

Presenter (3): \_\_\_\_\_

Moderator: \_\_\_\_\_

Discussant: \_\_\_\_\_

Tech Support: \_\_\_\_\_

### Role Breakdown (this section is relevant if you are new to webinars)

**Presenter(s):** The presenter(s) deliver the main sections of the webinar and are responsible for developing their own slides and presenting on the day of the webinar.

(Tip: EvaluATE normally has at least two presenters, but more are fine, depending on the time available.)

**Moderator:** The moderator is responsible for introducing the presenters, providing instructions on how to use the webinar platform, and moderating the question-and-answer breaks.

(Tip: It is very helpful if this person knows a little bit about the material to be able to better guide the questions to the presenters.)

**Discussant:** The discussant is given a specific time slot to give feedback to a Presenters' section or to help answer questions. They usually do not give a presentation during the webinar.

**Tech Support:** Depending on what type of webinar platform you choose, you may work with an outside group to 'host' your webinar and provide technical support. EvaluATE works with MATEC Networks National Resource Center ([www.matecnetworks.org](http://www.matecnetworks.org)). They manage registration, webinar reminders, and webinar rehearsal; oversee the live webinar; and send post-webinar information including the chat text, recording, and attendee information.

(Tip: If you are new to webinars, EvaluATE highly recommends you work with a tech support group, such as MATEC, that has several years of experience and can help with many issues that may arise.)

**Three Months Prior** \_\_\_\_\_ DATE \_\_\_\_\_

- Determine webinar title and contact tech support to schedule; once confirmed, post title, date, description, and registration link to website  
(Tip: If you are planning on having several webinars throughout the year, schedule all at once.)
- Identify and invite presenter(s) (note above)
- Schedule conference call with presenters (note above)
- Confirm that webinar registration is open

**Two Months Prior to Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Hold conference call with external presenter(s)
  - Check that presenters have necessary technical capacity:
    - Headset with microphone (VOIP or land-line phone is fine)
    - Microsoft PowerPoint
    - High-speed Internet
  - Inform presenter(s):
    - Time length for their portions of the webinar
    - Encourage interactivity (polls, questions to audience, quizzes, drawing)
    - Encourage real-world examples within presentation
    - Encourage presenter(s) to write out script
    - Encourage presenter(s) to practice prior to the rehearsal to ensure their presentations are the appropriate length
- Develop abstract and update website posting (if not already done)
- Email presenters with the following information/requests:
  - Rehearsal date and time
  - Due dates
  - 1-2 sentence presenter bio, highlighting experience related to webinar topic
  - High-quality digital photo of the presenter
  - High-quality digital logo of the presenter's organization
- Create webinar template including:  
(When the presenters send their slides, they will be added into the body of the webinar.)
  - Title slide with webinar title and start time

- Introduction slide including name(s) of presenters, moderator, and tech support with organizational photos
- Instructional slides regarding how to use webinar platform
- Individual presenter slide with photo and section title  
(Tip: Create a master slide for each presenter/moderator with their picture and name in the upper right corner; use these in their sections to indicate who will be responsible for advancing the slides and it will help the audience know who is talking.)
- Question-and-answer break slides between webinar sections
- Survey feedback slide
- Thank You Slide  
(Tip: If you are doing multiple webinars, re-use the introduction slides; you may also copy the Moderator script so it does not have to be rewritten.)
- Post webinar announcement on social media

**One Month Prior to Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Send email to project distribution list to announce webinar  
(Tip: EvaluATE uses [Constant Contact](#); [MailChimp](#) is another great service and is free.)
- Moderator, write script for presentation (front matter, question slides, transitions and ending slides)
- Post webinar announcement on social media

**Two Weeks Prior to Webinar** \_\_\_\_\_ DATE \_\_\_\_\_ (Draft Slides Due & Rehearsal)

- Combine all presenters' slides into webinar template
- Share full slide deck with all presenter(s)/moderator (prior to rehearsal)
- Create online feedback survey  
(Tip: EvaluATE uses [Qualtrics](#), [Survey Monkey](#) is another great service and is free.)
- Facilitate rehearsal two weeks prior to the webinar

Rehearsal:

- Remind presenter(s):
  - Have water on hand
  - Mute and stow cell phone
  - Turn off computer speakers
  - Stay on mute whenever you aren't speaking, and don't forget to unmute on your turn
  - Slide progression protocol
  - End within a minute or two of your allotted time
  - If get lost in slides, moderator will reset the slides
  - Describe signal to wrap it up due to time constraints (e.g., forwarding a particular slide)
  - Do not answer questions in the chat box; wait for moderator to present questions during the breaks
  - When using the chat box, select the appropriate recipients (e.g., all participants or moderators/presenters only)

- Don't close popup boxes (survey)
- Discuss opportunities for planted questions (1 per presenter or 2 per question-and-answer section; planted questions are good to have as back up, they can help inspire audience members to participate and avoid "dead air" while participants enter their questions)
- Have presenters practice using various application tools (e.g. advancing slides, pointer, marker and chat box)

After Rehearsal:

- Revise script and/or slides as needed
- Add next webinar descriptions/registration links to website (if applicable)
- Have presenters send key information for include in the webinar handout
- Post webinar announcement on social media

**Week Prior to Webinar** \_\_\_\_\_ DATE \_\_\_\_\_ (final slides due)

- Send direct email to project distribution list, excluding those already registered
- Create webinar handout and gather other supplementary materials
- Gather revised webinar slides from speakers
- Combine all final slides into one webinar slideshow
- Copyedit webinar slides and materials
- Create webinar timing schedule that specifies the start and end times for each portion of the webinar
- Email tech support regarding slide interactivity features (e.g., polls, quizzes, survey links); include slide number and interactivity
- Post webinar announcement on social media

**Day Before Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Send email to presenter(s) including:
  - Final slides
  - Webinar timing schedule
  - Webinar reminder list (see below)
- Confirm the feedback survey is open and the link is working
- Create PDF of slides (2 slides per page; remove question-and-answer or webinar instruction slides; include date, website, and page numbers)
- Upload webinar materials to website
  - Slide PDF
  - Webinar handout
- Post webinar announcement on social media

**Day of Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Post on social media
- Login to webinar (one hour prior to webinar start time)

- Remind Presenters:
  - Have water on hand
  - Mute and stow cell phone
  - Turn off computer speakers
  - Stay on mute whenever you aren't speaking, and don't forget to unmute on your turn
  - Slide progression protocol
  - End within a minute or two of your allotted time
  - If get lost in slides, moderator will reset the slides
  - Describe signal to wrap it up due to time constraints (e.g., forwarding a particular slide)
  - Do not answer questions in the chat box; wait for moderator to present questions during the breaks
  - When using the chat box, select the appropriate recipient s (e.g., all participants or moderators/presenters only)
  - Don't close popup boxes (survey)
- (Tip: EvaluATE highly recommends that all presenters login to and test the webinar platform one hour prior to webinar start time to ensure technical quality, including audio)
- Confirm that tech support will record the webinar

**Day After Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Tech support will send final registration list, webinar recording link, and chat record
- Convert webinar video
- Upload webinar recording to YouTube
- Add webinar video link to website
- Send email to all registrants, including link to recording, resources, and feedback survey link
- Send thank-you cards to presenter(s)
- Schedule webinar viewing with staff to identify strengths and weaknesses in order to improve future offerings
- Update project resume and repost online

**One Week After Webinar** \_\_\_\_\_ DATE \_\_\_\_\_

- Download webinar survey results and generate report
- Send survey report to all presenter(s)
- Review survey results to identify opportunities for improvement

Thank you to Kelly Parr of E-MATE and Lori Wingate for providing feedback on this checklist. If you have feedback or suggestions, please email Emma Perk at [emma.perk@wmich.edu](mailto:emma.perk@wmich.edu).