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Janus Henderson INVESTORS

Master the Art of the Webinar

Best practices for planning, promoting and hosting a high-quality virtual event

Webinars have been a fairly ubiquitous form of client communication for a long time now. And in today's socially distanced world, they are a truly essential touchpoint and a valuable opportunity to reach clients and prospects. How to make your event stand out? The key is thorough planning and strategic follow-up.

Following is a list of best practices to help guide you through pre-event preparation, ongoing promotion, day-of logistics and a strategic drip campaign to maintain interest after the webinar.

Prior to sending out invitations:

- Before you start communicating, identify your ideal audience. A well-crafted, targeted plan and personalized message will assist with fulfilling their unstated needs and increase engagement by offering topics most important to them.
- Define your objectives by establishing realistic outcomes and expectations with your team. Ask yourself questions to clarify whether you'd be happy with five clients or 50 clients in attendance? Does asset level matter or are you trying to solely prospect new business?
- Talk to the speaker(s) who will be presenting at the event so you can get a solid understanding of the topics they will cover. Having this conversation prior to promoting your webinar will help ensure your invitations and other promotions accurately represent the subject matter.
- Create content for your emails, social media posts, phone scripts, website copy and other materials you plan to use to promote the event, focusing on what you think will resonate with your particular audience and capture their attention.
- Develop a follow-up campaign that will be launched after the webinar that drips on clients and prospects for three or four weeks after the event.
- Delegate one member of your team to handle the technical aspects of your webinar platform to make sure you have the correct permissions selected for the speakers and attendees. Other features to check and fine-tune include registration requirements, the ability to mute attendees upon entry, Q&A functionality and being able to view other participants during the webinar.
- Include any related materials or pre-work in your invitations and provide best instructions on how to log on to the session. If there is a visual presentation, make sure attendees know that they should be at a computer or viewing from a tablet or phone.
- Decide if you will record the session for use at a later date (be sure to confirm with the speaker(s) and your compliance team that this is acceptable).

After the invitations go out:

- Make phone calls to the top 25 clients or prospects you would like to attend the webinar to explain what will be covered and answer any questions.
- Two to three days before the event, send reminder emails to those who have registered and to anyone you have not heard from yet. One hour before the session starts, send one final reminder email.

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During the session:

- Log on to the webinar 30 minutes prior to the scheduled start time to test all the functionality and review the flow of the webinar with your team and the speakers. Make sure all the settings for the system are the way you want them (e.g., test the mute and Q&A function, etc).
- Designate one person on your team to support clients who may have a harder time getting into the session or using the webinar functionality.
- As attendees start to join the session, have one team member welcome them, let them know you will be beginning shortly and explain the "ground rules" for the webinar (e.g., that their lines have been muted, they can use the chat function if they have questions, etc).

After the session:

- Execute the follow-up campaign you developed prior to the event.
- For your top prospects, consider creating more substantial materials – such as a whitepaper that ties back to the topic presented in the webinar – that you can share as part of the campaign.
- If you recorded the webinar, you may choose to edit the recording so you can use specific segments as part of your follow-up campaign or in other marketing efforts.

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