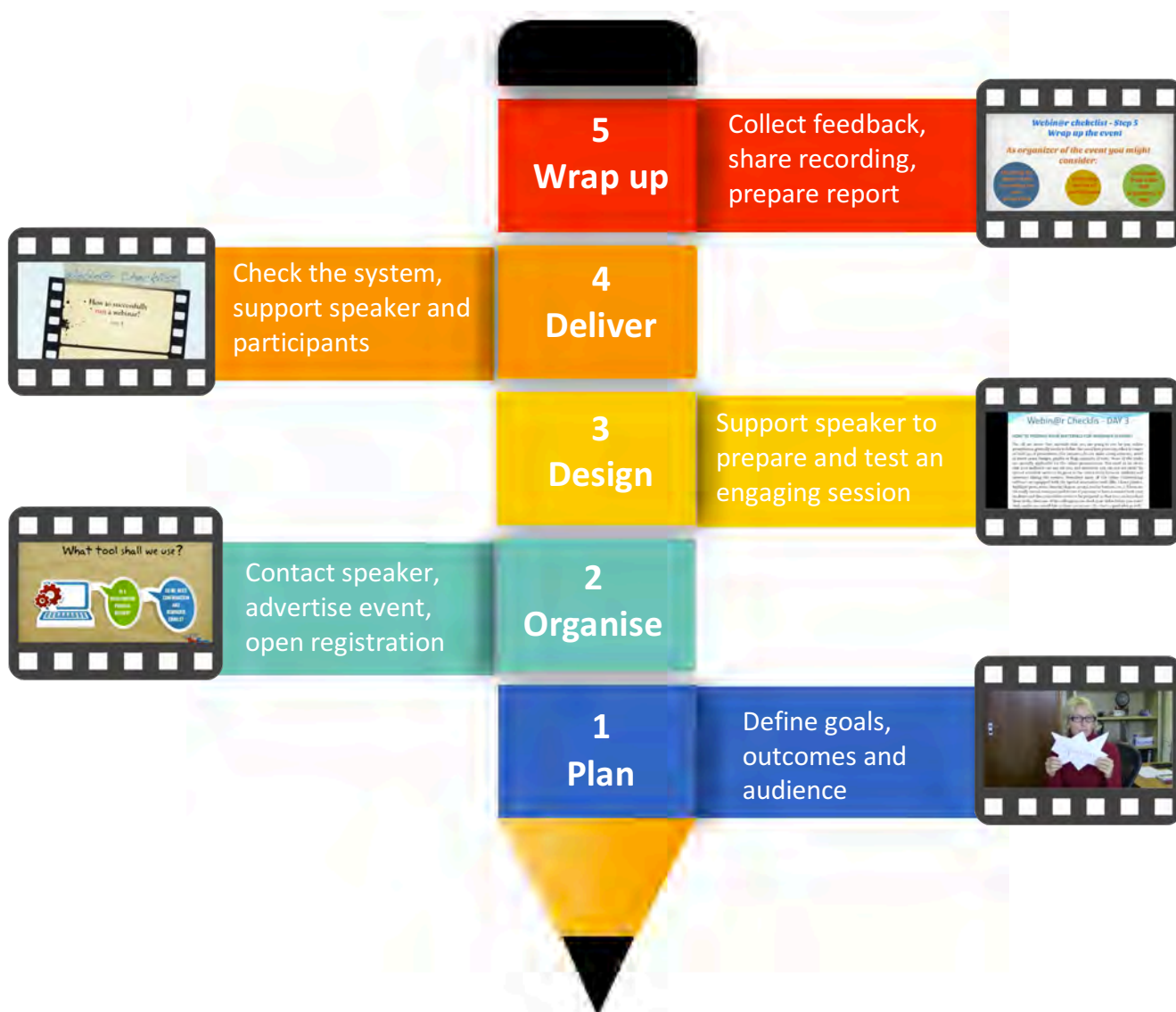


Checklists for Organising Webinars¹

When asking a group of technical support officers what would be the main activities one should perform when organising online seminars – most commonly called Webinars – they identified 5 main steps in the process. These steps represent different phases of the organisation process, from start to end. Each step comes with its own set of activities, which in turn, supports the next step.

The diagram below shows each step and includes short videos² prepared by the support officers to help webinar organisers to think what activities they would consider for each specific step. These videos were used in a training session in 2014, which resulted in the collaborative writing of the checklists that are presented in the next pages.



¹ Adapted from the session “Webinar Checklist” offered at CALMet Online 2014 by Anna Ghelli (ECMWF), Ivan Smiljanic (EUMeTrain), Lu Veeck (WMO/VLab), Alessandro Chiariello (EUMETCAL/FMI) and Maja Kuna-Parrish (EUMETSAT).

² Videos are linked to respective diagram pictures. If you have problems accessing the videos, please see full URLs listed at the end of this document

1. Plan		
Topic		Define list of topics
		Define how to integrate webinar into wider training programme (if existent)
Goals		List goals
		List expected outcomes
Partners		List potential providers of training who could help or be interested in collaboration
Audience		Map the audience (adult/children/managers/technical people/level of expertise in the topic/etc.)
		Language (do you require translators?)
		Time zones
Time Frame		Establish the time frame (i.e. how much time do you have before the due date of the webinar?)
		Identify any time constraint
Speakers		List candidate speakers
		Identify experts in the field who could advice you
Tech		Identify technical experts to advice on tools and provide technical support
Advertise		Identify advertising channels
		Draft advertisement (using the above defined goals and outcome)
Risks		List risks (add level of risk: high, medium, low)
Additional notes:		

2. Organise	
Select date	Check presenter(s) availability
	Check for major/local holidays
	Check for conflict of dates with other events of interest to same audience
Language	Make sure information and support is available in the language to be used
	Check if the conferencing system supports the language to be used (e.g. menu bar and text chat)
Manage Registration	If registration is to be required, decide if it will be managed manually or via conferencing system
	If registration is not required, decide if event is to be "open to all" or require preparations to deal with a "restricted audience" (e.g. password protected events)
	Make sure confirmation of registration (if registration required) and email reminders of webinar are sent to the audience and contain all relevant information to attend the event (e.g. webinar link and main point of contact in case of any problems)
Web Conferencing System	Make sure the 'main point of contact' for the event has access to all information needed to support participants (audience and presenter) using the conferencing system
	Plan to support presenter on the use of conferencing system (e.g. bookings induction and test sessions, upload material, distribute training material prior and after session if required)
	Plan to support audience on the use of the conferencing system (e.g. book induction sessions, make information and FAQ available)
	Be considerate that participants (audience and presenters) will most certainly be using different devices to attend the webinar, in different environments (e.g. bandwidth, institutional security firewalls) and also will have different levels of technological skills and experience
Certificate	Agree on design and basic information (logos, signatures, etc.)
	Decide on methods of production and distribution (printed or electronic format?)

Evaluation survey		Decide on methods of production and distribution for a post-event evaluation survey (this should be conducted after the event)
		Decide which tool to use for the survey, making sure the decision is based on accessibility by the audience (and may provide an alternative format if accessibility problems are foreseen)
		Write survey questions to collect feedback related to content, technology used in the event, speaker and support received (prior and after session)
Assessment		In cases where subject assessment is required, make sure this is explained to the audience well in advance of the session (and before the registration, if registration is planned)
		Plan the assessment format with the presenter in order to fulfil the learning outcomes established for the event
		Decide which tool(s) to use for the assessment, making sure the decision is based on accessibility by the audience (and may provide an alternative format accessibility problems are foreseen)
Advertising		Advertise the event well in advance in order to make sure participants have time to plan the attendance
		Use a variety of communication channels (e.g. relevant newsletters, mailing lists, online calendar of events, websites, social media)
Additional notes:		

3. Design

Support speaker's planning and preparation		Inform speaker about the system requirements of the web conferencing to be used
		Inform speaker about engagement functionalities available in the web conferencing system (e.g. poll, chat, questionnaire, break out rooms)
		Provide a list of document formats that can be uploaded to the web conferencing system (if applicable)
		Advise on the pros and cons of using animations, videos and application sharing during the online session. Remind speaker that the quality of internet connection of the participants can affect the use of these features
		Agree on the length of the webinar
		Check with speaker what web conferencing permissions the participants will need to engage in the webinar (e.g. annotation tools to draw on screen, chat, microphone, etc.)
Test		Book a test session for the speaker to test the quality of his audio, and how the material displays in the system (slides, animations, videos)
Confirm		Agree on a deadline for receiving a copy of final versions of all resources that will be used in the webinar (slides, animations, videos, etc.). This is a backup procedure, in case of technical problems
		Check with speaker if any resource should be shared with participants prior the session, as part of preparation to attend the webinar
		Confirm if facilitation support is needed during the session and agree on a strategy (e.g. would the speaker want help to monitor the chat, open and close polls, distribute participants in break out rooms, etc.)
		Obtain confirmation from speaker that the webinar can be recorded and the recordings shared after the event
Additional notes:		

4. Deliver	
Audio	Test microphones of speaker and participants
	Solve audio issues using the web conferencing system (as possible, depending on settings available for system administrators)
	Disable/enable microphones as needed during the session
Whiteboard	Test display and loading time of images and animations. Plan to do this before participants log in
	Test functionalities that will be used (e.g. poll, drawings, cleaning drawings). Plan to do this before participants log in
Backup	Make sure to have the backup files of all resources handy, in case there is need to upload it again
	Be prepared to call a speaker replacement if needed
Chat	Post a welcome message
	Answer technical questions (and content questions, if applicable)
Manage the flow of session	Introduce topic, speaker and acknowledge participants at the beginning of the session
	Set the rules for communication, informing the preferred time for questions (if participants should interrupt speaker to ask questions or let the questions to be asked at the end), and preferred functionality (use microphone for questions or type in the chat)
	Keep track of time and remind speaker
	Have an extra person as chat moderator, if applicable. This is advisable when having a large number of participants, so the organiser can dedicate its full attention to attend technical issues that arise during the session
	Support the facilitation of the session if previously agreed with speaker (e.g. open/close polls, distribute participants into break out rooms, clear drawings, initiate questionnaires, etc.)
	Add more “seats” for additional participants. Note: not all web conferencing systems allow this change after session started.
	Eject misbehaving participants

		Change participants' permissions or roles within the system when needed
		Record the session (if applicable)
On-site		Prevent interruptions (e.g. turn mobile phone off, inform office colleagues you should not be interrupted)
<p>Additional notes:</p>		

5. Wrap up

Record attendance		Save the registration data of the event. This can be useful to identify prospect participants for future events you may organise
		Distinguish between those who attended and those who missed the event. Most web conferencing systems will indicate this in the attendance report. You will need this information to send post-event messages and certificates
		Prepare certificates to those who attended the event (if applicable)
Post-event messages		Send a “Thank you” message to those who attended the event. Include the link to access recording and certificates (if applicable)
		Send an “Event missed” message to those who registered but not attended the event. Include the link to access recording, if applicable
		Send a “Thank you” message to the speaker. Share a short report of attendance and the link to access recording, if applicable
Recording		Download and save recording. Check the quality of the recording and edit if needed (e.g. cut unwanted audio tests and other irrelevant parts)
		Save all related material, for instance the chat discussions, shared files, poll results, etc.
		Convert recording file to appropriate format (e.g. mp4, wmv or other) to use in a website or selected platform for sharing (e.g. YouTube, Vimeo, etc.)
		Share the recording
		Follow the statistics of the recording playback. This can provide you useful insight regarding the audience and needs for similar training resources
Feedback		Distribute post-event survey to collect feedback
		Analyse survey results and share with managers, speakers, support officers and participants (if appropriate)
Report		Write a report. Make sure to include the outcome from the feedback survey, lessons learned and ways to apply it when organising future events
		Share the report with appropriate partners
Additional notes:		

Videos used in this resource:

Step 1 – Plan

<https://player.vimeo.com/video/109318168?color=c9ff23&am>

Step 2 – Organise

<https://youtu.be/ofAjW72TtOg>

Step 3 – Design

<https://player.vimeo.com/video/109671598?color=c9ff23&am>

Step 4 – Deliver

<https://player.vimeo.com/video/109761952?color=c9ff23&am>

Step 5 – Wrap up

<https://youtu.be/6y-7mDm9mPo>