Webinar 201: Beyond the Basics

Webinars, or web-based seminars, are a useful and popular format to disseminate information, provide professional development, promote collaboration, and bridge geographic space and time zones. Intentional planning, implementation, and follow-up actions on the part of the organizers ensures a webinar will meet learning objectives and be productive and rewarding for all participants. Assuming you have a basic understanding of webinars, have participated in, and maybe presented a few, these tips will help advance your capability to improve your webinar game.

Learning objectives for Webinars 201: Beyond the Basics:

- Improve understanding of the critical steps for preparation, implementation, and post webinar follow-up.
- Introduce more advanced ZOOM capabilities to explore on your own. Zoom has a wide and deep [tutorial and help database](#) if you want to learn more about something you see here!
- Introduce tricks of the trade to keeping webinar participants engaged and not checking their e-mail.

Preparing

- **Prepare a website landing page:** Include title, purpose, logistics, registration, log-in info, meeting objectives, time zones and time zone converter link if necessary. Include contact information. Shorten the URL to share with participants. Use the UC ANR Calendar asset to calendar the event on your website and share it with other programs and counties.
- **Software:** Consider the specific software tools available for 2-way interaction, engagement, discussion and feedback in the webinar including chat communication among and between participants, polling, un-muted vs muted discussion, offering a “bike rack of questions” to address later in the chat. Practice the tools you will use with a colleague so you are fluent with the processes on the day-of and not fumbling with technology. Some setting to explore and turn on (not all settings are on by default, in fact most of these common features are NOT turned on) include enabling telephone and computer audio, calendar integrations, auto saving chats, file transfer to participants through chats, establishing co-hosts, polling, meeting control toolbar, remote control to allow others to share, breakout rooms, screen sharing for participants, change default language from English.
- **Hardware:** Plan a technology run-through and be familiar with the hardware such as cameras, computers, speakers, mics. Practice together with co-hosts using the specific hardware each will use to communicate.
- **Invitations:** Send invitations and outreach to targeted groups or more widely if a large audience is desired. You can create a custom series of recurring meetings in Zoom, if desired. Send at least three invites to more formal webinars, including 1- save the date and title with your website landing page, ideally at least a month ahead of the date. 2- reminder to register, with repeat info ideally at least one-two weeks prior to the event. 3- day before reminder of registration and repeated connection information. You may also follow up individually or as a
group with pre-registrants with instructions on items they should be prepared to discuss, to ask for their input on the agenda or breakout group topics most relevant to their interest, etc.

- **Registration:** Decide on and implement registration protocols for participants. Will they need to pre-register, will there be an open registration link, will each person need a special link and password, or will the registration info be sent the day-of? Webinars may be encrypted if they are sensitive in nature.

- **Accessibility:** Anticipate and trouble shoot barriers to participants who want to join your webinar. Make the reasonable and necessary accommodations. Barriers may include firewalls to websites at agencies, slow or intermittent rural internet connections, hearing loss, language barriers, or technology know-how and computer access of the participants themselves. Consider providing a backup phone number participants may call in to if they have technology troubles. Think about setting up satellite hub viewing sites at agencies where everyone can watch together on one screen. Directly contact participants that express barriers to participation so you can trouble shoot on a case-by-case basis. Plan to record and archive your event. Zoom has a closed caption feature for people with hearing loss. To use this feature, appoint someone in advance to type the conversation in real-time, or identify a third party service. Zoom offers an open API for integrating closed captioning software and services. For participants outside of UC ANR, Zoom has a feature to bypass the application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications on their computers- common amongst federal and some state employees. The meeting experience from the browser is limited and the host, must enable this feature in your settings. Zoom also allows the host to change the default language from English to one of eight other common languages.

- **Social media:** You can choose to live stream your meeting on Facebook. Regardless if you want that kind of large, public audience, if your topic or findings are of wide interest, consider setting up a hash tag or thundervlop for outreach and social media archival purposes. Be sure to tag @UCANR and other relevant social media collaborators in every posting to help spotlight your event or series in advance, during and afterward. Make a calendar item with updates if you have a Facebook account.

- **In-person participation:** Decide whether participants may join the meeting in-person and make sure to have the appropriate mics read. A webcam may not adequately capture the conversation in one large room for participants on the phone or web room.

- **Media invitations:** If you want media coverage at your webinar, be sure to issue targeted personal invites early. Tag appropriate reporters, newspapers, magazines etc to make sure it is easy for them to follow along. Work on sharing and cultivating a relationship with the appropriate media throughout the year. Use our UC ANR CSIT professionals to help strategize how to effectively reach the appropriate audiences.

- **Know your audience:** Take some time to think about who is registering and anticipate their interests and concerns on the topic you are presenting.

- **Content and goals:** Determine the presentation style depending on what the goals of the webinar are. Are you trying to elicit a knowledge-to-action response? Teach a new skill? Share new research findings? Facilitate networking among a diverse group of individuals who haven’t met? Establish new professional collaborations? Simply run a great staff meeting? There are different presentation strategies for each of these goals. Some goals call for more interaction
than others. Consider a blend of interaction strategies and Zoom tools to keep the interest of your audience.

- **Contingency plan:** Make a plan for communicating in the unfortunate event of losing video connections, equipment failure, or other difficulties. Sharing the meeting phone number and collecting pre-registration (so you can e-mail participants during a technical failure) are a good start. Share a call-in number in the chat for participants to jot.

**Implementing**

- **Setting the stage:** To the extent possible, present in an un-cluttered space with few audio distractions and soft natural light. Setting the camera slightly above your face, several feet away is the most flattering angle. If you will be typing during the presentation, make sure your mic is not near your keyboard. Connect to your audience most effectively with direct eye contact. In any web-based chat, that means looking directly at your camera, not at your screen where you see people. This only comes naturally with practice, but remind yourself by attaching a sticky note with a smiley face drawn on it to your camera.

- **Support people:** If notes are necessary and chat features are implemented, try to assign a separate note taker and chat room moderator.

- **Housekeeping discussion:** Before you dive into content with your participants, make a short welcome and housekeeping announcement. This is particularly important with larger groups. Consider writing this info straight into chat so participants see a welcome, know they’re in the right place, and know how to find help if their audio isn’t working. Have the agenda on your shared screen. Inform participants if you are recording, and what your mute, chat and interaction plan is. Let them know what to do or who to contact or chat directly to if they are having technical challenges. If you will archive the webinar, inform them where it will be in case they jump off before the end of the webinar. Consider having participants write their name and affiliation or other pertinent info into “chat to everyone”, if the group doesn’t know each other. Sometimes more than one person will attend on one shared computer, so this will help you keep an accurate record of attendance as well.

- **Recording:** Making a recording of the webinar is a valuable archival tool and an offering to individuals who couldn’t attend. It is very easy to forget to hit record- make yourself a sticky note and stick it in the middle of your monitor to remind yourself.

- **Considerations for larger webinars:** Large groups of people in your webinar can pose some special logistic challenges. Decide how you will use mute and consider muting the whole group and unmuting individuals as needed. Keep in mind that some individuals that call in or log in outside of our organization (without a Zoom account) may not be easily identified by name. Muting is key to a large group presentation so your presentation isn’t derailed for everyone with outside chatting or hold music. Don’t enable the feature that makes a ring tone every time a new person joins the webinar. In large groups, you may encounter an unwillingness for participants to have a candid conversation. They may talk over each other if their internet speed is slow or just feel inhibited by a large group size. Zoom offers small group “breakout rooms” you may assign and separate individuals into to hold more meaningful conversations. Create up to 50 breakout rooms with a max 200 participants in each room. Breakout room participants have full audio, video and screen share capabilities. They are a great way to facilitate productive
discussion on specific topics. Participants can then come back together at the host’s command and share out on their discussion or findings. Practice in advance of your event, as breakout rooms require a bit of coordination and technology know-how. Chatting to “all” or individuals is another feature to facilitate discussion in a larger group. Enabling the polling feature can also break up a “talking head” type presentation. Enable uploading of docs via chat in your host settings so participants can share materials. Another feature that facilitates interaction is integrating the annotation and whiteboard tools that give participants some control over the materials and their feedback.

Post follow up

- **Evaluation:** Every great program includes a robust evaluation. Zoom has its own “thumbs up/thumbs down” style evaluation with an optional text box, but you may want to use something more robust to quantitatively measure outcomes. All UC ANR staff have access to Qualtrics, which is an excellent tool for this purpose. Don't forget to conduct an internal evaluation while the event is fresh in your mind and to ask co-presenters and helpers to participate in sharing constructive feedback.

- **Post-webinar communication with participants:** Send a thank you e-mail and include any relevant information such as the link to your evaluation, where notes and recordings will be posted, referenced documents, contact information of participants (with consent!) and future plans. If this webinar was shared widely, don’t forget to re-contact invited media with archival materials. Share out relevant materials on social media and with UC ANR CSIT staff that can help further the reach of the content.

- **Editing and archiving:** Download your chat archive, attendance record, recordings, and evaluation outcomes. Update your website landing page.

- **Monitor growth:** If you are conducting a new webinar series and growth in participation is an objective, be sure to track participation, numbers of contacts and downloads for online archived materials and social media posts, and media coverage. Sometimes a series is something participants have to get used to- you may be amazed at how large your audience gets, or who shows up at the virtual table, as the word gets out!

- **Adjust:** Maintain a vision of the goals of your webinar series and take the time to reflect on evaluation. Remain flexible to adjust content, format, and frequency.