

# The ultimate guide to effective and engaging webinars

A quick guide to designing, developing and delivering  
both internal and external webinars

# Introduction

Webinars are a really useful way to share knowledge quickly and easily to a wide audience within a short period of time. This guide will help you work out how to use this approach most effectively, speed up the process of preparing for them and deliver an experience that keeps people engaged to achieve your purpose.

It doesn't focus on a particular tool – you could be using Microsoft Teams, Adobe Connect or Skype for Business.

## So how do you get started?

### What's the need?

You first need to define what the drivers are for developing and delivering the webinar – we'll provide the questions you need to answer.

### What should be your outcomes?

You need to work out what your participants should be achieving or need to do as a result of attending the webinar.

### What's the best webinar structure?

We are providing some pre-built templates to speed up the development process and help you set clear expectations

(outcomes and objectives up front), structure and align content to address the needs and expectations of participants and provide guidance for appropriate levels of interaction (e.g., polling questions, use of chats, opening lines for verbal questions).

### How do I tell them?

Invitations and marketing communications should clearly identify the outcomes and objectives so that participants can determine the relevance of the webinar to them – we'll provide some tips on how your communications could be phrased.



# How do webinars differ from face-to-face sessions?

The pros and cons of using webinars compared to face-to-face approaches to communication and training

## Pros

No need for participants or facilitators/subject matter experts to travel

There's extra time and space for all participants to participate – more introverted ones can join in online chats. It's hard therefore for one or two people to dominate.

It's easy to have a record of the whole session – webinar tools normally have a feature to capture all that happens including audio and all the chat content

## Cons

Not easy to guarantee your participants are fully engaged and paying attention

**SOLUTION?**  
*Design group activities (polls, discussions) at least every 10 minutes and check everyone is then participating*

The only visual element is often the slide you are showing – it is easy to find yourself introducing a topic and you're still showing an old, now not relevant slide. This is called cognitive dissonance.

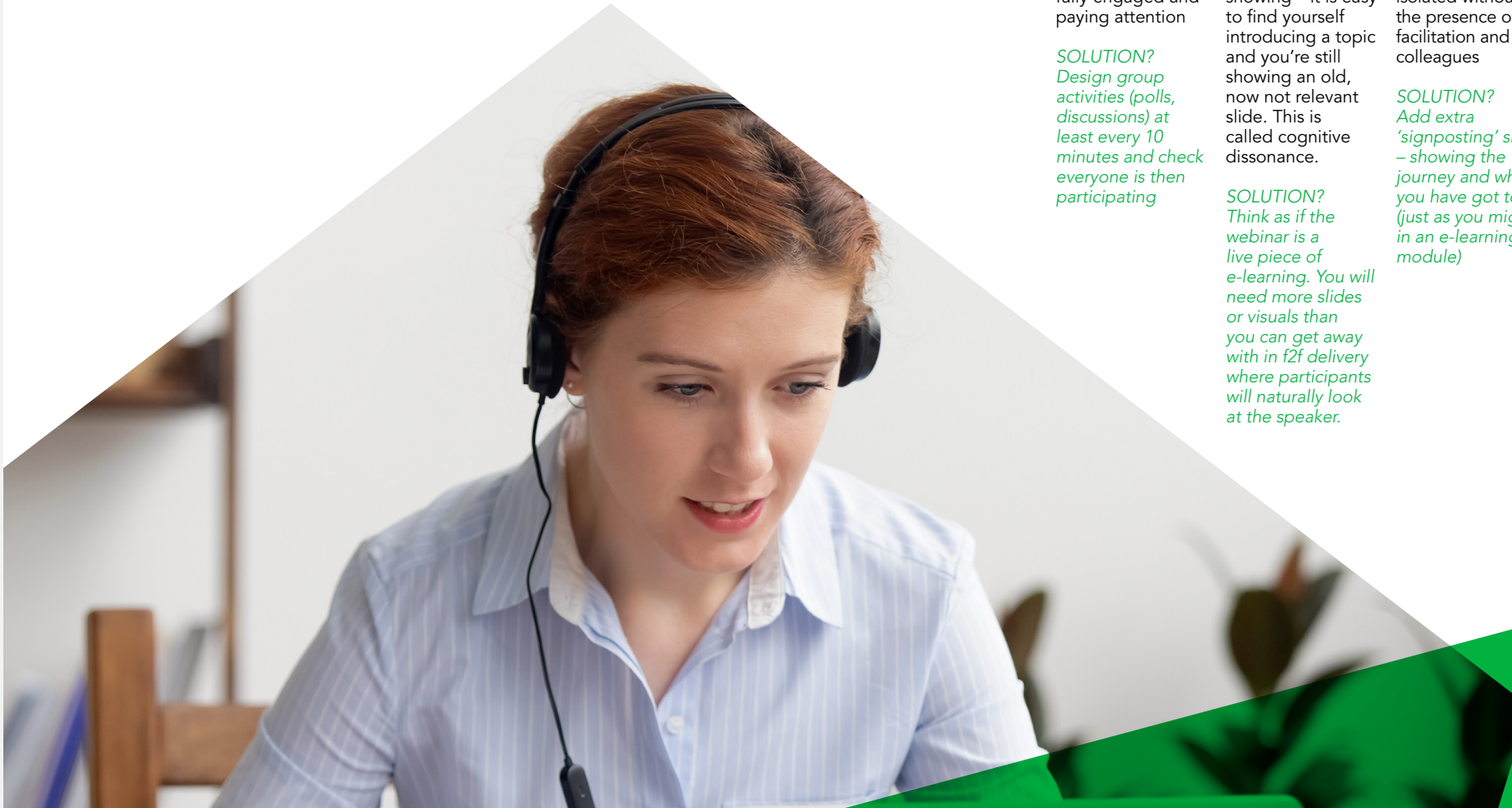
**SOLUTION?**  
*Think as if the webinar is a live piece of e-learning. You will need more slides or visuals than you can get away with in f2f delivery where participants will naturally look at the speaker.*

It is easy for participants to get lost and isolated without the presence of facilitation and colleagues

**SOLUTION?**  
*Add extra 'signposting' slides – showing the journey and where you have got to (just as you might in an e-learning module)*

It's hard to sustain participants' concentration for as long as you can in a face-to-face event

**SOLUTION?**  
*Keep it short. 90 minutes is a good maximum. Build in lots of interactions and chances for the participants to participate. Be careful about breaking up what would have been a long workshop into separate webinars – even if you try and run them on the same day. There is a real danger that you will get dropouts and it will then be hard to bring in the dropouts into future sessions.*



# What's a webinar and why does it matter how I deliver it?

**Why use webinars? If you need to deliver some training or have something you need to communicate to a widely spread group of people in a short period of time, using a webinar is a very sensible option.**

The best webinars are interactive experiences. Participants can ask questions to gain deeper understanding and fill in the gaps in their own knowledge. Because the speaker listens and responds to questions in real-time, they can adjust the presentation to better meet the needs of the participants.

If all the presenter does is read a list of text bullets from a PowerPoint, then the audience might be better off with the presenter just sending the deck out to save everyone time. Speakers provide value on a subject because they have knowledge and expertise to share but interaction needs to be built into all webinars to ensure they aren't just talk shops.

## Challenges of webinars

Because webinars are delivered virtually, the immediacy and connectivity of a face-to-face session can be lost. Facilitators can't see whether or not participants are paying attention or doing something else. With today's technology, webinar participants are just a toggle away from answering an email message or picking up a phone call.

As a speaker, the challenge is to provide value and keep the participants engaged and connected so that they pay attention and walk away having actually learned something they can put to use.



## Types of webinars

There are three main types of webinars:

Webinar Type	Purpose	Typical desired outcome for Participants in Applying the Awareness
1. Information	Awareness Raising ie Information not 'Learning'	Participants find out what happening (or will be happening) outside their immediate world
2. Learning	Skills and Knowledge acquisition	Participants achieve specific learning requirements (in order to do their job better)
3. Promotional	Persuasion/Selling	<b>Participants are persuaded to do something</b>

## Who's involved in a webinar?

### The following roles are typically included in the design and delivery of a webinar:

#### Presenter

The Presenter is ideally the expert on the particular topic who can talk with authority and answer questions when they are raised. If there are a lot of participants, the presenter will ideally be supported by a Producer who can help those struggling to join the session and act as a second pair of eyes to address any questions raised during the presentation. The Producer's role includes taking responsibility during the webinar to handle technical issues, monitor the chat stream and set up polls (see below for more details on this).

Sometimes you will need to perform both roles. The trick is to give very clear joining instructions and build in time during your sessions to look at what participants are putting in the chat areas. It's OK to pause in your presentations to address the query; it shows to everyone you are paying attention to your audience. Just be careful not to spend too much time being side tracked though. Sometimes you should acknowledge the question, make a note of it to yourself and return to the question at a more opportune time – perhaps at the end of that section or at Q&A at the end.

#### Producer

It is always easier for the presenter if there is a Producer or Administrator to ensure the webinar runs smoothly. They can:

Send out any pre- and post-webinar emails	Communicate before and after the webinar to registered participants.
Upload	Take the presenters completed PPT deck and upload it for use in the webinar platform.
Prepare any online polls	Prep any polls needed during the webinar – those that the presenter has set up in advance as well as any polls that the presenter would like to run on an ad hoc basis. The presenter could say something like, "That brings up a good question I'd like to ask. Let's do a quick ad hoc poll."
Record the meeting	By default, a recorded presentation includes the slides shown at the meeting and content added during the meeting, such as questions and edited text slides. You can also choose to record the audio and video.
Monitor the chat session	It can be really hard to keep up with all the chat in a session, especially if the presenter asks engaging questions and has good audience participation. This is a great thing and means that participants are learning and sharing from each other. The meeting organizer will monitor this chat stream and let the presenter know if any questions have come up.
Final evaluations	The producer can create a poll at the end of the webinar, asking participants a standard set of questions to gather feedback on the session.
After the webinar (one day later)	The producer could send out a thank you note to all participants, including a link to the recorded webinar and a PDF of the PowerPoint presentation and confirm any calls to action made at the end of the session.

Depending on the purpose of your webinar and the nature of your audience, you should decide on which of the above tasks are necessary. If the presenter is on their own in both organising and delivering the webinar (and has limited time), they may choose to miss out some of these tasks.



# Webinar design & development process

Here are the key steps that you should normally follow when putting together a webinar:



Identify



Scope



Develop



Market



Deliver



Evaluate



## Identify

Deciding on the topic and deciding on who should present

Webinars are less disruptive than face-to-face meetings BUT they still take time to organise and will eat into your participants' time. So, it should be a topic that participants will want to know about – or else you will struggle to get an audience for your session.

One of the big appeals for the use of virtual conferencing is the fact you can have real experts 'in the room' so once you have a topic that is needed you should think about who is best to present it. It could be you or it could be you and someone who is an expert but maybe not confident enough to be the sole presenter. You can then 'interview' the expert during the session so you control the process without the risk of the expert either freezing or rambling along a little.



## Scope

Define the objectives and success criteria

Once the webinar topic and date have been set, it's time to clearly define the presentation and set clear goals and objectives. The main complaint about webinars (beyond the pure technicalities of connectivity) are that participants are not properly briefed on the purpose of the session and the webinar lacks clarity.

Webinars are not simple to run and so it's good for both you and your participants if you do some preparation for the session.

As the presenter begins to create the presentation, they should always start with a clear view of the outcomes and objectives. Consider these questions:

- What do you want the participant to achieve during the session and take away from your program?
- What should they be able to DO with the information that you share with them?

The objectives should be directly related to the context in which the participant operates and so they should be couched in terms that will make them want to pay full attention to the session.

When participants have a clear idea of what they will get out of a session, they are more motivated to stick around and focus on your message.

### Example:

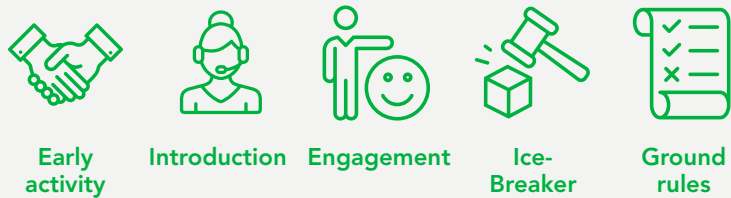
Today's objectives

Provide you with a detailed overview of the <insert topic here> so that you can identify potential opportunities where you can use it.

## Design

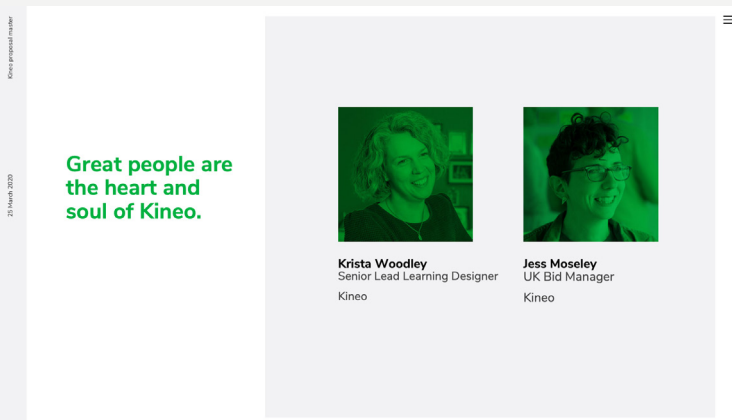
### What every webinar should include

Whatever your overall purpose, it's a good idea to follow the following steps right at the start:



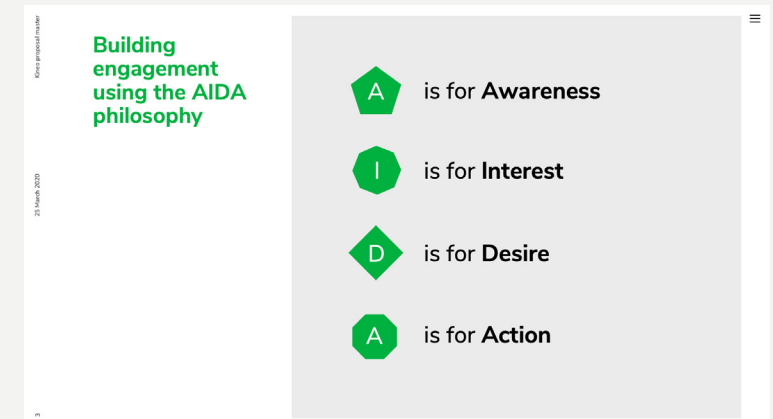
The Early Activity is there for the early arrivals – it could involve participants sharing information about themselves or initial thoughts on the topic. This keeps them involved in that dead time before the session starts.

Try and start on time (as it encourages people to be punctual in the future and does not penalise participants who are not late). The obvious start is to introduce yourself and the experts and/or producer. It's a good idea to have a slide with photos to help participants have a better idea of who you are.



Sometimes it is worth just turning on your webcam so they can really see who you are. You can then turn it off as you get into the session. You then have to really engage your participant's attention. Clearly the topic is one they have some interest in (or they have been told to attend!) but to get them fully engaged you have to generate a real commitment to get what they can from the session.

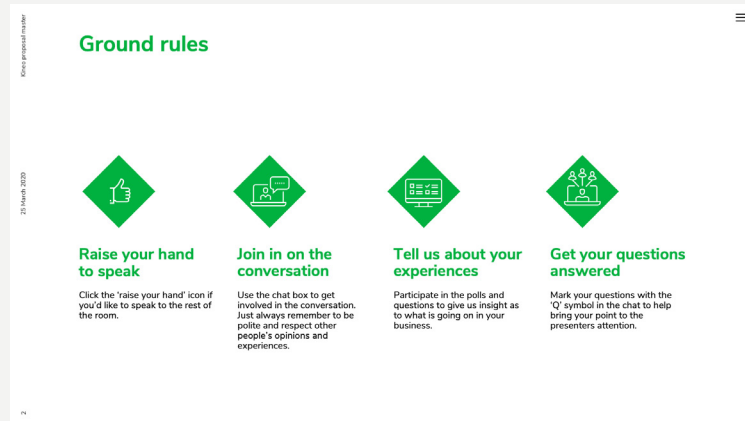
It's worth constructing an opening presentation (may be with some questions and interactions) that take participants through the following classic stages of the buying process:



The key is to move your participants from being aware of what you will be talking about to finding it all interesting (which isn't bad) to a having real desire to find out what they can. There are two potentially big drivers that create this kind of desire – the first is a positive reason (ie what this information will do to help them personally), the second is a more negative but often more powerful flip side (ie if you don't pick up this information you will miss out on something).

Before you start to cover your topic, you need to make sure that everyone is ready to use all the webinar facilities properly and understand the general protocols of being a webinar participant.

Here is how you could present the ground rules on a slide:



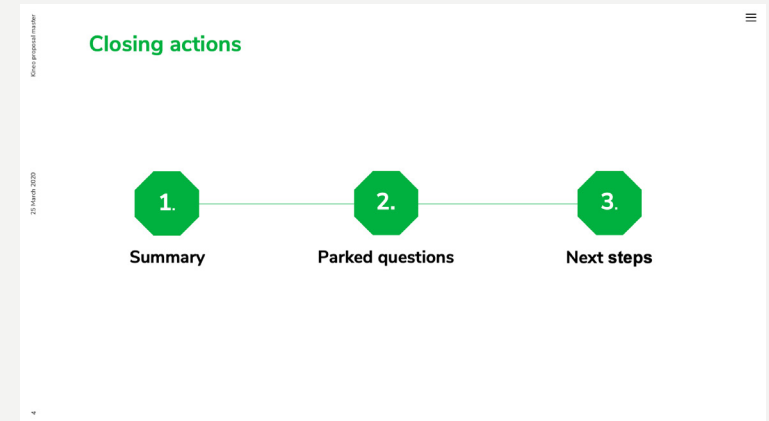
All webinars (be they Information, Learning or Persuasion) need to engage participants from the start so the AIDA sequence is recommended for all of your webinars.

### Structure for Information webinars

If you are in a pure information mode, the rest of the structure can be quite loose – following the classic “Tell them what you’re going to tell them, Tell them, Tell them you told them (ie summarise at the end)”.

So your structure would normally look something like this:

- Setting the scene
- Introductions
- What we’re covering today
- Topic A
- Topic B
- Summary
- Q&A
- Next Steps



The Q&A session could simply focus on the questions that participants have come up with during the presentation (if they weren't addressed at the time).

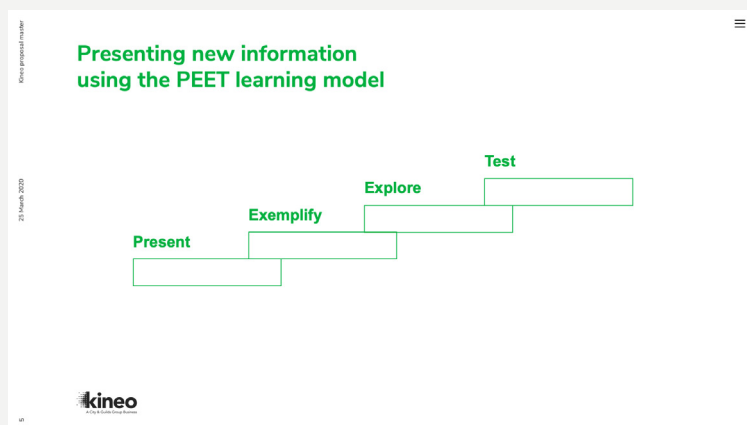
If you want people to give you feedback, why not ask them to drop into the chat area their thoughts on the session (this may elicit more chance to expand on topics overlooked in the presentation)?

You can also ask them to reflect on everything covered and put into the chat area their reflections on how things could be changed or areas that could be improved or what they personally might try and do differently. A classic prompt could be: “Put in something you will stop doing (as a result of what we have discussed), what you will continue doing (because you are clearly doing the right think already) and what you will start doing.”



### Structure for Learning webinars

If your session involves knowledge transfer, you may want to follow a trusted sequence that is more suitable for a classic learning path in which you want participants to consolidate the knowledge they are receiving and possibly demonstrate they have absorbed it at the end.



The way you present information will vary according to topic and can be done through simple group interactions or a straight-forward talk. It often helps then if you can take people through examples (Note: this is also a pretty good idea with Information webinars!). It is at the next stage that you do something that is unique to a proper learning experience – you try to get your participants to explore the topic.

There are many ways in which a topic can be explored further. One way could be to introduce a case study – and get the group to analyse it or decide what to do next. If you have the facilities to set up breakout groups (available in a tool like Adobe Connect or Webex) you could get different groups to work together on different angles of the case study and come back to the whole group with their thoughts.

The key is to provide enough space and time in the session for learners to absorb the information and reflect on what it means to them. The Explore exercise should therefore have enough ‘debrief’ time for those operating at a slower pace than others to get the key messages.

If you want to be sure people have picked up the knowledge required, you can then create some kind of Test involving the poll function found in all mainstream webinar tools. Each question is answered individually so you can check understanding whilst everyone is still in the session. Any areas that seem to be misunderstood can then be addressed before the webinar ends.

### Structure for Persuasive webinars

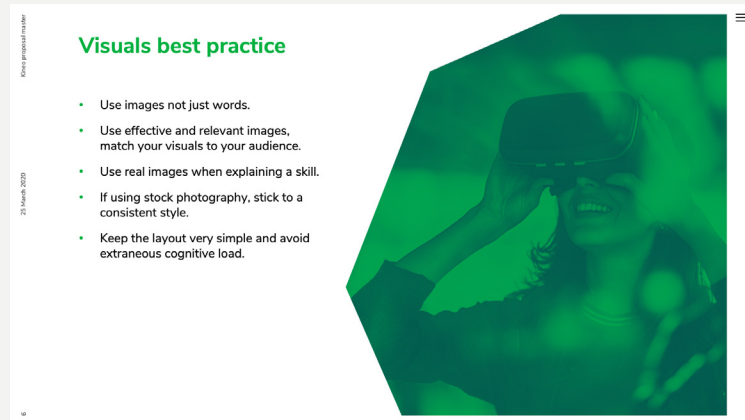
No one likes being told what to do or being blatantly sold to. So, if your webinar is primarily about persuading your participants to accept a change or do things differently (or simply adopt a product or service you are offering), you need to take a subtle selling approach.

The AIDA approach works well here and can be expanded a little as you want a little more than engagement. Ideally you want participants to feel both motivated to hear what you are about to say and also to feel you could really help improve their situation. So, there should be more time spend on highlighting needs while getting to the Desire stage.

The Next Steps can then represent some form of ‘Closing the Sale’ with the facilitator eliciting any concerns or objections to what was presented in the webinar and getting some form of general commitment before closing the session.

## Visuals

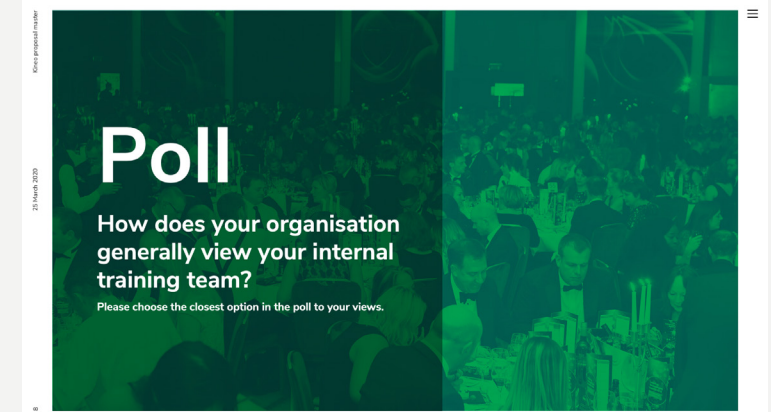
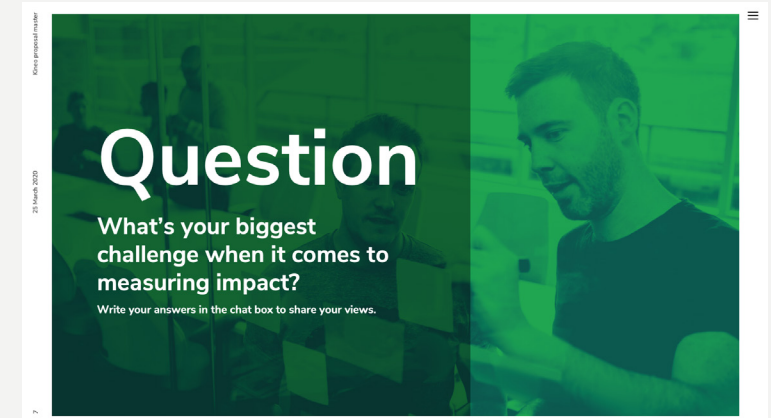
A core part of the webinar will be the visuals you use. Obviously, if the participants are only hearing your voice, the visuals you provide need to be engaging and relevant.



There is always a lot going on in webinars. Participants will have half an eye on the chat area (seeing what others are saying) and so it is crucial that your visuals are not complicated and, most importantly, absolutely match

Ideally all your activities should be clearly explained visually and so this means you should put the instructions on a slide and, even with poll questions, you should put your question to the audience on the slide they are looking at. At all times you should avoid cognitive dissonance whereby the participants see something on screen that does not match what you are talking about. With everything else in their eyeline and only hearing your voice, it can be very easy to confuse your audience.

Here are some example slides from a webinar on developing inhouse digital learning teams:



If you use breakout rooms, it's always a good idea to upload an instruction slide into each of the online breakout rooms so when they arrive they get a reminder of the task you want them to perform.

## Interactions

The key to success though really lies in how you reach out to the audience and get them involved. There are many ways in which you can do this in webinars and virtual classrooms (where you can use break out groups):

**Webinar / Virtual classroom activities**

- Breakout rooms**
  - Small and large groups
- Voice**
  - Conference line
  - VOIP
- Polls**
  - MCQ and open
- Chat box**
  - Private chat
  - Group chat
- Whiteboards**
  - Sharing
  - Allowing participants to draw / add text
- Sharing**
  - Screen share
  - Documents
  - Web-links
- Display icons**
  - Raised hands
  - Agree / disagree
  - Speed up / slow down
  - Speaker louder / softer
  - Step away

Whatever your purpose for running the webinar, you should aim use one or more these activities to ensure you involve your participants at regular occasions during the session. Here are some key principles that you should follow:

**Interactions best practice**

- Ask participants to interact every three to five minutes.
- It should have a purpose.
- Interactions should be meaningful and challenging and well planned.
- Involve the whole group.
- Avoid asking participants to interact one at a time.
- Design activities that can be undertaken in small groups or concurrently.
- Use a range of different interactions.

## Provide opportunity for interaction every 3-5 minutes.

It might sound like a lot, but simply asking a question and asking participants to type into chat encourages deeper reflection and synthesis on their part. It also helps the presenter understand where the knowledge gaps are so they can adjust the presentation as needed.

The earlier you ask participants to interact in a webinar, the more likely they will be to keep interacting—and keep paying attention. Within a 50 minute webinar, the goal should be for at least five polls or questions interspersed throughout the presentation.

## Using Polls

Interperse polls throughout the presentation.

Within the first few slides: ask a poll question about the content being discussed.

## Example:

Who has worked on an Interact project?

- Have completed one
- Just starting my first project
- May have one in the pipeline

This exercise gets the participant focused and helps the presenter understand what their needs are for the session.



## Develop

Now that you have defined what's going to be covered and the types of interactions you want to include, you're ready to work on the content and create a PowerPoint deck. We've put together some suggested formats to work with, but you should keep the following tips in mind when we start to build your slide deck and interactions.

### Vary the slide types

As a general rule, presenters should allocate about 1 minute per slide. Obviously, some slides may be longer, but to keep up visual interest for the participants, try to vary the slides. That is, alternate between diagrams, charts, images, and slide with text bullets.

### Use the Notes field

If you are creating content for someone else to present, rather than write out a full transcript of what they should say, jot down some keywords or ideas on the PowerPoint notes field. The presenter can refer to these while delivering the presentation to make sure all of the key points are covered.

This method ensures that the presenter doesn't just read a pre-written script, but instead speaks with an authentic voice of experience and expertise. Some presenters like using Mind Maps to create a more organic talking point structure.

### Make good use of chat

The presenter should build in open-ended questions that relate to the point they're making and have participants type their answers in chat.

The presenter could get input from participants about specific issues they are seeing in their geographic regions or challenges they are facing with this issue. By opening up to conversation throughout, the presenter provides a key opportunity for participants to learn from each other some of the key issues that are going on in the field.

It can be really hard to keep up with all the chat in a session, especially if the presenter is asking engaging questions and has good audience participation. This is a great thing and means that participants are learning and sharing from each other. The producer can monitor this chat stream and let the presenter know if any questions have come up.

If a particular lively chat is going on, the presenter should feel free to pause his or her dialogue and let the participants know that they're going to do a quick scan of the chat stream. Participants won't mind this break and will appreciate that the presenter is listening.

### Provide periodic recaps

As the presenter moves through the content, it can be important to provide periodic moments to stop and rest. The presenter should take a few moments to recap the key points from the learning objective that was just covered. This serves a few purposes, not the least of which is to pull people back in whose attention may have drifted while multi-tasking!

The presenter could even stop and ask the participants to provide a short recap themselves using the chat feature.

Although this may feel challenging when trying to cover a lot of material in a short time, providing the opportunity for recap will reinforce the content being covered and ensure more effective knowledge transfer.



## Market the webinar

**Now that the webinar topic and date has been set, it's time to let people know it's coming and why they should attend.**

In communication pieces announcing the webinar, include the webinar title and speaker name. Also include a short statement describing what the participant will get out of it. This creates interest in the topic, allowing potential participants to clearly see what's in it for me.

If you have successfully run the webinar already, get some comments from previous participants (especially if they talk about how they used the information shared) and include them in your webinar invites.

## Rehearse

**Practice makes perfect**

If a CEO were delivering a keynote at a conference, chances are they would rehearse before they stepped onto the stage.

In the ideal world, presenters take the time - even if it's just 30 minutes—to practice their presentations out loud. They can rehearse the webinar on their own by running the presentation on slide show mode and talking out loud to their computer.

A rehearsal helps the presenter get a sense of pacing and timing, letting them know where to cut things down and simplify, and gives them the polish they'll need to run an exceptional session.

If time permits, the presenter may want to run a full length "dress rehearsal" with their producer after they have made any initial adjustments. This is especially useful if the presenter is presenting for the first time and needs to get accustomed to the particular webinar platform.





## Deliver

Here are some final tips for presenting in an engaging and effective way:

Try to talk to your audience as if you are addressing them face-to-face. It is tempting to follow a script but it will always come over that you are reading.

**Deliver**

**Do Present**

**Don't Read**

Use the webcam functionality if you can, as it brings an added human dimension.

**Audio and voice**

**Webcam**

- Engaging
- Visual
- VOIP

**Voice**

- Still must be engaging
- VOIP or conference calling

## Webcam best practice

- Check you have sufficient bandwidth.
- Short video introductions are good. Too much can be distracting.
- Look directly into the camera.
- Be engaging facially – exaggerate.
- Check lighting and background distractions.
- Don't forget you're on camera!



You will probably though need to stick to audio if there are any potential bandwidth issues. So, you need to use your voice well as the participants will have no other connection with you:

## Audio best practice

- Check the audience can hear you clearly, ask your producer to advise you.
- Match your vocabulary to your audience.
- Think about your tone of voice in terms of cultural differences and expectations.
- Think about how cheerful, friendly and serious you sound, be authentic but professional.
- Vary tone of voice, volume and pace for impact.



## It's all in the tone

Believe it or not, your voice is what will make or break the presentation. If you sound dry and droning, your participants will start to tune out. But if you sound excited and interested in your content, your participants will pick up on that enthusiasm and pay attention.

## Some tips for creating energy in your presentation:

**Don't just read a script** You are the expert in this topic area and have lots of valuable information to share. Use your slides to guide the flow of the session, but don't read word for word from a script (otherwise, why not just send them your script for them to read at their own leisure?). When you created your PowerPoint presentation, you may have written down keywords or ideas on each slide. Use these notes to make sure you hit the right content, but allow yourself to speak from the heart - and directly from your own expertise.

**Avoid jargon** Speak in terms that your audience will easily understand. If you do need to introduce a new industry term, just provide a simple definition first.

**Keep it personal and talk to people** Some presenters like to look at a photograph on their desktop while speaking - it's a simple trick to remind you that you're not speaking to the silence of the Internet, but rather to real live people.

**Vary your pitch** Avoid droning by varying the inflection of your voice. Raise your pitch, lower your pitch. Insert pauses at key moments. Let yourself get excited by the content and raise your voice if you feel the need. Your enthusiasm will be contagious. Again, strive to sound like a real person connecting with another real person, not a news broadcaster reading the headlines on TV.

**Be informal** Be informal when it is appropriate to be - try to connect on a human level if you can. Of course, deliver the content in a style that's most comfortable for you.

**Smile** Yes, it might seem a bit cheesy but forcing a smile at the beginning will artificially create that energy you need right at the beginning to reach out to all those faceless people out there. The presenter is fundamental in creating the mood. So, making yourself get into a positive mood right from the start, will create an atmosphere that encourages engagement and active contributions.

## Using video

**Video is increasingly being used as part of webinar presentations to allow the participants to connect more deeply with the presenter. If a presenter will be making use of video, follow these best practices:**

Test the technology prior to running the webinar live to ensure there is strong enough connection.

Best to go with a wired Internet connection when delivering video as opposed to Wi-Fi.

The presenter should look directly into the camera as he or she speaks - this creates a more direct connection with the participants who feel like the presenter is looking at them.

Follow the same best practices above to maintain an interesting and engaging tone.

Hand gestures are fine and show that the presenter is engaged and animated.

## Annotating the presentation

Many presentations include detailed charts and data for review. If you have the facility (ie you are using Adobe Connect) you can make use of annotation tools which allow the speaker to highlight areas of a screen as they're talking about them or write text notes on screen. Using these annotation tools helps the participant focus in on the areas of the chart being discussed, providing opportunities for greater comprehension.



## Evaluate

At the conclusion of the presentation, you could use the polling tool to ask participants a series of standard questions. These questions allow you to gather feedback on presentations, improve delivery of future sessions and identify topics for future presentations.

For example, following a learning webinar, participants will be asked to rate each statement on a 1-5 scale.

1. I have the information I need to identify an opportunity for using this tool.
2. I know where to find more information about using this tool.
3. I know who to contact if I identify a potential opportunity for using the tool.
4. The presenter was knowledgeable about the topic.
5. Overall, the webinar was clear and the objectives were met.





# Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results.

**So, how can we help you?  
Get in touch about your digital learning challenges.**

---

#### Kineo UK

info@kineo.com

+44 (0)1 273 764 070

#### Kineo USA

usinfo@kineo.com

+1-312-846-6656

#### Kineo Australia

info@kineo.com.au

+61 1300 303 318

#### Kineo New Zealand

info@kineo.co.nz

+64 (0)4 801 6688

---

[www.kineo.com](http://www.kineo.com)

  
A City & Guilds Group Business