



# Learning Online: A TOPS Quick Guide to Webinar Production



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A TOPS Quick Guide to  
Webinar Production

The Technical and Operational Performance Support (TOPS) Program is the USAID/Food for Peace-funded learning mechanism that generates, captures, disseminates, and applies the highest quality information, knowledge, and promising practices in development food assistance programming, to ensure that more communities and households benefit from the U.S. Government's investment in fighting global hunger. Through technical capacity building, a small grants program to fund research, documentation and innovation, and an in-person and online community of practice (the Food Security and Nutrition [FSN] Network), The TOPS Program empowers food security implementers and the donor community to make lasting impact for millions of the world's most vulnerable people.

Led by Save the Children, The TOPS Program draws on the expertise of its consortium partners: CORE Group (knowledge management), Food for the Hungry (social and behavioral change), Mercy Corps (agriculture and natural resource management), and TANGO International (monitoring and evaluation). Save the Children brings its experience and expertise in commodity management, gender, and nutrition and food technology, as well as the management of this 7-year (2010–2017) US\$30 million award.

**Disclaimer:**

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# Acknowledgements

This resource was authored by Yemisi Songo-Williams and Adrienne Todela, Knowledge Management Specialist and Knowledge Management Officer respectively of the TOPS Program.

Ms. Songo-Williams and Ms. Todela have gained extensive experiencing designing and leading virtual knowledge sharing and learning events, and coordinate regularly with other teams in the food security and nutrition community to produce single event webinars and also incorporate virtual elements into in-person events.

The authors would like to thank the numerous teams they have collaborated with on various webinars, and who have provided valuable feedback that have helped the authors accumulate several best practices and enhance the webinar production processes that are documented in this resource.

The authors would also like to thank independent consultant Patrick Coonan, who, during his time as Knowledge Management Specialist with The TOPS Program, produced the supplementary video tutorials on preparing Adobe Connect Virtual Meeting Rooms that are included in this resource.

# Overview

We now live in an increasingly connected world. These heightened connections are manifested not only in the physical world, but also in the virtual space, through innovations in communications and information technology. The availability and accessibility of virtual platforms has been especially beneficial to learning, and have helped to diffuse knowledge and information across geographically dispersed audiences more widely than ever before.

In the context of international development, web seminars, or **webinars** for short, are being increasingly utilized to harness and share learning across various offices, organizations, borders, and time zones. Not only are webinars used for virtual internal meetings, they are now also employed for more structured online presentations and discussions that foster knowledge sharing and learning among those in attendance.

Webinars, in similarity with in-person events, are entire productions in and of themselves. And as with in-person events, webinars also require adequate time, resource, and people to plan and host them effectively.

*Learning Online: A TOPS Quick Guide to Webinar Production* presents the accumulation of best practices The TOPS Program adheres to when designing and producing webinars. This document is a step-by-step resource that reviews in turn the critical actions necessary across the three main stages of webinar design and implementation: **Pre-Production**, **Production**, and **Post-Production**.

- **Pre-Production** convenes the Production Team and outlines the content, event design, logistical and media outreach tasks to be completed prior the event.
- **Production** identifies further responsibilities of the Production Team right before and during the event.
- **Post-Production** highlights the internal and external steps necessary for a successful event follow-up.

This resource contains additional features, such as suggested timelines for when specific tasks within each webinar production phase should be completed. Supplementary tools, including video tutorials on how to format the webinar's Virtual Meeting Room (*specific to Adobe Connect*), are also provided where applicable.

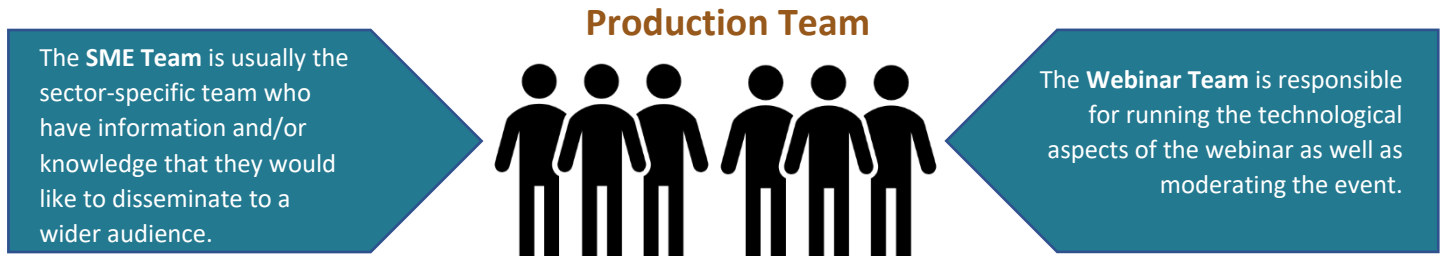
Finally, additional guidance from several webinar software providers is also included for further reference.

*It is important to note that the language throughout this document specifically refers to the Adobe Connect webinar software. However, since there are similarities across the different webinar platforms, users of other platforms may still find this resource useful.*

# Pre-Production

## The Information Call: 2-1½ Months Before Event

Webinar production, whether solely virtual or as a part of an in-person event, should start with discussions between the **SME<sup>1</sup> Team** and the **Webinar Team**. This initial information call is necessary to establish the objectives, content and logistics of the webinar.



The information call's agenda includes:

- Content
  - ✓ Brief on topic
  - ✓ Identify webinar objectives: Be clear on what the webinar will achieve
  - ✓ Type of event: *Will it be solely virtual? Or will it be part of an in-person (i.e. hybrid) event? Will it be lecture-based/presentation led? Or will participatory exercises be infused throughout to engage attendees more effectively?*
  - ✓ Speaker(s): *Have all speakers been identified? Has their participation been confirmed? Will speakers be joining the event from the same or different locations?*
- Logistics
  - ✓ Options for date and time
  - ✓ Options for venue, if part of an in-person event
  - ✓ Media outreach specifications: *Is there a specific target audience? If so, what are the dissemination channels to reach them?*
- Suggested Action Items
  - ✓ **SME Team** confirms **Speaker(s)**
  - ✓ **SME Team** confirms date, time, and venue
  - ✓ **SME Team** drafts 1-2 paragraph description of webinar with brief speaker bios and accompanying headshots, and provides this information to **Webinar Team** to facilitate effective outreach
  - ✓ **Webinar Team** creates event webpage that includes event information, registration details and any relevant materials

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<sup>1</sup> Subject Matter Expert



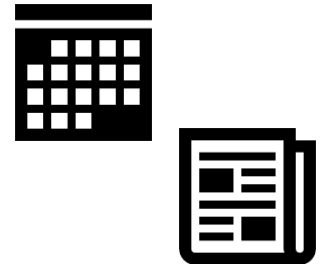
## Event Design and Media Outreach: 4-3 Weeks Before Event

The information call is followed by a round of targeted publicity to ensure that information about the event is disseminated widely to relevant audiences. The optimum length of time for outreach activities is a month: long enough to keep the posted event top-of-mind and attract registrants, but immediate enough to limit the chances of the event information being lost in the usual fray of listserv emails and event lists.

The **Webinar Team** creates the event webpage.

The event webpage must contain the following:

- ✓ Title
- ✓ Date
- ✓ Venue
- ✓ Description
- ✓ Speaker Bios and Headshots
- ✓ Registration Link
- ✓ All documents that attendees need to review in preparation for the event



The following information can be collected via the registration link:

- ✓ Full Name
- ✓ Position Title
- ✓ Organization
- ✓ Country/Location
- ✓ Email address
- ✓ If the webinar is being held as part of a hybrid event, registrants must choose whether they are attending in-person or virtually

Registration information collected can also include subject matter questions that the **SME Team** would like registrants to answer before the event.

After the event webpage is published, both the **Webinar and SME Teams** disseminate event information through:



- Targeted Invitations
- Event Lists on Relevant Organizations' Websites
- Relevant Online Forums
- Relevant Email Listservs
- Social Media

After completing the event webpage, the **Webinar Team** sends confirmation emails to registrants. This email must include the link to access the webinar, and if a hybrid event, the address of the venue as well.

## Production Team Set Up: 3-2 Weeks Before Event

The **Production Team** consists of the **Webinar and SME Teams** and invited speaker(s).

All members of the **Production Team** should participate in an introductory call before the event's Dry Run to facilitate introductions and review any questions about the content, technology or processes related to the event.

The roles and responsibilities of each member of the **Production Team** are as follows:



### Webinar Producer

#### Pre-Production

- Act as the lead of the **Webinar Team**; manages all communications with the **SME Team**
- Gathers all presentation materials and relevant resources from the speaker(s) and shares them with the Webinar Co-Producer to prepare the Virtual Meeting Room for the Dry Run
- Creates both the Participant Agenda for public reference and the Operational Agenda for managing the event. The Operational Agenda<sup>2</sup> details the flow of the webinar and breaks down which activities occur during each minute of the event.
- Leads the Dry Run with the rest of the **Production Team**.

#### Production

- Facilitates flow of the event and ensures smooth transitions between different sections
- Supports the Webinar Co-Producer with monitoring technological logistics
- Moderates question and answer sessions<sup>3</sup>
- Closes the event, shares relevant follow-up information and thanks attendees

#### Post-Production

- Leads the After Action Review<sup>4</sup>; documents and disseminates any lessons learned to the **Production Team**
- Oversees the dissemination of event materials to be completed by the Webinar Co-Producer



### Webinar Co-Producer<sup>5</sup>

#### Pre-Production

- Takes meeting notes during the information call
- Oversees media outreach, creates online registration form and event page
- Manages registration, tracking information and sending confirmation emails to registrants
- Prepares the Virtual Meeting Room and ensures layout meets the specific webinar structure
- Participates in the Dry Run and uploads final versions of the presentation materials to the Virtual Meeting Room

#### Production

- Opens the Virtual Meeting Room and gives Host Status to himself/herself and to the Webinar Producer. S/he also gives Presenter Status to the speaker(s)

<sup>2</sup> See Appendix 1 for an example.

<sup>3</sup> Also refer to specific tasks under Moderator Section on page 4.

<sup>4</sup> See Post-Production Section, page 9, for details.

<sup>5</sup> This role is suggested if the webinar or hybrid event is large and multi-faceted, with multiple speakers and discussion heavy.

- Welcomes attendees, shares housekeeping rules and facilitates any introductory activities
- Leads the monitoring of technological logistics, especially the audio broadcast
- Flags and resolves any technological issue noted by attendees
- Changes layouts throughout the presentation as per guidance in the Operational Agenda

#### *Post-Production*

- Participates in the After Action Review
- Sends out follow-up email with presentation materials to the attendees
- Updates the event page with all relevant materials



### **Speaker(s)**

#### *Pre-Production*

- Corresponds with the Webinar Producer to finalize presentation and all relevant resource materials
- Attends the Dry Run to become familiar with the technological features of the Virtual Meeting Room and to review the operational flow of the webinar.

#### *Production*

- Presents content
- Responds to all relevant questions from attendees

#### *Post-Production*

- Participates in the After Action Review
- Responds to any outstanding questions from attendees



### **Moderator**

For large, multi-faceted webinars with numerous Speakers, the inclusion of a designated Moderator (in addition to a Webinar Producer) is recommended. This is necessary to facilitate a successful discussion during the Q&A portion of the event, and frees up the Webinar Producer to concentrate on ensuring that webinar production continues smoothly overall.

#### *Pre-Production*

- Coordinates with the Speakers to prepare notes and general questions for their presentations
- Prepares a brief introduction of the Speakers and the content that will be discussed during the webinar
- Attends the Dry Run to get a handle of the technological features of the Virtual Meeting Room and to review the operational flow of the webinar

#### *Production*

- Introduces presenters, gives an overview of webinar objectives and content and hands the event over back to the Webinar Producer or Presenters
- Facilitates Q&A portion

#### *Post-Production*

- Participates in the After Action Review

## Virtual Meeting Room Design: 2-1 Week(s) Before Event

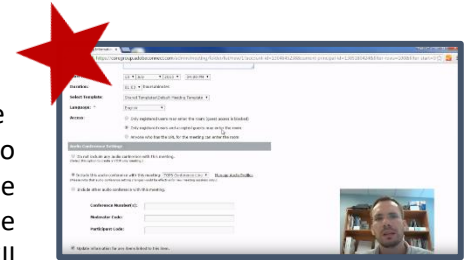
There are several webinar software platforms available, such as Adobe Connect, Go-To Meeting, through which Virtual Meeting Rooms can be set up and where all participants log in to participate in the webinar.

The **Webinar Team** selects the most appropriate software and sets up the Virtual Meeting Room, with its own specific URL. This link to the log-in page should be included in the confirmation email sent out to the registrants.

There are three major aspects to Meeting Room set-up<sup>6</sup>: Layouts, Pods, and Audio.

### Layouts

Layouts are the various sections of the webinar, with different layouts used to highlight different webinar aspects. The types of layouts selected will depend on the webinar design and flow agreed upon. For example, if the layout is meant to showcase a presentation, then the layout will be designed so that that the presentation is the most prominent feature in that layout. If the webinar has a simple presentation followed by a Q&A section, then two layouts, one for each section, will be created. Multiple layouts will be needed for longer and multi-sectioned webinars.



TOPS/FSN Network Adobe Connect 101:  
Creating a Meeting Room:  
<http://bit.ly/2DKQHg3>

### Pods

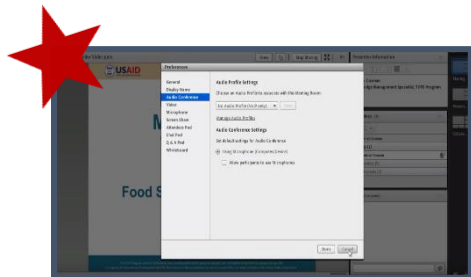
Layouts are composed of different pods, each with a unique function. The type of pod used depends on the material that will be presented in that pod and; the most commonly used ones are Share, Chat, and Poll pods.

A Share Pod is used to upload a PowerPoint Presentation, a PDF file, or a photo to be shared with attendees.

The Chat Pod is used for two-way communication with attendees and should always be present in all layouts. This enables attendees to keep interacting with each other and with the Production Team throughout the event.

A Poll Pod is used to ask attendees specific questions, and is a good way to solicit opinions from attendees at various stages of the webinar.

All pods can be edited by size, title, and content.



TOPS/FSN Network Adobe Connect 101:  
Audio: <http://bit.ly/2DN8enS>

### Audio

Due to its virtual nature and the accompanying lack of in-person/visual cues, audio is a critical component of webinar production. A webinar cannot be effective without functioning audio.

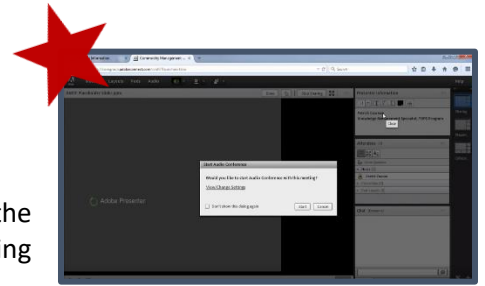
Audio can be linked to the Virtual Meeting Room in two ways: **VoIP** and **Conference Line**.

**VoIP** (Voice over Internet Protocol) transmits audio via computer audio systems only. Webinar attendees only hear the feed through their computer audio systems and can only speak using their computer microphones or headsets. Strong connectivity is key to a smoother VoIP experience, while low connectivity may result in lagged or no audio at all. It is especially recommended that speaker(s)

<sup>6</sup> This specifically refers to the Adobe Connect System. Other systems may have similar features that are named differently.

have their computers hardwired to an Ethernet port during the webinar to take advantage of the most stable Internet connection.

If the webinar is part of an in-person event, the **Webinar Team** must work with the venue's AV technician to sync the microphone(s) used by the speaker(s) to the audio system of the main webinar computer. This is to ensure an optimal audio experience for virtual attendees.



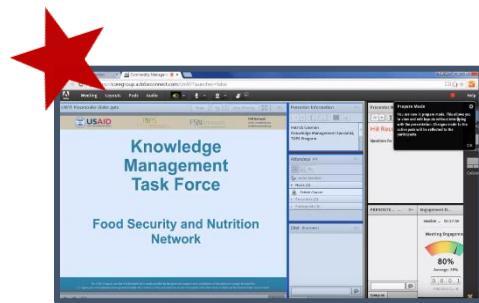
TOPS/FSN Network Adobe Connect 101:  
More Audio: <http://bit.ly/2rP6SaP>

Webinar audio can also be set up via a **conference line**. With this method, the Webinar Producer dials in to the conference line and opens the Virtual Meeting Room to broadcast audio via the conference line.

In general, both these methods can be made available in the same Virtual Meeting Room. The conference line method is especially helpful if one or two speaker(s) have low connectivity, as it enables each presenter to present over the phone. Attendees with bad connectivity can also benefit from using the line, as they will be able to follow along with the presentation, even if they cannot see the slides. Both options should be reviewed with the **Production Team** to reach an agreement on the preferred system that suits the specific logistics of each webinar.

**It is extremely important to remind attendees on the phone (just as you would remind those using VoIP) to mute their phones or microphones when they are not speaking to avoid any disruptive feedback or echos.**

The option of giving microphone rights to attendees is also a crucial one, and should in the same way be discussed and agreed upon with the **Production Team**. If attendees are required to contribute verbally, then microphone rights are a must. If verbal participation is not a necessary element of the event, all questions and comments from attendees can be directed to and addressed via the Chat Box.



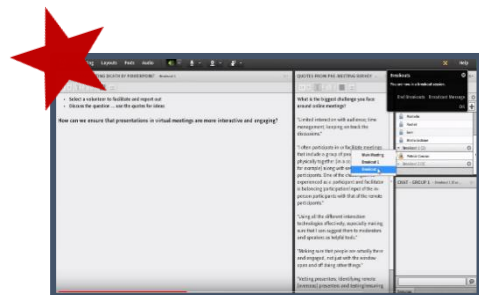
TOPS/FSN Network Adobe Connect 101:  
Meetings Menu: <http://bit.ly/2rQBcBN>

### Tailor Your Webinar

Each webinar has its own unique objectives, components and needs. Depending on the content and vision of the **SME Team**, webinars can run the entire gamut from being purely 'lecture-style' events to being as interactive and participatory as possible.

Lecture-style webinars will use different pods compared to those webinars that require more active participation from attendees.

Therefore, when designing the various webinar components, the **Production Team** must be guided by the kind of content to be shared, and how they want the content to be disseminated.



TOPS/FSN Network Adobe Connect 101:  
Using Breakout Feature for Producers:  
<http://bit.ly/2DLL55i>

A clear understanding of these various elements, coupled with strong communication and coordination within the **Production Team** will lead to more effective use of the various pods and layouts, and a better produced webinar overall.

## The Dry Run and Last Minute Reminder: 1 Week-2 Days Before Event



The **Production Team** should conduct a Dry Run before the event to make sure the meeting room is properly set up, all team members are aware both of their roles and responsibilities and any required transitions during the webinar, and any last minute changes are finalized. The Dry Run can last between 30 minutes and an hour, depending on the experience and familiarity of the speaker(s) with the webinar software and the event processes.

At the Dry Run, the Webinar Producer reviews the Operational Agenda with the **Production Team**, making sure that everyone is familiar with the various webinar elements of the webinar. The team will also jointly agree on a process for facilitating the question and answer section of the event.

The Webinar Co-Producer navigates through the various layouts, pods, and audio settings of the Virtual Meeting Room with the **Production Team**. Attention will be paid to ensuring that all audio settings for the speaker(s) are trouble-free: loud and clear, without any feedback or echo.

The Webinar Producer should also remind the speaker(s) to share any updated presentations in good time, and to log in to the Virtual Meeting Room 30 minutes before the webinar starts for any last minute checks.

After all final preparations have been confirmed during the Dry Run, the Webinar Co-Producer sends final confirmation emails to all registrants at least 24 hours before the event. Last minute reminders can also be sent 30 minutes before the event.



All reminder emails should contain the link to the Virtual Meeting Room, and a reminder that participants should try to be well connected to the Internet to ensure optimal broadcasting of the webinar.

# Production

## Final Check: 30 Minutes Before Event

The Webinar Producer and Webinar Co-Producer should log in to the Virtual Meeting Room at least 45 minutes before the event, and confirm that all layouts are in place and that final versions of the presentation materials have been correctly uploaded to the Virtual Meeting Room.

The speaker(s) should log in to the Virtual Meeting Room at least 30 minutes before the webinar starts to conduct a final technology check with the rest of the **Production Team**.



This will also be a final opportunity to make any necessary updates to the Meeting Room.

## The Webinar Event

The webinar starts with the Webinar Co-Producer welcoming attendees to the event and alerting them to various housekeeping rules necessary for an optimal webinar experience.

**Introductions:** Welcome the attendees, state the title of the webinar, the co-hosting organization or program, and a brief description of the event.

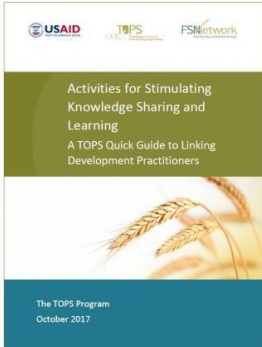
**Housekeeping:** Remind everyone that the webinar is being recorded to be shared with others who could not make the event and as a future reference. Also let attendees know that the recording, along with the rest of the presentation materials, will be shared afterwards, via email and online.

If microphone rights are granted to attendees, the Webinar Co-Producer must alert them when the microphones are open, and let them know that microphones need to be muted when they are not being actively used.

Alternatively, if attendee microphones are not activated, the Webinar Producer directs attendees to ask questions and share comments throughout the webinar via the Chat Box.

# Post-Production

## After Action Review: *Directly After Event*



Immediately, or soon after the event, the **Production Team** should conduct an After Action Review to discuss what went well during the webinar and identify which elements could be improved upon for future events.

Discussions will focus around webinar logistics, flow, content, and participant engagement.

The Webinar Producer notes these best practices and lessons learned for future webinars.

Learn How to Conduct an After Action Review with this resource:

<https://bit.ly/2LJZPd0>

## Follow-Up Email and Post-Event Outreach: *1-3 Days After Event*

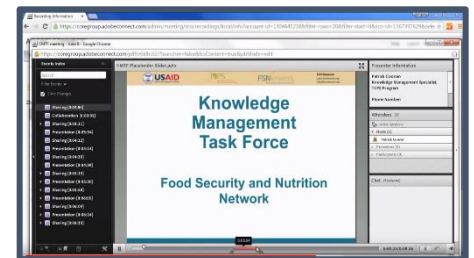
The Webinar Co-Producer edits the webinar recording and presentation materials for dissemination and uploads these resources to the event webpage.

It is advised that all presentations and resources shared during the webinar are converted to PDF file format to ensure full public viewing.

After all materials have been finalized the Webinar Co-Producer updates the event webpage with the recording and documents. The webinar description must also be revised to reflect the presentation and discussions had during the event.

A link to this webpage is sent via follow-up email to the communication channels used during outreach, and, more specifically, to the registrants.

Other final tasks, such as internal reporting of the final participant list, are completed as applicable.



TOPS/FSN Network Adobe Connect 101:  
Editing Recordings: <http://bit.ly/2DOaJ9I>



## Additional Resources

Resource	Website Link
<b>Adobe Connect Quick Start Guides:</b> These guides are reference materials for Meetings, Participants, Webinars, and Event Checklist	<a href="http://bit.ly/2DnV8qm">http://bit.ly/2DnV8qm</a>
<b>GoToMeeting Resource Center:</b> This online library provides checklists, management guides, and other reference materials for those using the software.	<a href="http://bit.ly/2BCq62N">http://bit.ly/2BCq62N</a>
<b>WebEx:</b> 12 Steps to a Wildly Successful Webinar	<a href="http://bit.ly/2rVOCg2">http://bit.ly/2rVOCg2</a>
<b>Zoom Training:</b> This resource page offers webinar video tutorials and best practices.	<a href="http://bit.ly/2ePeflr">http://bit.ly/2ePeflr</a>

# Appendix

## A Sample Operational Agenda – Webinar ONLY

### [Title of Event]

Date:

When:

Where:

### Roles and Responsibilities

SME Organizer:

Webinar Producer:

Webinar Co-Producer (if applicable):

Moderator:

Presenter 1:

Presenter 2:

Presenter 3:

### Supplies

Laptops

Headsets

### Last Minute Outreach

1. Webinar Producer/Co-Producer to send: 24-Hour Meeting Reminder
2. Webinar Producer/Co-Producer to send: 30-Minute Meeting Reminder

### Schedule

Date	Time	Task	Responsibility
2 days before		Script for Webinar Producer, Moderator, etc.	Respective person
1 day before		Reminder email	Webinar Producer/Co-Producer
1 day before		Final check of Meeting Room, making sure that all PPTs, etc. are in place	Webinar Producer/Co-Producer
Day of	45 minutes before start	Final check of Meeting Room and audio	Production Team
Day of	30 minutes before start	Email 30-minute reminder	Webinar Producer/Co-Producer

Day of	5 minutes before start	Begin Adobe recording	Webinar Producer/Co-Producer
Day of	Start time	Meeting begins	
Day of	During	Webinar structure and flow should be specified here	
Day of	Directly after	AAR	Webinar Producer to lead, Production Team
Day of	Later in the day	Edit recording if needed	Webinar Producer/Co-Producer
2-3 days after		Post recording link and session materials to the event web page; Email registrants link for the event's web page.	Webinar Producer