



WEBINAR INFORMATION SHEET

Complete the below template to define and prepare for your successful webinar!



BRAINSTORM:

What are your objectives in hosting a webinar?

PLAN

Target Audience:

Topic:

Type: Prospect Education Panel Office Hours Q&A Singular Series

Team: Who do you need to successfully execute?

Technology: What tech do you need to successfully execute?

BASIC DETAILS:

What is this webinar about? Is there a title already in mind? Is there a proposed date, time, and duration?

Webinar Title:

Proposed Date, Time, & Duration:

Brand/Logos:

PRESENTATION DETAILS:

Who is presenting/speaking during this webinar?

Who is responsible for the content in the presentation deck?

If assistance is needed in buildout of content, graphics, etc., please make a note here.

PROPOSED CONTENT + AGENDA + ENGAGEMENT

Please describe the proposed agenda and content for this webinar. Include any ideas for the email invite as well. This information will be used to create a draft for the email invite and Zoom registration page.

Do you want to provide the options for registrants to submit questions or answers ahead of the webinar? If so, what would you like to ask?

What does engagement look like during presentation? Do you want live polling? Want to get people engaged on chat? If so, what would you like to ask?



INVITE EMAIL LIST:

Brainstorm about the audience you would like to review marketing communications for this webinar.

- | | |
|---|---|
| <input type="checkbox"/> All Active Clients & Spouses | <input type="checkbox"/> Blog Subscribers |
| <input type="checkbox"/> COIs | <input type="checkbox"/> Employees |
| <input type="checkbox"/> Prospects | <input type="checkbox"/> Paid Ads |
| <input type="checkbox"/> Social Media | |

Any other opportunities or channels to marketing here:

DESTINY CAPITAL TIMELINE SAMPLE:

This is the timeline of a typical webinar:

Constant Contact Email Campaign (socials to be hit same time)

Initial Email Invite (CC Email #1)	14 Days Before
*First Reminder Invite (CC Email #2)	7 Days Before
*Second Reminder Invite (CC Email #3)	2 Days Before

*First and Second Reminders will only be sent to those who have NOT registered yet.

Zoom Automatic Reminder Emails

Zoom Webinar Reminder Email #1	7 Days Before
Zoom Webinar Reminder Email #2	1 Day Before
Zoom Webinar Reminder Email #3	1 Hour Before

*Zoom Webinar Reminder emails will only be sent to those who have already registered.

Internal Prep

Registrant Prep	Updated daily
Finalize Slide Deck	At Least 2 Days Before
Webinar Practice Session	At Least 1 Day Before

Follow-Up

Registered Follow-Up	Same Day
Prospect - Direct Follow-Up	Advisors/Growth Team
Recording email (non-registered)	<input type="checkbox"/> Separate email? or <input type="checkbox"/> Include in Newsletter?

Make notes for any modification to the above timeline:

ADDITIONAL NOTES + FYIS:

