WEBINAR WORKBOOK

A step by step workbook to help you create
your first marketing webinar.

INDIGO
Marketing Agency

SELECTING YOUR TOPIC

The topic of your webinar is critically important. It's worthwhile to do some research or run some tests when you're deciding what to cover for your first webinar. You'll want to focus on an urgent problem facing a specific group of people.

The best topics are laser-focused and give away a ton of specific value. Don't be tempted to go too broad here or your webinar will blend into all of the noise out there. Some top-performing webinars my clients have done include:

- How Intel Employees Can Prepare for the Next Round of Layoffs
- What Should Bristol-Myers Squibb Employees Do About the Pension Buyout?
- How Divorced and Widowed Women Can Maximize Their Social Security Benefits
- How Doctors Can Catch Up for Retirement in a Hurry

Here are some ways to decide what's the best fit for your firm.

1. CHECK OUT YOUR GOOGLE ANALYTICS

If you have Google Analytics set up for your website, it's easy to see which pages are the most popular. Just go to Behavior, then Overview to see your top 10 pages. Make sure you change the date range to the last year or so to get a wide range of visitors.

For my website, my recent post on How to Get New Clients During a Market Decline has the most views. This is a good indication that a webinar on how to use market volatility in your marketing strategy would be alluring to my visitors.

My Top 5 most popular pages:

	MOST POPULAR PAGES:
1	
2	
3	
4	
5	

2. TEST IDEAS USING FACEBOOK ADS

Every time I create a new webinar, I test out the topic and title using Facebook ads. It's easy to set up an ad that goes to my main webinar library and run it using different titles of topics I might want to cover. Then I compare and go with the lowest cost per click, which indicates the most people clicking on that title.

My Facebook Ideas & how they ranked:

FACEBOOK AD	COST PER CLICK
1	
2	
3	
4	
5	

3. ASK YOUR CLIENTS

It's easy to do a quick survey to your clients to ask them what they'd most like you to cover in a webinar. Using Google Forms or Survey Monkey, ask your clients to select between three to five options. When I did this for my email list, the feedback was overwhelming that advisors wanted me to do a webinar on Facebook ads next. If you don't want to be that formal, simply ask a few trusted clients for their feedback.

CLIENT IDEAS
1
2
3
4
5

Based on your research you should now have a good idea of your topic.

MY TOPIC IS: ____

NAMING YOUR WEBINAR

The title of your webinar is also really important. I've seen great webinars fail because the title is boring. Put on your marketing hat and name your webinar something exciting. You can test out the titles to see which one performs best. Here are some examples of great webinar titles:

- Social Security: The Choice of a Lifetime
- The Truth About Your Intel Benefits Package
- 6 Unexpected Risks to Your Retirement
- Demystifying the Bristol Myers Squibb Pension Plan Closure

Titles that include "the truth", "the biggest mistakes", and "demystifying" do really well.

MY WEBINAR NAME IS: ____

INDIGO Marketing Agency

CREATING YOUR PRESENTATION

Once you've selected a topic, it's time to get started mapping out your presentation. At Indigo Marketing Agency, we always use the same formula, which is based on research by NASA. The smart folks at NASA scientifically proved that presentations around 17 to 20 minutes are ideal to help viewers retain information. This means about 18 slides for your presentation.

Keep in mind that while you're creating your presentation, you'll just need slides with text. There's no need to worry about design, fonts, or formatting at this point. If you have relevant graphics, you can include them, but don't spend any energy on the design of your presentation. I typically open up a blank presentation and simply add one short sentence to each slide.

SLIDE 1: TITLE AND SUBTITLE

Ex: What Should You Do About the Bristol-Myers Squibb Pension Buyout?
How BMS Employees Can Plan to Maximize Their Benefits

SLIDE 2: YOUR CREDENTIALS

This slide should include your background, education, licenses, and firm affiliation. This answers the question "Why am I uniquely suited to teach this course?"

Ex: I've been working with BMS employees for two decades and am personally familiar with the pension plan.

SLIDE 3: YOUR MISSION

This slide should capture why you do what you do and why you're passionate about it. Until people understand what motivates you, they can't begin to trust you.

Ex: My wife works at BMS and I understand how confused and worried employees are about their benefits. I'm here to help you feel confident about selecting the best option for you so you can get back to work.

SLIDE 4: ABOUT THEM

This is your opportunity to communicate how well you understand the viewer. Relate to the challenges facing them, their background, why they face urgency now, and their fears.

Ex: You've likely worked at BMS for decades and always thought the pension plan would be there for you. Now it's closing and you face a critical decision that you must make within 90 days.

SLIDE 5: THE URGENT PROBLEM

Here you'll review the important choice they'll have to make—their urgent problem —and how it will impact them.

INDIGO Marketing Agency

Ex: This is your only chance to choose a lump-sum payout to receive cash for your pension benefits. This represents an incredible opportunity, but with considerable risk. It's critical to choose the best option for your specific situation, and if you do take the lump sum option, invest the money in line with your risk tolerance.

SLIDES 6-14: THE DETAILS

Here's where you'll go through the meat of the presentation and your expertise on the topic.

Ex: The history of the pension plan, the options available, potential scenarios, critical points to consider, etc.

SLIDE 15: EMOTIONAL CONFRONTATION

This is the key slide of your presentation. Confront the viewer with an uncomfortable emotional reality if they fail to take action.

Ex: If you do not take the lump-sum payout option, you will likely never get another opportunity to access your retirement benefits and invest them in a way that aligns with your best interests.
This could potentially leave you with a drastically reduced standard of living in retirement.

SLIDE 16: A POWERFUL SOLUTION

Here's where you offer an easy action for them to take to alleviate the emotional discomfort you caused in the last slide.

Ex: Schedule your complimentary one-on-one consultation with our team and we'll review your specific situation, answer your questions, and provide recommendations to maximize your pension benefits.

SLIDE 17: CALL TO ACTION

Urge viewers to take action now by scheduling a call, signing up for a meeting, or filling out a "Get Started Now" form.

Ex: Click below to schedule your meeting today. Remember, you only have 90 days to choose your payout option, so reserve your space now to make sure you are fully informed and confident in your decision.

SLIDE 18: HOW TO LEARN MORE

This slide is for people who are not ready to make the big jump and complete your call to action. Give them a way to learn more about the topic and keep in touch with you.

Ex: Download our free report on how to make the most of your pension plan options and join our newsletter for up-to-the-minute updates and news.

WHAT WILL GO ON MY SLIDES?

Slide #	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	

INDIGO Marketing Agency

DESIGNING YOUR PRESENTATION

To get your presentation designed on your own, I recommend using Upwork.com and searching for a PowerPoint designer. Take a look at their reviews, samples of their work, and their rate. Aim to pay about $100 to $200 to design your presentation.

Make sure you give the designer the following to help them create a beautiful presentation:

- Your logo
- Your headshot
- Your color scheme
- Any graphs or charts
- A photography theme (beaches, golf, business owners)

Once you get your designed presentation back, you'll want to send it through compliance. Make any compliance required changes, and then you're ready to record.

MY WEBINAR DESIGNER IS: ____

RECORDING YOUR WEBINAR

This is the point where most creators get stuck. You've already done 80% of the work, but many people get paralyzed by perfection and never record their webinar.

My best advice to overcome this is to schedule a time on your calendar to record and commit to yourself to get it done. Then, the day before you plan to record, do a complete run-through of your presentation.

When the time comes to record, accept no excuses and record as if it were live. You can always update your recording later, but it is critical to get your first webinar out and start collecting feedback to make it better.

MY RECORDING DATE IS: ____

AUTOMATING YOUR WEBINAR

I recommend always running automated webinars. There are a few reasons for this:

- There is no risk of technical difficulties
- People think automated webinars are live.
- Data shows that twice as many people watch an automated webinar as a live one, since about half of people watch the replay.

My favorite webinar automation tool is EasyWebinar. It's pretty robust and can be overwhelming, so if you're not tech-savvy, you'll want to outsource this piece of the puzzle. If you do it yourself here is a checklist of what to do:

WEBINAR SET UP CHECKLIST

- [ ] Upload your logo and headshot
- [ ] Create your presenter bio section
- [ ] Create your registration page
- [ ] Configure the dates and times your webinar will be available
- [ ] Create the automatic reminders to go out one day and one hour before it starts
- [ ] Add your "offer" pop-up and countdown timer to get people to take action
- [ ] Add your links, notes, and offer to the event page
- [ ] Add the presentation video to the event page
- [ ] Add an invitation video to the registration page

Once you've automated your webinar, sign up to watch it and make sure everything is configured properly.

PROMOTING YOUR WEBINAR

Now that your webinar is up and running and you have a registration page to share, it's time to promote your webinar. You worked hard to create a valuable presentation, so don't be shy about inviting everyone you know to watch.

INVITE YOUR NETWORK BY EMAIL

First, I recommend emailing out several promotional emails to your list. This should include a quick video inviting them to attend the webinar and explaining what you'll cover and why it's so important. Schedule at least four emails inviting them to watch:

- Save the Date for Our Upcoming Webinar
- Register Now for Our Webinar
- Last Chance to Register for Our Webinar
- Watch the Replay of Our Webinar

LEVERAGE LINKEDIN

Especially for employer-specific webinars, LinkedIn is the way to get your presentation in front of people you don't already know. Have your assistant send messages to everyone who fits your target demographic inviting them to attend. If you don't hear back, send a follow-up message with a link to the replay. You can even use an automated LinkedIn tool to invite people in bulk with automatic messages.

CONSIDER FACEBOOK ADS

If your target audience isn't on LinkedIn but you still want to get in front of people you don't already know, Facebook ads could be an option. You can create ads to target by location, age, gender, and interests. For example, you could target friends of people who have liked your page, presuming that the ads would be displayed to your clients' friends. Get creative with your Facebook ads to target your ideal prospects.

SHARE WITH REFERRAL PARTNERS

The best way to get your webinar in front of more qualified prospects is to ask referral partners to share it with their clients. If you work with a lawyer, CPA, or other professional who serves the same demographic, they may agree to invite their clients to attend your webinar as a value add for people in their network.

FOLLOWING UP TO CONVERT VIEWERS

Only a small percentage of webinar viewers will take action on the day they watch your webinar. In fact, the average time between when someone views a webinar and becomes a client is about one year.

This means that you need to regularly follow up with viewers to make sure you're top of mind when they finally get around to making a move. I recommend a 4-6 email follow-up series inviting them to take action. Here are some examples from top-performing follow-up email automations:

- Thanks for Watching Our Webinar—What Did You Think?
- Do You Have Questions About Your Specific Situation?
- Schedule Your Free One-on-One Consultation Today
- Why I Became a Financial Advisor
- What We Do & How We Can Help
- Do You Know Someone Who Needs Our Help
- Did You Know You Can Make an Appointment Online?
- Let's Get Coffee and Get to Know Each Other

Once your email series has completed, make sure all webinar viewers are on your regular email list so they'll see your updates. You can also have your assistant connect with them on LinkedIn so they'll see your posts and be able to get in touch with you there.

I know this all may seem like a lot of work, but webinars are incredibly powerful. When you consider setting up an automated webinar or hosting a dinner seminar, the costs and work involved don't compare.

If you were to do a seminar, you would need to do all the work to prepare and give a presentation—and pay for everyone's dinner. Yet a webinar will run forever, twenty-four hours a day.

You can continue to promote your webinar and get more and more viewers, which will grow your email list and put new appointments on your calendar. You can use it as a foot in the door with cold leads or send it as a follow-up once you've met with prospects.

Add it to the end of each blog post or email that you send. Share on your social media profiles so people can watch to learn more about you. Add it front and center to your website's home page to provide a dynamic way to introduce yourself to new people. Investing in your first webinar can go a long way in supporting the rest of your marketing strategy and growing your firm now and into the future.