CSG Advisory™

Culture | Strategy | Growth

Playbook: B2B Webinar strategy & implementation

For sales outreach

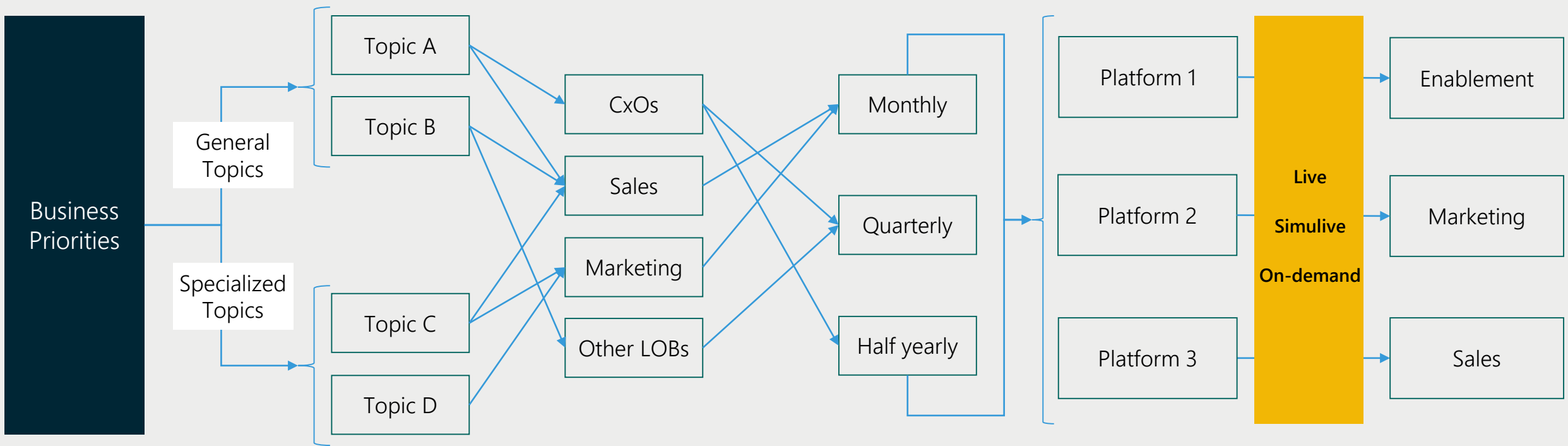August 2020

Design partner: Canva

Purpose of this document

- Organizing a one-off webinar is very different than building a structured webinar program. It may appear as an outreach tactic but requires thoughtful planning & detailed execution to be effective

- Our attempt here is to share a playbook that will guide in building a webinar program for effective B2B sales outreach

Guiding principles

- Clearly define the business objective & expected outcomes
- Create a taxonomy that outlines what is in-scope and out-scope
- Organize a small team comprising of SMEs, sales & marketing with clear R&R
- Plan for regular checkpoint with decision-makers & sponsors for guidance & alignment
- Establish a council of cross-functional members to review the content strategy mapped to business priorities & target audience
- Formulate a marketing plan for amplification & brand building of the webinar program
- Assess & select the right technology platform that meets your requirement
- Leverage analytics to understand audience engagement & make course corrections

Unified operating model

1 Build a content plan aligned to the business

2 Map your audience to the topics

3 Outreach frequency

4 Platforms & delivery modes

5 Execution Ownership

Business Priorities

General Topics

Specialized Topics

Topic A

Topic B

Topic C

Topic D

CxOs

Sales

Marketing

Other LOBs

Monthly

Quarterly

Half yearly

Platform 1

Platform 2

Platform 3

Live

Simulive

On-demand

Enablement

Marketing

Sales

Identify a LEAD to drive this orchestration

Structure internal teams to support the operating model

Create a centralized webinar calendar with topics & schedule spanning the organization

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Key considerations around content strategy

Sessions should be thematic instead of being topical

Clearly establish & map the target audience

Ensure a good mix of internal & external speakers

Recommend live learning checks after each topic, wherever applicable

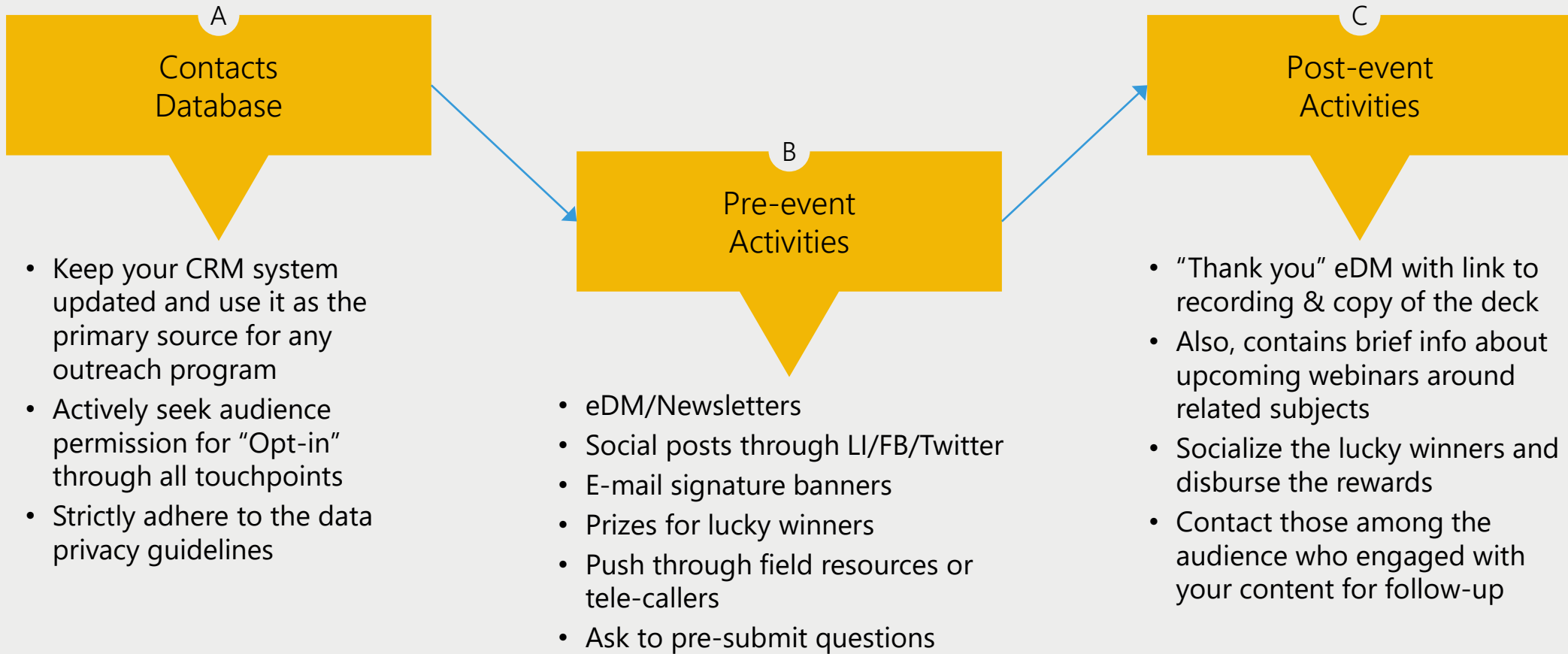There should be a clear CTA (call-to-action) for the audience

Should be actionable within 1-3 months timeframe

Building a webinar page for target audience

Illustration only

Create a dedicated page for your audience and keep it updated

CxO	Sales	Marketing
Upcoming	Upcoming	Upcoming
Recorded	Recorded	Recorded

A Avoid gating access to the webinar page

B Take a persona-based approach in organizing content

C Session access through registration only

D Actively socialize this page for audience capture

E Descriptive agenda outlining:
- Objectives & key takeaways
- Target audience
- Speaker bio with pictures
- Duration

Amplification strategy

A

Contacts Database

- Keep your CRM system updated and use it as the primary source for any outreach program
- Actively seek audience permission for "Opt-in" through all touchpoints
- Strictly adhere to the data privacy guidelines

B

Pre-event Activities

- eDM/Newsletters
- Social posts through LI/FB/Twitter
- E-mail signature banners
- Prizes for lucky winners
- Push through field resources or tele-callers
- Ask to pre-submit questions

C

Post-event Activities

- "Thank you" eDM with link to recording & copy of the deck
- Also, contains brief info about upcoming webinars around related subjects
- Socialize the lucky winners and disburse the rewards
- Contact those among the audience who engaged with your content for follow-up

Best Practices

- Ensure the agenda is Thematic and captures WIIFM
- 3-5 marketing touches per webinar
- Min. 2-3 weeks notice prior to every webinar
- Get your leaders to promote through their social accounts
- Final reminder to be sent 1-hour prior to the webinar

Webinar readiness checklist & guidance

✓ Test the platform & its features in advance

✓ Check the audio & video settings for a better experience

✓ Conduct dry-run with speakers & check the slide flow

✓ Manage slides from a single computer to avoid interruptions

✓ Do record the sessions for on-demand availability

✓ Quickly run-through the engagement features at the start of the session

✓ Avoid sessions longer than 60 minutes as it impacts audience engagement

✓ Ensure adequate time for Q&A; have some questions ready to drive interaction

✓ Build in live polling/quiz for audience engagement

✓ Join the session 30 mins prior & run the checks before going live

✓ Ensure you have technical support on "stand by" during the session

Available platform choices*

- Platform choice will depend on your organization procurement, legal & IT policies

- Apart from pricing, evaluate based on compatibility with your IT systems, security, capacity requirement, ease of use, features, training/support & market adoption

- You may also consider working with a third-party agency and using their proprietary platform

- Ensure the platform provides granular data for engagement analytics

* This is not an exhaustive list.

Engagement & success metrics*

Success will be a collective outcome of Content, Speaker, Experience & Engagement

Short-term metrics

- # Registration
- # Participation
- Registration to Participation conversion
- Time spent on webinar
- Participant feedback

Long-term metrics

- # On-demand views
- # Downloads
- # Repeat visitors
- Audience engagement through the webinar
- Follow-up based on engagement

* This is not an exhaustive list.

Further reading

Creating engagement and community feel in virtual live sessions requires planning and follow-up.

Tips for delivering an "in person" feel

Before the session
- Ensure you are comfortable with, and have tested, the technology
- Make participation easy by providing local-access dial-ins, as needed, in addition to any weblink
- Dedicate a moderator to manage speakers and discussion
- Send materials in advance via file sharing, and remind participants prior to starting

During the session
- Leverage technology features to keep participants engaged
- Keep video on, look at the webcam, and use gestures as in person
- Use online tools such as polling and chat to gather input
- Consider features such as virtual breakout rooms to encourage participation

After the session
- Distribute any work products or follow-up information as needed
- Solicit participant feedback on content, delivery, and technical experience
- Escalate any technical issues and identify workarounds or solutions

Learning and collaboration technologies for virtual delivery
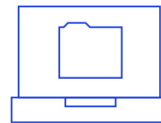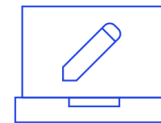
| Virtual classrooms | Webcasts | Video- and audio-conferencing | Virtual coaching | File sharing | Content co-creation (eg, whiteboards) |

WEBINAR BENCHMARKS REPORT—APAC

2020

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Thank you

For further guidance, meet us at:
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