

The Ultimate Webinar Check List

79 must-do points before
running your webinar





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The Ultimate Webinar Check List

79 must-do points before running your webinar

Your webinars are going drive amazing leads that turn into revenue. You've worked your fingers to the bone to secure an amazing speaker, gather a great list of registrants, and your designers have surpassed themselves designing all the collateral and graphics. This webinar is the jewel in your campaign's crown. Everything runs smoothly, you're the toast of your organisation and the CEO is asking when you'll be running the next stellar webinar...

...then you wake up from your day dream, realise you're starting to lose the plot (along with the will to live) and you're not really sure whether you've remembered or done everything to get this webinar off the ground. The speakers are waiting downstairs in the lobby and you're putting the finishing touches to the slide deck. You vow that this will never happen again – either because you'll point-blank refuse to do another webinar or because you simply won't be asked to do it again. People will ask "Oh, where is <insert-your-name-here>?" and the others will say "It's so tragic, after that last webinar they got 're-assigned' to another job."

Fear not! This will not happen to you! We are here to make sure of that. We've compiled a 79-point check list for you to pin on your wall to keep you sane (and on track). In fact, we've gone even further!

Along with each check list item, we've added:

- Who should be doing it
- When to do it

We also recognise that we all work differently, so we've done the hard work for you and created the check list from three different angles:

- 1 By role
- 2 By deadline
- 3 By process

You've got to unashamedly use this. Print it off. Share it around. Pin it on your wall. Make a copy of it for each webinar. Give it to anyone who is working with you on the webinar. Talk to your cat about it until it becomes second nature!

We want you to be amazing. We want you to become Mr or Mrs Webinar in your organisation. Aim to be the best and accept our help in the form of this 79-point check list. No more day dreaming – take that webinar by the scruff and own it! Boom! That's it – you rule!



Ultimate Webinar Check List – By Process

Process	Action	Responsibility	When?
<input type="checkbox"/> Topic, presentation & content	Identify webinar topic in line with content strategy and sales funnel stage	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create topic's core content structure and content bullet points	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Write long form content copy (e.g. whitepaper) as a basis for the webinar presentation	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Brief design team on required graphics types, style, usage, size variations	Marketing Manager	8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create all imagery for long form content, webinar and all promotional activity	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create digital long form document (e.g. whitepaper) if offered as incentive to webinar attendees	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create webinar slide deck based on long-form content	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Speakers	Identify most suitable speakers and moderator (internal and/or external) for planned topic	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Speakers	Send overview of proposed topic to selected speakers/moderator to get buy-in	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Confirm speaker/moderator availability (date and ability to attend recording location)	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Develop topic together with expert/speaker for long form content creation ahead of webinar	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of long-form content for final review to expert/speaker	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Get speaker bio, social URLs, and headshot photo from each speaker/moderator for setup of webinar registration page and webinar console	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of webinar slide deck to speaker and moderator	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Speakers	Brief speaker/moderator on webinar recording process and clarify any questions	Marketing Manager	1 - 2 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Promotion	Define and book in webinar for promotional cycle & dates	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Promotion	Setup marketing campaign in Marketing Automation and CRM tools	Campaign Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Promotion	Create landing page and tracking codes, if needed in addition to webinar's own registration page and tracking	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Identify and create target segment in email database	Email marketing manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional summary, copy, stats and keywords for emails, landing page, social updates, ppc etc	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional blog posts and include in promo cycle	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to speakers for promotion to their own audience	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to social media manager for social promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to PPC marketing manager for inclusion in PPC campaigns	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to content manager for blog creation and promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to email marketing manager for inclusion in relevant newsletters and roundup emails	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to sales. account management and outbound teams for promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Setup promo email template in CRM system for sales reps to send to customers and/or prospects. Notify sales reps	Campaign Manager	4 - 6 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Promotion	Setup, test, and schedule promo emails	Email marketing manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Provide on-demand promo URL and amended promo banner (date removed) to social media manager for ongoing social promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Promotion	Provide on-demand promo URL and amended promo banner (date removed) to email marketing manager for ongoing email promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Promotion	Ensure on-demand webinar is available on the website and banners/description have been updated to "on-demand" (date removed)	Marketing Manager	Day after the webinar
<input type="checkbox"/> Webinar Setup	Book webinar on webinar platform, if necessary	Marketing Manager	10-12 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar registration page on webinar platform	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup system emails on the webinar platform (registration confirmation, reminders and post-webinar follow-up)	Email Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Create separate landing/registration page via Marketing Automation (MA) tool, if desired	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup registration and reporting integration between webinar and MA/CRM (if possible and desired)	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar console/interface design and activate desired features/widgets	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload presentation slide deck to webinar platform	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Identify supporting resources for download by webinar audience	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Check for resources your guest speaker would like to make available for download during the webinar (if applicable)	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload final audio/video webinar recording to webinar platform (if webinar is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Sync slide timings to audio/video file (if webinar content is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload additional content and resources for audience download to webinar platform	Marketing Manager	1 - 2 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Webinar Setup	Setup polls on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup survey on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Publish presentation to on-demand or simulative (if webinar is not live)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Set reminder for on-demand version to expire or extend at the end of the standard hosting period, depending on requirement	Marketing Manager	After webinar has finished
<input type="checkbox"/> Recording	Decide webinar format (audio or video) and streaming type (live, simulative, on-demand)	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check recording room availability, including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video production team availability	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book recording room (depending whether audio or video recording), including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book audio/video production team for recording	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check recording room's webinar connectivity requirements are met	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Confirm recording date, time (approx an hour before live), and location with speakers	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Recording	Provide slide deck file and backup printed version to all speakers/moderator	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Recording	Pre-record webinar content, if webinar is not live	Audio/video team	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video recording for any editing requirements, if webinar is not live	Marketing Manager	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Set date for final recording edits (latest 2 days before webinar live time)	Marketing Manager	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	If audio webinar is not recorded on-site, send remote recording details (URLs, dial in details etc) to speakers and moderator	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	Do final edits to recording if required, if webinar is not live	Audio/video team	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	Put up "Do not disturb" signs on recording room door	Marketing Manager	Day of the webinar

Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Check phone and internet connectivity again	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Check recording / technical equipment again	Audio/video team	Day of the webinar
<input type="checkbox"/> Recording	High-level dry run with speakers/moderator	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Water top-up and final toilet break	Speakers	Day of the webinar
<input type="checkbox"/> Recording	Switch off mobile phones	Speakers	Day of the webinar
<input type="checkbox"/> Recording	Press the "Live" button and present the webinar	Speakers	Day of the webinar
<input type="checkbox"/> Follow-up	Create qualification questionnaire / talk track for outbound/sales team lead follow-up	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Follow-up	Brief outbound/sales team on topic for lead/attendee follow-up	Marketing Manager	1 week before webinar
<input type="checkbox"/> Follow-up	Extract leads for follow-up and distribute to outbound/sales team (from Marketing Automation / CRM system if integrated)	Campaign Manager	Immediately after webinar has finished
<input type="checkbox"/> Follow-up	Obtain answers to unanswered attendee questions posed during live Q&A session	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Respond to 'contact us' or demo requests from attendees	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Notify account managers of any customers attended the webinar	Campaign Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Send answers to unanswered attendee questions from Q&A session by email	Marketing Manager	Week following the webinar
<input type="checkbox"/> Post-webinar reporting	Analyse key benchmarks, including attendance and conversion rates, lead sources, attendee engagement, and survey results	Marketing Manager	Day after the webinar
<input type="checkbox"/> Post-webinar reporting	Monitor on-demand usage of the webinar	Campaign Manager	Throughout on-demand duration
<input type="checkbox"/> Post-webinar reporting	Respond to questions from on-demand attendees	Marketing Manager	Throughout on-demand duration
<input type="checkbox"/> Post-webinar reporting	Manage and process leads from on-demand attendance, if process is not automated	Campaign Manager	Throughout on-demand duration

Ultimate Webinar Check List – By Deadline

Process	Action	Responsibility	When?
<input type="checkbox"/> Webinar Setup	Book webinar on webinar platform, if necessary	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Identify webinar topic in line with content strategy and sales funnel stage	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Speakers	Identify most suitable speakers and moderator (internal and/or external) for planned topic	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Decide webinar format (audio or video) and streaming type (live, simulive, on-demand)	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check recording room availability, including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video production team availability	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book recording room (depending whether audio or video recording), including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book audio/video production team for recording	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check recording room's webinar connectivity requirements are met	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Promotion	Define and book in webinar for promotional cycle & dates	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create topic's core content structure and content bullet points	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Send overview of proposed topic to selected speakers/moderator to get buy-in	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Confirm speaker/moderator availability (date and ability to attend recording location)	Marketing Manager	8 - 10 weeks before webinar

Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Confirm recording date, time (approx an hour before live), and location with speakers	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Develop topic together with expert/speaker for long form content creation ahead of webinar	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Write long form content copy (e.g. whitepaper) as a basis for the webinar presentation	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Promotion	Setup marketing campaign in Marketing Automation and CRM tools	Campaign Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Brief design team on required graphics types, style, usage, size variations	Marketing Manager	8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create all imagery for long form content, webinar and all promotional activity	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create digital long form document (e.g. whitepaper) if offered as incentive to webinar attendees	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of long-form content for final review to expert/speaker	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Get speaker bio, social URLs, and headshot photo from each speaker/moderator for setup of webinar registration page and webinar console	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Create landing page and tracking codes, if needed in addition to webinar's own registration page and tracking	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Identify and create target segment in email database	Email marketing manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar registration page on webinar platform	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup system emails on the webinar platform (registration confirmation, reminders and post-webinar follow-up)	Email Marketing Manager	6 - 8 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Webinar Setup	Create separate landing/registration page via Marketing Automation (MA) tool, if desired	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create webinar slide deck based on long-form content	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of webinar slide deck to speaker and moderator	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Recording	Provide slide deck file and backup printed version to all speakers/moderator	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional summary, copy, stats and keywords for emails, landing page, social updates, ppc etc	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional blog posts and include in promo cycle	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to speakers for promotion to their own audience	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to social media manager for social promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to PPC marketing manager for inclusion in PPC campaigns	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to content manager for blog creation and promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to email marketing manager for inclusion in relevant newsletters and roundup emails	Marketing Manager	4 - 6 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to sales, account management and outbound teams for promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Setup promo email template in CRM system for sales reps to send to customers and/or prospects. Notify sales reps	Campaign Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Setup, test, and schedule promo emails	Email marketing manager	4 - 6 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup registration and reporting integration between webinar and MA/CRM (if possible and desired)	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send on-demand promo URL and amended promo banner (date removed) to social media manager for ongoing social promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Promotion	Send on-demand promo URL and amended promo banner (date removed) to email marketing manager for ongoing email promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar console/interface design and activate desired features/widgets	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload presentation slide deck to webinar platform	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Identify supporting resources for download by webinar audience	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Check for resources your guest speaker would like to make available for download during the webinar (if applicable)	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Recording	Pre-record webinar content, if webinar is not live	Audio/video team	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video recording for any editing requirements, if webinar is not live	Marketing Manager	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Set date for final recording edits (latest 2 days before webinar live time)	Marketing Manager	2 - 3 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Speakers	Brief speaker/moderator on webinar recording process and clarify any questions	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	If audio webinar is not recorded on-site, send remote recording details (URLs, dial in details etc) to speakers and moderator	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	Do final edits to recording if required, if webinar is not live	Audio/video team	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload final audio/video webinar recording to webinar platform (if webinar is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Sync slide timings to audio/video file (if webinar content is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload additional content and resources for audience download to webinar platform	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup polls on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup survey on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Publish presentation to on-demand or simulative (if webinar is not live)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Follow-up	Create qualification questionnaire / talk track for outbound/sales team lead follow-up	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Follow-up	Brief outbound/sales team on topic for lead/ attendee follow-up	Marketing Manager	1 week before webinar
<input type="checkbox"/> Recording	Put up "Do not disturb" signs on recording room door	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Check phone and internet connectivity again	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Check recording / technical equipment again	Audio/video team	Day of the webinar
<input type="checkbox"/> Recording	High-level dry run with speakers/moderator	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Water top-up and final toilet break	Speakers	Day of the webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Switch off mobile phones	Speakers	Day of the webinar
<input type="checkbox"/> Recording	Press the "Live" button and present the webinar	Speakers	Day of the webinar
<input type="checkbox"/> Follow-up	Extract leads for follow-up and distribute to outbound/sales team (from Marketing Automation / CRM system if integrated)	Campaign Manager	Immediately after webinar has finished
<input type="checkbox"/> Webinar Setup	Set reminder for on-demand version to expire or extend at the end of the standard hosting period, depending on requirement	Marketing Manager	After webinar has finished
<input type="checkbox"/> Promotion	Ensure on-demand webinar is available on the website and banners/description have been updated to "on-demand" (date removed)	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Obtain answers to unanswered attendee questions posed during live Q&A session	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Respond to 'contact us' or demo requests from attendees	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Notify account managers of any customers attended the webinar	Campaign Manager	Day after the webinar
<input type="checkbox"/> Post-webinar reporting	Analyse key benchmarks, including attendance and conversion rates, lead sources, attendee engagement, and survey results	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Send answers to unanswered attendee questions from Q&A session by email	Marketing Manager	Week following the webinar
<input type="checkbox"/> Post-webinar reporting	Monitor on-demand usage of the webinar	Campaign Manager	Throughout on-demand duration
<input type="checkbox"/> Post-webinar reporting	Respond to questions from on-demand attendees	Marketing Manager	Throughout on-demand duration
<input type="checkbox"/> Post-webinar reporting	Manage and process leads from on-demand attendance, if process is not automated	Campaign Manager	Throughout on-demand duration



Ultimate Webinar Check List – By Role

Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Pre-record webinar content, if webinar is not live	Audio/video team	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Do final edits to recording if required, if webinar is not live	Audio/video team	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	Check recording / technical equipment again	Audio/video team	Day of the webinar
<input type="checkbox"/> Promotion	Setup marketing campaign in Marketing Automation and CRM tools	Campaign Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Promotion	Create landing page and tracking codes, if needed in addition to webinar's own registration page and tracking	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Create separate landing/registration page via Marketing Automation (MA) tool, if desired	Campaign Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Setup promo email template in CRM system for sales reps to send to customers and/or prospects. Notify sales reps	Campaign Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Follow-up	Extract leads for follow-up and distribute to outbound/sales team (from Marketing Automation / CRM system if integrated)	Campaign Manager	Immediately after webinar has finished
<input type="checkbox"/> Follow-up	Notify account managers of any customers attended the webinar	Campaign Manager	Day after the webinar
<input type="checkbox"/> Post-webinar reporting	Monitor on-demand usage of the webinar	Campaign Manager	Throughout on-demand duration
<input type="checkbox"/> Post-webinar reporting	Manage and process leads from on-demand attendance, if process is not automated	Campaign Manager	Throughout on-demand duration
<input type="checkbox"/> Topic, presentation & content	Create topic's core content structure and content bullet points	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Develop topic together with expert/speaker for long form content creation ahead of webinar	Content Marketing Manager	8 - 10 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Topic, presentation & content	Write long form content copy (e.g. whitepaper) as a basis for the webinar presentation	Content Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create webinar slide deck based on long-form content	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional summary, copy, stats and keywords for emails, landing page, social updates, ppc etc	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Write promotional blog posts and include in promo cycle	Content Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create all imagery for long form content, webinar and all promotional activity	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Create digital long form document (e.g. whitepaper) if offered as incentive to webinar attendees	Design	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Identify and create target segment in email database	Email marketing manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup system emails on the webinar platform (registration confirmation, reminders and post-webinar follow-up)	Email Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Promotion	Setup, test, and schedule promo emails	Email marketing manager	4 - 6 weeks before webinar
<input type="checkbox"/> Webinar Setup	Book webinar on webinar platform, if necessary	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Identify webinar topic in line with content strategy and sales funnel stage	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Speakers	Identify most suitable speakers and moderator (internal and/or external) for planned topic	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Decide webinar format (audio or video) and streaming type (live, simulive, on-demand)	Marketing Manager	10 - 12 weeks before webinar

Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Check recording room availability, including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video production team availability	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book recording room (depending whether audio or video recording), including back-up room	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Book audio/video production team for recording	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Check recording room's webinar connectivity requirements are met	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Recording	Confirm date with audio/video team	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Promotion	Define and book in webinar for promotional cycle & dates	Marketing Manager	10 - 12 weeks before webinar
<input type="checkbox"/> Speakers	Send overview of proposed topic to selected speakers/moderator to get buy-in	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Speakers	Confirm speaker/moderator availability (date and ability to attend recording location)	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Recording	Confirm recording date, time (approx an hour before live), and location with speakers	Marketing Manager	8 - 10 weeks before webinar
<input type="checkbox"/> Topic, presentation & content	Brief design team on required graphics types, style, usage, size variations	Marketing Manager	8 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of long-form content for final review to expert/speaker	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Get speaker bio, social URLs, and headshot photo from each speaker/moderator for setup of webinar registration page and webinar console	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar registration page on webinar platform	Marketing Manager	6 - 8 weeks before webinar
<input type="checkbox"/> Speakers	Send final version of webinar slide deck to speaker and moderator	Marketing Manager	4 - 6 weeks before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Provide slide deck file and backup printed version to all speakers/moderator	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to speakers for promotion to their own audience	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to social media manager for social promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, promo banners, and keywords to PPC marketing manager for inclusion in PPC campaigns	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to content manager for blog creation and promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to email marketing manager for inclusion in relevant newsletters and roundup emails	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send webinar promo summary, URL with tracking codes, and promo banner to sales, account management and outbound teams for promo	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup registration and reporting integration between webinar and MA/CRM (if possible and desired)	Marketing Manager	4 - 6 weeks before webinar
<input type="checkbox"/> Promotion	Send on-demand promo URL and amended promo banner (date removed) to social media manager for ongoing social promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Promotion	Send on-demand promo URL and amended promo banner (date removed) to email marketing manager for ongoing email promo	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup webinar console/interface design and activate desired features/widgets	Marketing Manager	2 - 4 weeks before webinar

Process	Action	Responsibility	When?
<input type="checkbox"/> Webinar Setup	Upload presentation slide deck to webinar platform	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Identify supporting resources for download by webinar audience	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Webinar Setup	Check for resources your guest speaker would like to make available for download during the webinar (if applicable)	Marketing Manager	2 - 4 weeks before webinar
<input type="checkbox"/> Recording	Check audio/video recording for any editing requirements, if webinar is not live	Marketing Manager	2 - 3 weeks before webinar
<input type="checkbox"/> Recording	Set date for final recording edits (latest 2 days before webinar live time)	Marketing Manager	2 - 3 weeks before webinar
<input type="checkbox"/> Speakers	Brief speaker/moderator on webinar recording process and clarify any questions	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Recording	If audio webinar is not recorded on-site, send remote recording details (URLs, dial in details etc) to speakers and moderator	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload final audio/video webinar recording to webinar platform (if webinar is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Sync slide timings to audio/video file (if webinar content is pre-recorded)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Upload additional content and resources for audience download to webinar platform	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup polls on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Setup survey on the webinar platform (if required)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Webinar Setup	Publish presentation to on-demand or simulive (if webinar is not live)	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Follow-up	Create qualification questionnaire / talk track for outbound/sales team lead follow-up	Marketing Manager	1 - 2 weeks before webinar
<input type="checkbox"/> Follow-up	Brief outbound/sales team on topic for lead/attendee follow-up	Marketing Manager	1 week before webinar



Process	Action	Responsibility	When?
<input type="checkbox"/> Recording	Put up "Do not disturb" signs on recording room door	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	Check phone and internet connectivity again	Marketing Manager	Day of the webinar
<input type="checkbox"/> Recording	High-level dry run with speakers/moderator	Marketing Manager	Day of the webinar
<input type="checkbox"/> Promotion	Ensure on-demand webinar is available on the website and banners/description have been updated to "on-demand" (date removed)	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Obtain answers to unanswered attendee questions posed during live Q&A session	Marketing Manager	Day after the webinar
<input type="checkbox"/> Follow-up	Respond to 'contact us' or demo requests from attendees	Marketing Manager	Day after the webinar
<input type="checkbox"/> Post-webinar reporting	Analyse key benchmarks, including attendance and conversion rates, lead sources, attendee engagement, and survey results	Marketing Manager	Day after the webinar
<input type="checkbox"/> Webinar Setup	Set reminder for on-demand version to expire or extend at the end of the standard hosting period, depending on requirement	Marketing Manager	After webinar has finished
<input type="checkbox"/> Follow-up	Send answers to unanswered attendee questions from Q&A session by email	Marketing Manager	Week following the webinar
<input type="checkbox"/> Post-webinar reporting	Respond to questions from on-demand attendees	Marketing Manager	Throughout on-demand duration
<input type="checkbox"/> Recording	Water top-up and final toilet break	Speakers	Day of the webinar
<input type="checkbox"/> Recording	Switch off mobile phones	Speakers	Day of the webinar
<input type="checkbox"/> Recording	Press the "Live" button and present the webinar	Speakers	Day of the webinar

Want more? You check-list junkie!

If you are a webinar presenter or organiser and you'd like even more info and check lists, why not take a look at our [Presenter Checklist webinar](#), which features another check list of 33 specific points for presenters.

Remember, we all love a good list (can you tell?), but also enjoy the process!

The small print!

Many of the marketing processes we use as marketers are complex, yet we don't realise it until we learn a new one, or explain what we know to someone else. The same applies to running webinars, so we have compiled the ultimate webinar checklist to help you master the art of running webinars without a mad panic the days and weeks before going live.

The points in this check list are set out from the view of the webinar organiser. We've called them the Marketing Manager. The points in this checklist will guide you along the best practice path of planning, setting up and promoting a webinar. Many of the points on this list require further action from you or your team(s). What these actions are in detail varies between each company, so we have not broken these points into subsections. That is for you to determine.

The competencies and resources for planning, setting up and promoting webinars also vary between companies. The timelines we have set out are based on averages and optimal timelines. Circumstances or resources may require you to work to shorter timelines. This is certainly possible and the timelines can be compressed into a shorter timeframe. Overall, however, our recommendation is to begin promotion four weeks ahead of the webinar's live date. Timelines and required steps can be determined by working back from that date, should you have the need to work towards a shorter overall timeline.

This webinar checklist also assumes you have access to a self-service webinar platform, i.e. you can setup and make changes to your webinars yourself. Certain points may not apply, if the webinar vendor is responsible for setting up the webinar for you.



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