

Event Checklist

Event Date _____

Event Time _____

Name of Event _____

# of Days Until Event	Task Due Date	Responsible Party	Task	Comments
Prerequisite			Identify target audience	Assists in promotional targeting as well as selecting the appropriate presenter and presentation
Prerequisite			Create leads management process	Your system to manage leads must be in place
Prerequisite			Determine lead generation objectives (quantifiable), as part of overall marketing objectives	Ultimately, this drives your costs associated with your web seminar
Prerequisite			Secure internal presenter or third party analyst/presenter	
Prerequisite			Client to advise on internal project manager	The internal POC for event manager to contact
26			Schedule presenter	Train speaker on how to use PictureTalk
26			Schedule Webinar date & time	Secure date & time with client
26			Schedule web conferencing visual/audio functionality and establish meeting date within the platform; set up web conference with all details	Pixion will advise on web conferencing details. Regarding audio: ensure setup of both US and international phone numbers. NOTE: you will have to prepare all email communications at this time, including "thank you for registering" and reminder e-mails. DO NOT ESTABLISH URL UNTIL YOUR COPY TO THESE EMAILS HAVE BEEN ESTABLISHED, LINKS IN PLACE AND APPROVED
26			Receive presentation from presenter	Need this at this time, as all promotional copy will assist in creating the content that will be delivered.
25			Request speaker materials	Speaker introduction, 200 word Webinar description, canned Q & A questions, bio & photo of speaker.
25			Create HTML format for Webinar e-vite and (if necessary) design for printed invitation.	You need to have a graphically appealing piece.
25			Design landing page (mini-site) for attendees to view after event.	Visitors will go here for more information, download presentation, any special white paper offers, etc. You will be able to measure effectiveness of presentation. This is also where they can click on a link to listen to recorded presentation.
25			Define and secure offer	The incentive for targets to register.
23			Secure presenter approval of copy	Copy only at this time.
22			Secure all internal approval for e-vite and printed invitation copy.	Need client approval of e-vite copy.
22			Convert e-vite copy into HTML and lay out e-vite	Merge the copy with the layout for e-vite and printed invitation.
22			Create text e-vite from HTML invite.	Text version required for electronic email (not everyone will accept HTML mail).
22			Content for landing page is approved and posted	This copy should be short, compelling and in keeping with the rest of your company website.
20			Establish tracking code	If Client has CRM system.
19			Secure list sources and lists	External and internal lists.
18			Check e-vites and registration links	Does everything work?

# of Days Until Event	Task Due Date		Task	Comments
17			Notify third party mailing house	For sending printed invitations.
16			Prepare response e-mails "Webinar Don't Forget", "It's Today", "Thank You for Attending", "Sorry We Missed You" e-mails.	Send to registration management group.
16			Test e-vite mailing with online mailing system	For the internal list.
16			Send HTML to Sales team covering e-mail	You want the team to start promoting the event.
16			Prep Inside Sales: intent, content, objectives, follow-up and scripts	The group that will most likely perform follow-up.
16			Conduct mailings	Out the door
12			Process registrations	Begin processing
10			Evaluate: should another mailing go out?	Measure current response against your enrollment objective - if you need more participants, send more mailings
8			Create post-event questionnaire	For the post-event questionnaire, you may want to consider the use of WebSurveyor (www.websurveyor.com). Regardless, have the post-event questionnaire focus on the user experience, the value of the content, gauge interest in your products/services, and request recommendations for future events.
7			Establish PictureTalk Technical Support for this event.	If any attendee has a problem they can contact someone directly at Pixion.
7			Finalize and prepare audio questions or any polling questions	You want your audience's questions & polling questions to be set-up or frame the discussion for each section of the presentation.
7			Finalize your presentation	Put it to bed so that you are prepared to practice your presentation. Note: Your title page should include the audio line & technical support line at Pixion.
3			Presenter preparation	Pixion will act as a facilitator so as to guide the activities of the presenter, and prepare the presenter for the Webinar presentation. This includes: (1) Coaching & training the presenter(s): This includes review of presenter's content/presentation, advising the presenter accordingly, as well as review/advising the presenter as to Webinar procedures, i.e., what to expect during the Webinar. Pixion will prepare and walk the presenter through all aspects of the session. (2) Create opening and closing dialogue copy to be presented at the Webinar session, and ensure delivery of this dialogue during the Webinar session. This includes introducing the presenter and topic, closing out the presentation, delineating the call to action for the audience, introducing the Q&A session, and closing out the session. (3) Performing Webinar set-up, preparation and managing the session: presenters are properly trained on web conferencing platform, audio is properly set-up, etc.
1			Conduct dry run	Work the kinks out of the presentation, and if multiple presenters, ensure presentation coordination. Pixion recommends two individuals run the event, and the other respond to online chat as well as manage the polling features. Ensure the presenter is comfortable with using PictureTalk prior to event.
1			Send out reminder and "don't forget" emails to registrants	

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Showtime			Three hours prior to Webinar, send out the reminder e-mail	Ensure maximum attendance
Showtime			Assign a customer service representative to assist with your Webinar.	PictureTalk Support - (925) 467-5353
Showtime			Conduct Webinar / PictureTalk Webinar Assistance	PictureTalk will set the pace of your Webinar appropriately, which can be easily done using PictureTalk's feedback mechanism that let's the presenter know that everyone is in synch with the presentation.
Showtime			Conduct Webinar / Public & Private Chat Features	Keep your presentation interactive by using both private and public chat, messages can be sent with the click of your mouse without having to type each message.
Showtime			Conduct Webinar / Polling Questions	Create a poll to ask the audience, get instant feedback during the event. This will allow you to make any adjustments required to make sure you are getting the appropriate message to your audience. This is also going to be very useful information to have post Webinar and it will help keep the attention of the audience because they have an action themselves to take care of.
Showtime			Conduct Webinar / Annotation Features	Bring attention to important points in your presentation. When showing a PowerPoint slide use the annotation feature in PictureTalk to highlight important bullets that you want to make sure your attendees take notice. Or, place a check mark or star next to each bullet so the audience follows along. It's important to have a good speaker but also have action in the presentation to keep the audience engaged.
Showtime			Conduct Webinar / Share Active Content	The more active you can keep the presentation, the more likely you will keep your audience engaged. Are you a software company releasing a new version? Demo it during the Webinar. Are you the author of a new book? Read a few excerpts of your new work as your audience follows along. Encourage interactivity wherever you can.
Showtime			Conduct Webinar / Record Webinar	Record the event - not everyone will be able to make the time you schedule, but they may still be interested in viewing your presentation. Archive the Webinar and make the recording available for future playback. Recordings can be managed for playback directly for the PictureTalk server and tracked in the same way as the live event or can be recorded in either Windows Media or QuickTime format that can be accessed from your webpage, or even distributed on a CD.
Showtime			Monitor attendance	Periodically monitor the attendance online so as to determine presentation "staying power."
Showtime			Send "Thank You for Attending" e-mail with the event questionnaire	Follow-up with phone calls
Showtime			Send "Sorry We Missed You" e-mails with link to review presentation	Follow-up with phone calls
Postshow			Link to recording of presentation (if appropriate) given to webmaster.	Link tested on web-page.
			Process offer	Have you offered an incentive for participation (such as a free publication or premium)? Make sure your fulfillment company processes these immediately.
			Evaluate cost per lead against objectives	
			Evaluate cost per meeting against objective	