

Webinar Best Practices

Follow These Tips to Attract and Retain Clients During Covid-19

One in four Americans say they have engaged a financial advisor for the first time as a result of the coronavirus pandemic, according to a recent survey conducted by Nationwide Retirement Institute (a division of Nationwide) and The Harris Poll. A well-presented webinar may be one of the most effective prospecting and retention tools at your disposal during this time of social distancing.



PREPARATION

- Create an attention-grabbing title.
- Email is the best way to promote your webinar! Send an invite 7-10 days prior to the event. Send a reminder 2-3 days before. Consider sending a third email the day before. Resends can be sent to people who have not opened the email. The invite should include: an intriguing webinar title, a one-paragraph description, five bullet points of what will be covered and a registration link. You may also include your headshot and a short bio.
- The registration page should include everything on the webinar invite. Create the following required registration fields: First and Last Name, Email Address, Phone Number, and Company Name or Job Title.
- Send all registrants a CALENDAR ITEM to save the event to their calendars. This is very important!
- Share your webinar on social media.
- Invite clients when talking over the phone.
- Remember that the best days to give a webinar are Wednesdays and Thursdays at 11:00 a.m. or 2:00 p.m. local time.
- Create a PowerPoint or Google Slides presentation with 10-15 slides. Slides should include a mix of statistics, graphs, pictures, and bulleted lists to support your presentation. Each slide should only contain one idea. The cover page should include your webinar title, name of company, your picture, and the month and year you are presenting. Pick fonts and colors that are legible. They may match your company's branding palette.
- Create another piece of content that summarizes this information in a PDF document. This thought leadership piece or best practices guide can be sent when you follow up with your registrants.
- Wearing a suit and tie or dress is preferable. You may also wear business slacks and a button-down shirt.
- The camera will record you and your background, so make sure your background is clean and professional. Appropriate backgrounds include bookcases, plants, a diploma or a plain wall. Avoid backlight from a window and people walking behind you. You may also use a green screen or chroma key.
- The camera should be positioned at eye level or slightly higher. Stand up when presenting.
- Pick a webinar platform that works for you: Zoom, GoToWebinar, Demio, WebinarNinja, JetWebinar, WebEx, GetResponse, ClickMeeting, Livestream, or Webinars OnAir. Perform a rehearsal with a friend or family member as the audience. This is a good time to check the audio, microphone, and moving the slides.



LIGHTS, CAMERA, ACTION!

- When the webinar starts, you will be in full screen. Introduce yourself, say a few words about your background, and provide a short story about how you became a financial advisor. If this seems too private, share a success story that you are proud of.
- RECORD the webinar. Post the webinar to your website for on-demand viewing.

- When it's time to start the presentation, share your screen with the presentation slides. Keep in mind that the audience will still have a view of you, only smaller.
- Ask 2-3 questions during your webinar. You can utilize your platform's poll feature or ask the audience to respond in the live chat feature. Your questions should be basic ones relating to your webinar topic. For example, "Why do most people invest?" or "What do you consider most when choosing a financial advisor?" These can be open-ended questions or multiple choice. Share the results of the poll during the webinar. This will keep your audience engaged and show that you are interested in their thoughts and opinions.
- Humor can be used once or twice during a webinar, but it is important to speak with a professional tone. This is similar to an interview, where you need to sell yourself and your knowledge.
- The last slide should include your phone number and email address. Welcome them to contact you with questions.
- The webinar should last about 30 minutes. Answer a few questions from the chat box at the end of the webinar. If there are more questions, follow up with an email.



AFTER THE WEBINAR

- Send all registrants an email 2-3 days after the webinar, thanking them for their time. Include a link to the webinar in case they were busy. You can include an optional customer feedback survey.
- Call all registrants 4-5 days after the webinar and offer to send the white paper or best practices guide. This may be the presentation itself.
- Start a conversation. Create a nurturing email sequence for all registrants.



BONUS POINTS

- Co-host a webinar with someone in your industry. You can both send out webinar invites to get more attendees.
- Include a promo video in your invite or on your website.
- Create sponsored ads on Facebook to promote the webinar.
- Obtain an MP4 file of the recording and post it to your website. Make sure to update the webinar quarterly or twice a year.
- Include text message reminders before the webinar.
- Boost your confidence with power poses before and during the webinar!



WEBINAR DO NOTS

Things to avoid:

Too sales-y

Too high level

Makes a promise and does not deliver

No actionable items

Talking too fast

Too much content on each slide

It's always tough presenting your first webinar. If you give webinars regularly, you will be a pro in no time! Don't get discouraged. Giving webinars and communicating online will help your business survive during Covid-19.

Call +1 800 233 2834

To learn more, visit broadridgeadvisor.com

Or email advisorsolutions@broadridge.com



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