

## **Nine Tips for Presenting and Promoting Winning Webinars**

**by Jeff Briskin**

When presented and promoted effectively, webinars are one of the best ways for asset managers, custodians and other firms to build awareness of their brand and capabilities and generate qualified leads among financial advisors.

Advisor Perspectives has hosted and promoted more than 60 advisor-only webinars on topics ranging from retirement-income planning to alternative investments to client acquisition and communication. Through analysis of our most successful webinars, we've identified nine factors that consistently result in higher levels of registrations and engagement.

### **Three “hooks” for attracting attendees**

Advisors receive dozens of webinar invitations every month. We've found that registrations are highest for those that offer the following.

#### **1. A knowledgeable, articulate and trusted presenter**

No other factor—not even the topic—is more important than the webinar presenter. Advisors want to hear from trusted sources in the investment and financial planning industry. Our most highly attended webinars have been those presented by thought leaders such as Wade Pfau, Jeffrey Gundlach, Richard Bernstein and Bob Veres. If your firm is planning on presenting a webinar, choose a speaker such as a portfolio manager or chief investment officer who has deep subject matter expertise and is comfortable speaking to an audience of advisors.

#### **2. CE credits**

Advisors with CFP®, CIMA®, CIMC® and other industry designations regularly attend webinars to earn continuing education (CE) credits. Since we started serving as a CE sponsor for the CFP Board® and IMCA®, live attendance rates for our clients' CE-eligible webinars are, on average, 40% higher than those that don't offer CE credits. And 50% of all live attendees of our CE-eligible webinars ask us to give them CE credits.

Attendees can automatically receive a CE credit for attending a live webinar. However, if you wish to offer CE credits for a recorded webinar, there are testing requirements you must administer to gauge designees' comprehension of the presented material.

#### **3. A compelling topic that hasn't been overdone**

Many firms will present a webinar on an investment theme that's currently “hot.” If you're presenting on a commonly discussed subject, you need to offer insights that add to the conversation and don't restate what advisors already know. Or, better yet, choose an original theme that is an area of interest for advisors and plays to your firm's expertise.

## Three proven promotion practices

With webinars, many firms make the “Field of Dreams” mistake—they assume if they host it, advisors will come. In fact, the opposite is true—the number of likely attendees is in direct proportion to the effectiveness of your online promotional campaigns. We’ve identified three factors that not only improve registration rates, but also ensure they’re the registrations you want.

### 1. A “must-open” email subject line

Whether you’re sending the invitation to your own advisor distribution list or using a list of advisors from a publication like *Advisor Perspectives*, email is the most cost-effective way to promote and track interest in your webinar.

With that in mind, the subject line is the most important element of your promotion. It needs to be attention-grabbing and benefit-driven enough to pique the curiosity of people who receive dozens of marketing emails every day. For example, instead of using an all-too-common “literal” subject line such as:

*Join XYZ Funds for a webinar on large-cap opportunities*

Use a hook that makes it a “must-attend” benefit, such as:

*CE Webinar: 4 reasons why large caps are undervalued*

The email message itself should be short, benefit-driven and offer several ways to link to the webinar description page and sign-up form.

### 2. Leverage social media

If your firm has many Twitter and LinkedIn followers, use these platforms as additional low-cost outlets for promoting your webinars. Keep your tweets and posts short, and provide a shorter link (generated through bitly or tinyurl) to your webinar sign-up page.

### 3. Qualify at sign-up

If you don’t want non-advisors—or your competitors—attending your webinars, add qualifying criteria to the form required for registration. In addition to their name and work email address, ask attendees to enter their job title (or choose from a list of choices) and the name of their firm. Include questions such as what kind of firm they work for (RIA, broker/dealer, bank, etc.) and how much in assets they manage for clients.

## Three ways to make your webinar memorable

You've spent a great deal of time and effort to convince advisors to attend your webinar. The last thing you want is for technical glitches to ruin your event. Or for advisors to start dropping off halfway through. Assuming you've got a strong presentation and a top-notch speaker, you can make your webinar even more successful by choosing the right host and creating opportunities for engagement with your audience.

### 1. Maximize interactivity

A webinar that doesn't allow for attendee interactions won't sustain interest for long. Advisors are more likely to remain online for the entire session and retain what they've learned when webinars offer time for Q&A and other forms of live engagement with presenters. We recommend:

- Starting the webinar off with a polling question related to the theme, and announce and comment on the results. Better yet, use several polling questions, dispersed throughout the presentation.
- Answering one or more attendee questions during natural stopping points during the presentation, rather than saving them all for the end.
- Providing contact information for the speaker, in case attendees have additional questions.

### 2. Choose an appropriate hosting platform

There are plenty of free web hosting platforms, but you get what you pay for. Many free hosting sites can't handle many attendees, offer limited interaction capabilities and prominently feature banner ads—maybe even those from your competitors.

A paid webinar host will provide better capabilities and reliability. At Advisor Perspectives, we use BrightTalk, which is capable of handling a thousand or more attendees, allows for customized fill-in questions that can be used to qualify leads, and has robust polling and Q&A functions. Factors that may determine which platform you need include:

- **Presentation format.** Are you presenting a static PowerPoint presentation, or do you need a screenshare interface for conducting a demo or for showing slide builds and animations?
- **Q&A interface.** Do you want attendees to ask questions using a text-based interface or have them "speak" as in a teleconference?
- **Replay capabilities.** Do you want to offer advisors the opportunity to view a replay of the webinar? If so, do you want this replay to be accessible from the host's website, or should the host create a video file that you can load onto your firm's website?

### 3. Outsource your webinar production and promotion

If you don't have the internal resources to host and effectively promote a webinar, partner with a firm that can take on these responsibilities on your behalf. Advisor Perspectives hosts webinars that it promotes to more than 330,000 advisors via email, social media and our websites. We also serve as a continuing education sponsor for IMCA® and the CFP Board®, which allows advisors to receive CE credits for attending qualified events. We also provide detailed reporting, including information on every advisor who registers for and attends the live event or views replays.

Outsourcing webinars removes the logistical headaches so you can focus on what's most important—delivering a presentation that addresses your business needs.

*For more information on Advisor Perspectives webinar hosting and promotion services, contact us at [sales@advisorperspectives.com](mailto:sales@advisorperspectives.com).*

---

*Jeff Briskin is the director of marketing for Advisor Perspectives.*

© 2017 Advisor Perspectives, Inc. All rights reserved.

[www.advisorperspectives.com](http://www.advisorperspectives.com)