RingCentral Webinar checklist

We've put together an easy-to-follow checklist to help you schedule, deliver, and measure the success of your RingCentral Webinar.

Before scheduling your webinar, we recommend you create your webinar agenda, determine how you want to engage with your audience, and identify your cohosts and/or panelists.

Scheduling

How early you schedule your webinar is up to you; however, if you're using registration, we recommend you schedule and send your invitations at least 2 weeks before your event to allow attendees time to register.

Without registration

- [ ] Schedule your RingCentral Webinar.
- [ ] Configure your webinar's settings.
- [ ] Set up pre-configured polls.
- [ ] Send out your webinar invitations.
    - [ ] Send invitations and reminders to cohost(s) and panelist(s).
    - [ ] Send invitations and reminders to attendees.

  Note: If the webinar date, time, or agenda changes, you can update the event details using the RingCentral app and your calendar app.

With registration

- [ ] Schedule your RingCentral Webinar.
- [ ] Configure your webinar's settings.
- [ ] Configure registration form, automated emails, and branding.
- [ ] Set up pre-configured polls.
- [ ] Send out your webinar invitations.
    - [ ] Send invitations and reminders to cohost(s) and panelist(s).
    - [ ] Share the registration form to your prospective registrants.

Rehearsing in a prep session

We recommend rehearsing your presentation early so you can make changes to your agenda, the speaking order, come up with seed questions, or adjust your presentation material prior to the webinar date.

You can have as many rehearsals as you want by starting the prep session. Here are a few tips to cover during your rehearsal:

- [ ] Review webinar controls.
    - [ ] Set up your virtual background, if desired. We recommend that each speaker use the same background; either your company logo or something non-distracting.
    - [ ] Practice screensharing.
    - [ ] Determine hand-off cues to know when to switch layouts.
- [ ] Set your webinar's video settings.
- [ ] Double-check your panelists' permissions and calendar invites to make sure that they have the right date and time and that they know when to join the prep session.
    - [ ] Walk your presentation team through the webinar features, including presenter chat and Q&A.
    - [ ] Run through slide transitions.
    - [ ] If you or your speakers are presenting video, follow the same instructions as recommended for RingCentral Video meetings.
    - [ ] Check everyone's equipment. Remind them to use high-quality, noise-reducing headsets to eliminate echo.
    - [ ] Remind speakers and panelists of any time restrictions.
    - [ ] Review your plans for managing Q&A, including who will read questions aloud, who will answer certain types of questions, and which types of questions you might want to answer offline.

On event day

During your final prep session on event day, you and your panelists and cohosts can make final adjustments before starting the webinar. Here are a few recommended items to cover:

- [ ] Resend the panelist or cohost invitations, if needed.
- [ ] Test connections and technical functionalities.
    - [ ] Confirm that everyone has a stable internet connection.
    - [ ] Close unnecessary apps and browser tabs that could slow down your device.
    - [ ] Conduct a sound check to ensure that your presentation team can hear and be heard.
    - [ ] Remind your panelists they'll be muted and unmuted when it's their turn to speak or take questions, if you disabled their permission to mute/unmute themselves.
    - [ ] Check video connections.
- [ ] Review webinar controls and check if anyone has any last-minute questions.
- [ ] Review any last-minute changes to the agenda and presentation order, your agreed-upon verbal or chat hand-off cues, and the flow of your polls and QA session(s).

Running your event

When everyone is ready, start your webinar by clicking **Go Live** in the bottom menu. In cases where the host cannot start the webinar, the cohost can start it on behalf of the host.

- [ ] Kick off your presentation and introduce your presentation team and topic/agenda.
- [ ] Set how your attendees see the video layout based on the agreed-upon hand-off cues.
- [ ] Chat privately with cohosts and panelists to make any on-the-fly changes to the webinar agenda.
- [ ] Manage the Q&A session and polling.
- [ ] Monitor participants' attendance.
- [ ] Change panelists' or cohosts' roles, if necessary.

Ending your event

When you have concluded the event, end the webinar.

Debrief after your event

Once you end the webinar for your attendees, you, your cohost, and panelists can remain connected in the webinar to discuss the event. Ask the group:

- [ ] What went well during the webinar?
- [ ] What would you do differently next webinar?
- [ ] Which of the attendees' questions were left unanswered, and why?
- [ ] Who will address attendees' follow-up questions?
- [ ] Will you share the webinar recording with attendees?

After your event

Measure your webinar's success by reviewing your post-webinar data.

- [ ] Pull your webinar attendance report.
    - [ ] Compare your registration numbers to the number of people who attended, if applicable.
- [ ] Pull the Q&A report.
    - [ ] Send the Q&A report to the panelist/s who agreed to address attendees' follow-up questions.
- [ ] Pull the polling report.
- [ ] Share the webinar recording link with your attendees.