

# Virtual Educational Event/Webinar Planning Process

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HBA components (i.e. chapters, regions, branches, affinity groups, programs) can plan and execute their own virtual educational offerings (i.e. webinars) Monday-Friday and there are multiple time slots available each day to choose from (maximum 3 webinars per day). To ensure webinar topics and dates/times are never in conflict with each other, while also providing our programming teams a lot more flexibility and ownership, we have developed a step-by-step process:

## Step 1: initial conceptualization

Begin developing your program concept and determining/securing potential speaker(s) internally (see Event speaker management guidance for more information). Leave yourself some flexibility, but begin determining a few potential dates and times that could work for all necessary parties for the webinar. Make sure to visit the [HBA Master Events List](#) to see what other events are in the works across HBA. This planning document also outlines holidays and HBA Central event dates to avoid. The Global Planning Calendar can also be used to collaborate across chapters or regions on similar event topics. We also have an **association-wide calendar** that shows educational virtual webinars already booked. Lastly, speak with your regional programming team to get a better idea of what other webinars are upcoming so you can better plan your event.

## Step 2: secure your webinar date and time slot

Visit **HBA's webinar scheduler** on Calendly to see which of the dates and times you've determined are available. This tool will show you in real-time what webinar slots are available on any given day.

- Times listed are in Eastern Standard Time, but you are welcome to convert to your time zone via the drop-down at the bottom of the calendar.
- If your webinar is longer than one hour or does not perfectly fit into one of the slots listed, please select the closest slot available. Please note if a time overlaps with an existing webinar, your time will not be approved.
- Once selected, enter your name, email, proposed webinar title, region/AG, description, speakers, and any additional comments (such as chapter name, if being handled by a chapter, exact timing if it differs from the slot you selected) and click **Schedule Event**.
- **Note: If you plan to hold your webinar on your region or affinity group's Zoom license, please also make sure the date and time are available on that platform and set up your webinar *while* booking your Calendly slot.**
- This is a best practice to ensure HBA events are not competing with one another. It also allows for HBA Central to market your event globally via our weekly event digest email, and reach a wider audience than just your chapter/region/affinity group -- which will in turn increase your registration and revenue.

## Step 3: await HBA approval (within 2 business days)

HBA staff will review your submission to ensure the topic is not duplicative or competing with

existing upcoming webinars, and confirm your date/time selection. Once approved, your event will appear on the **association-wide calendar**, which is available to all HBA programming teams for planning purposes and the individual who submitted the proposal will be directly notified.

## Step 4: set up your event for registration (needs to happen at least 4 weeks from your event date)

Once your webinar is approved by HBA Central, the concept is fully developed and speakers/sponsors are secured, you are welcome to open your event for registration following the procedure outlined in our How to open an event for registration article. Remember, the minimum pricing for educational webinars is \$10/€10 for members, \$20/€20 for nonmembers and this will be auto-populated in the pricing section for you. You are always welcome to increase these prices, especially if you are covering a popular topic or have important speakers.

Upon the submission of your event setup form:

- You will receive confirmation of your event submission.
- You will be notified when the registration link is available and live on the HBA website (after review and approval by HBA Staff).
- Your event will be automatically included in the weekly HBA event digest email and will be available for registration association-wide. *Note: events set up after COB Wednesday will not appear in the following Monday's digest.*

## Step 5: marketing and pre-webinar prep

**Marketing:** While your webinar is automatically added to the weekly event digest email, the chapter/region/affinity group is responsible for all other marketing of the event, such as on social media channels and through the HBA Community.

### Pre-webinar prep:

- **Panel prep:** as you would with any other educational event, work with your team and speakers to ensure all are prepared to address the content and topics of the webinar, including preparing them with all questions that may be asked, and opinions they may be asked to give. Please feel free to have your team and speakers refer to HBA Virtual Presentations - Speaker & Recording Tips (1).pdf
- **Develop your materials** such as:
  - **Slide deck:** please use HBA's Intro slides as a basis for your webinar presentation, which are templates with HBA branding, including an HBA informational slide and technical tips to quickly review with your attendees. **Download the HBA PowerPoint template**
  - **Other optional items:** poll questions, handouts to be shared with attendees, a few Q&A questions to be prepared should attendees not ask enough questions via the chat

## Step 6: technical rehearsal

Scheduling a tech rehearsal on the same platform you will be using is incredibly important to ensure all team members and speakers have an understanding of the technical nuances and flow of the event. It should be held a few days before the actual webinar date and last about 30-45

minutes. Be sure to include all event team members who will be responsible for something on the day of the event and all speakers.

**Before the rehearsal, identify your technical leader:** at least one of your team members should be savvy with the webinar platform so they can be the "Host". This person will assist and guide the team and speakers through any technical elements (such as video camera sharing, breakout rooms, polling, etc). It is helpful to inform your technical leader of elements such as polling, breakouts, etc that you are hoping to make use of before the technical rehearsal, so they can be prepared. Be sure to use the same technical leader for the live event.

**Please make use of HBA's Zoom tech support tips.** These are a collection of technical tips and nuances that HBA's staff have learned over the years, which will help you run your event smoothly and look polished.

#### **During the tech rehearsal:**

- Please make use of our Webinar technical rehearsal guide to walk you through the flow of the rehearsal and make sure you don't miss any important details.
- Use HBA webinar tech rehearsal notes.pdf [tool](#) to log any and all important information.

## **Step 7: hold your flawless webinar**

Your team and speakers should log on to the platform 15-30 minutes early to ensure no one has any issues. Also, take this time to review any important last-minute items or gain clarity on any final details and feel free to refer to the Zoom Interview Best Practices 3.pdf [document](#) to ensure everyone looks/sounds their best.

- Remember to use HBA's Zoom tech tips during the live webinar to ensure you don't miss any nuances.
- **Click "Record" and be sure to select "Record to Cloud".**
- Remind attendees to take the post-event feedback survey. This will be sent by HBA via email automatically. [Click here](#) for more information on accessing survey results.

## **Step 8: post-event wrap-up**

After your event, **send the shareable link to your event recording and any additional resources** to [events@hbanet.org](mailto:events@hbanet.org) so they can be emailed to all registrants. HBA will download the file for our archives upon receipt. More in-depth instructions can be found here: [How to send additional resources or event recordings](#)

Finally, thank your speakers and team for a job well done!

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