

By following these best practices, financial advisors can ensure they are well-prepared for successful webinars.

1. Understand Your Audience

Identify who you're trying to reach with your webinar. Understand their pain points, interests, and the kind of content they engage with.

2. Set Clear Goals

Clearly define the purpose and goal of your webinar (lead generation, education, engagement, etc.)

3. Select the Right Topic

Choose a topic that is relevant and interesting to your audience and aligns with your business objectives.

4. Plan Your Content

Outline the structure of your webinar, including introductions, main content, Q&A, etc. Add engaging elements like stories, case studies, or interactive polls.

5. Choose a Suitable Time and Date

Consider when your audience would be most available to attend (consider different time zones).

6. Technical Setup and Platform Selection

Select a reliable webinar platform that meets your needs regarding features, audience capacity, and cost.

Test your equipment (microphone, camera, internet connection) to avoid any technical issues.

7. Promotion and Registration

- **Create a Registration Page:** Build a dedicated landing page on your website for registration. This page should include key details such as the topic, date, time, speakers' information, and the value proposition for the webinar. The registration form should ask for essential information only to avoid drop-offs.
- **Email Marketing:** Use your existing mailing list to invite potential attendees. Craft a compelling email with a clear call to action to register for the webinar. Don't forget to send reminder emails as the webinar date approaches.
 - **Initial Invite:** Send this about 2-3 weeks prior to the event.
 - **Reminder Emails:** Send these 1 week before, 1 day before, and the day of the event.
- **Blog Posts:** Create blog posts related to the webinar to promote the event and establish your expertise on the topic. Include a CTA to register for the webinar at the end of the blog post. Be sure to change the CTA and link to direct readers to the webinar replay once the event is over.
- **Social Media:** Use your company's social media channels to reach a larger audience. Create engaging posts about the webinar and encourage followers to share them. Consider using relevant hashtags to expand your reach.
- **LinkedIn:** As a platform popular among professionals and particularly financial advisors, LinkedIn can be very effective. Post updates about the webinar, create an event, or use targeted ads to reach your desired audience.
- **Partnerships:** Collaborate with influencers, thought leaders, or other businesses in your industry who can help promote your webinar to their audience. Examples can include:
 - **Retirement Planning:** Retirement coaches or counselors, CPAs (Certified Public Accountants), estate attorneys, and social security benefits consultants.
 - **Economics:** Economists, finance professors, or market analysts can provide a broader economic and market perspective.
 - **Tax Planning:** Tax attorneys, CPAs, or Enrolled Agents (EAs) who specialize in tax planning.
 - **Estate Planning:** Estate attorneys, trust officers at a local bank, or experts in elder law could add valuable insights.
 - **Risk Management and Insurance:** Insurance agents or brokers, risk management consultants, or financial risk analysts.
 - **Education Savings:** College admissions consultants or financial aid officers at a local university can help parents understand the costs of education and the financial aid landscape.
 - **Behavioral Finance:** Psychologists or therapists specializing in finance-related stress or decision-making, or professors of behavioral economics.
 - **Cybersecurity and Fraud Protection:** Cybersecurity consultants or IT professionals specialized in security, local law enforcement officers who deal with fraud and identity theft.

- Sustainable and Socially Responsible Investing: Environmental scientists, sustainability consultants, or representatives from ESG-rating agencies or socially responsible funds
- **Personal Invitations:** If there are high-value prospects you want to attend, don't shy away from a personal invitation through a direct email or LinkedIn message.
- **Optimize for SEO:** If you're hosting your webinar details on your website, make sure the content is SEO optimized so it can be found by people searching for related topics on search engines. Use target keywords in prominent locations, like your title.

Remember, the effectiveness of your promotional activities can have a big impact on the number of registrations and, ultimately, the success of your webinar, so it's worth investing time and effort in these activities.

8. Practice

Rehearse your webinar to ensure smooth delivery. Test the webinar software's features to become familiar with the interface.

9. Engage Your Audience

Encourage participants to ask questions or participate in polls. Monitor the chat for questions and feedback during the webinar.

10. Follow-up

Send a thank you email to attendees with a recording or recap of the webinar. Consider a survey to gather feedback for improvement. Nurture leads with relevant content or offers based on the webinar topic.

11. Repurpose the Content

- **Email the Webinar Replay:** After the webinar, send an email to all registrants, including both attendees and non-attendees, providing them with a link to watch the replay. This allows those who missed the event to catch up and those who attended to revisit any points of interest.
- **Transcribe the Webinar:** Transcribe the webinar and create a blog post or article around it. This expands your content offerings and makes the content accessible to those who prefer reading or are hearing impaired.

- **Create Short Clips:** Break down the webinar into bite-sized clips that highlight key points or interesting moments. These clips can be used for social media posts, making them more shareable and digestible.
- **Podcast Episode:** If you run a company podcast, consider repurposing the webinar content into one or more podcast episodes. This is especially useful if the webinar includes a guest speaker or a discussion.
- **Infographics or Visual Summaries:** Create infographics or visual summaries of the key points discussed in the webinar. These are particularly effective for sharing on social media.
- **LinkedIn Slideshare:** Convert your webinar slides into a Slideshare for LinkedIn to make your content accessible to a broader audience and help establish your company as an expert on the topic.
- **Q&A Document or FAQ:** If the webinar had a Q&A section, consider creating a separate document or blog post that provides the answers to these questions. This will be valuable for attendees and non-attendees alike who have similar questions.
- **Update Your Webinar Landing Page:** Update the webinar landing page to a replay page where visitors can access the recording, slides, and any other related materials.

12. Evaluate

Analyze the success of your webinar based on your set goals. Review attendee feedback to make future improvements. Track how many leads move further down your sales funnel as a result of the webinar.

Looking for additional webinar support?

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