ANALYST THOUGHT LEADERSHIP

WEBINAR PROCESS

WEBINAR MISSION

The [redacted] webinar is not about a company, product, or solution. The webinar is an inspirational and educational opportunity for the audience, designed to present new, insightful, and provocative information on the specified technology. The focus is on fresh and original content, while avoiding general discussion that has already been played out.

WEBINAR MGMT. TEAM ROLES AND CONTACTS

- **Analyst / Presenter** - Leads webinar, assures content quality, creates content and builds the deck.
  - This assignee changes based on the webinar.
- **Webinar Project Manager** - Oversees the webinar event from a demand generation standpoint, as well as handles lead generation, including email marketing of the event. She also handles the logistics during the event, including sharing audience questions to panelists.
- **Customer/Analyst Liaison and Content Developer** - Liaise with the analyst and client teams, draft/edit webinar marketing materials, including the webinar abstract and manages client communication and collection of assets and information for the event
- **Web Registration and Content Management** - Sets up registration page and posts the webinar content on GigaOm.com
- **Deck Template Creation and Editorial and Graphic Support**
- **Social Media Manager** - Manages creative for social media, and plans, performs and reports on social media supporting the webinar event.

PROJECT MANAGEMENT TOOLS AND PROCESS

Webinar event planning, content creation (deck and marketing material) and social media are managed using the Asana project management tool combined with Google Docs. Learn more about using Asana..

NOTE: *Google Docs is the mandated standard for document creation (this prevents duplicate copies).*

NOTE: *To use Google Docs, Sheets, and Slides offline you can save the most recently opened documents on your computer.*

- To turn on offline access:

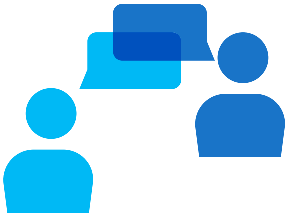
- *You must be connected to the internet.*
- *Use the Google Chrome browser. Don't use private browsing.*
- *Install and enable Google Docs offline Chrome extension.*
- *Make sure you have enough free space on your device to save your files.*

- The project manager assigns key tasks related to each stage of the webinar project at the start of the planning process.
- Each task owner manages their tasks and signals progress (and delays) by commenting, attaching key docs and marking task status (dates due / on hold / complete etc). This is necessary by all to keep each project on course.
- Dates noted for tasks are Delivery Dates. Plan to start them in time to deliver on the dates that appear in Asana.

asana + +

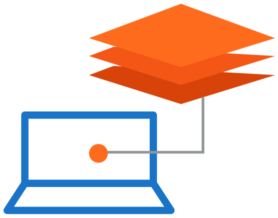
KEY WEBINAR DEVELOPMENT STAGES

While there are numerous tasks assigned across the webinar team members, the Analyst Tasks are outlined here by Key Stages:



STAGE 1 - KICK OFF CALL

- Analyst Signs SOW - *Task requiring Analyst Involvement*
- Host Client-only 15 Minute Review Call -
- Optional Technical Briefing - *Task requiring Analyst Involvement*
- Schedule 30 Minute Kick Off Call -
- Analyst Hosts 30 Minute Kick Off Call - *Task requiring Analyst Involvement*

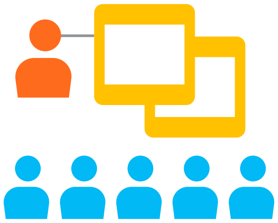


STAGE 2 - ABSTRACT / LANDING PAGE CREATION

- Analyst Completes Abstract" (the details of using the template and where it lives are in the description of the task).
- Analyst Gets Client Abstract Agreement
- Abstract Finalized
- Optional Webinar Review Call

STAGE 3 - SLIDE DECK CREATION AND CLIENT APPROVAL

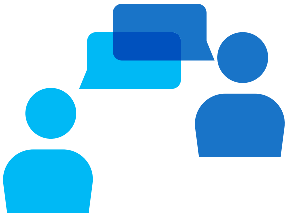
- Analyst Edit and Save Final Slides with Notes in Google Team Drive
- Analyst Presents Slides and Presentation to Client



STAGE 4 - WEBINAR EVENT

- Webinar Live Event

STAGE 1: KICK OFF CALL



OBJECTIVES:

In this 30-minute Kickoff call, the [redacted] analyst joins the client to discuss the strategy for the webinar. The goals of the call are to:

- Decide a topic and format (generally a conversation between peers).
- Achieve agreement on audience, length, areas to be covered and potentially order.
- Determine what behavior the webinar is aiming to change, and what's the CTA.
- Explain to the client how the webinar takes place, the number and purpose of upcoming calls.

PRODUCT BRIEFINGS

Product briefings are sometimes a necessary addition to prepare for the webinar event. These can be done before or after the kick-off call, or as an extended 60 minute kick-off call, with 30 minutes being dedicated to the webinar topic, and 30 minutes dedicated to the product briefing.

LEADING THE KICK OFF CALL *Lead by the Analyst*

The goal of the kick-off is to confirm a topic and scope and to assure its suitability.

- The analyst underscores the following for the client:

  - The goal of the Thought Leadership webinar is not on a company, product, or solution.
  - The focus is on fresh and original content, while avoiding general discussion that has already been well played out.

- If for some reason a client does not come prepared with potential themes or topics, please let the [redacted] Webinar Production Team know so that the kick-off call can be rescheduled.

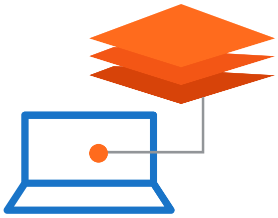
WEBINAR DATES AND PREPARATIONS

Webinar dates are typically proposed after [redacted] has determined the webinar topic, delivered a final abstract / landing page, and determined where it fits best in [redacted] promotional calendar.

- The ideal lead time from Kick Off Call to Webinar date is 6 weeks.
- 1-2 weeks from SOW to kick off, 1-2 weeks to write, agree, publish abstract, 2-3 weeks to promote.
- In some instances, dates are proposed and confirmed with the analyst and client before the kick-off call.
- Webinars take place Tuesday, Wednesday, or Thursday at 9 am or 10 am PST.

STAGE 2: ABSTRACT / LANDING PAGE CREATION

OBJECTIVES:



The abstract serves as a roadmap and marketing tool for the webinar. The abstract is used to build a landing page and to promote the event. The abstract also serves as an outline and roadmap for the analyst's presentation and for any other presenters.

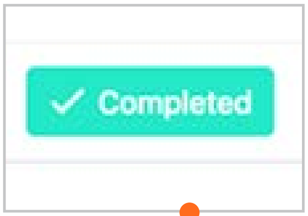
DRAFTING THE ABSTRACT *(Analyst Participation & Contribution)*

After the kick-off call, the analyst fills out the abstract template as assigned in Asana. This task is named "Analyst Completes Abstract."

- View all assigned tasks in Asana in the left nav bar near the top under "My Tasks."
- Access the link to the Webinar Abstract Template in the Files section of your task 'Analyst
- Completed Abstract'

  You can also find the template link under the files tab for that project in Asana

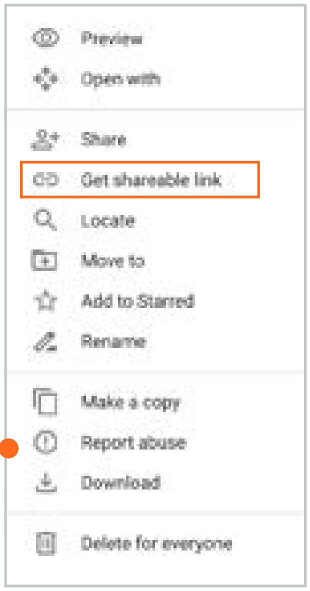
  > *Or find the template by navigating to Google Drive / Team Drives / Production- Analyst - (Analyst Name) - "Webinars" folder, and in a sub-folder named with this project/vendor name.*
  > **The naming convention is usually:** Date of Webinar - Name of Sponsor (01/09 - Sponsor)



- Edit this template and Google Docs will auto-save your changes.
- Complete a month before the webinar.
- Mark this task complete in Asana to inform webinar manager that the abstract is ready.

INTERNAL ABSTRACT REVIEW *(Internal Content Team)*

- Once the draft is submitted by the Analyst, the Customer/Analyst Liaison and Content Developer reviews and polishes the webinar abstract and collects assets and information related to the event.
- Once the Abstract has undergone the internal review, the Analyst is assigned the task "Analyst Gets Client Abstract Agreement."
  - The analyst then presents the abstract to the client using the Google Document link.
  - "Click 'Sharing settings' then click 'Who has access' then select 'Link sharing on' then click 'Allow external access' and then copy the link from there.
  - This link is acquired by navigating to the folder in which the document lives and right clicking on the document. Find the "Get Shareable Link" option in the dropdown menu. (There's a "Share" button on the top right of the Doc in order to get to the link sharing options.)



NOTE: *Do NOT email a download of the abstract to the client for approval, send a shareable link for version control.*

STAGE 2: ABSTRACT / LANDING PAGE CREATION

CLIENT ABSTRACT APPROVAL *(Analyst & Client)*

The client reviews the abstract and makes suggested edits to the Google Doc file.

- The analyst approves or reject edits. Please give the client context for rejected edits.
- When final edits are complete, the analyst marks the task "Abstract Finalized" as complete.

IMPORTANT NOTE: *Once approved the title of the document should NOT change, as Abstract Approval triggers the start of the Marketing and Design Process.*

LANDING PAGE CREATION & REVIEW *(Internal Web Content Team)*

After client approval of the abstract, the Web Registration and Content Management lead uses the abstract to set up the registration page on GotoWebinar and posts the webinar content event page on [redacted]

SOCIAL MEDIA GRAPHICS & PROMOTION *(Social Media Team)*

- While the Abstract is under client review, the graphic team begins work on the social media graphics featuring the event (title, dates/times, speakers etc)
- Once the Event Page is live on [redacted] the social media manager socially promotes the event on [redacted] social media.
- Promotion ideally starts at least two weeks prior to the event.

STAGE 3: SLIDE DECK CREATION & CLIENT APPROVAL

OBJECTIVES:

The analyst creates slides to act as a roadmap and to provide any visuals, like graphs or tables, to attendees.

DECK CREATION *(Internal Marketing Team & Analyst)*

The analyst uses a [redacted] Pre-Filled Template for the slide deck presentation.

- [redacted] marketing graphics creates an event specific webinar deck template prefilled with key information for each webinar event and adds the event-specific template automatically to your Google folder once it is ready for the analyst to work with. If it does not appear in your folder check with the Graphics/Marketing contact noted above.
- When the deck is ready, the Asana task "Create Slide Deck Template for Analyst," is marked "complete" by Marketing, a link to the template is added under the files attached to the task in Asana, and Marketing messages the Analyst via Asana that the deck is ready to work with.

  > Analysts may access the deck via the link in Asana or may navigate directly to their Analyst Production Drive production Google Drive folder to access the file where it lives.

- The Analyst uses this template to build the Webinar slide presentation. The presentation always includes the Title, the Analyst(s) name(s) and images and co-presenters' and guests' names and images pre-filled. If it is not complete check with the Graphics/Marketing contact noted above.
- The deck includes empty template slides to work with and notes the font/sizes to standardize on.
- When the deck is complete and ready for client approval, the Analyst marks the Asana task "Analyst Submit Slides with Notes in Google Team Drive" complete.

STAGE 3: SLIDE DECK CREATION & CLIENT APPROVAL

PEER REVIEW & CLIENT APPROVAL *(Analyst, Internal Team & Client)*

Slides are always approved by both the client and the analyst.

- The Final Draft of the slide deck is reviewed by the Internal Webinar product lead (Peer Review).
- Once the "Approve Final Presentation - Peer Review" Asana task is completed internally, the Analyst is notified in Asana that their task, "Analyst Presents Slides and Presentation to Client" is ready to complete.
- The analyst **SHARES** the link to the **Google Slide Deck** with the client one week before the webinar for approval. The **Google Slide Deck** is cleared of any internal comments or notes before sharing the link.
- Share the **Google Slide Deck** with the client by simply right clicking on the deck in the folder and navigating down to **"Get Shareable Link"** - Clients are to make comments and edits in the Google Deck.
- Edits to slides are to be made by the client within the week leading up to the webinar and finalized by the analyst no later than two days before the webinar.

IMPORTANT NOTES:

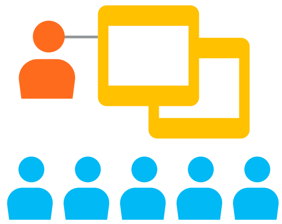
Our default doc format for word and slides is Google.

- Some Analysts may need to work outside of Google for exceptional situations. If the analyst needs to work outside of Google Docs for whatever reason, working and final docs are still only uploaded in a Google format for compatibility and versioning reasons.
- Downloading a pre-prepared Google Deck as a PPT, usually results in replaced fonts and slides that do not look the same when reupload as a Google Doc.
- Decks and word docs are to be uploaded as Google Decks or Google Docs when added back to Team Drive. Decks uploaded as PPTs and docs uploaded as Microsoft Word files, can only be downloaded (not worked on or shared online) and this creates versioning issues for both.
- Please DO NOT download decks to send to clients, only share the Google link as described above.

STAGE 4: WEBINAR EVENT

OBJECTIVES:

The analyst and guests prepare for, practice and present the webinar to engage and educate attendees who have signed up to attend and participate in the event.



PREPARATIONS, BEST PRACTICES & 30-MIN A/V & LOGISTICS SESSION *(Analyst & Client)*

- Presenters attend a 30-minute A/V and logistics session prior to the webinar.
- Technology is tested and the structure of the webinar reviewed.
- No changes to structure, slides, or the presentation can be made at this time.
- The analyst is always present for both the A/V check and the live webinar.
- The analyst (moderator) presents the slides and controls the pace during the webinar.
- Slides are ideally presented from a single monitor, not a dual monitor setup.

> **TECHNICAL TIP:** *If presenting from dual monitors, the GoToWebinar presenter display screen shows the PowerPoint in whatever window the analyst selects to present from in presenter mode. At this point, the analyst can choose between the options: Window 1, Window 2, Window 1 (clean), Window 2 (clean). "Clean" means that GoToWebinar won't show any icons from the desktop window. Please choose the clean version of the appropriate window if presenting from dual monitors.*

SOCIAL MEDIA *(Social Media Manager)*

- The Social Media Manager promotes the event across [redacted] Twitter, Facebook and LinkedIn channels and tags the Analyst, Sponsor and Guests social handles when available.
- Analysts, guests and sponsors are encouraged to share GigaOm posts across their own social networks and create their own social posts to promote the event.

  > Independent posts about the event may tag and are retweeted / shared across our channels.
- To ensure the most exposure - The analyst is encouraged to note key social media hashtags specific to the event topic as a comment at the bottom of the abstract. These are picked up and used when posting on social media.

EVENT FOLLOW UP *(Analyst & Webinar Manager)*

- The webinar project leads thank the client by email and copies the analyst, main client POC, speaker, and business development manager of the client.

- The webinar project leads let the client know how many people were registered for the webinar, and alerts the client of next steps, including the schedule of the standard thank you email to all registrations, as well as the delivery time for the scrubbed registration list (leads) and webinar recording asset (MP4 file), which is 1-2 days.

Hi all [Main POC, Speaker, Analyst, Sales Person, Ryan]

Thank you [Analyst Name] and [Speaker Name] for a great and engaging conversation on this afternoon's webinar! [Speaker Name], we appreciate you lending your thought leadership to today's discussion, and [Analyst] as always and for moderating.

[Main POC],

There were over [Number] registered for today's webinar.

In terms of next steps, standard thank you email inviting all our registrants to access the recording on-demand will be sent out through our email platform tomorrow.

We will be back in touch with you on [weekday] once the the registration report and MP4 recording after ready for delivery. Our standard webinar post-ops happen over a 1-2 day period, and after our ops team has stored the file and scrubbed the list in queue we can deliver the final webinar asset and numbers to you.