The Modern Webinar Execution Checklist

A Strategic Campaign Framework by Witmer Group

8 Weeks Prior: Strategy & Foundations

- [ ] **Define Concrete Commercial Goals & KPIs:** Establish target registrants, pipeline influence, and primary attendee actions (e.g., demo requests, trial activations).
- [ ] **Confirm Date, Time & Calendar Scheduling:** Select optimal broadcast windows across key attendee time zones.
- [ ] **Determine the Core Topic & Value Hook:** Address high-intent buyer pain points or emerging industry shifts.
- [ ] **Select & Confirm Speakers / Co-Hosts:** Line up internal subject-matter experts or guest practitioners.
- [ ] **Activate Strategic Partner Co-Marketing (Optional):** Coordinate cross-promotion and audience-sharing with ecosystem partners.
- [ ] **Secure Production Space & Hardware:** Book a dedicated studio or quiet recording room equipped with high-fidelity microphones, lighting, and hardwired internet.

5 Weeks Prior: Infrastructure & Platform Setup

- [ ] **Build High-Converting Registration Landing Pages:** Set up mobile-responsive landing pages integrated directly with your CRM for automatic lead capture and tracking.
- [ ] **Select & Configure Webinar / Streaming Platform:** Ensure platform support for HD recording, interactive polling, automated captioning, and backstage green rooms.
- [ ] **Develop Comprehensive Presentation Outline:** Structure content flow, interactive audience checkpoints, and dedicated Q&A segments.
- [ ] **Establish Automated Confirmation Workflows:** Set up calendar invites (.ics files) and automated registration confirmations.

3 Weeks Prior: Asset Creation & Multichannel Promotion

- [ ] **Draft Core Presentation Deck & Visuals:** Build high-contrast slides focused on data, clean frameworks, and visual clarity.

3 Weeks Prior (continued)

- [ ] **Finalize Promotional Creative:** Design branded banners, social carousels, video teasers, and email graphics.
- [ ] **Launch Multichannel Promotional Campaign:**
  - [ ] **Targeted Email Broadcasts:** Segmented invites sent to contacts based on buyer personas and lifecycle stage.
  - [ ] **Social Media Feeds & Communities:** Organic posts, speaker teasers, and event page announcements across relevant professional networks.
  - [ ] **Content Hub & Blog Alignment:** Contextual banners and callout modules embedded in high-traffic related articles.
  - [ ] **Co-Marketing & Partner Distribution:** Partner email blasts and collaborative social shares.
  - [ ] **Direct Customer Communications:** Tailored invitations sent to current clients for adoption and expansion.
  - [ ] **Targeted Paid Media:** Paid social ads, retargeting campaigns, and search campaigns aimed at your ideal customer profile.

2 Weeks Prior: Integration & Mid-Campaign Push

- [ ] **Upload Assets to Platform:** Load slide decks, polling questions, and handouts into the hosting environment.
- [ ] **Execute Secondary Promotion Wave:** Retarget non-converters and deploy second-round email invitations with fresh subject lines.
- [ ] **Audit CRM Tracking:** Verify UTM parameters, custom tracking pixels, and CRM property mappings to ensure clean lead attribution.

1 Week Prior: Rehearsal & Attendee Priming

- [ ] **Conduct Full Technical Dry Run:** Test audio, camera feeds, screen sharing, backup presenters, and slide transitions with all speakers.

1 Week Prior (continued)

- [ ] **Deploy 1-Week Reminder Notice:** Send reminder message with agenda highlights and calendar direct-add links to existing registrants.
- [ ] **Final Push Across Channels:** Coordinate urgent “Last Chance to Register” messaging across email, social channels, and customer success teams.

3 Days Prior: Final Prep

- [ ] **Send 3-Day Reminder Email:** Deliver event details, key takeaway previews, and login links.
- [ ] **Confirm Moderation Roles:** Designate team members to manage technical questions, curate live Q&A, and drop relevant resource links into chat.

Day of Webinar: Live Broadcast Execution

- [ ] **Send Final Countdown Reminders:** Deliver morning-of and “Starting in 15 Minutes” reminder emails containing direct access links.
- [ ] **Publish Final Social Teasers:** Announce the live broadcast across brand social profiles.
- [ ] **Convene Speakers in Green Room (30 Mins Prior):** Run final mic, lighting, and connection checks with all panelists and guests.
- [ ] **Initiate Cloud & Local Recording:** Begin recording before opening the broadcast to ensure clean captures for on-demand repurposing.

Day of Webinar (continued)

- [ ] **Facilitate Real-Time Engagement:** Run live polls, moderate discussions, answer real-time questions, and live-share key insights across social channels.

Post-Webinar: Follow-Up, Repurposing & Revenue Handoff

- [ ] **Convert & Edit Master Recording:** Process on-demand video files, generate accurate transcripts, and create short video highlights.
- [ ] **Update Registration Page to On-Demand Asset:** Convert live sign-up pages into gated on-demand resource hubs to continue capturing inbound leads.
- [ ] **Publish Video & Slide Resources:** Host the recording and presentation deck on your resource center or video hub.
- [ ] **Deploy Segmented Follow-Up Emails:** Send tailored follow-up messages within 24 hours (one stream for attendees with recording/deck, one stream for no-shows inviting them to watch on-demand).
- [ ] **Enroll Leads in Dynamic Nurture Sequences:** Trigger automated workflows based on engagement levels and poll responses.
- [ ] **Enable Sales Teams & Hand Off Qualified Leads:** Alert account executives, surface high-intent leads (e.g., asked buying questions, requested pricing), and provide call context.
- [ ] **Conduct Performance & Attribution Analysis:** Review registration-to-attendance ratios, drop-off timeframes, audience interactions, and initial pipeline sourced.

Accelerate Your Webinar Campaigns with Witmer Group + HubSpot

Automate registration workflows, build smart segmented follow-ups, and track pipeline attribution seamlessly. Visit **witmergroup.com** to book a demo and streamline your inbound marketing engine.

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