

Strategies for Effective Webinars

Many organizations and agencies currently use webinars to provide learning experiences for audiences across a region, across the United States, or across the globe.

This guide provides a brief introduction to key principles from research and practical experience on how to make webinars most effective.

What Is A Webinar?

A *webinar* is a Web-based seminar—a learning event that combines live audio, via telephone conference call or voice-over-Internet (VOIP) technology, with simultaneous visual material provided over the Internet.

Most webinar platforms also include a variety of other tools, such as text chat and polling, which enable participants to interact in real time.

Common webinar platforms include:

- » Adobe Connect (www.adobe.com/products/adobeconnect)
- » GoToWebinar (www.gotowebinar.com)
- » WebEx (www.webex.com)
- » Zoom (zoom.us)

What Is a Webinar/Online Meeting?

A Web-based Seminar/Meeting



Why Use Webinars?

Webinars are being used more and more frequently by partner organizations and agencies. What is driving this increasing popularity?

Projects may use a webinar format for a number of reasons:

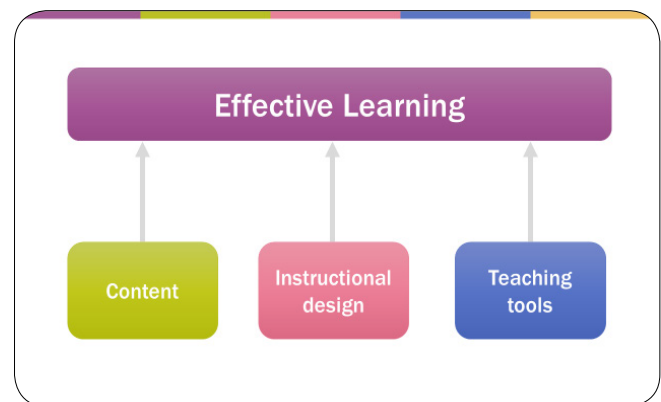
- » Convenience – Webinars make it easy to connect with sites across distance without anyone having to leave the office.
- » Cost – Compared with in-person events, webinars offer substantial savings in travel and facilities costs and require relatively little equipment or expense.
- » Connection – Due to greater convenience and lower cost, webinars enable us to connect more frequently with groups of sites than in-person events do. They also provide live interaction that is not possible with printed materials or static websites.
- » Commitment – When people set aside time to take part in a live event, they may be more likely to follow through than they would with reading materials or self-paced online courses.

- » Reach – Through webinars, we can reach out more broadly, involving people who cannot typically come to in-person events, including those who are geographically distant.
- » Responsiveness – With a live, interactive event, presenters can provide the most up-to-date information, and participants can receive immediate answers to their questions.
- » Multimedia – Webinars provide both audio and visual content in a live, interactive format.
- » “Everyone else is doing it” – Because of their increasing popularity, we may sometimes use webinars by default, even when other formats may be more effective in addressing a particular learning need.

Core Elements of an Effective Webinar

What is at the core of an effective webinar? A webinar is a learning event, so the same basic elements of any effective learning event apply. Therefore, the event needs to fulfill the following:

- » Provide participants with valuable *content*
- » Employ effective *instructional design*
- » Make appropriate use of whatever *teaching tools* are selected—whether flipcharts, markers, and printed handouts or a conference call line and webinar platform.



Content

What makes content valuable? The value of content depends on the needs of the learner. For example, what is valuable to a brand new clinician may be very different from what is valuable to a more experienced professional.

How can we ensure our content is valuable?

1. Assess the learning needs of your intended participants.
2. Ensure that the content you are providing is aligned with those needs and makes a significant contribution to addressing those needs.
3. Provide a clear description of the content and format in advance of the event to enable participants to select the learning experiences that will be most appropriate and valuable to them.

Instructional Design

Once we have identified valuable content, we use effective instructional design to help participants engage with the content in ways that align with the principles of how adults learn—a key to making a learning experience most successful.

In *The Adult Learner*¹, Malcolm Knowles and colleagues describe a number of aspects of effective adult learning. We’ve summarized them in the following four elements:

1. Relevant – Addresses participants’ needs.
2. Useable – Provides practical information that the participants can apply to real-life situations.

¹ Knowles, M. S., Holton III, E. F., & Swanson, R. A. (2014). *The adult learner: The definitive classic in adult education and human resource development*. Routledge.

3. Builds on prior knowledge – Assumes that participants bring valuable experience to the learning situation that helps them make connections between existing knowledge and new information.
4. Self-directed – Engages learners in the experience. Participants contribute to the creation of knowledge, and structures and resources support learners in deciding what and how to explore next.

Teaching Tools

Once we have identified the content and the instructional design approach, we need to effectively use whatever teaching tools we have available and choose to employ. Just as different instructional designers and presenters differ hugely in how effective or ineffective they are in using a circle of chairs, flipcharts, or markers, we may vary in how effective or ineffective we are in the use of tools provided by webinar technology.

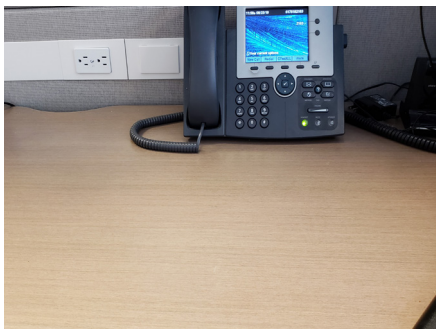
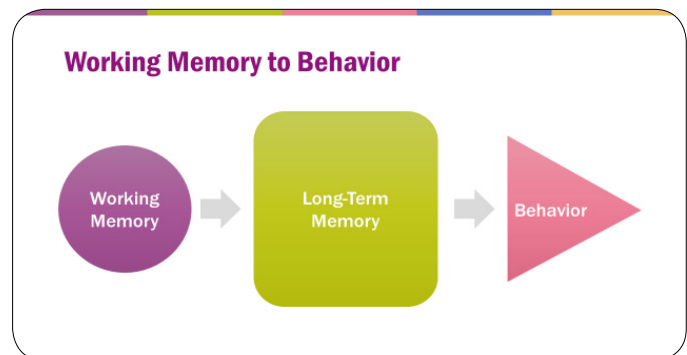
All too often, we may approach new teaching tools as if we were in completely foreign, and perhaps hostile, territory. In the process, we may often forget key principles of effective learning.

For example, an experienced presenter, who would never lecture a group for an hour without scanning the group for comprehension or questions, may as a new webinar presenter use a format in which participants are on mute during a 50-minute PowerPoint presentation, followed by 10 minutes of structured questions and answers.

Learning That Lasts

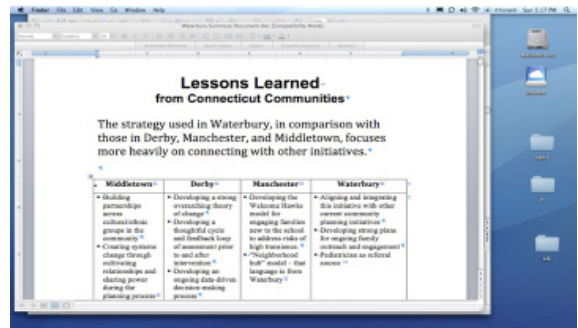
Our goal throughout the process of designing and delivering a learning event is to help the learner engage with new content (knowledge, skills, or attitudes) in ways that make a lasting difference when the opportunity arises to apply this new information in the real world. For this transfer to happen, the new content must enter a participant's limited working memory and be stored in long-term memory in such a way that the participant can later access it and translate it into action.

Think about what happens when new printed materials come into your office. You have limited working space on your desk. When too much material piles up on your desk, it becomes impossible to find anything. So you turn to filing cabinets for long-term storage. But to file new content effectively, you have to find the appropriate place to put it—either in an existing folder or in a new folder you create. The real test comes later when you need to retrieve the materials. Have you stored them in a place where you can easily find them?



In designing a webinar (or any learning event), we need to ensure the following:

- » The content we are providing comes to the participant's attention in a way that it will enter the limited working memory
- » We help the participant make connections to where to store this content in long-term memory.
- » Ideally, we provide the participant with practice in retrieving and applying the content in situations similar to those he or she will encounter in the future.



But the deepest learning doesn't simply involve storing and retrieving information. In the most powerful learning experiences, participants synthesize content, combining new key ideas with past knowledge and experience to increase their effectiveness in handling future situations. Inviting webinar participants to reflect on and share how new content fits or doesn't fit with their own ideas and experiences is one way to help foster this type of deeper learning and transfer.

Additional Resource on Designing Effective Webinars

The New Virtual Classroom: Evidence-based Guidelines for Synchronous e-Learning, Ruth Covin Clark and Ann Kwin
www.amazon.com/New-Virtual-Classroom-Evidence-based-Professionals/dp/0787986526

Challenges of Using Webinars

While the core principles of effective learning apply to webinars, what are some of the particular challenges of using a webinar format?



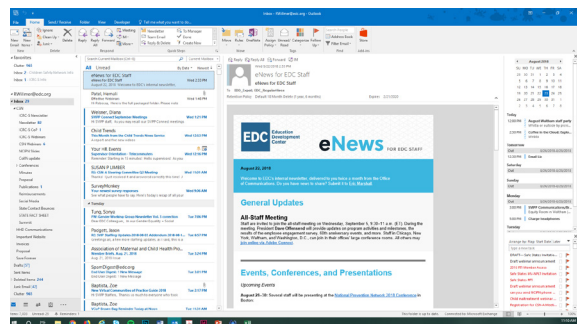
Distractibility and Lack of Commitment

When we talk with people who have had bad experiences as a webinar participant, they will often say that they found the webinar boring, became disengaged, and started doing other things.

For some, the problem may have been that the content wasn't aligned with their needs, wasn't practical, or was presented in a way that didn't engage their experience. However, the webinar format itself contains aspects that make this experience more likely to occur. For example:

- » The very convenience of being able to participate without ever leaving the office means that participants may be less selective when they choose to register.
- » Participants may feel much less committed than if they had spent time and expense to travel to an in-person event.
- » Competing demands and other distractions abound when alone in one's own office.

If a webinar seems less than fully engaging, it may take only the "bing" of an e-mail, the ring of the phone, a colleague's voice in the hall, or even the allure of an interesting website for the learner's attention to be lost permanently.



Lack of Human Visual Cues

Another aspect of webinars that can increase the risk of participant disengagement is the lack of visual cues that we typically use during in-person interactions:

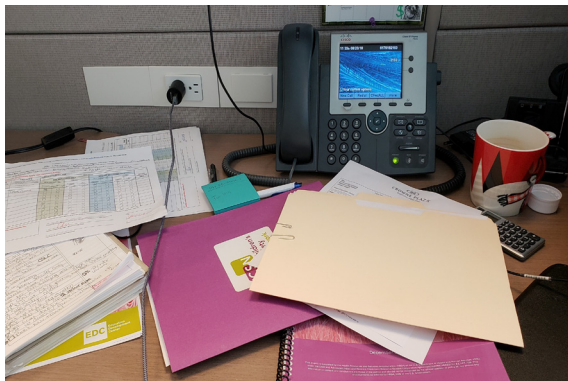
- » Participants cannot see the speaker's gestures, body language, and facial expressions—all of which help to clarify content and carry much of the emotional content of the communication.
- » The speaker cannot see the body language cues of the participants, cues that are often key signals that let the speaker know when to speed up or slow down, clarify a confusing point, or stop for questions or comments.
- » During open discussion, participants may have difficulty knowing when to jump in for fear of speaking at the same time as another participant who was not actually finished or who started to speak at the same moment.



Without these human visual cues, instructors and participants can become out of synch with each other, and participants may disengage—and begin to read e-mail that has arrived since the webinar began.

Cognitive Overload

Without visual cues, the instructor may have a hard time adjusting the pace properly to introduce new information at a rate that the participants can best absorb. As a result, the participant's "desktop space" of working memory of the participants may become filled to overflowing, resulting in cognitive overload, which in turn can lead participants to tune out.



Also, participants new to the webinar experience may find using the webinar tools overwhelming, further adding to cognitive overload.

Instructors who are new to using webinar tools may find themselves experiencing cognitive overload as well, which may dampen their ability to be aware of and responsive to the needs of the participants.

Lack of Social Contact

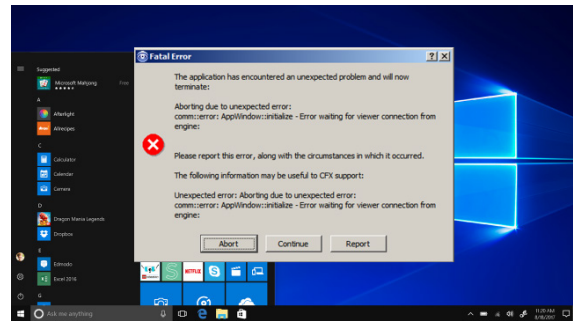
Cut off from human visual cues and contending with a potentially overwhelming amount of input from both the content and the technology, a participant sitting alone in front of the computer may also feel isolated—cut off from human contact. While participants at in-person events commonly remark about the value of connecting informally with other participants, webinar participants may feel disconnected from others, increasing the allure of the colleague in the hallway who is interested in chatting.



Technical Difficulties

Social isolation and cognitive overload can increase a participant's level of frustration and decrease their patience with the challenges of dealing with the technology. When technical problems arise, the participant may give up completely, deciding to simply listen in on the conference call line or to abandon the event entirely and move on to doing something else.

How do we address these various challenges in order to design and deliver an effective webinar? The strategies we use will depend on the roles we play in the webinar.



Webinar Roles and Responsibilities

Designing and delivering a webinar involves a number of different roles related to creating content, applying adult learning principles, and making effective use of webinar tools.

While roles may overlap (e.g., a simple webinar might require only one or two people), we have broken out key webinar responsibilities into three different overall roles: staff lead/designer, presenter/moderator, and technology support.

Staff Lead/Designer

- » Staff lead – Oversees the webinar overall and coordinates the work of staff in other roles
- » Designer – Assesses participant needs, develops webinar content and structure, and arranges for and prepares presenters

Presenter/Moderator

- » Presenter – Facilitates the learning process and delivers content during the webinar
- » Moderator – Welcomes participants, introduces presenters, and monitors and facilitates questions and discussion
- » Moderator assistant – Monitors and, where appropriate, responds to participant questions

Technology Support

- » Technical organizer – Develops and supports the technical aspects of the webinar and advises the designer on the use of webinar tools to meet learning objectives
- » Technical assistant – Supports participants, presenters, and the technical organizer with technical aspects during the webinar

Strategies for Effective Webinars

What strategies can webinar designers and presenters use to maximize the effectiveness of the learning experience?

While webinar design and facilitation is an emerging field, there has been increasing research and emerging best practices in designing and facilitating webinars—collected in books such as *The New Virtual Classroom* by Ruth Covlin Clark and Ann Kwinn.²

2 Clark, R. C., & Kwinn, A. (2007). *The new virtual classroom: Evidence-based guidelines for synchronous e-learning*. John Wiley & Sons.

Incorporate Frequent, Relevant Interaction

Designers should incorporate frequent opportunities for participants to interact with presenters and with each other.

Many of us have participated in webinars that consisted of 50 minutes of a presenter narrating PowerPoint slides, followed by 10 minutes of participant questions. In *The New Virtual Classroom*, Ruth Colvin Clark and Ann Kwinn suggest that we build in some type of interaction every 1–3 minutes. While it is unlikely that most of our webinars will be as highly interactive as the virtual classroom sessions they describe, we can incorporate many types of interaction. The interaction tools we choose to use will depend on the size of the group, learning objectives, and event format.

Typical modes of interaction include:

- » Voice – The conference call line can be unmuted, and participants can speak their questions or comments. A “hand raise” feature can be used so that participants are able to indicate when they would like to speak.
- » Text Chat – Participants can type comments into a chat box. These comments may either be displayed automatically to all other participants or go only to presenters and moderators for typed or spoken responses.
- » Polls – Participants can respond to multiple-choice polls that, when launched, appear on their computer screens. The presenter or moderator can choose to immediately display a chart summarizing the poll results to all participants. Polls are most often prepared in advance, although it is possible for the tech organizer or tech assistant to set up a poll on the fly while the webinar is in progress.
- » Hand Raise – Participants can click on the icon of a raised hand to indicate that they have a question or comment. The presenter or moderator can also use the hand raise feature to take a quick poll of the group, even spontaneously (e.g., “Raise your hand if you have ever....”).
- » Whiteboard – Participants can share responses, verbally or by text chat, that are then displayed on their screens on a virtual whiteboard. Participants may also be able to type their own contributions directly onto the whiteboard or use their keyboard and mouse in other ways to interact directly with the on-screen content.
- » Interactive Map – Participants can use voice or text to identify locations (e.g., in answer to “Where are you participating from today?”), which are then displayed on their screens as push pins on an electronic map.
- » Breakout rooms – Participants can be divided into smaller breakout groups, where they can chat with other participants in their assigned group, jotting notes from their small group conversation on a shared whiteboard.

For any of these modes of interaction to be effective, they must be used in a way that directly supports the learning objectives and instructional design of the webinar. When used effectively, opportunities for interaction can support accessing prior knowledge, increase social presence, and facilitate participant-directed learning, as well as keep participant interest and engagement high.

The technical organizer helps the designer understand what interaction tools are available in the webinar platform and which tools might fit best with the learning objectives for the webinar.

**Provide frequent,
relevant interaction**



Additional Resources on Interaction Tools

The New Virtual Classroom: Evidence-based Guidelines for Synchronous e-Learning, Ruth Covin Clark and Ann Kirwin
– Chapters 6 and 7

www.amazon.com/New-Virtual-Classroom-Evidence-based-Professionals/dp/0787986526

Adobe Connect Online Help

www.connectusers.com/learning_center/getting_started/quickstart.php

GoToWebinar Online Help

support.logmeininc.com/gotowebinar

ReadyTalk Online Help

support.readytalk.com/SP/resources.php

GoToWebinar Online Help

support.zoom.us

Foster Social Presence

Frequent interaction can help to decrease participants' sense of social isolation and increase the feeling that participants are connected with others during the learning experience.

As with an in-person event, the strategies used to foster social presence will vary depending on the number of participants, learning objectives, and instructional design. If the group is small enough (typically 30 or less), you might start the webinar with a whiteboard to which participants' names and locations are added as they join the event, followed by brief spoken participant introductions using the order listed on the whiteboard.

Leaving participant phone lines unmuted throughout the webinar for questions and comments (with the tech assistant ready to mute noisy lines individually, if necessary) can provide for more lively connections among participants and between participants and presenters.

If the group is larger, in place of spoken introductions, an interactive map can be used to display participants' locations as they join the webinar.

Whiteboard brainstorm activities (with contributions spoken and/or through text chat) can engage participants in collectively building content, at the same time accessing participants' prior knowledge.

Polls can also be used to give participants (as well as presenters) more information about the group, building a stronger sense of commonality and connection with others who are participating as well as fostering an appreciation for the diversity of the group.

When presenters respond quickly and personally (privately or to the full group) to participants' use of the hand raise feature or text chat for a question or comment, it can enhance the sense that participants are actively connected with the presenters. If a text chat question or comment is pertinent to the topic being currently discussed, the presenter may fold his or her response immediately into the presentation (e.g., "As Pat from Texas points out, this approach may need to be adapted in communities such as....").

Using participants' first names can also increase the sense of social connection. In fact, the use of participants' names is actually easier in a webinar than at an in-person event, as webinar participants names appear automatically alongside participants' text chat questions or comments.



Use Effective Visuals

Most typical webinars include a display of PowerPoint slides. While research has shown that relevant visuals explained through spoken narration can be a particularly effective mode for successful learning, many typical PowerPoint presentations are not designed in ways that support learning.

The most effective visuals graphically present a representation or visual metaphor for a key concept. But most PowerPoint presentations include slide after slide of bulleted text—a mode that PowerPoint is well designed to support.

The typical “wall of words” can actually depress learning, as participants’ attention is split between reading ahead and listening to the presenter, who may be reading the text directly from the slide.

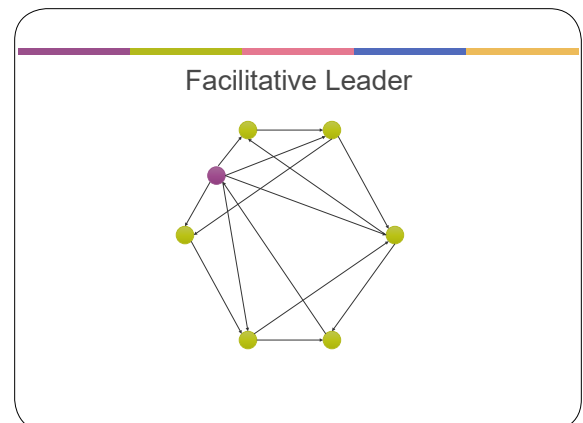
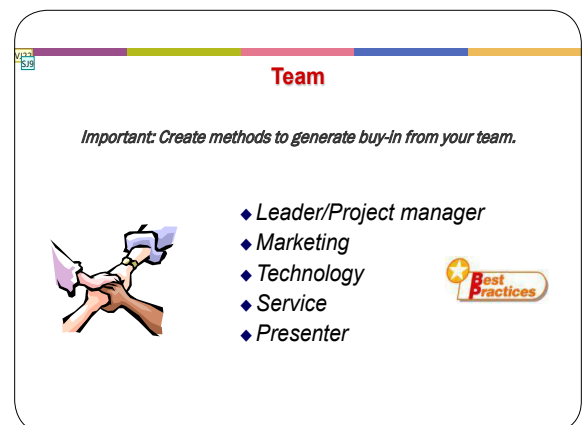
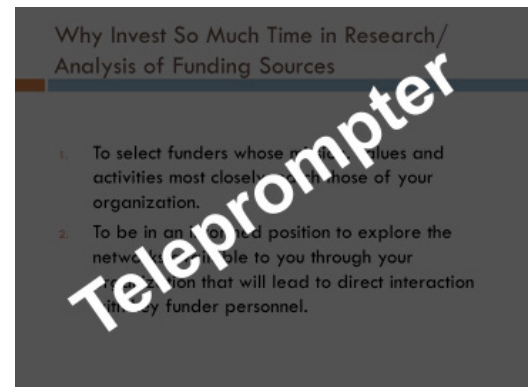
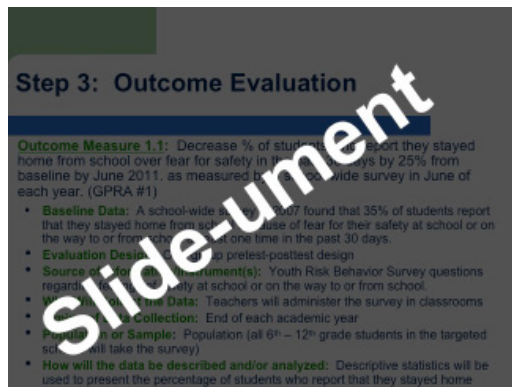
In *Slide:ology*³, Nancy Duarte suggests that any slide that contains more than 75 words is no longer a visual support for group learning but instead is really a document that is best read individually. Duarte calls this type of slide a *slide-ument*.

If a slide has around 50 words, its main benefit may be as a memory aide for the presenter, rather than as an effective visual learning support for participants. Duarte calls this type of slide a *teleprompter*.

While there is no definitive guideline on the maximum number of words on a slide, keep text brief and focused on supporting the main points—offering a thought-provoking or summarizing headline rather than an entire article.

Research has also found that extraneous visual materials can also decrease learning rather than enhance it. Eliminate graphics that do not contribute to the key message of the slide. These typically include elements such as complicated slide themes, logos on every slide, extraneous stock clip art, and unnecessary animations.

Instead, look for a simple diagram or an illustration that communicates the key concept of the slide, either in a literal fashion or through a metaphor.



3 Duarte, N. (2008). *Slide: ology: The art and science of creating great presentations* (pp. 417-421). Toronto, ON: O'Reilly Media.

Often, the process of developing this type of visual pushes the designer to clarify the ideas being communicated. Once the idea is clear, the visual representation can be created using tools such as drawing and charting tools (e.g., in PowerPoint or another graphics programs) or through photography (including photographs you take yourself or obtain through one of the low-cost stock photo websites).

To illustrate an explanation of an activity that participants will do on a computer (e.g., how to access resources on a website, how to fill out a form), the presenter can also use application-sharing features of the webinar platform to share her or his computer desktop in real time so that participants can follow the explanation visually.

A clearer, more compelling visual (e.g., a photo, illustration, chart) will often take more time to create, but it will likely be a much more effective tool for learning.

Additional Resources on Creating Effective Visuals

Graphics for Learning: Proven Guidelines for Planning, Designing, and Evaluating Visuals in Training Materials, Ruth Colvin Clark and Chopeta Lyons

www.amazon.com/Graphics-Learning-Guidelines-Designing-Evaluating/dp/078796994X

Presentation Zen Handout, Garr Reynolds

www.garrreynolds.com/Presentation/pdf/presentation_tips.pdf

Presentation Zen: Simple Ideas on Presentation Design and Delivery, Garr Reynolds

www.amazon.com/Presentation-Zen-Simple-Design-Delivery/dp/0321525655

Slide:ology: The Art and Science of Creating Great Presentations, Nancy Duarte

www.amazon.com/slide-ology-Science-Creating-Presentations/dp/0596522347

Manage Mental Overload

In less effective webinars, participants may have an overwhelmed, “my brain is full” experience. Research on cognitive load explains this feeling. It is important to manage the cognitive demands the webinar places on participants to ensure the most effective learning experience.

Recent research suggests that we can hold even less in our short-term working memory than was previously thought, retaining only about four separate items at one time. If additional information comes in before we have encoded previous items in long-term memory, information is lost.

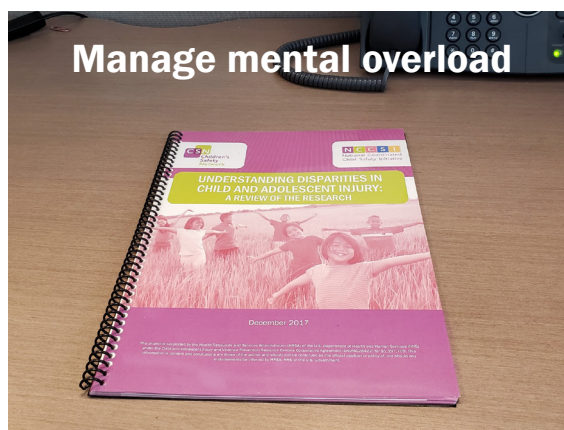
As a result, in designing our webinars, it is important to avoid including unnecessary, distracting materials. Instead, focus on items that are most central to the learning objectives.

Effective visual design helps. If we avoid unrelated decoration or extensive text and focus on visuals that illustrate key concepts, the visuals are more likely to support learning.

Similarly, be sure that anecdotes and examples align well with the key concepts presented. While an amusing story may effectively engage participants’ attention, if it is not connected to the intended content, it may dominate limited memory space and decrease learning.

These ideas are not intended to suggest that we only use Spartan visuals with no decorative elements or never share an entertaining anecdote. But the more we can tie all aspects of our webinar to the learning objectives, the more effective the learning experience is likely to be.

For participants who are new to webinars, using the webinar tools may place high cognitive demands. To help reduce these



demands, provide a clear orientation to the tools as well as opportunities for participants to practice before the key content begins. When working with a particular group of participants (e.g., a cohort of grantees) over time, consistently using the same webinar platform and gradually incorporating additional interaction tools may also help.

Webinar presenters may also experience challenges with cognitive load. Presenters who are experienced with in-person events may have learned over time to unconsciously, automatically scan participants' facial expressions and body language for signs of comprehension, indications that participants have questions, etc. In moving to the webinar format, the presenter will need to consciously remember to scan the webinar dashboard, participant list, and chat box, all while presenting information or facilitating discussion.

So take it slowly. Add new tools and approaches to your work with webinars gradually so that neither you nor your participants become overwhelmed.

Additional Resources on Managing Cognitive Load

The New Virtual Classroom: Evidence-based Guidelines for Synchronous e-Learning, Ruth Covin Clark and Ann Kirwin – Chapter 8

www.amazon.com/New-Virtual-Classroom-Evidence-based-Professionals/dp/0787986526/

Prepare and Practice

To manage cognitive load while learning to use the webinar format, practice helps. Give yourself ample time to prepare. Presenters may benefit from hands-on opportunities to explore the use of the webinar tools as well as from rehearsing the use of specific tools that will be employed in a particular event.

Being very familiar with the content can also be a huge help. If the presenter sufficiently reviews the content to be presented and the sequence of activities for the event, it can reduce the additional cognitive load of searching for the next word or concept.

Basic preparation of yourself and your space can also reduce the load from other distractions. Preparing to present at a webinar can be like preparing for an extended car trip.

- » Make sure your equipment (e.g., a computer with fast, reliable Internet access and landline telephone with handset or headset) is set up and in good working order.
- » Print out your outline, slides, and speaker notes and have them in a place where you can refer to them easily as a map for the event.
- » Do not forget the basics—use the rest room and have a glass of room temperature water nearby.
- » Close your door and put up a “do not disturb” sign to avoid the “distracted driving” experience of having a colleague poke her or his head in, only to discover you talking animatedly to your computer.



Giving everyone involved with the webinar ample time to prepare and practice can also be one of the best ways to avoid unnecessary technical problems and to be ready to handle unexpected difficulties if they do arise. While few hosts of an important in-person workshop would plan to arrive only a few minutes before the event is to begin, it's not unusual for some webinar hosts or presenters to only log in shortly before the schedule time. Logging into a webinar 10 minutes before the start time and finding you don't have the right password is like showing up at a meeting space 10 minutes before the start of a workshop, only to find that you don't have the right key to the space. Both can be avoided through a little more advance planning.

- » Take plenty of time to familiarize yourself with any of the webinar tools you plan to use.
- » Plan out each section of the webinar and be clear about who will do what.
- » Schedule a run-through or a rehearsal a day or two before the events. In particular, practice transitions from speaker to speaker and interactive activities, such as polls, whiteboard brainstorm, and breakout rooms.

On the day of the webinar:

- » Set aside an hour or more prior to the start of the event to prepare:
 - o Set up your space
 - o Log in and call in
 - o Conduct a final sound and visuals test
 - o Review transitions
 - o Be ready to welcome participants as they arrive in the virtual meeting room
- » Make sure someone is available to help participants with any difficulties they encounter as they log in and participate in the event.

Conclusion

If you incorporate frequent, relevant interaction, foster social presence, use effective visuals, manage cognitive load, and prepare and practice, you can increase the effectiveness of your webinars. By following these practices, you can avoid typical problems and build on a base of valuable content, strong instructional design, and effective use of webinar teaching tools to provide a meaningful learning experience for your participants.



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