

Audience Analysis Checklist

Before you charge off and start building your presentation, take some time to check your assumptions about your audience. Sit down with this chart and ask yourself the following questions.

In the section marked "What You Do Know," put only those things that you know for a fact are true. If you are guessing, be honest with yourself. Sometimes you have to go on a hunch, but the more you know for sure, the better.

Some sample answers to "Why It's Important" are included to guide your thinking. The simplest way to think of these is, "So, what does this mean to me for making my presentation as successful as possible?"

Audience Analysis

What You Should Know	What You Do Know	Why It's Important
How many people will be at the web meeting?		In general, the more people attending a meeting, the less interactive it will be.
Have they attended a web meeting before?		Will they be comfortable participating?
Will everyone be online, or will some people be together physically?		If some people are in a conference room sharing a speakerphone, interaction via chat will be limited. You may also have a lot of background noise, and facilitating a question-and-answer period could take some coordination.
How will they connect (broadband, dial-up)?		Connecting through slow connections means that video, webcam, and some other functions will run slower and even freeze completely.
Are the audio and video connected?		If both audio and video are over the web, participants can listen on their computers through speakers or headphones and participate with microphones. If audio and video are separate and something happens to the webinar video, participants can still listen in on the microphone even if they can't see.

Identify Your Objectives and Outcomes

What You Should Know	What You Do Know	Why It's Important
What is their level of expertise with your subject?		If participants are experienced and knowledgeable, don't bore them with background; get to the point. If they aren't, you might need some good solid examples of what you're talking about to help them understand the context.
Do they know the background of the meeting or presentation?		Have people asked for more information on your topic? Were they told what to expect or just to show up? This affects their mindset and willingness to engage with your topic.
Do they understand the primary objective and outcomes of the meeting?		If not, then it should be part of the introduction so they pay attention.
Have they received an agenda in advance?		How can they be prepared to participate and be in the right mindset if they don't know what's being discussed? Can you get an agenda to them before your presentation starts?
Do they want to be at this meeting? Why or why not?		How can you make it worth their while?
What are their roles: Are they decision makers, influencers, or implementers?		If you're asking people to make a decision, they must have the authority to do so. If your goal is to encourage them to take action, do you know what action they can actually take?
What external factors might interfere with their concentration?		Is attending your presentation the last thing they'll do before they leave for the day? That can affect concentration. Will they be in home offices? Cubicles? If they're at work, get them to turn off their email and other distractions.
If you were an attendee, what would be the single most important takeaway message from the meeting or presentation?		If you can't answer this question, you're not ready to start. If you can, do you have the visuals to help people retain your key points?

Identify Objectives and Outcomes

What You Should Know	What You Do Know	Why It's Important
Are there time zones or language barriers to consider?		If language is a problem, make sure to speak slowly and have plenty of text on the slides to reinforce your points—many people read a language better than they speak or translate it. Also, if it's the middle of the night, apologize for keeping people up—it is only polite and helps build rapport.
Are they internal to your organization or outsiders?		Terminology, jargon, and acronyms might cause confusion; plus you might have to introduce yourself or your company as part of the presentation.

NOTES

Sample Email Invitation

This invitation assumes that your audience is more interested in the topic than the presenter. Unless you are a well-known industry leader, you might want to take this approach—after all, most people you send this to will have no idea who you are yet! Notice the email is to the point.

Subject Line:

3 Ways to Empty Your Email Inbox—A New Webinar

The Body of the Email (start with a catchy statement that will show up in the preview pane of recipients' email, so those who scan their email will at least know they should pay attention to this message):

Studies show that email is now the biggest time waster in the workplace. How can you make better use of your time, reduce rework, and get more done?

Join us on _____ at _____ for a webinar: "3 Simple Techniques to Clear Up Your Email Inbox." [The presenters from your company] and the authors of *What Part of "Delete All" Did You Not Understand?* will give you practical advice on how to manage your email, communicate more effectively with your teammates, and save your manager's sanity.

Register now by clicking here. [Link directly to your landing/data capture page.]

In this webinar you'll learn [insert your learning objectives here]:

- ◆ why email has gone from timesaving tool to the bane of your existence
- ◆ 3 simple techniques to stop email from sucking up so much of your time
- ◆ resources and tools to help you keep up the good work.

[Include a two-sentence bio for each presenter.]

[Include a one- or two-sentence overview of your company and its achievements.]

Don't forget to join us for this important event [provide date and time].

Register here [repeat link to landing/data capture page].

[Personalize your signature and include your title (president, CEO, chief marketing officer)].

Contact Information and Website Info:

We respect your privacy. To take your name off our email list, please click here [include an email link] and put REMOVE in the subject line.

This invitation contains everything you need. You have a problem that needs to be solved (email clutter) and an identified audience (those who need help). You have identified what will happen and who will help them, and you have made it as easy as possible to register their intention to attend.

Meeting Agenda Template

Save this information as an email template, and just fill it in for each new meeting. Don't miss this step—you'll be surprised how much smoother your meetings run when people know what to expect and act accordingly.

Time, date, and meeting length

Meeting format and log-in data

Include both web and audio requirements and if people will be expected to participate by voice.

Meeting host and presenters

Objectives and outcomes

Describe the meeting—for example, whether you will be updating participants on a critical piece of information, asking them to brainstorm (in this case advise people what to think about in advance), or asking them to make a decision.

Expected participant preparation

Note whether participants need to read, prepare, check out, or analyze anything to be properly armed for the meeting.

Where participants can find relevant information and materials

Ensure that all participants have a copy of the spreadsheet you sent. If not, they can find it on the shared drive or the SharePoint site drive (include a link so they don't have to bug you for it).

Any additional information they should know

Introduce any new people or outsiders who will be participating in the meeting. Note anything new or different about this meeting relative to the others you've held.

Presentation Outline Template

Presentation Topic _____

Estimated Time _____

Start Time _____

Presenter(s) _____

Introduction:

- ◆ Introduce yourself and your background or credentials (via picture or webcam, for example).
- ◆ State the topic of the webcast and desired outcomes or action items.
- ◆ Tell attendees how long the webcast will last.
- ◆ State any special requests, prerequisites, or prework they'll need to complete in advance of the presentation.
- ◆ Lay out the ground rules.
- ◆ Give the participants a "tour" of the platform and introduce the technology you will use.

Topic or agenda item 1: _____

Visuals or media required: _____

Questions or interaction you'll use: _____

Estimated time: _____ **Time marker:** _____

Topic or agenda item 2: _____

Visuals or media required: _____

Questions or interaction you'll use: _____

Estimated time: _____ Time marker: _____

Closing statement: _____

Call for action items (write this out completely so you get it right and your audience understands): _____

Project Plan: General Webinar or Meeting

This tool will be a good starting point any time you need to do a basic information-style webinar. Follow the steps to prevent last-minute panic. You'll find more specific presentation plans later in the book.

Because most of us have "real" jobs in addition to making web presentations, why not make your life simpler?

Plan Step	Why It Matters	Time Frame
Pre-work: Define objectives and outcomes Analyze the audience Check with other stakeholders to confirm assumptions	You obviously need to know not only what you want to achieve but also what others in the organization might want to make sure happens. Maybe you should use (or avoid) specific terms, or marketing or legal has wording or format needs. Don't make yourself crazy later.	Especially the first time you do this particular presentation, give yourself plenty of time. I would suggest you begin conversations with stakeholders a month before the event so they know the project has begun and they'd better speak now or forever hold their peace.
Logistics: Define roles and responsibilities Choose platform Schedule event Create and send invitations	If you haven't already chosen a platform for this event, you need time to assess it and get comfortable. You should know its strengths, capability, and drawbacks before building your presentation and finding you've painted yourself into a corner.	If you're just now choosing a platform, you'll need plenty of time. Also, several rounds of invitations might be necessary, so plan to send them out early enough that people's calendars aren't full but not so early they forget about your event. Three weeks is probably about right. Plan accordingly. Also, plan for reminder notices 24 hours and even one hour before the event (someone will have the time zones confused). Ease people's pain and your stress level.

Plan Step	Why It Matters	Time Frame
<p>Content: Create the presentation visuals Create a script or an outline Create special visuals</p>	<p>Presenting online is different. You might have to add content like housekeeping rules and how the audience can interact with the platform to chat or write in questions. Additionally, animation that works live might not work on your platform. Your script is your chance to plan for the interaction you would have naturally in a live presentation but can easily forget when presenting online. You want to make sure you don't have any typos in your polling or other visuals that can come from rushing just before the event.</p>	<p>This will depend entirely on whether it's the first time you've given this presentation—or the 40th.</p>
<p>Rehearsal: Conduct tech rehearsal Conduct dress rehearsal</p>	<p>If you are unfamiliar with the platform and its capabilities, schedule some time to play with it and get familiar. Try conducting a poll and using all the annotation tools. When you're comfortable, schedule a dress rehearsal for your actual presentation with the close-to-final content.</p>	<p>Tech rehearsal will depend on your experience level with the presentation and the tools.</p> <p>If you've never given this presentation, a walk-through a week before the event with a couple of stakeholders is suggested to get their input and check your assumptions about content and time.</p> <p>Most important, hold at least one full dress rehearsal at least 48 hours before your event. That way, if you have to make changes, you have a little time and won't freak out the night before.</p>

Plan Step	Why It Matters	Time Frame
<p>Delivery day: Secure your environment Log on early</p>	<p>Many presenters become distracted by their surroundings when presenting. Make sure you have time to schedule a private conference room, clear your schedule, or turn off the phones and put the dog out.</p>	<p>Give yourself at least half an hour before showtime to log on and make sure you (and any co-presenters) have everything working and aren't rushed for time.</p>
<p>Follow-up: Send out any communication Debrief and decompress</p>	<p>Remember you're putting yourself through this to accomplish an objective. Don't let action items sit there without a quick reminder to your audience. If you want people to have the visuals, make sure they can get them quickly while they are still thinking about your topic. If you've recorded the webinar, make sure the recording is available and people know how to access it.</p>	<p>The longer you let your audience members go without reminding them of their action items or confirming your seriousness, the less likely they are to take the action you want. Show them you mean business. Any follow-up communication should be conducted within 24 hours of your presentation at the most.</p>

Show-Day Checklist

All program-day participants should receive a copy of this checklist so that they know what is involved and has to happen. Final responsibility of distributing this rests with the producer.

If it seems like overkill, remember that pilots go over a checklist whenever they get into the cockpit, no matter how many hours of flying time they have. Feel better now?

Time	Task	Done?	
30 minutes prior	Log in to meeting		
30 minutes prior	Ensure telephony is working and recording functional		
30 minutes prior	Upload and run "cycle slides" (if applicable)		
20 minutes prior	Ensure polling slides are created and loaded properly		
20 minutes prior	Check that other visuals or applications as necessary are ready to go		
15 minutes prior	Make a 15-minute announcement		
10 minutes prior	Make a 10-minute announcement		
5 minutes priors	Make a 5-minute announcement		
1 minute prior	Hit "record"		
Showtime!	Introduce webinar		
	Deliver your presentation		
	Monitor time		
	Monitor question-and-answer box, choose questions, and answer the easy ones		
	Introduce question-and-answer		
	Check for audience questions, and use prepared or planted questions to jump-start the session if necessary		
	Close presentation		
	Turn off recording		
	Copy question-and-answer log (if appropriate) to the platform		
	Save presentation with polling data and annotations (if appropriate) to the platform		
	5 minutes after	Close the platform; end the webinar	

Verbal and Vocal Skills Checklist

This checklist has many purposes. You can ask trusted team members for feedback during rehearsal, or you can have someone monitor you during the actual presentation itself. Perhaps more important, if you record your web presentations and webinars, you can experience the presentation as your audience does.

Whether for a boss, a co-worker, a trusted audience member, or yourself, the key here is to offer specific, behavioral feedback. Each section includes room for written comments. If a real example was not good, explain why not. Perhaps it addressed an issue your audience couldn't relate to, or maybe it was too technical. If at some point you sounded distracted and the *ums* and *ers* showed up, remember exactly where. If you can identify what happened, you can fix it next time.

And there *will* be a next time.

Verbal Skills

What You Heard	Needs Improvement	Meets Expectations	Excellent
Uses real examples			
Success stories are clear and concise			
Doesn't use jargon or acronyms			
Avoids repetitive or "comfort" words			
Uses participant names			
Uses appropriate language			

Vocal Skills

What You Heard	Needs Improvement	Meets Expectations	Excellent
Speaks at a clear volume			
Voice sounds energetic and interesting			
Speed is not too fast			
Pauses are frequent and comfortable			
Doesn't obviously read to the audience			

What You Heard	Needs Improvement	Meets Expectations	Excellent
Finishes sentences on a positive note			
Doesn't use <i>ums</i> or fillers			

Interaction

What You Heard	Needs Improvement	Meets Expectations	Excellent
Instructions are clear and easy to follow			
There were no dead spots where the audience felt disengaged			
The activities or questions made sense to the audience members			
Presenter sounded confident and interested in the audience			
Working with the chat and other technology appeared seamless to the audience			

WORKSHEET

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Topic or agenda item 1: _____

Visuals or media required: _____

Questions or interaction you'll use: _____

Estimated time: _____ Time marker: _____
