Step-by-Step Guide to Using GoToWebinar

Jay Boyer & John S. Rhodes

Contents

Getting your message in front of potential customers is one of the most important challenges you face as a small-business owner. After all, even if you've developed and cultivated a very high level of customer loyalty, you're still going to need to bring in new business each month. Having a steady stream of new customers will help you grow your business, of course, but getting feedback from these new customers will also help you be sure that your products and services are responsive to the constantly evolving needs of the marketplace.

Online tools that let you run video conferences and webinars are a powerful method for helping you achieve new customer growth. Webinars let you easily get your message in front of dozens or even hundreds of new prospects at a time, as well as pre-sell new and existing customers on your higher-end products and services

Furthermore, depending on the type of business you're in, webinars and online video conferences can be a great way to conduct your business. A professional coach, for example could use an online webinar service to conduct group coaching events as well as private sessions. This type of interaction can be much more effect than having to rely solely on telephone and e-mail coaching sessions.

Finally, you can use a video conferencing tool to manage any employees or contractors you might employ to help you with your business. "Face to face" video conferencing can be an invaluable tool for managing these individuals effectively.

One of the leading online services quickly and easily conducting video conferences and webinars is GoToWebinar. In this report were going to walk through the steps for setting up and running a GoToWebinar account, and then highlighting some of the ways that you can use it to optimize your business.

Signing Up for GoToWebinar

To get started with the GoToWebinar service, go to
http://www.gotomeeting.com/online/webinar/pricing and select the package that best suits
your current needs. GoToWebinar is priced on the basis of the number of attendees within
each event, not the number of events that you plan to host. Each membership level includes
the ability to conduct an unlimited number of webinars. The basic service tiers for a single seat
are as follows:

- $99 per month (or $948 for a year paid in advance) to host events with up to 100
  attendees;
- $399 per month (or $3,828 for a year paid in advance) to host events with up to
  500 attendees; and
- $499 per month (or $4,788 for a year paid in advance) to host events with up to
  1,000 attendees.

GoToWebinar also offers a free 30-day trial that you can use to take the service for a test drive
and make sure it fits your needs.

Note that this pricing is calculated on the basis of a single seat license. This means that you
must identify a specific individual within your organization who will be responsible for setting
up and administering all of the webinars within GoToWebinar. If you run a coaching business or
are otherwise a solo businessperson then this shouldn't be a problem. But if you run a large
business then you may wish to consider signing up for multiple licenses so that more than one
person can run the webinars.

GoToWebinar works on both PCs and Macs, although a few functions (such as specific
application sharing, multiple monitor support, and drawing tools – all of which we'll discuss
below) are not available for the Mac.

The Key Features of GoToWebinar

Before we go into detail on the nuts and bolts of using GoToWebinar, let's first highlight some of the key features of the service. You'll note that there are a wide range of options and tools available in GoToWebinar, and that's what makes the service so powerful. Different types of business can all benefit from using GoToWebinar in a way that's best for them.

- HD video conferencing. This is one of the newest features of GoToWebinar, and one of the most valuable. HD video conferencing (referred to as "HDFaces" within GoToWebinar) lets you conduct your presentations in high definition video, and share the video streams of up to six presenters or panelists simultaneously. You can also do sales and product demonstrations using this high definition streaming capability. Just think about how much more effective these demonstrations will be with crystal clear video.

  One video conferencing hurdle some users face is that many still think of video chat the way it was just a few years ago – low quality video that's fuzzy and jerky. Obviously a low-quality stream will impact the power of your message and make it more likely that your viewers will lose interest. But with GoToWebinar, as long as you have an HD WebCam you'll be able to use HDFaces.

- Full Desktop Sharing and Specific Application Sharing. One popular way to use a webinar service such as GoToWebinar is to give a demonstration by walking customers through the process of using your website or application. Rather than having to read instructions for how to use something, customers can watch along as you click through the process and see exactly how it works.

  With GoToWebinar you can share either your entire computer desktop with the people who are participating in the webinar, or you can share just a specific application that's running on your desktop. This lets you broadcast only what's relevant to the webinar, and help your audience stay focused.

- Change Presenters Instantly. If you are running an event with multiple presenters, you can quickly switch between them by using the Change button in your control panel. The presenter has the option to share his or her screen and applications.

There are numerous other features that are available when you sign up for a GoToWebinar account, and the easiest way to understand their value by discussing them in the context of setting up and running an actual event.

## Steps to Setting Up Your First Webinar on GoToWebinar

Once you've set up an account with GoToWebinar, it's easy to set up your first event. Let's run through the step-by-step process for doing so. When you first launch the GoToWebinar service you'll be asked whether you want to host a webinar right now or schedule a webinar for later. We'll walk through the steps for scheduling a webinar that you'll conduct at a later date.

Scheduling Your Webinar

After logging into your account, click the "Schedule a Webinar" link on the left side of your account page (under the "My Webinars" heading). You'll be asked to choose a title for your Webinar, write a brief description of what your webinar is about, the date on which you want it to occur, and the start and end time for the event. You'll also be asked if this is going to be a recurring event (so you don't have to schedule each recurring event manually).

Setting Webinar Options

Next you'll be asked to set up various conference options for the event you just created. You'll first choose the type of audio to be used during the event. If you use the built-in audio conference features within GoToWebinar, you'll be asked how your webinar participants will connect. Your choices are: VoIP (and the participant will need to have a microphone and speakers on their computer); a long-distance dialing telephone number; or a toll-free number. Enabling the toll-free number requires you to pay an additional fee.
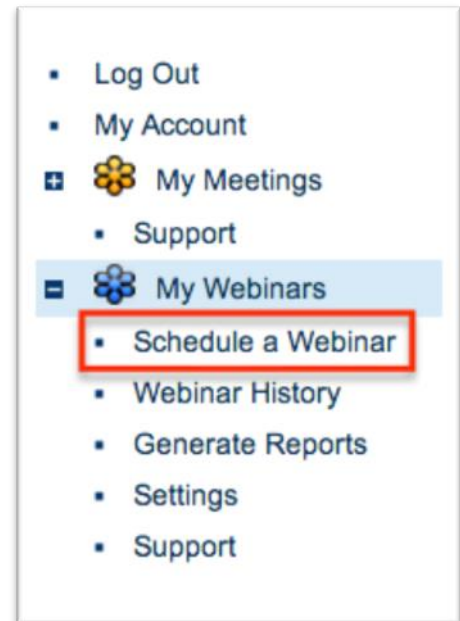
Schedule a Webinar

Enter the Webinar details below, then click Save and Continue.

See how to create a Webinar in 3 easy steps!

1. Webinar Details   2. Branding and Theme   3. Registration

Title & Description

Schedule Similar Webinar:
Choose one...   Manage List

Webinar Name:
New Webinar
117 more characters allowed. (128 max)

The description will be used in your Webinar Invitation Email and Registration page.

Date & Time

Start Date: **Start Time:**   **End Time:**
Wed, Jan 22, 2014   9:00   AM   10:00   AM

Time Zone:
(GMT-06:00) Central Time (US and Canada)

Recurs:
Does not recur

Audio

Edit audio conference options:

○ **Use built-in audio conferencing**
    Provide the following options to my Webinar participants:
     ☑ VoIP - Requires microphone and speakers
     ☑ Long distance number for: United States Edit
     ☐ Toll-free number Contact your Administrator

○ **Use my own conference call service**

Co-Organizers & Panelists (edit)

Other Organizer(s): None specified.
Panelist(s): None specified.

☐ **Require Webinar Password**

Save and Continue »

You can choose more than one of these options for a particular event, and it's generally a good idea to do so in order to give your participants the option to use whatever works best for them. Alternatively, you can use your own conference call service if you already have an outside provider.

Next you'll need to identify any other co-organizers or panelists that will be involved with the webinar. A "co-organizer" for a particular event has all the administrative rights as the primary

organizer, including the ability to start or end that event. Co-organizers must already exist in your account as an additional "seat." However, during the event you have the option to promote anyone to organizer status. "Panelists" include speakers or anyone else that will participate as a presenter during the event.

Finally, you can choose to set a password that will be required for access to the webinar. Your webinar is now set within GoToWebinar, and ready for you to begin at the time you've selected.

Branding Your Webinar

After you set up and choose the various options for your webinar, you'll be taken to a page for branding the event. (Alternatively, once you click the "Schedule a Webinar" menu option on the left side of your dashboard, you can click the "Branding and Theme" tab to customize the look and feel of a particular event.) Your branding options include the ability to upload your company logo to be included with the invitation to the webinar, and add a custom image that will be incorporated into the theme you use for the webinar.

Another aspect of branding and customization comes in the form of being able to set the look and feel of the webinar waiting room. The webinar waiting room is where your webinar audience will be directed when they navigate to your webinar but it has not yet begun. The

waiting room will include your custom image and logo, as well as information about the presenters (which may also include a picture of each presenter, if desired) who are scheduled to participate in the webinar. You can also set a standard or custom color to be used throughout the waiting room.

You can also add a custom message that the attendees will see when they first arrived in the waiting room. This is a great way to let participants know about any last minute changes to the webinar, or if you plan to begin the event a few minutes late.

Creating a Registration Form

For each webinar you create, you can set up a custom registration form that must be completed by anyone who wants to attend. At a minimum, this registration form will ask each potential attendee to enter their name and e-mail address. If you desire, you can also ask them to provide their telephone number, location information, job title, company name, or any other information that you want to require.

When you create this registration form you can also set GoToWebinar to either automatically approve every completed registration form upon submission (and e-mail a confirmation to each registrant), or to have you, as the webinar administrator, manually approve every registration. You might want to select this second option if you find that too many participants are viewing your webinar after providing bogus registration information. You can also choose to have a registrant redirected to a particular webpage (such as a "thank you" or "more information" page on your business website) after they register.

If you're a professional coach, or your business could benefit from conducting one-on-one webinars with individual clients, you may wish to make this registration form much more detailed (and request specific information) than if you're broadcasting a webinar to multiple

clients at once.

Inviting Webinar Participants

Of course, you need to tell your potential participants how they can sign up. Right after scheduling your webinar event, GoToWebinar will send you (as the webinar organizer) an email with your webinar invitation. You can edit this information and then send it out to all registered attendees. Recipients of your email can register for your GoToWebinar event by clicking the "Register Now" button that's included within the body of the email invitation.

If you decide to send out these invitations yourself, remember to add the email addresses as Blind Carbon Copies ("BCCs") rather than in the "To" or "Carbon Copy" ("CC") fields of your email client so that you're not disclosing the participants' email addresses to one another. If you use a mailing list service you can also coordinate (or simply cut and paste) the HTML e-mail into your list service.

Professional coaches who use GoToWebinar for one-on-one events can choose to work the invitation email into various types of client communications rather than using the default email invitation format.

Tracking User Registrations

The user registration tracking features within GoToWebinar allow you to see how many individuals open your webinar invitation e-mail, as well as a number of registrants whose registration request is waiting for approval (assuming that you've selected the option that all participants must be approved).

Log into your account and go to your "My Webinars" page, then the webinar that you want to track. If you click the number that's given under the "Registered" field you'll be taken to a window that lists all of the registrants by name, and also gives their e-mail address, the time and date on which they registered, as well as whether they have been approved or are still awaiting your approval. You can bulk approve or deny any group of registrants simply by checking the boxes next to their name and clicking the "Change Status" button.

Anytime you approve or deny a registration request, or change from one to the other, the registrant will receive an e-mail notification.

Additional Settings and Functions

There are also a few other features that you can use within each webinar after the initial set up. For example, if you go back to the "My Webinars" page and click on the "Change Session Settings" drop-down you'll notice that there are selections for "Polls" and "Surveys."

A Poll can be opened during the webinar by making the appropriate selection from your administrator control panel. This enables you to gain immediate feedback from your webinar participants, and possibly even use that to make adjustments to the direction in which you move the webinar.

A Survey can be created and sent to webinar participants before or after the webinar. (You can also create multiple surveys to send out both before and after – just be sure to not overwhelm your webinar participants.) Using surveys after a webinar can be a great way to get feedback on what you did right and what you could possibly do better next time.

This portion of the settings panel also allows you to adjust when reminder e-mails go out to all registered participants in advance of a webinar.

Survey for all sessions

New Question ❓
Question Type

[Choice - Single Answer   ⬍] Show me the Question Types

Question:

[   ]

Provide up to 5 answers.   **Answers:**

[   ]

[   ]

[   ]

[   ]

[   ]

▼ Create

Use Up/Down buttons to change   **Survey Questions:**
the order of appearance.
No questions created.   Edit

                                               Delete

                                            Up   Down

Options:

◉ Show after attendee exits Webinar.

◯ Include link to survey in follow-up email to attendees.

Save Changes   Preview   Cancel

Planning The Webinar

Note that while GoToWebinar provides you with an easy to use infrastructure to broadcast your webinar, you still must plan a professional and high quality event. If this is your first webinar, you may wish to consult with colleagues who have done them before in order to find out their views on what works and what doesn't. It's also worth thinking back to webinars you may have attended, and recalling the things you liked and didn't like.

Once you've broadcast your first webinar on GoToWebinar you can use the various reporting and feedback tools (which we will cover below) to fine tune your approach.

Starting and Running Your Webinar

When it's time to start the webinar that you've set up in accordance with the instructions above, simply log into your GoToWebinar account and select the appropriate event (if you have multiple events scheduled) from those listed on your dashboard. You do not have to wait until the schedule time to click the "start" button. In fact, it's a good idea to start your even about 10 minutes early so that you can be sure your audio and video are working. Your attendees (if they also log on early) will not be able to see or hear you until you click the "Start Broadcast" button from within your event.

   a.   Getting to Know the Control Panel

As soon as you start a webinar, you'll see the Control Panel that will enable you to run the event. At the very top of the control panel you are likely to see the message "Attendees Still on Hold" within a red box, and the clickable "Start Broadcast" button right next to that.

In the bottom of the control panel you'll see that the various webinar "staff" (which includes you, other co-organizers, and all presenters) are in a separate sub-conference from the webinar attendees. This allows the staff to discuss anything they need to do before the event actually begins. Attendees will only be able to hear the staff when you click that "Start Broadcast" button.

      b.   Screen Sharing and Drawing

As we briefly discussed above, one of the most powerful features of GoToWebinar is the ability to screen share with your audience. The functionality for doing this within the event is located near the top of the Control Panel.

The buttons for controlling the screen sharing function resemble the computer media player interface that you are likely already very familiar with. Clicking the Play button labeled "Show My" (which resembles a triangle pointing to the right) will share your screen with the audience. This allows you to demo a website or web service or
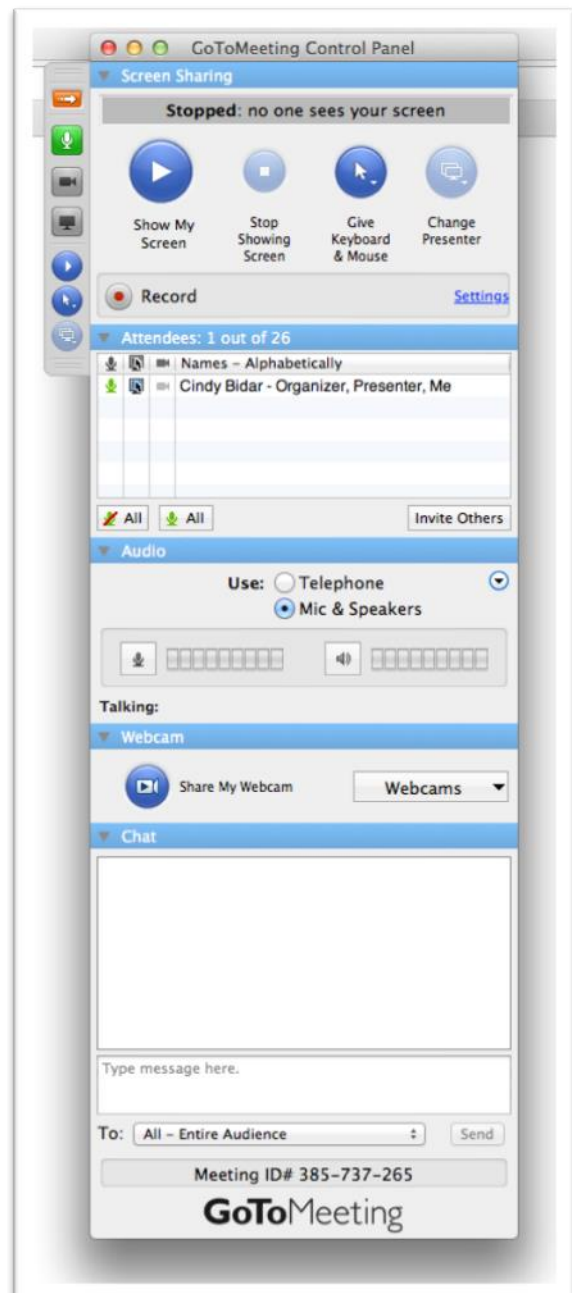
share anything else that's displayed on your screen. After you click the "Show My" button you'll notice that the drop down underneath lets you switch between your entire screen and a specific app on your screen.

This same display panel also has a button labeled "Change Presenter." This lets you switch which other co-organizer has control over the desktop (or app) sharing that the webinar attendees will see. You can even click the "Give Keyboard & Mouse" button and allow any of the other organizers to take control over your desktop for purposes of running the webinar.

A great display feature that you can use during a webinar is the integrated "Drawing Tools." You can access drawing tools by clicking the bottom button on the "presenter grab" tab (the vertical bar of icons) during a webinar. The drawing tools icon looks like a yellow highlighter. Once you click this, you can select a pen tool, highlighter tool, spotlight tool, or arrow tool. You can use these on your screen to focus the attention of all attendees to a particular area on your screen. Simply click the "Erase all drawings" selection to clear everything you've drawn on the screen.

c.   The Dashboard Menu

Clicking the "Dashboard" link will bring up a drop-down menu that shows various details about the webinar, including how long it's been live (and how much time you have remaining based on the duration you originally scheduled), how many attendees there are, how "attentive" they are (we'll talk a bit more on this later), how many polls you've taken, how many questions have been answered, and how many attendees currently have their "hands raised" (meaning that they want to ask a question to the presenter).

d.   The Audience View Drop-Down

The "Audience View" drop-down provides a thumbnail snapshot of the screen that the audience currently sees. This can be a great way for you to make sure that your display is being shown as intended.

e.   The Audience List

The "Attendee List" drop-down allows you to see every staff member and audience member that's currently part of the webinar. If you'd like to be able to allow an audience member to ask a question that the other audience members can hear, simply click the green telephone icon that's next to the audience member's name on the list.

f.   Live Polling

Earlier in this report we describe the steps you take in order to create a poll that you can give to audience members during a GoToWebinar event. When your webinar is live you can select the poll from the "Polls" drop-down menu of your control panel. You can create as many polls as you'd like, but be sensitive to overwhelming your webinar participants or distracting them from your presentation. Simply select the poll you want to give and click the "Launch" button. Once

everyone completes the poll, you can share the results with the entire audience by clicking the "Share" button.

You can even create a poll <u>during</u> the webinar by clicking the "manage polls" button and entering the necessary information. This can be a great method for involving your audience in a way that is particularly responsive to the discussion during the webinar. For example, if an audience member makes a particularly insightful comment or asks a highly relevant question, you can quickly follow up with a targeted poll to the rest of the audience members.

g. The Questions Panel

Directly underneath the "Polls" section of the control panel is a drop-down window labeled "Questions." This lets you review all the questions that have been submitted by webinar audience members through their interfaces. You can use this window to type out an answer to the question, and either respond privately to the individual who asked it, or respond to the entire audience. This lets you share the best and most valuable questions and responses with everyone, rather than just having to reply to the individual who asked. You can also delete questions that are off-topic or inappropriate.

h. The Chat Window

Finally, you can use the chat window to converse directly with your entire audience, and individual audience member or the other staff members that are involved in the webinar.

i. Practicing Your Webinar

The first time you log into your account and pull up your "My Webinars" page, you may notice that there is a button labeled "practice." This is a GoToWebinar feature that allows you to practice a webinar session with all of the panelists and organizers, so that you can make sure things flow exactly as you'd like. You can even click "practice" and run through a quick session before the webinar begins; when you are in practice mode, simply open your control panel and click the start button to make the webinar go live.

You can undock any of the windows from your control panel and position them in any other location on the screen. This makes it easy for you to set up your webinar administration in whatever way is most efficient for your needs. Don't worry about where your control panel screens are on your desktop. Even if you're sharing your screen with attendees, they can't see the GoToWebinar control panel.

After the Webinar

The time you put in after the webinar is over is in some ways more important than the webinar planning and preparation, and even the webinar itself. Once the webinar is completed you can ask the attendees for their feedback, get together with the presenters and other co-organizers to discuss what they thought went well (and what didn't), and you can review your own webinar statistics to see how your audience reacted.

Attendee Feedback

In an earlier section of this report we describe how to set up surveys that you could send to your attendees. A properly worded feedback survey sent immediately after your webinar is completed can be an invaluable source of information to help you improve future events. You can also get information about your attendees by generating different types of reports from within GoToWebinar.

GoToWebinar Reports

GoToWebinar lets you generate several different reports after your webinar is completed. Simply log into your account and click the "Generate Reports" button on the left navigation bar. There are several different kinds of reports available, and each can be downloaded in several different file formats. Here's an overview of the key report types:

- The Registration Report provides the demographic and other details for each of your registrants. This report will identify when each individual registered for the webinar, for example, so you can use this information to determine whether your promotional efforts were successful or not.

  For example, if most of your registrants only signed up in a day or two before the event, you can analyze what might have contributed to that behavior. You can also learn more about whether the recipients opened your invitation e-mail, or found your registration link through some other source.

- The Attendee Report provides a variety of information about each attendee of your webinar. Perhaps the most valuable piece of information is a metric that GoToWebinar calls the attendee's "Interest Rating." The Interest Rating is a number between 1 and 100 (1 being zero interest and 100 being the theoretical highest – though unattainable – level of interest) that measures each individual's interactions throughout the webinar.

  There are a number of factors that GoToWebinar uses to calculate the Interest Rating, including: how long the individual attended; the individual's

attentiveness during the session (i.e., were they using other applications on their computer while the presentation was live); the number of questions they asked; whether they completed any polls or surveys; and how much of the optional registration information they provided.

> The Attendee Report can be a great way to decide how to prioritize your follow-up efforts after the webinar. Individuals who exhibited the highest level of interest and participation are likely to be the first people you follow up with, for example. Furthermore, depending on the nature of the questions asked by different individuals, you might also wish to prioritize your follow-up efforts appropriately.

- The Performance Report is perhaps the best way to get a quick overview of your overall webinar performance. You can use this report to see the response rates for your polls and surveys, how many questions were asked during a session (and how many were answered), the percentage of registrants who attended, the average attendance duration, and various other performance metrics.

Recording Your Webinars for Archiving and Future Playback

Once you've started a webinar, click "view" at the very top of your control panel, and select the recording item from the drop-down menu. This will display the "Start Recording" button on your control panel if it's not there already.

You can elect not to record audio, use your own audio service to record, or use the integrated audio. Selecting this last option will record every one who speaks on the presentation, regardless of whether they are using a microphone or telephone log in, and this is likely to be the option you'll use most often. You also have options for video recording, including recording in the native GoToWebinar format (which is not compatible with Mac computers) or Windows Media Player format. Note that if an individual chooses to playback your webinar later and doesn't have Windows Media Player on their computer then they will be prompted to download the appropriate video codec.

Unlike some other webinar services, GoToWebinar recordings are created and stored on your computer, not on GoToWebinar. This makes it easy to upload your recorded webinars to your own website, an online video service, or even share it on your social network account.

* * *

Regardless of whether you use GoToWebinar to conduct individual client coaching sessions, training programs for your employees and contractors, large-scale promotional presentations, or all of these things, you're likely to find the process straightforward and efficient.

If you have specific questions about the GoToWebinar service you can visit the customer support and FAQ website at http://support.citrixonline.com/en_US/gotowebinar.