BEST PRACTICE

WEBINARS:
CREATING SUCCESSFUL TRAINING WEBINARS FOR YOUR AGENTS

Webinars are an effective way to train agents and deliver timely information about products, marketing and general best practices. Having a training webinar roster is also powerful for agent recruitment — agents appreciate an FMO that provides training. Webinars can be recorded and shared as needed, making them a valuable tool in your training arsenal.

PREPARING FOR YOUR WEBINAR

First, have an idea of the type of webinar you're hosting.

Type of Webinar:	Live Training	Overview or Carrier Update
Length:	Up to an hour	5 – 10 minutes
Notes:	Allow for Q&A time	Keep as short as possible

Next, you'll need to lay the groundwork for successful content.

1. Narrow down your topic and content. It could be a simple orientation video for new hires, a "Selling Medicare" guide, or a carrier update overview.
2. Write out your script. This part is important to make sure it meets compliance or carrier rules before you take the time to record any video.
3. Do a timed practice run of your script to confirm your target length.

GET YOUR SCRIPT APPROVED!

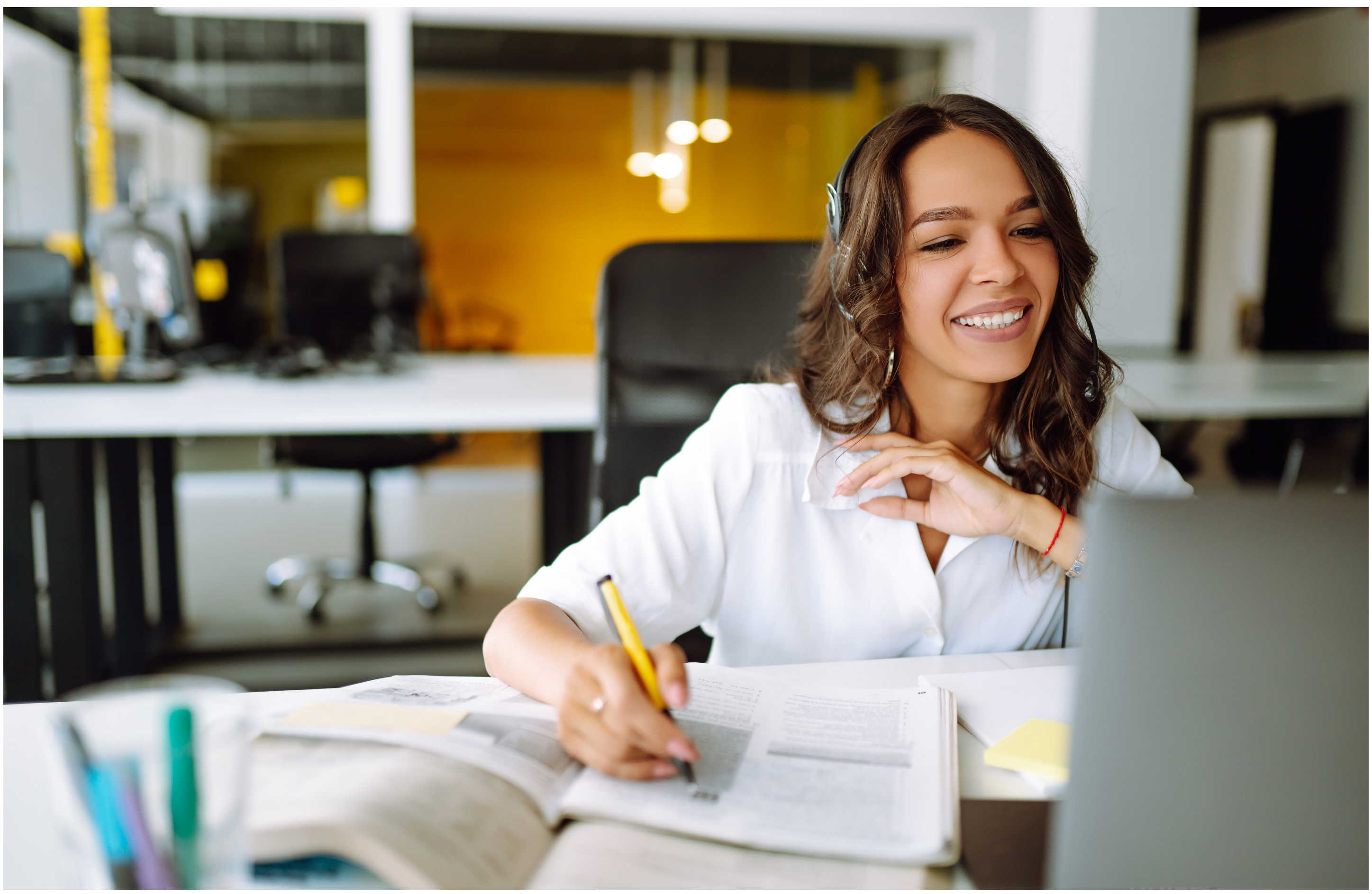
One of the most important steps to building webinars is compliance. Whether delivering general Medicare information or going over carrier plan updates, make sure you have your script approved by your Integrity compliance team or the carrier (if appropriate).

Getting your script approved is a far simpler process than creating your content and then submitting the final video. Review takes longer, and if revisions need to be made, you'll have to record again with a new script.

Once you have an approved script, it's time to schedule and record your webinar.

Before Your Webinar

- Make sure to invite guests and set up the space (virtual or physical) where you'll be filming.
- Provide a good summary of what will be covered in the training with time length required to attend or to watch the video.
- Gather key information you will need for follow-up post-webinar, such as:
  - First/Last Name
  - Email
  - Phone
  - NPN
  - Agency Name
- For all webinars, make sure you have all your notes and any on-screen resources ready to go.
- Recording your webinar to share out at a later time can be helpful as a tool to offer agents in a resource library.



For video appearances, you can follow these guidelines:

Lighting: Keep windows in front of you to avoid being in shadow.

Camera Height: Keep your camera lens at eye level. Use a stand, books, or raise your desk!

Background: Use your real background — blurring your background can be distracting.

Ambient Noise: Choose a quiet space with minimal background noise.

Clothing: Wear dark or muted colors that work well on camera. Test beforehand!

> **TIP:** For a more in-depth guide to looking great on video, download our "Using a Webcam for Effective Virtual Meetings Guide"

Keeping the Presentation Engaging

- **Have poll questions during the presentation.** This is a great way of gathering additional information from agents. Host can use the results of poll questions to add additional insights based on how agents answer questions.
- **Allow agents to ask questions in a chat box.** Set expectations on when/how you will answer questions. Let them know if they can ask during the webinar, or should wait until the end.
- **Prepare common questions ahead of time.** If no one has questions, you can pretend questions came in and ask your prepared questions. Agents will feel more engaged and remember key information.
- **Add graphics, chart, video, show a live demonstration.** This keeps attention better than a "talking head" presentation.
- **Bring in another subject matter expert.** Listening to two people can be more engaging and provide different information/ideas.

Finishing Your Webinar

Whether the webinar was live or pre-recorded, you can always add to a resource library and share out as needed. And remember, follow-up is key, to stay engaged with interested agents and continue to nurture your relationships with them. For live webinars, always remember to send follow-up messages to participants to thank them for attending.