Online Meeting Checklist

COMMUNICATIONS TEMPLATE SERIES

Disaster Risk Financing & Insurance Program

SUPPORTED BY
WORLD BANK GROUP

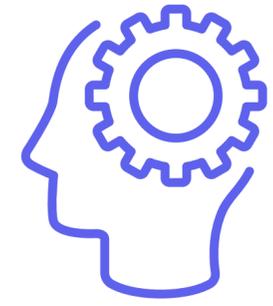# A webinar team usually includes these members:

Knowledge coordinator

Speaker coordinator

Speakers
(and discussants,
facilitator, etc.)

Technical support

14 Days Prior to the Webinar

Knowledge coordinator:

☐ Set up a virtual meeting (Webex/Teams/Webex events, etc.)

☐ Develop an invitation/announcement. This should have a short paragraph on the webinar, three learning objectives, and information about the speakers, discussants, technical support, and facilitators.

☐ Distribute an announcement to appropriate mailing lists.

☐ Reach out to technical support to ensure that recording for the event and the technical coordinator are set.

☐ Prepare emergency contact information.

Speaker coordinator:

☐ Send a personalized invitation to all speakers and ensure that you have their confirmed title and organization, biography, clear headshot, and emergency phone number.

☐ Set up a virtual meeting to discuss the content and flow for the event. This meeting should include the knowledge coordinator.

☐ Provide the standard webinar design template *(link here*)* to speakers to help design their slides.

EMERGENCY CONTACTS

Organizing team
Speaker coordinator:

Phone 1:   Phone 2:

Knowledge coordinator:

Phone 1:   Phone 2:

Speakers:

   Phone:

AV/IT support - 24x7 support

Internal: 5220-84336 | External: +1-202-458-4336

Call support for streaming, recording, and testing

Meeting information - Join using Webex Iink

   Meeting number:

Meeting password:

            Time:

      Zoom link:

      Teams link:

05 Days Prior to the Webinar

Knowledge coordinator:

- ☐ Send an information packet to the speaker coordinator. The packet should include the running order for the event and IT instructions to join the meeting (e.g., *how to join a Webex meeting).*

- ☐ When possible, please ask all speakers to download the desktop app (Webex, Teams, Zoom, etc.) and test their video and microphone.

- ☐ Send the reminder invitation to all mailing lists. Sometimes this can be done a week in advance.

01 Day Prior to the Webinar
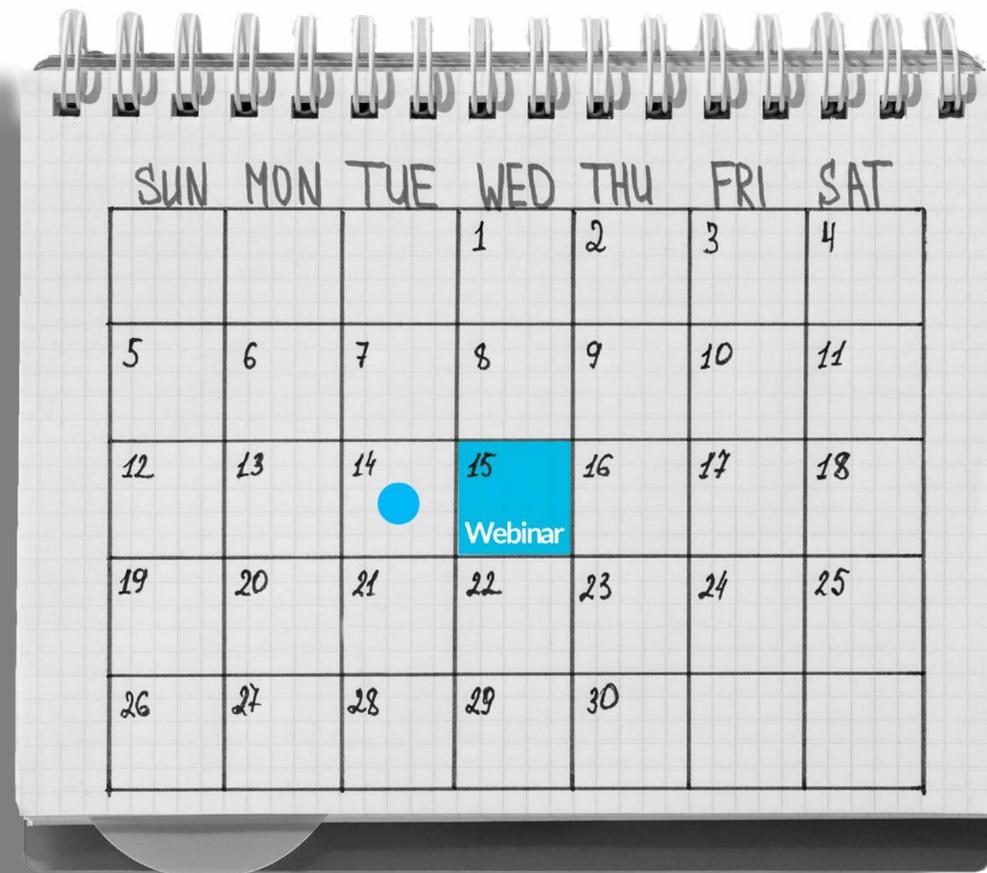
Knowledge coordinator:

☐ Consolidate the final presentation slides and let the speakers know that the slides will be controlled by the knowledge coordinator.

☐ Inform speakers that when presenting, they will need to give the signal "next slide please" to allow the knowledge coordinator to move the slides while they speak.

☐ Brainstorm a list of backup questions for the Q&A session. Plan for a maximum of three backup questions.

Speaker coordinator:

☐ Run a practice session (if necessary) to practice slide transitions, polls, breakout rooms, etc.

☐ When necessary, involve the technical coordinator to walk through the technology with the webinar team.

☐ Send the reminder invitation to all mailing lists.

30-60 Minutes Prior to the Webinar
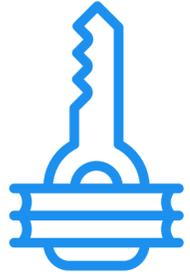
☐ **Have the full webinar team log into the webinar.**

☐ **Send the reminder invitation to all mailing lists.**

Knowledge coordinator:

☐ The knowledge coordinator will hold the "host" rights on the event.

☐ Check the Mute on Entry box and unclick Anyone Can Share under the Participants dropdown menu. This step ensures that only the assigned host can share the screen. In smaller meetings, when participants are expected to share their screen, the host can always check Anyone Can Share.

☐ Perform an audio and video check to ensure that the speakers (especially external speakers) and discussants are clearly audible and visible. All those with a speaking role should have their videos turned on.

☐ For technical glitches, reach out to IT 24X7 support (See the prepared Emergency Contact information).

☐ Upload the final PowerPoint and choose Share a File. This step showcases only the PowerPoint, not your whole screen, thus allowing the host to multitask—e.g., type messages in the chat box.

☐ Load polls and keep them ready to use during the session (when applicable).

☐ Press Record to start video-recording the session (when applicable).

☐ Let participants know—by voice as well as through the discussion box—that they need to mute themselves to avoid noises. Please mute yourself unless it is necessary to be unmuted.

☐ When it is time to start, notify the chair to start the session

During the Webinar

Knowledge coordinator:

Type the greeting message in the chat box when the chair is providing opening remarks.

Greeting message:

Dear participants, welcome to [name of webinar]. Please type questions and comments for the speaker in the chat box. If you are addressing a specific speaker, please use this format: Name of speaker; question. We will try our best to address your questions in the Q&A session. Thank you for muting yourself to avoid background noises while a speaker is presenting.

Type the reminder message in the chat box when discussants are expressing their opinions.

Reminder message:

Dear participants, we are collecting questions for the Q&A session. Please type your questions in the chat box. If you are addressing a specific speaker, please use this format: Name of speaker; question. When possible, please also indicate your name and affiliation. We will try our best to address your questions. Thank you!

- When applicable, curate and read questions aloud from the chat box during the Q&A session. When necessary, use backup questions prepared in advance to ensure continued interaction.
- Type the thank-you message when the chair is delivering the closing remarks.

Thank-you message:
On behalf of the Disaster Risk Financing and Insurance Program, we thank you for your participation in [name of webinar]. We enjoyed hosting you virtually. If we were unable to answer your questions during the Q&A session, we will try our best to do so off-line through direct follow-up with you. Please note that the presentation slides and a recording will be shared with all registered participants.

Before Closing the Webinar

Signing Out?

Yes   Cancel

Knowledge coordinator:
☐ Save the information collected through the polls.
☐ Save the information collected through the Q&A session.
☐ Stop recording the session.
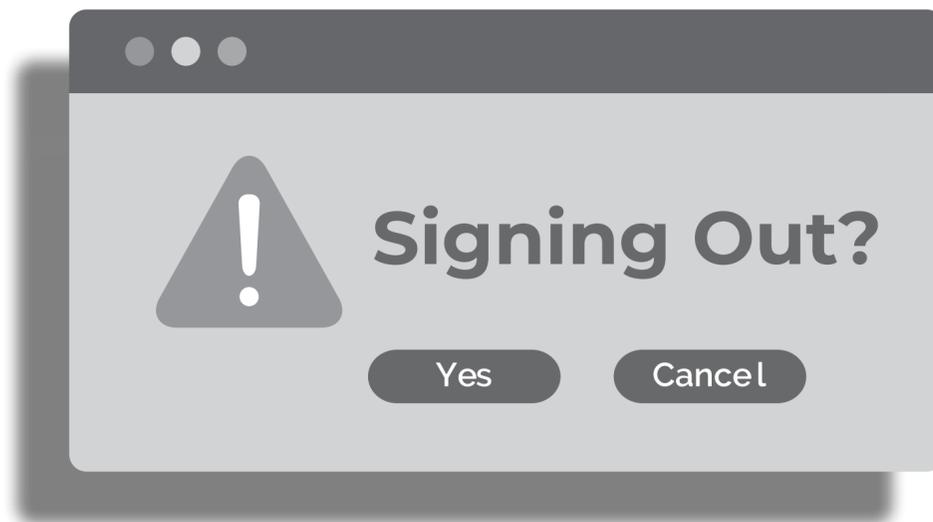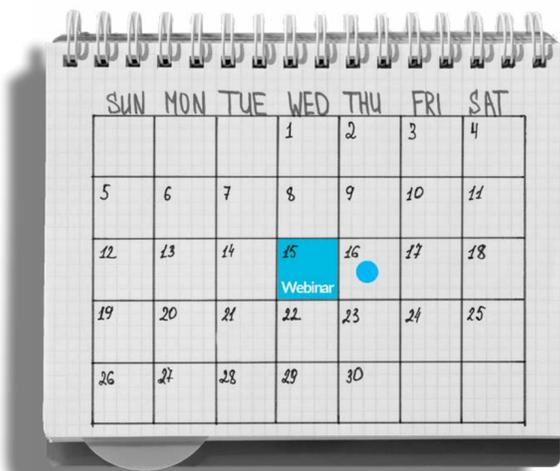
01 Day after the Webinar

Knowledge coordinator:

☐ Develop the post-event resources announcement with the slides, recording, and any relevant information.

☐ Send a personalized thank-you email to everyone in the webinar team as well as the speakers.

Services to be provided by the knowledge team (please check all that apply)

☐ Develop announcement/invitation.

☐ Send email blast of announcement/invitation.

☐ Coordinate design of final deck.

☐ Schedule practice session (1 day prior).

☐ Schedule technology walk-through (1 day prior).

☐ Act as meeting host (handle recording, polls, support with chat box).

☐ Handle meeting facilitation (emcee the event; facilitate Q&A session).

☐ Send post-event resources email.

☐ Develop and publish an external feature (on Financial Protection Forum, COP [Community of Practice] newsletters).

☐ Develop and publish an internal feature (on DRFIP team news, COP internal list).

For more information, please contact:

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pli2@worldbank.org

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& Insurance Program
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