

LESSONS LEARNED IN PLANNING AND EXECUTING WEBINARS THAT PROVIDE VALUABLE TRADE-RELATED INFORMATION TO MARKET ACTORS

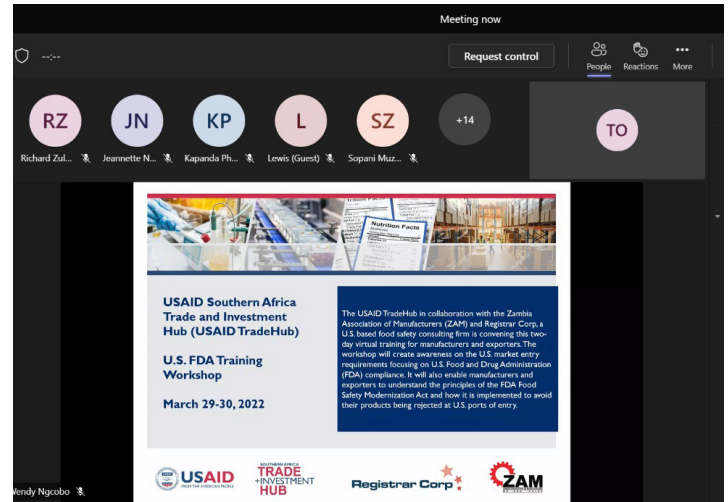
OVERVIEW

From the onset of COVID-19, many actors in the trade promotion sector, including the USAID TradeHub, have had to pivot to digital forms of delivery to overcome challenges posed to trade facilitation by restrictions on gatherings and travel. Virtual events such as meetings, workshops, webinars, trade shows, expos, and buyer missions have therefore become commonplace. From March 2020 to March 2022, the USAID TradeHub hosted or co-hosted 116 virtual events.

Organizing these activities has enabled the USAID TradeHub to gain valuable insights into how best to ensure that these events are well delivered, achieve intended outcomes, and meet audience needs.

WHAT IS A TRADE-RELATED WEBINAR?

A trade-related webinar, as hosted by the USAID TradeHub, is intended to impart useful information to stakeholders in the trade and trade-facilitation ecosystem. These stakeholders could include export firms, buyers, distributors, trade promotion agencies such as business membership organizations (BMOs), trade promotion service providers (TPSPs), financial service providers (FSPs), certification bodies, standards authorities, and African Growth and Opportunity Act (AGOA) reference groups. Themes typically covered at these webinars include market-entry requirements for South Africa and the United States, certifications, U.S. Food and Drug Administration (FDA) label reviews, and lessons and experiences from exporting. Resources often presented at these webinars include the Regional Cross-Border Trade Toolkit, the AGOA Export Manual, and trade platforms such as the African Trade Platform (ATP) and the Netcampus Digital Financial Learning Solution.



TIPS TO CONDUCTING A SUCCESSFUL TRADE-RELATED WEBINAR

- Expected outcomes of the webinar are clearly articulated
- The design of the webinar is co-created by the key participating agencies or experts
- The webinar presentations are delivered by topic experts who are very knowledgeable about the topics under discussion
- The webinar invitation is disseminated to the target audience well ahead of time, especially through partner networks
- The webinar is delivered via the most appropriate platform (for example, Zoom supports simultaneous translation and is therefore often best suited for multi-language webinars)
- The webinar registration solicits questions from attendees so speakers can be better prepared to respond
- The webinar is preceded by a dry-run to enable the planning team to ensure accuracy of technical content, troubleshoot audio-visual elements, and practice the flow of speakers and presentations ahead of the event.
- The webinar enables some form of interaction between participants and speakers, whether through a panel discussion, a Q&A or interactive polling.
- The webinar concludes with clear “next steps” or follow-on communication

Figure 1. Process map for hosting a webinar



Reflection on the various platforms and what they offer – Zoom vs MS Teams

At the time of this publication, the most popular platforms in use for webinars are Microsoft Teams and Zoom. The digital platforms on offer have different attributes and as such it is important to consider which ones may be more appropriate for a particular webinar or event. For example, Zoom and Microsoft Teams will be most suitable for many webinars because they will likely be more easily accessible to a majority of attendees. However, between the two, only Zoom supports simultaneous translation and is therefore the best suited for webinars conducted in multiple languages.

Name of Platform	Breakaway Rooms Supported	Registration Supported	Recording and transcription Supported	Simultaneous Translation
Microsoft Teams	Yes	Yes	Yes	No
Zoom	Yes	Yes	Yes	Yes
Hopin	Yes	Yes	Yes	No

I. PRE-WEBINAR PLANNING

STEP I

The brainstorming session is a meeting to discuss the proposed webinar and an opportunity to ensure that all parties involved in organizing the event understand its purpose. It should have a chairperson to lead the discussions, and a note taker to ensure that all the discussions, and most importantly, the agreements and way forward, are clearly documented. Ideally, this session should take place at least a month before the proposed event is held. Figure 2 below is a sample a webinar planning sheet.

Figure 2. Sample Webinar Planning Sheet

WEBINAR PLANNING SHEET

PROPOSED TITLE OF WEBINAR:

- Name of Requestor and department:
- Background:
- Objective:

Work plan milestones to be addressed by this activity:

- Activity milestones, outcomes, and outputs

Indicators to be addressed by activity:

- Technical assistance (firm and persons); application of technical assistance (firm and person).

Monitoring Evaluation and Learning (MEL) agenda:

- MEL actions before the event:
- MEL actions during the event:
- MEL actions after the event:
- MEL event report deadline:

Proposed Event/Webinar Date:

- Time:
- Target Audience:
- Platform:
- Moderator:

External dry run:

- Date:
- Time:

Internal Dry Run:

- Date:
- Time:
- Dry run links:

STEP 2 – PLAN THE WEBINAR

The below checklist in Figure 3 can be used after the brainstorming stage to continue the webinar planning. This ensures the organizer has all the resources and support they need before the event takes place. These needs can also be cross-checked during a dry run and therefore this list must be used during this step.

Figure. 3 Sample Checklist for hosting a webinar

Name of Event: Proposed date:

	Item	Yes/No	Responsible Person	Status/ Comments/ Timeframe
Brainstorming Stage				
1	Is the date confirmed?			
2	Who will create/disseminate the invitation link?			
3	Are there any partner organizations involved? If yes, what is the branding requirement for developing event materials?			
4	What are these materials and who will produce them? • Invitation flyer • Agenda			
5	What are the proposed channels to disseminate these materials?			
Planning Stage				
11	Are there preparatory materials needed? • Talking points • Delegate bios and photos • Press release • Media factsheet • Social media post • Presentations			
12	Will the media be present?			
13	Who is responsible for inviting the media?			
14	Who will record the event?			
15	Who is responsible for engaging the Audio Visual team?			

STEP 3 -SCHEDULE A DRY-RUN?

The dry-run is a critical pre-event task that ensures that the organizers can test the various technical and coordination aspects of the event to have a seamless session. As it involves simulating the actual event, all planning should be completed by the time a dry-run takes place. The dry-run should be held at least 24-hours before the event, and should take place on the same digital platform to be used for the main event and from the same venue, if

a hybrid event. The stakeholders who should be present for the dry-run should therefore be:

1. The moderator or master of ceremonies
2. All speakers and presenters
3. The technical support person(s)
4. Participants who do not have a speaking role

Figure 4 provides a list of the requirements for organizing and hosting a successful dry-run and should be completed during the dry-run.

Sample Dry-run Organizing Sheet

Task/Activity	Person Responsible	Status
Are all the speakers, moderators, or presenters present for the dry-run?		
Are all the speakers able to connect and or project their slides and have clear audio/video when speaking?		
Are there any corrections or additions that need to be made to the presentation slides? Have all names and titles been captured correctly?		
Have all the finalized presentation materials (slides, audio visuals) been submitted to the designated technical support person?		
Is there a back-up in place for each speaker?		
Are there any further details all speakers should be aware of? Such as receiving pre-submitted questions from the audience?		
Is there a WhatsApp group with all the speakers to coordinate the event proceedings?		
Do all the speakers have the link to the actual event?		

2. WEBINAR DELIVERY

The webinar itself should run as per the agreed agenda from the brainstorming, and also adhering to any final adjustments made during the dry-run. During the webinar, the organizers should conduct the following activities:

1. Record the webinar for dissemination after the event.
2. Maintain a register of the actual participants. Participants in a webinar may be different to those who have RSVP'd. As such, it is important for monitoring, evaluation and learning purposes to reflect the correct number of participants in the event.
3. Monitor hands-raised and questions posed in the chat function of the platform. Very often, the moderator or facilitator of the webinar requires support in the form of someone monitoring hands that are raised by participants on the virtual event platform (indicating that a webinar participant would like to ask a question). The moderator may also require support with monitoring the questions or comments posed in the chat function of the webinar platform. The organizers should determine if such support is required and if someone within the organization can support during the webinar.

Sample Webinar Agenda

Time (SAST)	Activity	Responsible
15h00 – 15h10	Welcome and Opening	Moderator
15h10 – 15h20	Introduction of Guest Speakers	Dagmar Honsbein, Acting Secretary General, Namibia Network of the Cosmetics Industry (NANCI)
15h20 – 15h35	Presentation: Preparing for and Undergoing an Organic Certification Audit	Daniel Kotze – ECOCERT South Africa Country Manager
15h35 – 15h40	What you wish you knew when you started the organic certification process: Practical insights	Tris Lahti and Hangara Ruviana (General Manager) – DLG Naturals
15h40 – 15h50	Presentation: The Business Case for Organic Certification	Gerrit Struyf, Matebeleng Milling, and Botswana Country Representative, USAID TradeHub
15h50 – 16h00	Q & A	All
16h00 – 16h10	Updates and developments	Fair & Square and African Trade Platform
16h10 – 16h20	Closing Remarks	Frances Fraser, Portfolio Manager – Botswana, Namibia, and Malawi, USAID TradeHub
16h20 – 16h30	End of Session	

3. POST-WEBINAR DELIVERY

STEP 1 – Host a debrief session

The debrief is an important post-event learning activity that enables all parties involved in putting together the event – organizers, moderators, speakers – to discuss feedback on how the event proceeded. The debrief should ideally take place on the same day as the event, to capture

reflections while they are still fresh in the minds of stakeholders. The debrief should have a chair and a note taker and should be conducted in the spirit of learning and improving. The debrief is also an opportunity to decide on necessary post-event tasks to undertake, and to assign these tasks to a designated responsible person and set clear deadlines. The note taker should endeavor to send out the minutes of the debrief session within a day of the session.

Sample Debrief Note-taking Sheet

DEBRIEFING SESSION:

Date	January 27, 2022
Location	MS Teams
Participants	
Apologies	
Meeting Chair	
Note taker	

MEETING MINUTES

1. Welcome and apologies
2. Meeting Agenda

Discussion points

What went well?

Areas of improvement

3. Wrap up and next steps

Action Items	Person Responsible	Deadline
Send out post-event email to participants		
Share presentation and recordings		
Develop thank you letters for speakers		
Analyze post-event evaluation form		

STEP 2 – POST WEBINAR

POST WEBINAR COMMUNICATION

It is important that the necessary actions are performed after the webinar or event to ensure the expected communication is received by all the relevant stakeholders. These should include sending out an email to all participants with the information that they are expecting to receive. These could include:

1. Presentations made
2. Link to the recording of the event
3. Responses to any outstanding questions from the session
4. Next steps following the event