**Checklist For**

**Selecting Web Event Software**

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**INTRODUCTION**

This document presents a high-level checklist of key considerations that you can reference as you evaluate webinar or webcast vendors and products. The considerations presented here will almost certainly be overkill for selecting basic peer-to-peer web meeting software. I am focusing on support for structured one-to-many or few-to-many web presentations.

This is not intended to be an RFP (Request For Proposal) template itself. Your priorities, constraints, and uses for the web event software will dictate which items to include and how much weight to place on the different responses. You will see items in this list that do not apply in your unique situation, and you should be ready to ignore those that are unimportant or inapplicable to you.

When soliciting responses from vendors, try to avoid simple Yes/No or checkbox answers. The more commentary or specifics you can get, the better your comparison can be. To illustrate with one example, consider the difference between these two questions:

1. Do you support interactive attendee polls in a meeting? Yes/No
2. List the types of interactive attendee polls you support in a meeting. Describe limits on number of answer choices, types of questions supported (eg: single response, multiple responses, essay, drop-down). Describe options for display (eg: absolute votes, percentages, graphical). List any unique features that should be considered in comparison to competitors.

As a former software vendor myself, I would like to make one last request. Please do not make reference contacts a part of your preliminary request. Wait until you have narrowed your candidates to one or two front-runners who satisfy your other criteria, then ask those vendors for references as a final checkpoint. This helps reduce “reference fatigue” and unnecessary calls to reference sources.

To be perfectly honest, the vendor is always going to point you to a happy, satisfied customer. I prefer trying to solicit opinions from the internet community to hear unfiltered positives and negatives. Some of the best resources are LinkedIn groups, including:

* “Web Conferencing Professionals” (Over 2000 members)
* “Webcasting & Webinar Professionals” (Over 2000 members)
* “Sales + Marketing Collaboration Community” (Over 4000 members)

If people are hesitant to make public responses in these groups, you can also invite them to send you email. I recommend using one of the many “disposable email” services available on the web (just Google that term). You can then publicly post the email address without worrying about spam attacks.

**ESTABLISH YOUR PRIORITIES**

Start by clarifying your probable use cases for the web event software. This helps you pare down which questions are necessary or important for you and helps vendors recommend the right solution and licensing model for your needs.

1. **What will the software be used for (commonly vs. occasionally)?**
   * Formal educational courses
   * Formal sales/marketing demonstrations
   * Informal demonstrations and training
   * Internal all-hands presentations
   * Marketing and lead generation
   * Public outreach
   * Media/investor relations
   * Selling products/services
   * Interactive discussions/brainstorming/meetings
   * Other (list)
2. **What frequency of use do you foresee?**
   * Daily
   * Weekly
   * Monthly
   * Quarterly
   * Annually
3. **Do you need the ability to run 2 or more web events at the same time?** 
   * No
   * 2
   * 3-5
   * 6+
4. **Who is likely to schedule or set up web events in your organization?**
   * One central coordinator
   * A limited number of specific people
   * Large numbers of people as needed
5. **Who is likely to host/moderate web events in your organization?**
   * One central coordinator
   * A limited number of specific people
   * Large numbers of people as needed
6. **How many attendees do you foresee as likely for your web events?**
   * Most common
   * Peak
7. **Does your IT department want oversight of the software or should this remain a user-controlled application?**
   * If IT will be involved, find out their preference for on-premise software installation versus cloud-based (aka: SaaS, web-hosted) availability
8. **Do you plan to charge for attendance at any web events?**
   * Through your own “shopping cart” system
   * Through the web event software
9. **How do you need to provide access to recordings?**
   * No need
   * Online, unsecured, public access
   * Registration, tracking, reporting on viewers
   * Secured by password or validated viewers
   * Ability to download, edit, and host outside of the vendor’s system
   * Fee-based viewing (vendor payment system / your own shopping cart)
10. **Do you need to support webinars in languages other than English?**
    * No
    * Allow presenters/attendees to see conferencing controls in their local language
    * Allow in-event captioning in choice of languages
    * Allow simultaneous translation by interpreters
    * Provide technical support in multiple languages
11. **Do you need to integrate with other software/systems?**
    * Customer Relationship Management
    * Sales Management
    * Marketing/Communications
    * Learning Management System
    * Payment/Shopping Cart
    * Other (list)
12. **Do you need to comply with European GDPR data security regulations?**
    * Yes
    * No

**List the priority/importance of the following items:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **No interest** |  |  |  | **Critical** |
| ADA/Section 508 support |  |  |  |  |  |
| Attendee access to live web pages |  |  |  |  |  |
| Attendees able to speak on air |  |  |  |  |  |
| Convenience for multiple presenters in a single event |  |  |  |  |  |
| Cost |  |  |  |  |  |
| Customizable registrant emails |  |  |  |  |  |
| Customizable registration pages |  |  |  |  |  |
| Demos/screen sharing |  |  |  |  |  |
| In-session interactive polls |  |  |  |  |  |
| In-session scored tests/quizzes |  |  |  |  |  |
| In-session Twitter integration |  |  |  |  |  |
| Integration with external systems |  |  |  |  |  |
| International phone access (toll free?) |  |  |  |  |  |
| Live video of attendees |  |  |  |  |  |
| Live video of presenters |  |  |  |  |  |
| Login security for attendees |  |  |  |  |  |
| Multilingual product/support |  |  |  |  |  |
| On-demand access to event recordings |  |  |  |  |  |
| Payment processing (external or in-product) |  |  |  |  |  |
| Phone/streaming audio integration |  |  |  |  |  |
| Post-webinar surveys |  |  |  |  |  |
| Presenting Microsoft Office documents |  |  |  |  |  |
| Presenting PowerPoint |  |  |  |  |  |
| Presenting prerecorded content as a live presentation |  |  |  |  |  |
| Presenting Prezi, Keynote, etc. |  |  |  |  |  |
| Presenting recorded audio/video clips |  |  |  |  |  |
| Quick learning curve for attendees |  |  |  |  |  |
| Quick learning curve for hosts/admins |  |  |  |  |  |
| Quick learning curve for presenters |  |  |  |  |  |
| Typed question management |  |  |  |  |  |
| Vendor assistance with event marketing/promotion |  |  |  |  |  |
| Vendor assistance with in-session attendee technical support |  |  |  |  |  |
| Vendor assistance with in-session host/presenter technical support |  |  |  |  |  |
| Vendor assistance with product training |  |  |  |  |  |
| Vendor production services and moderating |  |  |  |  |  |

**COMPANY**

* **Longevity**: How long have they been in business?
* **Stability**: How many employees do they have? Can they survive normal turnover and attrition?
* **Responsiveness**: How easy is it to contact them? How long does it take to get a response? Are questions answered in a straightforward manner?
* **Presence**: Are there recent and historical press releases, news articles, blog posts, or web updates?

**SUPPORT**

* **Availability**: What days/hours is support available? Optional extra-charge after hours event support? What channels are available (phone, email, web chat)?
* **Locations**: Are there local offices in your target countries? Is support offered in other languages of interest?
* **Attendee Login Support**: Does the vendor offer direct support for attendees having problems logging into your event?
* **Ticket Tracking/Updates**: Can you check status of reported bugs or get updates on resolution or scheduled fixes?
* **Upgrades**: Are upgrade releases announced and documented? Are product changes/fixes incorporated on the fly? Is there notification when something changes that would affect your instructions/documentation?

**LICENSING**

* **License Models**: What payment options are available (per event, month-to-month, annual)? Are you charged per named host account or is there an option for unlimited hosts on an enterprise license?
* **Capacity/Overflow**: How does pricing correlate with maximum event participation? What is the behavior/pricing when capacity is reached (lockout, overflow pricing)?
* **Recording Charges**: Does the vendor host your recordings? Is there a hosting lifespan and can it be extended for a recording? Are you charged per recording, per minute, per view? Can recordings be converted/downloaded for external use? Is there a charge for this?

**SERVICES**

* **Branding/Customization**: Will the vendor set up your account with branding, colors, text, etc?
* **Event Production**: Can the vendor schedule your event, run rehearsals and presenter familiarization, run post-webinar reports, etc?
* **Moderating**: Can the vendor supply a technical moderator to manage and support the live session?
* **Integration**: Will the vendor integrate the product with your desired systems (payment processing, registration, reporting, sales force management, CRM)?
* **Product Training**: Will the vendor supply product training for hosts/presenters?
* **Promotion/Marketing**: Does the vendor provide promotion assistance for your event?
* **Payment Processing**: Can the vendor accept paid registration for events?
  + Are funds collected and redistributed to you, or do they go directly to your merchant account?
  + How much does the vendor charge you?
  + Can you charge viewers for on-demand playback of recordings?
  + Is there built-in functionality for processing refunds?

**PRODUCT**

* **Technical Requirements**:
  + What is the minimum and recommended hardware requirement to host, present, and attend a web event?
  + If the product requires Flash, Java, or other installed platform software, what are the minimum and recommended version levels to host, present, and attend a web event?
  + If web-based, which browsers and versions are supported?
* **Hosted Availability**:
  + How many service interruptions occurred over the last 12 months?
  + What was the longest duration for an interruption?
* **Maximum Capacity**:
  + What is the largest audience size that can be handled?
  + Does capacity vary based on use of streaming video, screen sharing, other? Is performance impacted by number of participants?
* **API**:
  + Is there a published API for integration with external systems?
  + Does the vendor offer documentation and support?
* **Branding**:
  + Can you change colors & logo displayed in an event?
  + Can you change branding of emails sent from the conference system?
  + Can you include click-through to a web page?
  + Is rebranding under user control or does it require vendor interaction?
  + Can you set a web page for display after registration or upon exiting/ending an event?
* **Volatility**:
  + Can a meeting room be configured ahead of time with content so it is ready to use in an event? Or must content be shared/loaded/configured at event time?
* **Layout**:
  + Is the displayed content layout configurable?
  + Can it be changed during an active event?
  + Can multiple pieces of content be displayed and interacted with simultaneously?
* **Presentation Slides**: Does the product display presentations via upload or screen sharing? If via upload, check the following:
  + Which PowerPoint versions are supported?
  + Are Keynote, OpenOffice, or other formats supported?
  + Can you replace a single slide in an uploaded presentation?
  + What is typical upload/conversion time for a presentation?
  + Is the slide display resizable, or in a fixed window?
  + Does it display PowerPoint animations and slide transitions? Timed animations?
  + Are hyperlinks on slides active in the display area?
  + Are embedded sounds and videos supported?
  + Can multiple slide decks be uploaded for use within a session?
  + What slide navigation is supported? By keyboard arrow? By mouse click? Direct access by slide number, slide title, or thumbnail image?
  + Can presenters see slide notes?
* **Screen Sharing**:
  + Can you choose to show full screen, a defined region, or a named application?
  + Can you select which monitor gets shown in multi-monitor setups?
  + Can you pause and continue the shared stream?
* **Roles**:
  + Does the product support the concept of roles (eg: Host, Moderator, Presenter, Attendee) with different authority levels and functionality?
  + Can messages be shared to or among all participants within a given role?
* **Multiple Presenters**:
  + Is control exclusive to one presenter at a time, or simultaneous for all?
  + Can a presenter control another presenter’s mouse/keyboard during screen share?
* **Chat**:
  + Can presentation team members share chat that attendees can’t see?
  + Can host/presenter initiate a private chat with an attendee?
  + Is there a choice to make attendee chat public or private? Can it be switched during an active session?
  + Can attendees initiate private chat with the host/moderator?
  + What is the lag time for display of new chat messages?
  + Can presenters/hosts send chat announcements to all attendees?
  + Can chat messages be individually deleted from the queue?
  + Can multiple chat messages be deleted/cleared at once?
  + Are deleted messages retained in post-session reports?
* **Q&A**:
  + Does the product separate the concept of Chat and Questions?
  + Can questions be marked/annotated by the presentation team to indicate priority, assignment, etc?
  + Can questions be answered privately or publicly as desired?
  + If a question is answered publicly, is the question redisplayed to all attendees? With or without the submitter’s name?
  + Can questions be individually deleted from the queue? Deleted/cleared in a group?
  + Are deleted questions retained in post-session reports?
* **Annotation**:
  + Can you annotate on top of slides? On top of screen share?
  + What symbols/annotations are allowed?
  + Can multiple presenters annotate simultaneously?
  + Can annotation control be granted/revoked to a single attendee? To all attendees?
  + Can presenters change annotation color?
  + Can a single annotation be deleted? Moved on the screen?
  + Can all annotations be removed quickly and easily?
  + Do previous slide annotations remain if a slide is revisited?
* **Co-browsing**:
  + Can you display an active web page that allows attendee interaction?
  + Can you resynchronize attendees with your web page when desired?
* **Polling**:
  + What types of polls are supported (single-answer, multiple-answer, text, slider, scoring, etc)?
  + Is there a maximum number of answer choices per poll?
  + Can you create polls on the fly during an active session?
  + Can polls be created ahead of time and stored for use in a session?
  + Are any standard polls provided by the vendor for quick selection in a session? (Yes/No, Very good -> Very bad, etc)
  + Do polls overlay/replace slide or screen share display?
  + Can a poll remain open for continuous voting while a presentation continues?
  + Does the host have an option to display dynamic results during voting, or only after voting is closed?
  + Can results be shown as raw # of votes? Percentage of total? Both?
  + Can results be shown as a bar graph or pie chart? Is this selectable?
  + Can results of a poll be redisplayed later in a session for reference?
  + Do reports capture both cumulative results and individual votes?
* **Recording**:
  + Can recording be paused and continued during a session?
  + Can one recording be saved and a new recording started during a session?
  + If the host forgets to stop the recorder, does the recording automatically end and save when the web event is ended?
  + Does the product record to local disk or to a server location?
  + Is recording in a public or proprietary format?
  + Can recordings be saved in a public format for editing/redistribution?
  + Does the product include a recording editor?
  + What content is included/excluded in the recording? Does it show exactly what a live attendee would have seen?
  + Can recordings include interactions such as polls, co-browsing, or live hyperlinks?
  + Can playback include registration, password protection, or pay-per-view?
  + Can playback continue from where the viewer previously left off?
  + Can a viewer jump around in the playback? By time slider? By slide name/number? By an arbitrarily inserted chapter or bookmark?
  + Does recording require any local or host-based post-processing before availability? What is a typical turnaround time?
* **Pre-recorded Audio/Video**:
  + Can you upload video or audio clips from local disk for playback in a session?
  + Can you play video or audio clips from the web during a session?
  + What formats are supported? Do they require conversion before use?
  + Is playback synchronized for all attendees or can buffering cause some to begin/end at different times?
* **Video Streaming**:
  + Does the product accept webcam feeds without an external encoder?
  + Does the product accept externally encoded video feeds?
  + Does the product accept and display both 4:3 and 16:9 formats?
  + Is video size and position fixed, or changeable by the host or attendee?
  + How does the product handle slower connections/computers? Dropped frames? Lower frame rate? Buffering? Lower size/bitrate?
  + Does the product repoll each attendee connection and raise/lower video performance accordingly?
  + How many video feeds can be accepted in total?
  + How many video feeds can be displayed simultaneously?
  + Can attendees have video rights granted/revoked individually or as a group?
  + Can the host supress a participant’s video feed if necessary?
* **Registration**:
  + Can all registration fields be customized/relabeled?
  + Can you add graphics and text wherever desired on the page? Only in certain locations?
  + Does the vendor provide premade choice fields for country and state/province?
  + What types of custom fields can be added? (Radio button, drop-down, text field, multi-line text box, checkbox, etc)
  + Is vendor branding or copyright always visible on the registration page?
  + Can fields be individually made optional/required?
  + Can registration be made conditional upon manual review?
  + Can registration be made conditional based on rules?
  + Can you revoke an individual’s registration?
  + Can registrations be uploaded from a text file or spreadsheet?
  + Can you resend a registration confirmation email to a person’s registered email address? To an alternate address you specify?
  + Can registration be embedded on Facebook? A web page?
* **Login**:
  + Can you set an event to use individual login links for each individual to automatically track their attendance?
  + Can you set an event to allow public login without registration?
  + Can a public login event ask for name and email at login time?
  + Can an event prevent multiple people from logging in with the same information?
  + Can you customize login behavior when room capacity is reached?
  + Can login be integrated with SSO systems for automatic tracking?
* **File Sharing**:
  + Can hosts make files available for attendee download in session?
  + Can files be added during an active session?
* **Payment Processing**:
  + Can you establish passwords or codes for discounts?
  + Can payments be accepted via credit card or PayPal?
  + Can administrators register people who have paid externally (check, PO, etc)? Manually vs. uploaded file?
* **Audio Integration**:
  + Can presenters choose to use telephone or computer microphones?
  + Can attendees choose to listen via telephone or computer?
  + Are all audio components delivered to both methods (video clips, shared web page multimedia, etc)?
  + Can hosts control muting/unmuting of phone and computer lines via the web console?
  + Can we use our own choice of audio conference provider?
  + If phone audio is provided, are there local or toll free international numbers? What countries have access numbers?
* **Emails**:
  + Can the entire email message be customized, or only parts of it?
  + Can you eliminate vendor text and branding?
  + Can you send multi-part emails (HTML and Text)?
  + Can you control the “From” field?
  + Can you send test emails before they go into production?
  + How many reminder emails can be sent? Are they scheduled or manually triggered?
  + Can you send a follow up email to all registrants or separate ones to attendees and no-shows?
  + Can you edit follow up emails after an event is over before they are sent?
* **Reporting**:
  + Can you grant access to pre-event registration reports so interested parties can see up-to-date information as desired?
  + Do question/chat logs contain all messages (including ones suppressed or deleted during the event)?
  + Do question/chat logs include the person’s name, email, and message time?
  + Can questions be marked for reporting as “answered in session”?
  + Do reports show entry/exit time and time in session? How do they handle multiple entries (disconnects and leave/return)?
  + Are reports accessible in both text and spreadsheet format for display vs. analysis?
  + How quickly are reports available after a session is ended?
  + Do reports require manual steps to save session data, or is it automatic?
* **Surveys**:
  + Can the product display a custom survey after registration? Automatically upon exiting/ending a session? On demand during/after a session?
  + Can the survey track who is responding automatically?
  + What types of questions are available (Radio button, drop-down, text field, essay, checkbox, etc)?
  + Can results be reported in both cumulative and individual levels of detail?
* **Timers**:
  + Can hosts display a countdown or count up timer for presenters only?
  + Can hosts display a countdown or count up timer for attendees?
  + Can timers be set/started/stopped/reset during a session?
* **Closed Captioning**:
  + Can the product display closed captions?
  + Can attendees reposition the display of captions? Change font/size/color?
  + Can the product read caption files for playback of pre-recorded content?
  + Can the product integrate with speech-to-text systems to provide captioning?
  + Can the product integrate with specialized/professional caption input devices?
* **Mobile Access**:
  + Can hosts present from iOS and Android mobile devices? Any limitations on functionality?
  + Can attendees view content on iOS and Android mobile devices? Any limitations on functionality?
  + Is mobile access provided through web browsing or through a downloaded and installed mobile app?
* **Breakout Rooms**:
  + Can hosts create breakout rooms for subgroups of attendees?
  + Can attendees choose their desired room?
  + Can attendees be randomly assigned to rooms for balanced size?
  + Can attendees be individually assigned to specific rooms by the host?
  + Can hosts pull all attendees back to the main session when desired?
  + Can hosts send messages/announcements to all breakout rooms simultaneously?
  + Can hosts move to different breakout rooms to participate with attendees?
* **Certification**:
  + Are there provisions for checking attendee presence?
  + Can you validate attendee time in session?
  + Can you score responses to certification questions?
  + Does the product offer the ability to generate an electronic certificate document for verified attendees?
* **Pre- and Post- Session Behavior:**
  + Can hosts/presenters speak to each other without early attendees hearing?
  + Is there a configuration option for early attendees to hear silence / music / a recorded announcement?
  + Can the host/presenter give a standby announcement to early attendees and return to the private pre-session conference?
  + Can early attendees see an automatically scrolling set of uploaded slides?
  + Can early attendees see other visual materials or a customizable display?
  + Can hosts/presenters join a private post-conference audio session?
* **Attendee Audio/Video:**
  + Can phone attendees use phone keypad controls to queue to ask a question? Can the host see queued attendees, open and close their phone line, remove them from the queue?
  + Can the host open and close an attendee’s live video stream without making them a presenter? Does the attendee see a confirmation before their camera goes live?
* **Pre-recorded Sessions:**
  + Can you play pre-recorded content in a live session?
  + Can you mix pre-recorded content with live presentation in a session?
  + Can attendees and presenters use Chat or Q&A while pre-recorded content is playing?
  + Can you automate a pre-recorded session to run as a live event with no host/presenter in attendance?
  + Can you include Chat or Q&A captured in a previous live session as part of the recorded playback in a new session?
* **Data Security:**
  + Does the vendor maintain any confidential information about event participants in its own databases? This includes passwords, credit card information, payment information, or answers to custom registration fields created by the event host.
  + Is such data encrypted and secured to standards dictated by American SSAE 16 or European GDPR audit requirements?

**REVIEWING RESPONSES**

Some of the questions in this checklist are difficult to answer concisely. Products can have complex implementations that act differently under different use cases or configurations. Leave your vendor room to elaborate and invite them to demonstrate functionality when a demonstration works better than a text description. But if you are comparing products, you need some record in order to create a framework for comparison.

Look out for simple yes/no answers where they don’t seem warranted. These may indicate an attempt to downplay an area of weakness. You may wish to use the vendor’s responses to help you pick areas to investigate in testing or demonstrations.

You can also use the responses as guidelines for asking other customers about their impressions and experiences with specific areas of functionality or support. This is likely to give you more information than a blanket question about whether they like or dislike the product.

**CONTACT ME**

I welcome your comments and feedback about this subject. Please feel free to email me at [kmolay@wsuccess.com](mailto:kmolay@wsuccess.com). I wish you great success with your vendor selection process! And please remember that Webinar Success stands ready to assist with webinar services including presenter training, review and improvement of your webinar process, administration and management of webinars, and on-air moderating. Just visit [www.wsuccess.com](https://www.wsuccess.com/) for details.