



+

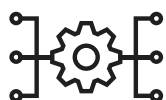


IMPACT  
PARTNERSHIP

# HOLDING YOUR AMERICAN RETIREMENT INSTITUTE COURSE ONLINE

Online classes are a great way to reach a busy demographic, especially when you live in a high-traffic area or outside circumstances prevent you from holding your classes in person.

To conduct your American Retirement Institute class online, Impact will facilitate all marketing efforts to drive registrants through Facebook ads. We'll also build a pre and post email campaign, which we can connect through your selected webinar platform.



## Choosing Your Webinar Platform

Advisors will be required to purchase and set up their own webinar platform and provide Impact with the registration link for their held courses. The two platforms we recommend using to host your online courses are GoToWebinar and Zoom (with the webinar feature added). Here are a few recommendations on what to look for when researching different platforms:

- Platform can host both live and pre-recorded online courses
- Prospects can register through landing page provided by the platform
- Reporting tools include attendance rates, engagement of attendees, etc.
- Phone number is provided
- All attendees can be muted during course
- Chat feature or file-sharing feature to provide immediate access to articles or your website
- Integration with Infusionsoft so Impact can connect the email drip campaign. If program doesn't integrate with Infusionsoft, you'll be limited to the email reminders provided by the platform itself



## Marketing Your Course

1. Work with your marketing strategist to determine dates and times to hold your online class.
2. Offer two days and times for attendees. Remember, because you're online, you can be flexible with your time slots. Try offering a class in the morning and in the afternoon to find the best time for your area. During the evening, you may be fighting for attention with the evening news.
3. Impact's digital team will create your Facebook ads and email reminders, as normally done for your in-person events. You'll be able to track your registrations in real time through your chosen webinar platform.
4. Your ads will begin to run two weeks prior to your first course date with email content and reminders delivered to registered prospects.
5. Sign up for your own course so you receive the same notification as your prospects and you know when communication happens.



## Logistics & Testing



When you get your software access, use this time to test the technology and make sure you're comfortable with starting the webinar and navigating through your presentation and that all audio works properly. Test with your marketing strategist or office teammate for a guaranteed flawless online course.



Ask them to show you what it looks like from the participant's view so you know everything is up to your standards as you'd normally check during an in-person course.



Also, don't forget to test your location! Make sure you have a fast internet connection (hardwire in, if possible) and a quiet environment with no disruptions. Put up an "online course in progress" sign on your door or within your office so everyone knows to keep quiet during this time.



## Web Cam Set Up

It's recommended you share your webcam when giving a presentation to a new set of prospects. This is a great way to create a personal connection with them that you'd normally do in person. Here are our best tips for webcam use during your course:

- Put your webcam at eye level. Don't have it above or below you. Prop it on a stand or set of books so the camera sees you straight on and not up your nose.
- Be mindful of angles behind you that can be distracting or cause the camera to play tricks on the viewers' eyes.
- Don't place a window behind you, as the light coming from behind you will create shadows on your face and your viewer won't have a clear picture of you. Instead, flip the setting and put the window in front of you to give direct, natural light on your face. If you don't have a window in the room where you're holding the class, place an additional light (not fluorescent) in your direction so participants can better see you.
- Eliminate any "busy" settings behind you that could distract the viewer from concentrating on what you're saying because they're so focused on understanding what's going on behind you. Keep it simple with a blank wall and a plant to keep their attention on you.
- Dress smart when preparing for your online course. If your wall is white, don't wear a white shirt. Wear something that will help you pop from the background.
- When you're speaking, remember to look at the camera.





## Facilitating the Online Class

You have the option to host your course live or run a pre-recorded version that will appear live to your attendees. If you choose to host a live course, make sure you record your session so you can send it to those registrants who did not attend during your follow-up process.

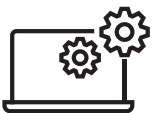
Your registrants may require a software download when accessing the online classroom, but a link to instructions from the platform's site will be provided in the emails. Most platforms will allow you to watch in a web browser, but this should be something you're prepared to explain.

**Pro Tip:** We recommend launching the platform 15 minutes prior to your dedicated class time and share your intro slide as you would in a live setting. This will help participants know they've launched their software correctly and you'll be starting soon. Use the chat feature a few minutes before you start to let them know your course will begin shortly. This will open your audience to the chat feature and encourage participation.

Close any unnecessary apps and programs running on your computer to eliminate potential pop-ups or alerts that could be shared when sharing your screen.

Remember, it won't be as easy to keep their attention as it is in person, so keep your class under an hour. You may have to skip some content you normally cover, but remind them that's the importance of booking their financial lab.

Since workbooks won't be delivered as they are in person, use those as a tool to drive the financial lab and continue to provide them education. We will not provide a virtual copy of the workbook because we want the attendees focused on your presentation and not trying to navigate through a long PDF.



## Booking Virtual Labs

Just as you would during an in-person course, it's important to try to book virtual labs while you have their attention in the online course. Get them familiar with the idea and bring it up throughout your class so they know that is the next step.

When you end your course, provide them with instructions on how to request a virtual lab. It's recommended to use an online appointment booking platform like Calendly so attendees can book appointments immediately based on their schedule and your availability.

Put the instructions on the screen at the end of your event with exactly what they should do. If you have a direct link on your website for attendees to request an appointment, send that link through the chat.



## Post Online Class

- ✓ The online platform will notate those who attended or did not attend and will send follow-up emails based on their attendance.
- ✓ It's encouraged to call all participants to book their virtual lab and offer their feedback of their course experience within 24 hours of your course.
- ✓ Use the opportunity for those who didn't attend the webinar to do a private course in person with them, invite them to the next online course, or offer them a virtual appointment.



IMPACTPARTNER.COM | 800.380.5040

For internal and financial advisor use only, not to be distributed to the general public.