

Webcasting

Production Practices Guide



The logo for mediaplatform, featuring a stylized globe icon above the word "mediaplatform" in a lowercase, sans-serif font.



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Introduction

Webcasting is a unique and powerful way to reach large audiences with high impact, rich-media presentations. Producing even a simple webcast however, can be a challenging endeavor. Webcasting tools enable a webcast producer to create the best possible event, but the technology is only part of the overall webcasting equation. Production practices – the way you put a webcast together with a team - can make or break a webcast event. We developed this guide to help you make the best use of your webcasting tools in the production of professional webcasts. For the purpose of this paper, we've focused on one webcasting solution, MediaPlatform's WebCaster, a highly scalable and customizable tool that enables you to produce, manage, distribute and monitor live and on-demand webcasts. With over 10 years in the corporate online video business and the development of stable webcasting products, MediaPlatform has established the foundation for best practices for webcast production.

About Webcasting

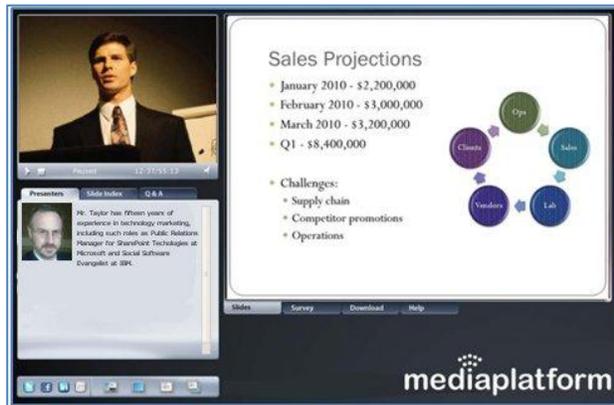
A webcast is typically a live presentation of some kind distributed online to a remote audience. For many years, people presented in front of video projectors in meeting rooms and auditoriums where the only people who could see what was happening were sitting in the audience. In the last ten years however, there has been a movement toward making these sorts of live presentations available to a wider audience on the Web. The process of putting a presentation that combines a video signal, PowerPoint, and interactive elements such as surveys and polls on the Web is known as a webcast. Some webcasts are presented live, while others are pre-recorded and played on demand.

Why do organizations produce webcasts? Usually, there is a need to present material to a large number of people who cannot physically attend an event, training session, or meeting. Other uses of webcasting include marketing lead generation, continuing education, employee-facing communication, and public relations.

Webcasting is frequently confused with web conferencing, a technology that is used for online collaboration. Examples of web conferencing tools include Webex and Live Meeting. Though the two tool sets are similar, they serve quite different purposes and operate on a different underlying technological basis. Web conferencing products are great for smaller group meetings (i.e. fewer than 50 attendees) where there is a need for interaction and collaboration amongst all the attendees (i.e. "few to few"). Webcasting, on the other hand, is better suited for presentations that typically involve a small number of presenters and a large number of viewers (i.e. "one or a few to many"). With webcast presentations, the experience can be fully customized and branded while the audience's participation is designed to be limited to participating in surveys or moderated question and answer sessions.

What's Happening During a Webcast

When you log into a webcast produced with MediaPlatform's WebCaster, your browser will display a player that looks like that in Figure 1. You have a player that features a streaming video, synchronized PowerPoint, and tabs for presenter bio, Q&A, and slide index. Behind this seamless interface however, many things had to happen in order to create this flawless display and event.



Most webcasts originate with a fairly conventional audio-visual process. Whether it's a presenter speaking into a webcam or a speaker being recorded in a high-end television studio, the video signal captures a person making a presentation on camera. To accompany the presenter's speech, there is almost always a matching PowerPoint slide deck.

Figure 1 - A typical webcast template created with WebCaster, featuring a live video stream, PowerPoint slides, Q&A, slide index, and author bio

Figure 2 depicts the process of putting a presentation, either live or pre-recorded, onto the Web in a webcast. The video signal of the presenter is encoded on a PC type of device and sent to Content Distribution Network (CDN), where WebCaster manages the event, synchronizing the video with the PowerPoint slides and other interactive elements.

In general, webcasts are published through one of two modes of content distribution. A webcast that is sent to the public Internet for viewing by a general audience is usually published to a Content Distribution Network, or CDN, such as Akamai Network. The CDN is a large, complex network of computing and network infrastructure assets that makes the webcast available quickly and easily to a very large global audience. Many significant web publishers, such as CNN.com or Yahoo! use CDNs to make their content available worldwide on a fast, efficient basis. WebCaster enables you to take advantage of CDNs to stream your webcast to very large audiences.

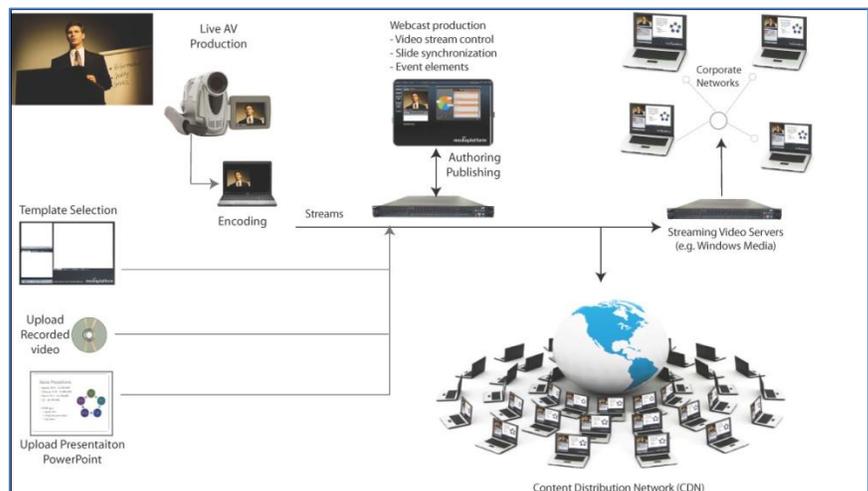


Figure 2 – The webcasting process. The video signal that originates with AV production flows to the streaming servers or CDN, where it is synchronized with PowerPoint slides and other interactive elements.

Webcasts that are intended only for an internal audience are typically streamed over private corporate networks behind their firewall. Depending on the way the network is set up, this might be a relatively simple process or one that taxes the network resources. To ease the strain, most enterprises now rely on an approach to video streaming known as multicasting. Multicasting is a technology that allows groups of viewers to share a video stream in such a way that the signal only has to travel once to each node of a corporate network. In contrast to unicasting, where every viewer pings the media server to receive a single, dedicated video stream – a process that is extremely network bandwidth intensive – a multicast network enables tremendous network efficiency for video.

Who's Who in the Webcasting Process

If you're reading this manual, you are likely part of a team that produces webcasts. Every organization has a slightly different approach to producing webcasts, but in general, there are a few common structures and roles that we find in most companies.

The Client

For virtually every webcast, there is a client of some kind who has requested that it be produced. In a media production business, it is usually quite clear who the client is – it's the person or entity paying for the production. In a corporate setting, it may be a little more subtle. Some media departments in a corporation have actual, defined "internal clients" that pay for webcast production services as if the media department were a vendor. In other situations, the client may simply be an individual in the company who needs a webcast produced. In all of these situations, the dynamics are the same. There is a client who wants a webcast produced, and the producer, or production team, that is responsible for getting it done. The producer is responsible for meeting or exceeding the client's expectations for the entire process and final product.

The IT Department

Depending on how your organization is set up, the Information Technology (IT) Department may have a big or small role in webcasting. In some companies, the IT department is completely responsible for webcasting. In other situations, such as one where the webcasting is produced through an external, Software-as-a-Service (SaaS) offering, the IT Department might have minimal involvement. In almost all cases however, IT is involved in validating that the webcasting technology in use meets with organizational standards for security, software applications, and network usage. In many webcasting productions, IT needs to be aware of what is going on so they can facilitate the production process. In addition, IT is usually responsible for providing the PCs and other necessary equipment used in a webcast production.

The Production Team

This is where we see the greatest variation in roles. In some organizations, just one person may be responsible for lighting, sound, and video recording, as well as the online aspects of a webcast production. At the other extreme, there may be more than a dozen people performing these tasks as separate roles. Most webcast productions have a basic division between people who are responsible for recording the live video and those who are tasked with putting that video signal out on the Web synchronized with PowerPoint and other elements.

A live webcast is almost no different from a live television show. Putting a presentation live on the Web has all the excitement and potential for problems as producing the evening news, and arguably has even more risks. A lot of things can go wrong, so the production team for a live webcast usually mirrors that of a live TV event, with a few extra people added to manage the unique aspects of a Web production. Most webcasts are produced by a team performing the following roles, though in many cases one person does multiple jobs:

- **Physical video production** – This crew is responsible for the actual video recording, the set up of lights, camera, sound, etc.
- **Encoding and webcasting technology setup** – This person is responsible for providing and operating the equipment and network components of the production. (e.g. laptops, cables, etc.)
- **Live event director** – This person manages the synchronization of the video, PowerPoint, and other interactive elements, such as surveys and polls, using WebCaster's Live Event Editor interface.
- **Question and answer handler(s)** – These are the people who oversee the answering of audience questions, routing them to the correct person for answers, and screening out questions that do not need to be answered.
- **The Presenter, or Presenters** – Though not part of the team, per se, they are definitely a critical element in the production process. The presenter needs to understand what is going on and be prepared to do his or her part of the webcast in a way that makes everyone, especially the presenter, look good.

- **The producer** – Someone has to be in charge of all this. (Or should be!) That person is the producer. The producer is the “boss” of the webcast production team and is responsible to the client for the quality and success of the webcast.

The Five Stages of a Webcast Production

A webcast is a production. Like any other event, it follows a fairly standard flow of production stages, beginning with the planning stage and culminating in the completion and archiving of the webcast material. In some ways, producing a webcast is no different from producing any other kind of media, such as a television show or a convention keynote address. The only differences involve the unique technologies that are employed in the process of distributing the webcast onto the Internet or private corporate network.

In our experience, webcast production involves five basic steps, as shown in Figure 3:

1. **Plan** – Before any production begins, the client, producer, and production team must come together to develop a plan for what is going to happen and who is responsible for what.
2. **Set up** – This stage involves getting the event set up in WebCaster, establishing the invitation and registration process for the event in WebCaster, assembling presentation materials, and assigning production team roles.
3. **Rehearse** – Once the event has been set up, it is necessary to run through the event and make sure that everyone involved knows what they are supposed to be doing and how the presentation is meant to flow.
4. **Perform** – This is the actual event, where the video and presentation stream to the live audience, or where the presentation is recorded for later on-demand play.
5. **Complete** – After the event has been performed, it’s time to archive it for later viewing, thank the people who viewed it, and generate reports on how the event went.



Figure 3 – The five stages of webcast production

Production Stage 1: Plan



Every well produced webcast begins with a plan. The plan could be as simple as a few people agreeing on what is going to happen, or as involved as a lengthy document detailing what is going to occur at every minute of a presentation. The reason plans are so important in webcasting is that producing a webcast can be an unpredictable and error-prone process that involves multiple factors. These include remote presenters, accompanying hardware and software, and a lot of people on Internet connections watching the webcast. In other words, it can be a recipe for disaster if the entire process and flow of the event has not been worked out in advance. The following Stage 1 Checklist summarizes the key components of the webcast planning process.

Production Stage 1 – Plan Checklist				
Item	Description/Issues involved	Owner	Deadline	Done
<input checked="" type="checkbox"/>	Role assignment	Who is going to do what on the team?		
	Promotion plan	How is the event going to be promoted? Who is responsible? What role, if any, does the production team have in the promotion process?		
	Key Stakeholder list	Who are the key stakeholders in the event? Who is the internal client? What does each stakeholder expect to have happen with the event?		
	Production Schedule	What date and time is the event occurring? What needs to happen before the event? Who is responsible for each key project milestone?		
	Registration	What do attendees need to do to register? What information does the production team (or client) want to get from attendees when they register for the event? What specific actions will need to be taken to set up the WebCaster registration interface?		

Invitation	How will attendees be invited? Will they receive emails from the WebCaster invitation system?			
Follow up	What will the follow up email to attendees say, if anything? How will the team handle people who missed the event?			
Polls	Are you planning on conducting polls during the event? What will they ask? Who is responsible for developing and approving poll questions?			
Surveys	Are you planning on conducting surveys during the event? What will they ask? Who is responsible for developing and approving survey questions?			
Template	Which template will you be using for your presentation? If it is being customized, who is responsible for customization and quality checking it?			
Q&A format	Will questions be allowed during the event? Who will handle them? (More than one person can be delegated Q&A admin rights with WebCaster.) Will the legal department need to review the questions?			
Live or pre-recorded	Will this event be live, pre-recorded, or a combination? For a pre-recorded event, who approves the recorded content for publication?			
Audio or video?	Is this going to be an event with video or just audio?			

If you follow the planning checklist, you will find that most of the unknown factors in your production will be addressed before they become problematic. What follows is a list of suggested practices to help you make the most of your production planning process.

	Production Stage 1 – Best Practices
Item	Description/Issues involved
Master Plan document	The format is up to you, but the idea is the same – keep all the important facts of your plan in one document, with one person assigned to “own” the document.
Contact List	As part of the plan document, or a separate piece, there should be one place to find how to reach everyone involved, by cell phone, email, IM, etc.
Online collaboration site for project management	It can be very helpful to have a dedicated online collaboration site where the production team can share important documents, schedules, and so forth e.g. Google docs, SharePoint team sites, Jive Clearspace.
Deliverables List	Usually part of the Master Plan, the deliverables list makes it clear exactly what must be produced, and by whom, in order for the event to take place e.g. who is going to write the event invitation text or the event summary blurb.
Review and Approval Loops	Make it clear who is required to review and approve project deliverables. If there are multiple client personnel involved in the production, it’s a great practice to make sure that the producer knows exactly who has final say on all creative inputs to the webcast.
Regular Planning and Status Meetings	Putting on a webcast is a potentially major effort, with reputations and business outcomes riding on its success. Regular production planning meetings leading up to the event can help assure that it will go as smoothly as possible.

Production Stage 2: Set Up



Once you have established your plan and locked down the specifics of your webcast production, it is now time to start setting up the event in WebCaster. If you’ve planned thoroughly, setup should not be a big challenge. In Production Stage 2, you can implement your plan as it pertains to registrations, invitations, production team assignments, templates, lobby design, and more. The following checklist summarizes key tasks in the setup phase:

 Production Stage 2 – Plan Checklist				
Item	Description/Issues involved	Owner	Deadline	Done
Template	Select the audience template you want for your event.			
Registration Fields	Add, delete, or edit the registration fields, depending on what kind of information you want to gather from your attendees when they register for the event.			
Registration Form	Implement the registration form in WebCaster			
Surveys	If you are doing surveys, populate the survey questions in WebCaster			
Polls	If you are doing polls, populate the polls in WebCaster			
Lobby	Design and deploy your event lobby in WebCaster			
Live/Recorded setup	Designate the event as live or pre-recorded in WebCaster			
Invitations	Create an invitation email in WebCaster or your email service provider (e.g. ExactTarget)			
Invite	Invite attendees to the event			
Share	Share the event internally, inviting internal people to attend			
Invite presenters	Invite presenters			
Invite and assign production team members	Invite your team members and use WebCaster to specify their role in the production, e.g. flipping slides, managing Q&A. Invite presenters using WebCaster			

 Production Stage 2 – Best Practices	
Item	Description/Issues involved
Follow up with invited team members and presenters	For executive presenters, it's a great idea to follow up directly with them, or their executive admin to make sure they understand exactly what they will be doing, when the event is occurring, when rehearsals are scheduled, how much time to allow for pre-event sign in, and so forth. For VIP presenters, this is especially important.
Test invitation emails	We highly recommend that you test invitation emails to make sure that they look right and that the URLs embedded in them function as intended.
Script	The flow of the event should be captured in a script that specifies exactly what is going to happen at specific times in the presentation.

Sample script

Time	Action	Slides	Presenter	Description	Notes
00:00 – 00:09	Roll intro video	NA	NA		
00:10 – 01:00	Announce event	1	Narrator	“Good morning. Thank you for joining us today...”	Be ready to switch to Narrator
01:00 – 03:00	Introduction	2	John Smith		Switch to Jolene at 3:00
03:00 – 15:00	Presentation	3 – 20	Jolene Ryan		
15:00 – 20	Q&A	21	John Smith	Live Q&A	Victor is responsible for sending John the questions he will answer live.

Production Stage 3: Rehearse



The meaning of “rehearse” may be obvious, but we wanted to point out a few nuances of rehearsing a webcast that make it slightly different from the typical AV production. In a webcast, you have all the logistical factors involved in putting on an AV production, but you also have technical elements that need to be checked, including computing, software setup, and network settings.

 Production Stage 3 – Plan Checklist				
Item	Description/Issues involved	Owner	Deadline	Done
“Tick tock” walk through	Everyone sits down and goes over the flow of the event, minute by minute, to make sure that everyone understands what is about to happen and what their roles are. The tick tock is a good way to catch potential errors in the script or flow before they go live.			
Live run-through	This is a run through of the event using WebCaster in Offline Mode.			
Test pre-recorded elements	Make sure than any videos you want to play in the event are in the right place and play as intended.			
Test polls	Run a test of the polls			
Test surveys	Run a test of the surveys			
Test Q&A	Make sure that all Q&A moderators are comfortable with the system, understand their role and what they are being asked to do.			
Test the PowerPoint	Make sure the PowerPoint looks the way you want it to look on the player.			

 Production Stage 3 – Best Practices	
Item	Description/Issues involved
Practice an error	Run through what happens if something goes wrong. Make sure everyone is prepared.

Production Stage 4: Perform



If you’re producing an on-demand webcast, where you’re assembling pre-recorded elements into a finished product that is published whole, the performance aspect is not that important. If you’re doing a live event, it’s a different story. Putting on a live webcast is a demanding and sensitive production. However if you’ve planned, prepared, and rehearsed thoroughly, you will have a successful experience. The following checklist will help you perform as required when you go live with your webcast.

 Production Stage 4 – Plan Checklist				
Item	Description/Issues involved	Owner	Deadline	Done
Test presenter video and sound pre-event	Even if you have rehearsed, you need to make sure that all microphones and cameras are functioning properly before going live.			
Establish communication channel with remote presenters	You should have a way to communicate with a remote presenter, e.g. a live chat dialogue open.			
Make sure the live presentation area is quiet and free from disturbances	The presentation area should be separated from any noisy activities or people.			

Make sure presenters and production team members are in place prior to going live.	Everyone needs to be in their places before the event begins.			
Re-test pre-recorded elements	Even if you tested during rehearsal, retest before the live event			

	Production Stage 4 – Best Practices			
Item	Description/Issues involved			
Have an IM session going	It is useful to have everyone on the crew able to communicate via chat before and during the event.			

Production Stage 5: Complete



WebCaster offers several different post-event processes, some or all of which may be useful to your webcasting project. Through WebCaster, you can create an archived version of the webcast that can be a replica of the live event or completely different from what was originally broadcasted. WebCaster also provides valuable information about the webcast, including who attended, where they came from, how long they watched, and so forth. After your event, you can also run reports on how it went and share them with key stakeholders.

	Production Stage 5 – Plan Checklist			
Item	Description/Issues involved	Owner	Deadline	Done
Final Deck and Sequence	If needed, change the PowerPoint deck, slide sequence and synchronization in the final, archived version.			
Fixes	You can edit the video, cutting unwanted footage.			
Post-event notifications	Send emails to attendees as per plan: follow up actions for those who watched; “Sorry we missed you... here is the archive” messages for those who couldn’t watch.			
Storage and URL	Assign a specific storage location for the archive edition and circulate the archive URL to required stakeholders.			
Access Controls	Determine access restrictions and implement access controls for archived version on WebCaster.			
Report Out	Prepare reports on event data and distribute to required stakeholders.			

	Production Stage 5 – Best Practices			
Item	Description/Issues involved			
Post-Event Wrap Up	It can be very useful to have everyone involved in the production meet to review what went right and what didn’t, to make a better webcast next time.			

MediaPlatform Webcasting Solutions

MediaPlatform’s webcasting solutions have been designed from the ground up for professional webcasting best practices. Each feature in WebCaster has been crafted to enable the production of successful webcast events.



Figure 4 –WebCaster main “Overview” screen

Figure 4 shows WebCaster’s main “Overview” screen, which is the interface that you see when you launch the application. This screen displays the key information about the most recent webcast you have been working on. From this screen, you can open other webcasts you are working on, start a new webcast project, or “save as.” The overview screen is the access point to all the main functions of WebCaster, as enabled by the toolbar.

WebCaster’s toolbar, shown in Figure 5, enables you to go to each of WebCaster’s five production screens. Everything you need to do to set up, rehearse, perform, and complete a webcast can be done through these production screens. By following the production practices we’ve outlined throughout this document, and by utilizing the tools that WebCaster provides, we hope to help you produce a successful webcast event.



Figure 5 –WebCaster toolbar and the capabilities of each of the production screen.

About MediaPlatform, Inc.

MediaPlatform, Inc. (formerly IVT) delivers best-in-class webcasting and media management technology to global enterprises and digital media producers. MediaPlatform’s webcasting software enables high-impact presentations for lead generation, corporate communications and training. The company offers organizations the ability to take advantage of scalable cloud-based computing, as well as on-premises deployment, to present and manage rich media. With media management tools built on its platform, the company helps clients derive long term archive value from their investment in media content. www.mediaplatform.com www.twitter.com/webcaster