

ORBITAL 

# Webinar mastery:

10 steps to take your webinars  
from planning to powerful results

## TABLE OF CONTENTS

# I. Introduction

- 01 | Establish the strategy over a prolonged period (12 months)
- 02 | Define the audience
- 03 | Nail the audience build - do not rely on outdated CRM audiences
- 04 | Identify the stories to tell
- 05 | Build the stories for the audience to cover top, middle, bottom of funnel - emote feeling over thinking, lead with value, find speakers, be engaging
- 06 | Ensure the systems are set for email outbound
- 07 | Leverage the full commercial team to build interest (cold calls turn to warm calls when you invite first, use it to help drive upsells in existing accounts)
- 08 | Continuous experimentation (data-driven). /optimisation/ engagement
- 09 | Cascading content (marketing side)
- 10 | Nurturing the leads

## Introduction:

Many B2B marketing teams run terrible webinars and you are missing a huge performance lever for your business. This report distils what OrbitalX learned from running and analysing 2,500 webinars into ten practical steps you can follow to turn webinars into a genuine demand generation engine, one that compounds over time, not one that resets every time you hit “End webinar”.

B2B buyers spend only **17%** of their time meeting with potential suppliers, while the rest is spent researching independently and validating through digital channels.

**Gartner**<sup>®</sup>



If you're not showing up credibly in the places buyers choose to learn, you're not in the deal until you're already late.

Webinar sits at the intersection of two big truths about modern B2B buying.

## First:

Buyers are doing more work before they ever speak to sales.

In Demand Gen Report's research,

71 %

B2B buyers said they downloaded and consumed multiple assets to support a decision

46 %

said they increased the amount of content they consumed over the prior 12 months.

## Second:

Buyers want digital experiences, but they don't want to buy in a vacuum. This is why webinars matter more than they're usually given credit for. When they're done well, they're one of the few channels that can deliver:



### A buyer-preferred format

(webinars/digital events consistently rank among the most appealing content types).



### Value across the journey

(not just top-of-funnel awareness, but real problem framing and decision support).



### High-signal, first-party engagement,

at a time when third-party targeting keeps getting weaker (and buyer attention keeps getting more expensive).

## CHAPTER 1:

# Establish the strategy over a prolonged period

## Why most webinar programs stall

Most webinar programs don't fail because the content is poor. They stall because they're treated as one-off events.

The typical cycle looks like this: a timely topic, a good speaker, a late promotional push, decent attendance, and then the team moves on to the next priority. The webinar "worked", but nothing meaningful compounds, because it wasn't designed to.

Across 2,500 webinars analysed by OrbitalX, the most effective programs share one trait: they run webinars as a system that builds demand over time, not as occasional spikes. The value isn't limited to the live session. It comes from what happens when each webinar reinforces the next, and the outputs continue to drive activity after the event ends.

A 12-month strategy creates three compounding advantages:



### Compounding attention:

---

Repeated exposure builds familiarity and trust with the right buyers



### Compounding data:

---

You learn what messages, segments, formats, and offers consistently perform



### Compounding assets:

---

Each webinar becomes reusable fuel for outbound, content, and nurture

## Start with Story Onboarding (so the year has a spine)

Strong webinar programs feel connected. Topics ladder into the same point of view, the messaging stays consistent, and the audience knows why it's worth showing up.

Story Onboarding is the upfront alignment that makes that possible. It's a focused phase to set the narrative and operating guardrails before you start shipping webinars:

- ICP + sales positioning deep dive to anchor topics in real buying conversations
- Core narrative + strategic pillars you can sustain across the year
- First campaign angles that are specific, differentiated, and repeatable
- Sign-off milestones so marketing and sales align on audience, messaging, and success criteria

With these foundations in place and the right skills plugged in (research, strategy, writing, design, ops), the program stays coherent, scalable, and easier to improve over time.

## The 12-month framework: think in quarters, not events

A year-long strategy shouldn't feel overwhelming. The simplest way to make it operational is to treat the year like four focused seasons. Each quarter has a job, and each job builds toward repeatable, measurable

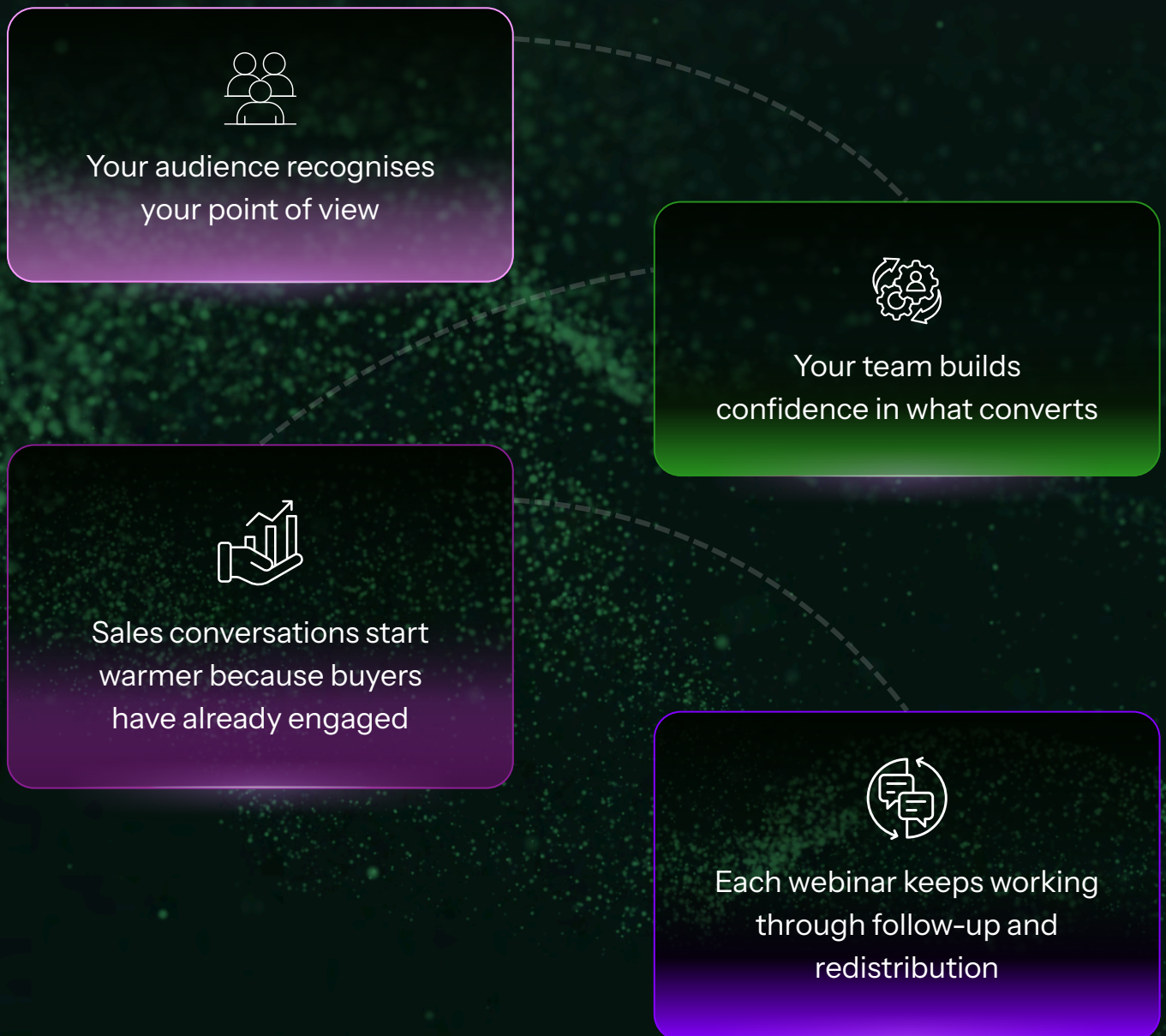
Quarter	Focus	What you build	What you're proving
Q1: Foundation	Stop guessing	ICP rules + segmentation, narrative + pillars, series structure, measurement plan	Marketing + Sales alignment on definitions and outcomes
Q2: Repeatability	Build the machine	Cadence, promotion workflow, follow-up sequences, engagement design	Consistent ICP-fit attendance and participation
Q3: Commercial impact	Turn attention into action	Outbound integration, AE/BDR/CS plays, value-first CTA strategy	Webinars are warming accounts and generating meetings/pipeline
Q4: Compounding	Make it always-on	On-demand redistribution system, experimentation loop, next-year planning	The program performs beyond the live moment and gets more efficient

## From webinar activity to a durable channel

A single webinar can generate attention.

A 12-month strategy builds market presence.

With a consistent narrative, repeatable cadence, and metrics tied to pipeline outcomes (not vanity numbers), webinars start to behave like a dependable growth channel:



This is the core shift behind turning webinars into a demand generation engine: commit to a 12-month system where each event increases the effectiveness of the next.

CHAPTER 2:

# Define the audience

## Start with intent: who are we trying to move, and to what outcome?

Before you build lists or pick topics, get specific about who the webinar program is for and what you want to change. A strong audience definition is less “persona work” and more a set of decisions the business can execute against.

At minimum, define:



### Primary outcome:

pipeline creation, expansion/upsell, product adoption, partner demand, category education (pick one as the main job)



### Buying motion:

self-serve, sales-led, enterprise, land-and-expand (this affects roles, content depth, and CTAs)



### Audience scope:

new logo, open pipeline, existing customers, partners (each needs different messaging and follow-up)

This prevents the classic failure mode where one webinar tries to serve everyone, and ends up resonating with no one.

## Build your “Audience Thesis”

Think of this as the one-paragraph brief that keeps the program consistent for a year.

It should answer:

**Who:** the specific buyer group (not broad “marketing leaders”)

**Where:** industries/regions where you’re prioritising growth

**Why now:** the trigger/problem they’re actively trying to solve

**What they need to believe:** the shift your narrative is trying to create

**What success looks like:** the next step you want them to take

Example (format, not content):

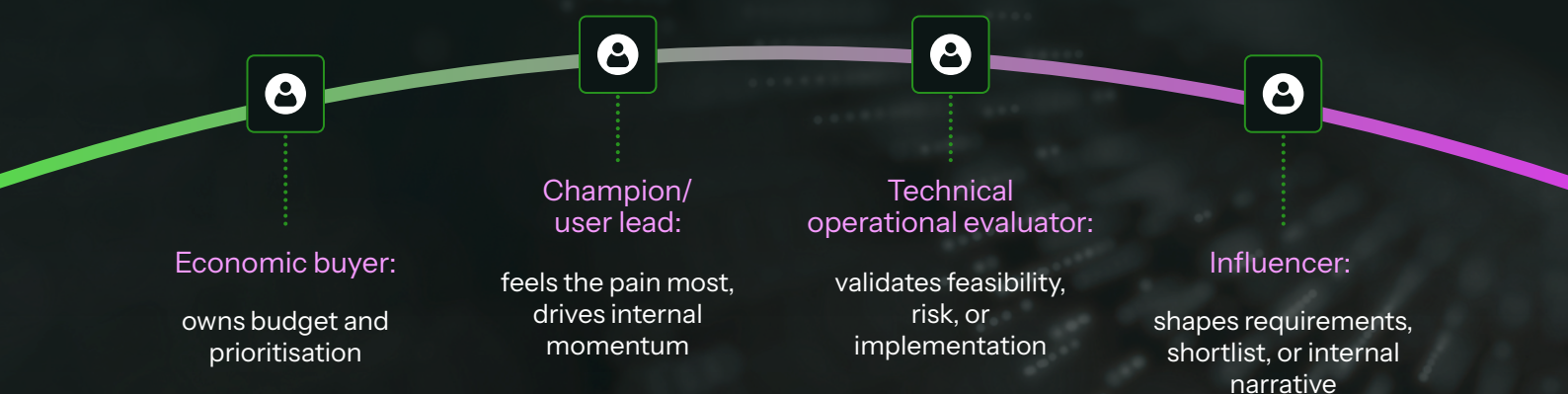
We're targeting [role] in [company type] across [region/industry] who are dealing with [trigger/problem]. Over the next 12 months, our webinars will help them move from believing [old belief] to [new belief], resulting in [desired next step].



This becomes the anchor for content, speakers, promotion, and conversion paths.

## Define roles by buying influence (not job titles alone)

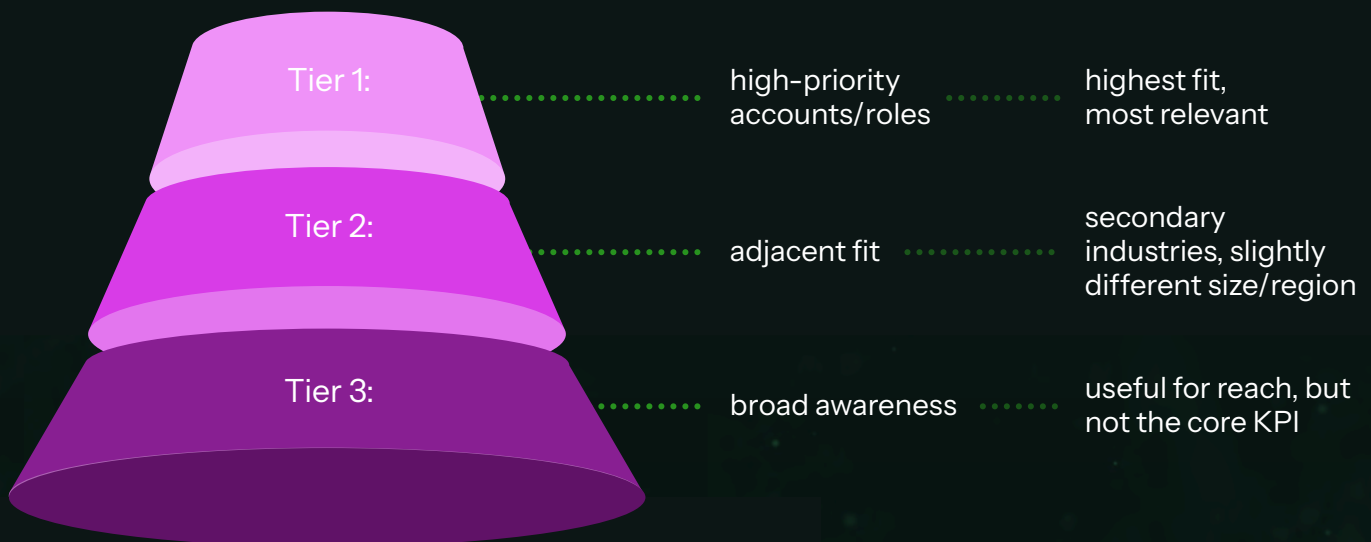
Personas get messy when they're built from titles only. Instead, define roles based on how they participate in the buying decision. Most B2B webinar audiences include a mix of:



Once you know which of these you need, titles become a mapping exercise—not a guessing game.

## Segment your audience into tiers you can act on

To make the audience definition useful, translate it into tiers that change how you invite and follow up. A simple model:



This makes it easier to align internally: marketing knows who to optimise for, sales knows who to prioritise, and reporting stays honest.

## What “defined” looks like

By the end of this chapter, you should be able to say with clarity:

The primary audience (accounts + roles) this series is designed for

The belief shift your narrative will create for that audience

The segments/tiers that will guide invites, messaging, and follow-up

The primary conversion action you’re optimising toward

Now you’re ready to build the audience properly.

## CHAPTER 3:

# Define the audience

## Aim for the right rooms, not bigger rooms

If webinars are going to drive demand, audience definition can't be vague. "Good attendance" doesn't matter if the wrong companies and the wrong roles are showing up.

A usable audience definition answers four questions:



Which companies should be in the room?



Which roles inside those companies matter?



Which regions are in scope (and out of scope)?



What counts as fit so you can measure it consistently?

### Step 01

## Turn your ICP into targeting rules

The most helpful ICP isn't a description but a set of filters your team can execute.

Translate your ICP into clear criteria:



**Industries**  
(primary + secondary)



**Growth profile**  
(e.g., stage/funding, if relevant)



**Geographies**  
(countries/regions)



**Exclusions**  
(competitors, irrelevant segments, existing customers—depending on goal)



**Company size**  
(headcount, revenue bands)



**Optional signals**  
(tech stack, intent, hiring, if relevant)

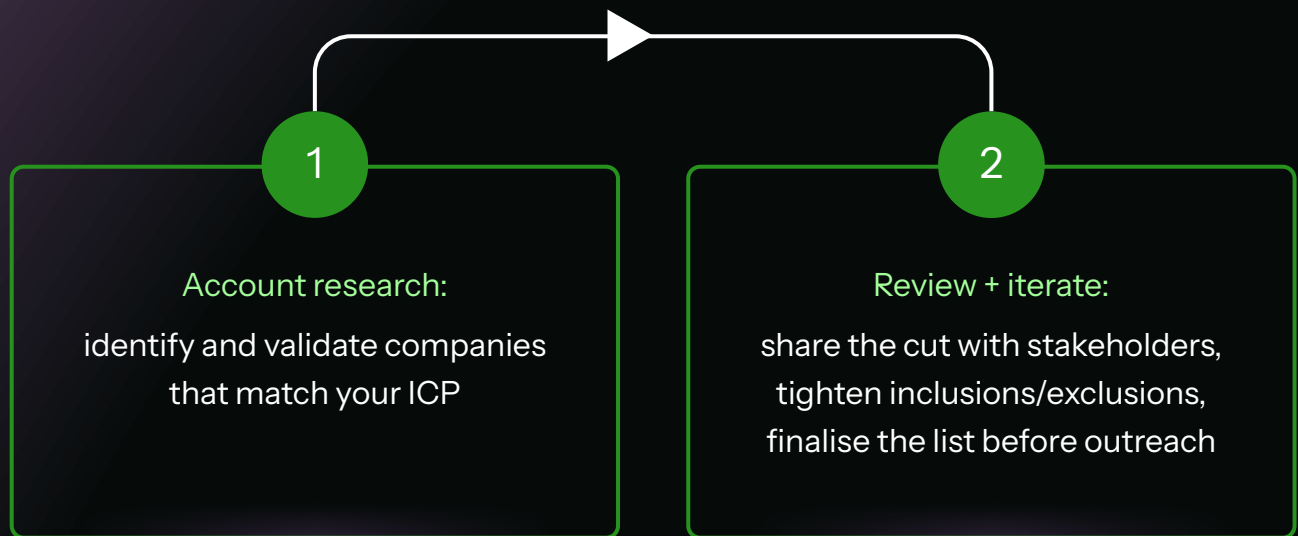
These rules become the basis for list building, segmentation, and reporting.

## Step 02

## Build the account universe (don't assume it already exists)

Most teams over-trust what's in their CRM. Instead, treat account targeting as its own workstream: build a clean "account universe" that matches the rules above.

A practical two-step method:



This turns "we target mid-market X" into a real list your team can invite, track, and learn from.

## Step 03

## Define the people inside those accounts

Once accounts are set, decide who you need in the room.

Define:

Functions (the departments you sell into)

Titles + seniority (e.g., Manager vs Director/VP/C-level)

Region (aligned with scope)

Buying influence (economic buyer vs technical/operational roles, if relevant)

Then build the contact layer with minimum data standards. At a baseline, you want:

- Name, company, title, location
- Verified email
- LinkedIn URL (or equivalent validation)

## A simple “Audience Spec” to reuse all year

Keep it repeatable. For every webinar (or series), document an Audience Spec that includes:



## What changes once the audience is defined properly

When your audience definition is tight and executable, three things happen immediately:

- ➔ **Your promotion gets sharper.** Messaging can be segmented by role and account type instead of “one size fits all”.
- ➔ **Your measurement becomes meaningful.** You stop celebrating volume and start tracking fit, engagement, and downstream action by segment.
- ➔ **Your follow-up gets easier.** Sales and marketing can run consistent plays because the audience is known, tagged, and verifiable.

## CHAPTER 4:

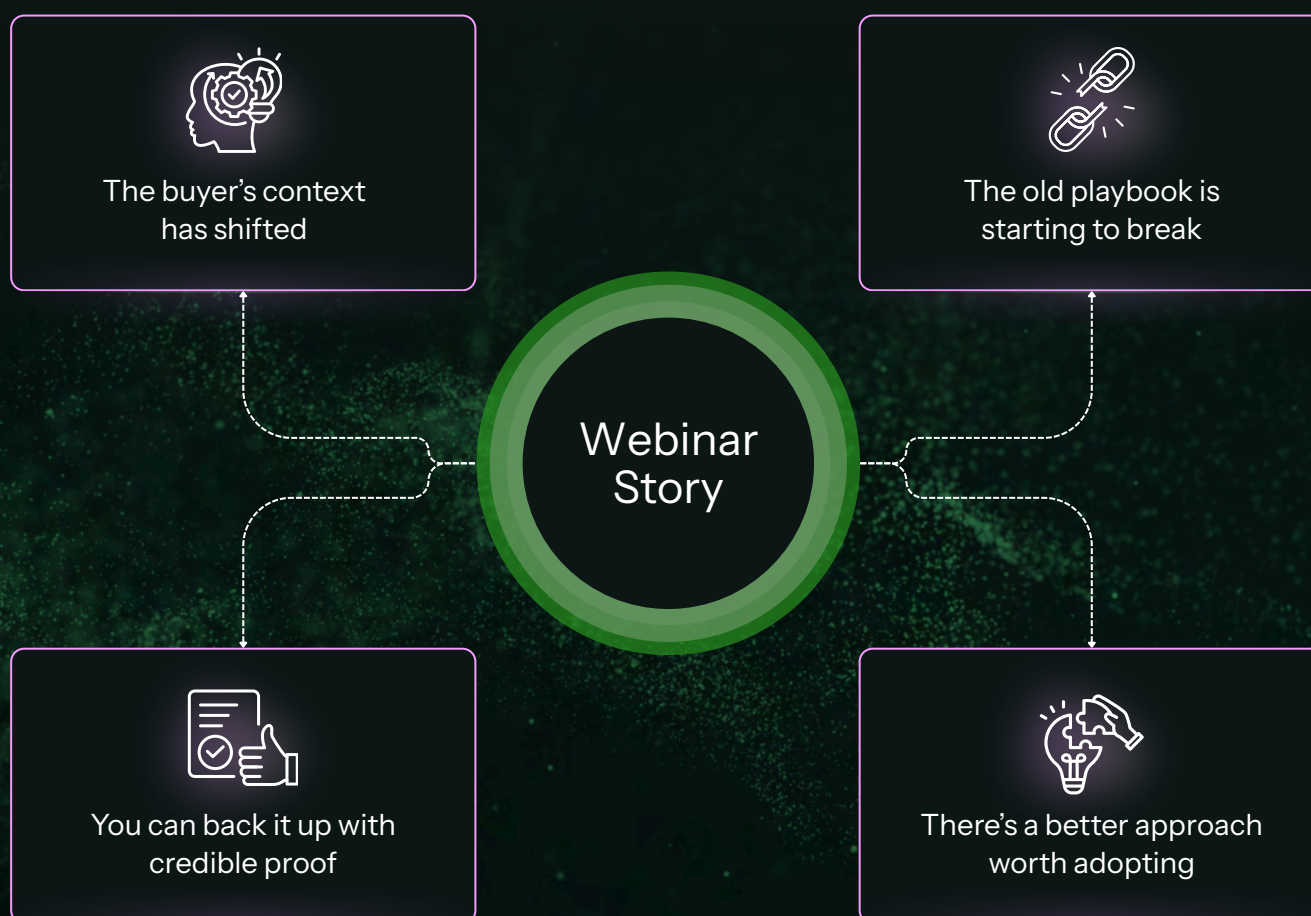
# Identify the stories to tell

## Start with what buyers are already trying to solve

Once you've defined the audience and built a clean way to reach them, the next constraint is attention. The best webinar programs don't win because they pick "hot topics". They win because they tell stories buyers recognise as immediately relevant, stories that help them make a decision, reduce risk, or see a problem differently.

A useful way to think about it: a webinar isn't a subject but a point of view. It should create movement, from uncertainty to clarity, from curiosity to action, from "we've been doing it this way" to "we should reconsider."

A strong webinar story usually includes a few core elements:



If you can't articulate those pieces in a sentence or two, you don't have a story yet; you have a theme.

## Where the best stories come from

Most teams already have strong stories; they're just scattered across conversations and outcomes. Chapter 4 is about collecting them, then selecting the few that deserve a spot in your webinar program.

Start by building a “story inventory.” Look in four places:

### Sales conversations.



The best story angles often start as recurring friction: the same objections, the same misconceptions, the same moments where a deal changes direction. Those patterns are useful because they're real, and because they reflect how buyers actually think.

### Customer outcomes.



Look for before/after moments: what was broken, what changed, what they tried that didn't work, and what created results. These are the most reusable stories because they naturally include stakes, proof, and a clear arc.

### Market shifts.



Buyers don't wake up wanting a webinar but responding to change. A shift in priorities, a new risk, a new internal metric, a new “this is now table stakes.” Strong stories attach to those shifts, then help the audience navigate them.

### Your operating advantage.



Not product features, your unique insight. The patterns you see across accounts, the contrarian beliefs you're willing to defend, and the process you use to get to outcomes. This is where differentiation lives.

At this stage, you're not trying to write titles. You're trying to capture angles that have energy and consequence.

## Select the stories that will actually perform

Now comes the quality filter. Many stories are interesting; fewer are effective webinar stories.

Use this short checklist when deciding what makes the cut:

✓ **Specific** to a real buyer problem (not a broad trend)

✓ **Relevant** to your defined audience segments

✓ **Differentiated** (not something any competitor could run tomorrow)

✓ **Credible** (supported by proof: data, patterns, outcomes)

✓ **Actionable** (gives the audience a clear takeaway or next step)

If it's interesting but not actionable, it's usually better as a blog post. If it's actionable but not differentiated, it may get attendance but won't build preference.

CHAPTER 5:

# Build the stories for the audience (top, middle, bottom of funnel)

Chapter 4 helps you choose the right story angles. Chapter 5 is about packaging those angles so they consistently earn attention, hold it, and move buyers forward without changing your voice or turning the session into a pitch.

Use this table as the backbone for how you build stories across the funnel:

Funnel intent	What the story must do	What the audience should leave with
Top	Reframe the problem and create urgency	A new lens + “we should pay attention”
Middle	Provide a framework to evaluate options	Criteria + a clear approach
Bottom	Reduce risk and show the path to value	Proof + a confident next step

## A practical story blueprint (use this every time)

You don’t need three completely different webinar formats. You need one consistent structure, with different emphasis depending on funnel intent:

### Hook (fast recognition)

Open with a tension your audience immediately relates to. Top-of-funnel leans into urgency; middle/bottom leans into specificity.

### Shift (why now)

Name what’s changed in the buyer’s world, new expectations, risks, constraints, or metrics. This creates relevance without hype.

## Value (the framework)

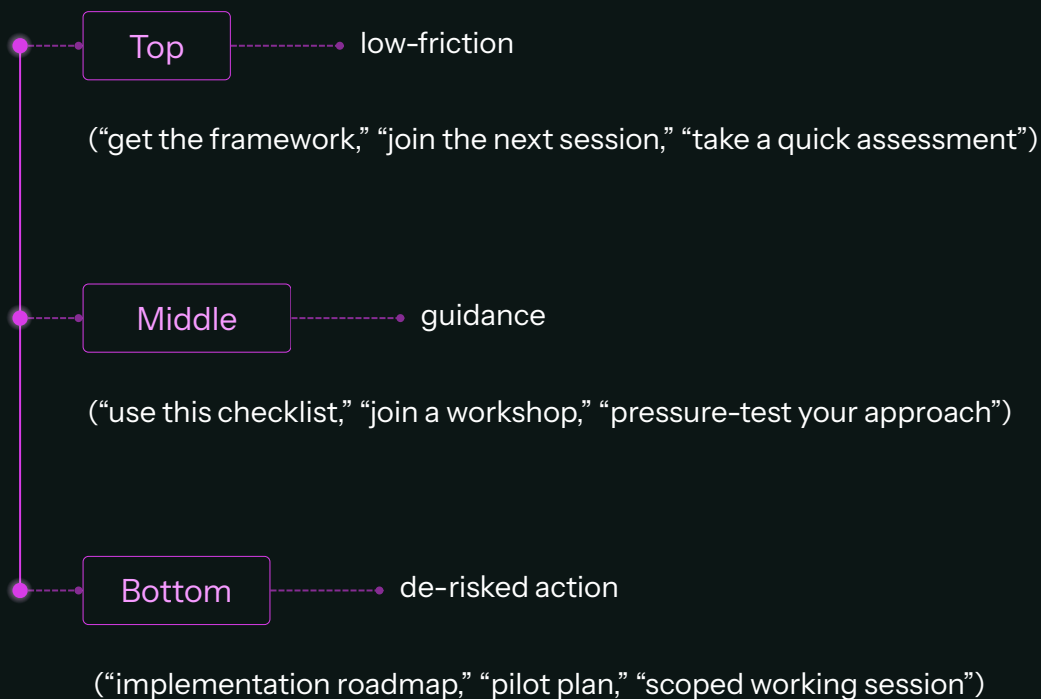
Deliver the core value early: a model, steps, decision criteria, or diagnostic. Middle-of-funnel is framework-heavy; top-of-funnel keeps it lightweight and punchy; bottom-of-funnel anchors it in execution.

## Proof (make it believable)

Bring evidence: patterns across accounts, examples, customer outcomes, benchmarks, or common failure modes. Bottom-of-funnel requires the most proof and detail.

## Next step (make action feel natural)

The next step should feel like a continuation of the value:



## Make it emotional, credible, and interactive (in one build)

A webinar lands when it combines stakes, credibility, and engagement without overcomplicating the session.

### Stakes

(emotion without drama)

Name pressures buyers already feel: the frustration of the old approach, the risk of getting it wrong, and the relief of having a clear framework and path forward.

### Credibility

(speaker choice is part of the story)

Pick speakers who can be clear, specific, and confident. A dependable format is practitioner + host: the practitioner brings real examples and proof, while the host keeps pace, structure, and audience focus.

### Engagement (design it in, don't hope for it)

Keep interaction light but deliberate:

- Start with one quick poll to diagnose the room
- Add a mid-session prompt (“which scenario fits you?”)
- Close with structured Q&A and a tight recap (3 takeaways + next step)

## Conclusion

When you build stories by funnel intent, every webinar has a clear job: Top creates urgency, Middle creates clarity, Bottom creates confidence. That's how a series stays coherent, stays valuable, and consistently moves buyers forward.

## CHAPTER 6:

# Ensure the systems are set for email outbound

Webinars don't become a demand engine when you "send an invite". They become a demand engine when outbound is repeatable and reliably delivered. If your email system is shaky, everything upstream suffers: list quality, attendance, follow-up, and pipeline attribution.

Start by treating outbound as infrastructure. Set once, improved continuously.

## Get the basics right: deliverability and data hygiene

Before you scale sends, protect your ability to land in inboxes:

Domain and sender setup:

separate sending domains where appropriate, consistent sender names, and clean authentication (SPF/DKIM/DMARC).

Warm-up and volume discipline:

ramp gradually; avoid sudden spikes.

Suppression and hygiene:

remove bounces, complainers, and unsubscribes immediately. Don't re-import old lists without revalidation.

If you want a demand engine, you need **stable deliverability**. Everything else builds on that.

## Make outbound usable for a webinar motion

Webinar outbound isn't "one email." It's a short sequence designed to create touchpoints and drive registration. Operationally, you need:

Clear segmentation:

by account tier, persona/buying role, industry, region, lifecycle stage.

### Consistent fields:

first name, company, role, industry, region, LinkedIn URL (where available), plus engagement history.

### A standard sequence template:

invite → reminder → “last chance” → post-event replay/next step.

Use personalisation where it actually matters: relevance (role + industry + problem), not gimmicks.

## Track what matters (so you can improve it)

Outbound should tell you, quickly, what’s working:



### Delivery health:

bounce rate, spam complaints, inbox placement signals



### Engagement:

open proxy signals (if available), clicks, replies



### Outcome:

registrations, meetings booked, influenced opportunities

The point isn’t “more emails.” It’s more meetings from the right accounts.

## CHAPTER 7:

# Leverage the full commercial team to build interest

Webinars perform best when they're not "a marketing thing." They're a commercial play. The simplest win: invites turn cold outreach into warm conversations. People are far more receptive to a call or email when the first touch is value-led.

## The invite-first approach (cold becomes warm)

Instead of opening with "Can we get 15 minutes?", lead with a relevant invite. It works because:

It's **low-friction** (easy to say yes, or at least engage)

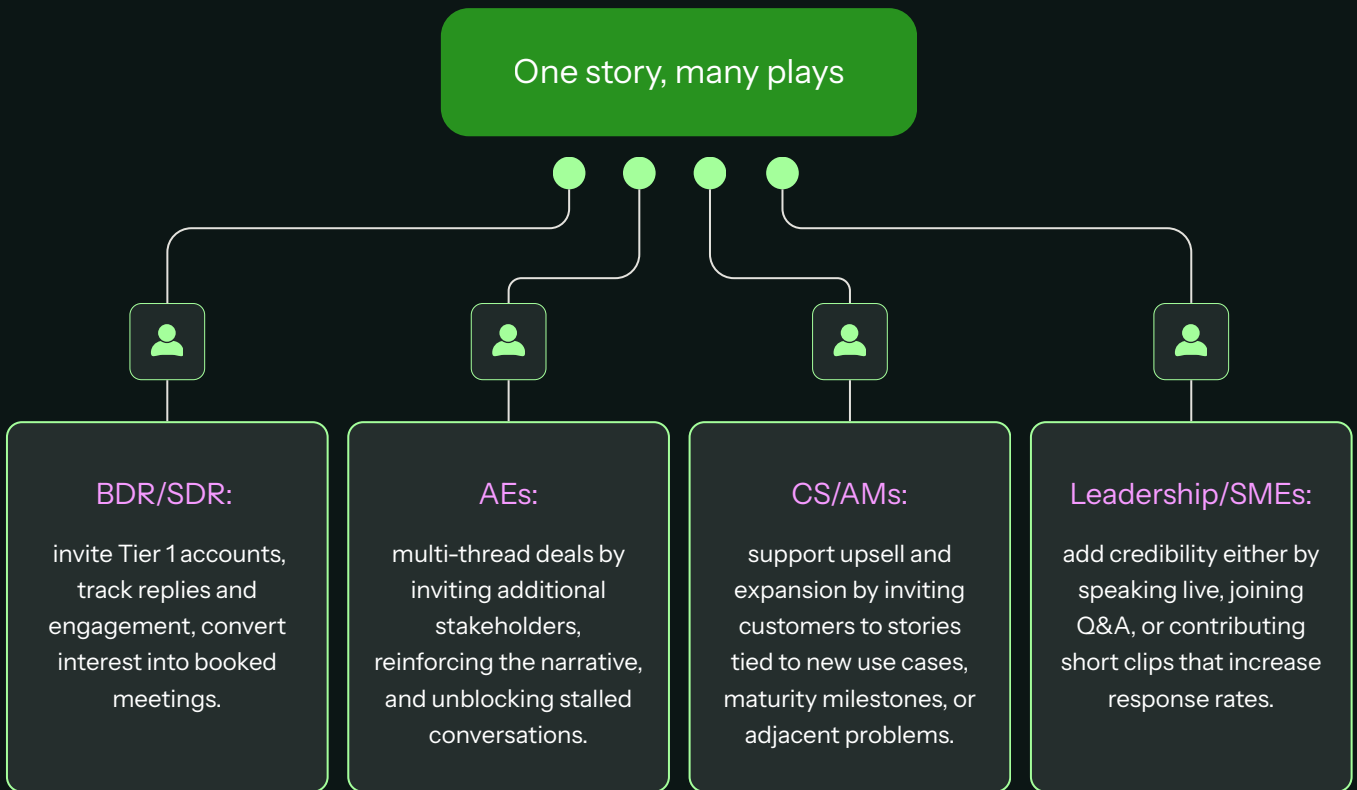
It's **value-first** (you're offering insight, not asking for time)

It creates a **natural follow-up** ("Did you catch it?" "Want the framework?" "Which part was most relevant?")

This reframes outbound from interruption to invitation. Your SDR/BDR team isn't there to "promote the webinar." They're there to use the webinar as a reason to start conversations that convert into next steps.

## Make it a team sport (roles and plays)

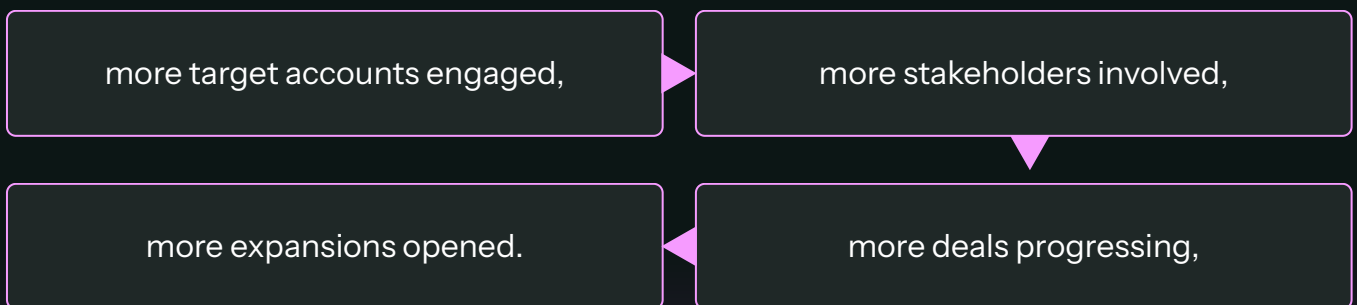
Different parts of the commercial team can use webinars for different outcomes. The key is to treat the webinar as a shared asset.



When these teams run in sync, webinars create coordinated market touchpoints that make pipeline easier to open and easier to move.

## Tie it to pipeline, not “attendance”

The objective isn’t “more people in the room.” It’s:



If commercial teams see that, they’ll show up for it.

## CHAPTER 8:

# Continuous experimentation (data-driven optimisation & engagement)

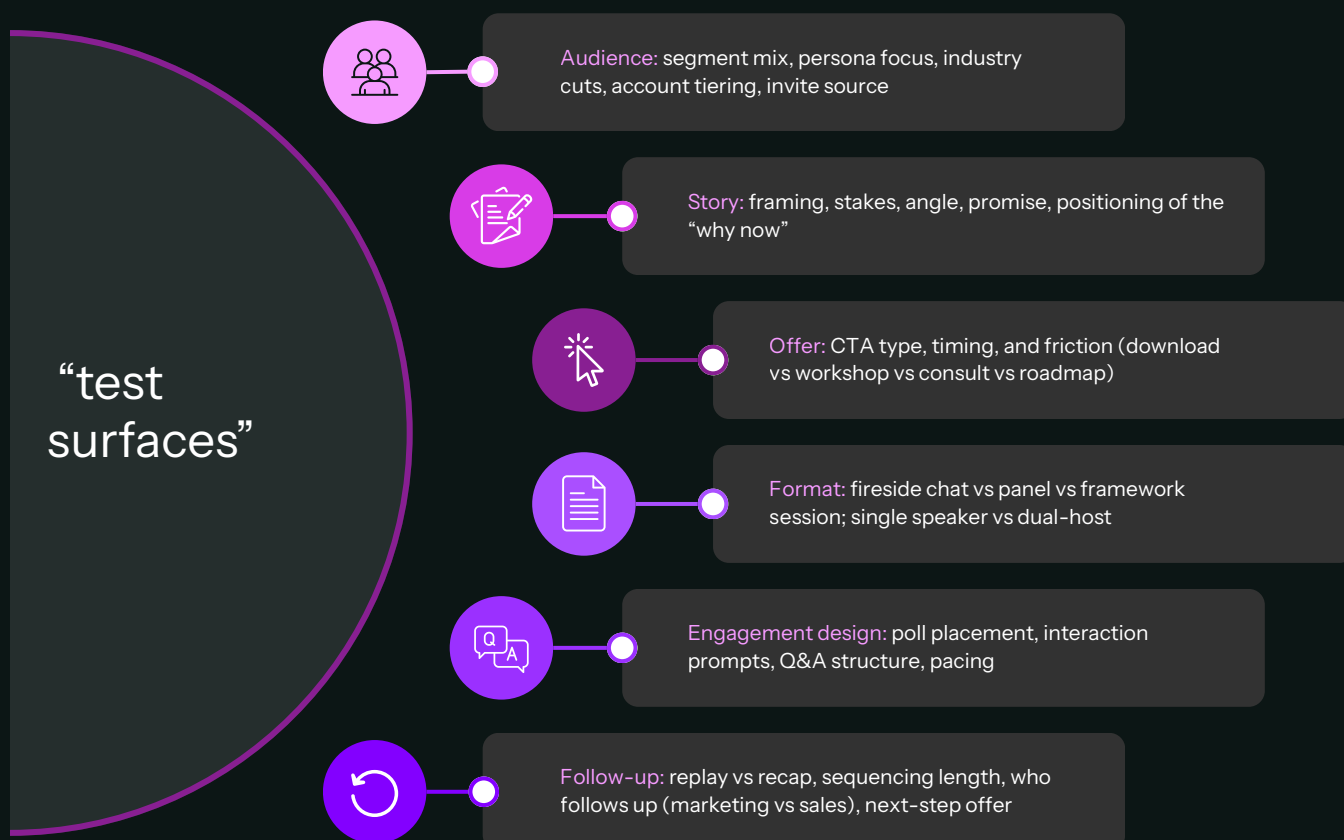
If you run webinars the same way every time, results usually plateau. Not because the channel stops working, but because the market adapts and your program stops learning.

Most teams “experiment” by changing everything at once, so they can’t tell what actually caused the result. A mature program does the opposite: it keeps the foundation stable and tests one meaningful variable at a time.

## Experiment across the full system (not just titles)

Testing titles is a start, but it’s rarely the biggest lever. Webinar performance is the result of an entire system working together. That’s where the highest-impact experiments live.

Here are the most useful “test surfaces” to rotate through:



Not all tests are equal. Audience and offer tests often produce the biggest swings because they affect both the quality of the room and the action people take afterwards.

## Keep it simple: one change, one learning

A practical rule that keeps programs coherent is one meaningful variable per webinar. Everything else stays consistent, so you can attribute results.

For example:

- Keep the story lane and audience constant, test **CTA timing**
- Keep CTA and format constant, test **persona focus**
- Keep persona and CTA constant, test **webinar format**

Within a few cycles, you stop debating opinions and start making decisions with evidence.

## Define what “better” means before you run the test

Experiments fail when success criteria are vague. Before you run a test, define:

Primary metric:

what you're optimising for (e.g., Tier 1 attendance, engagement rate, meetings booked)

Secondary metrics:

what you'll watch to explain the result (e.g., replies, Q&A volume, CTA clicks)

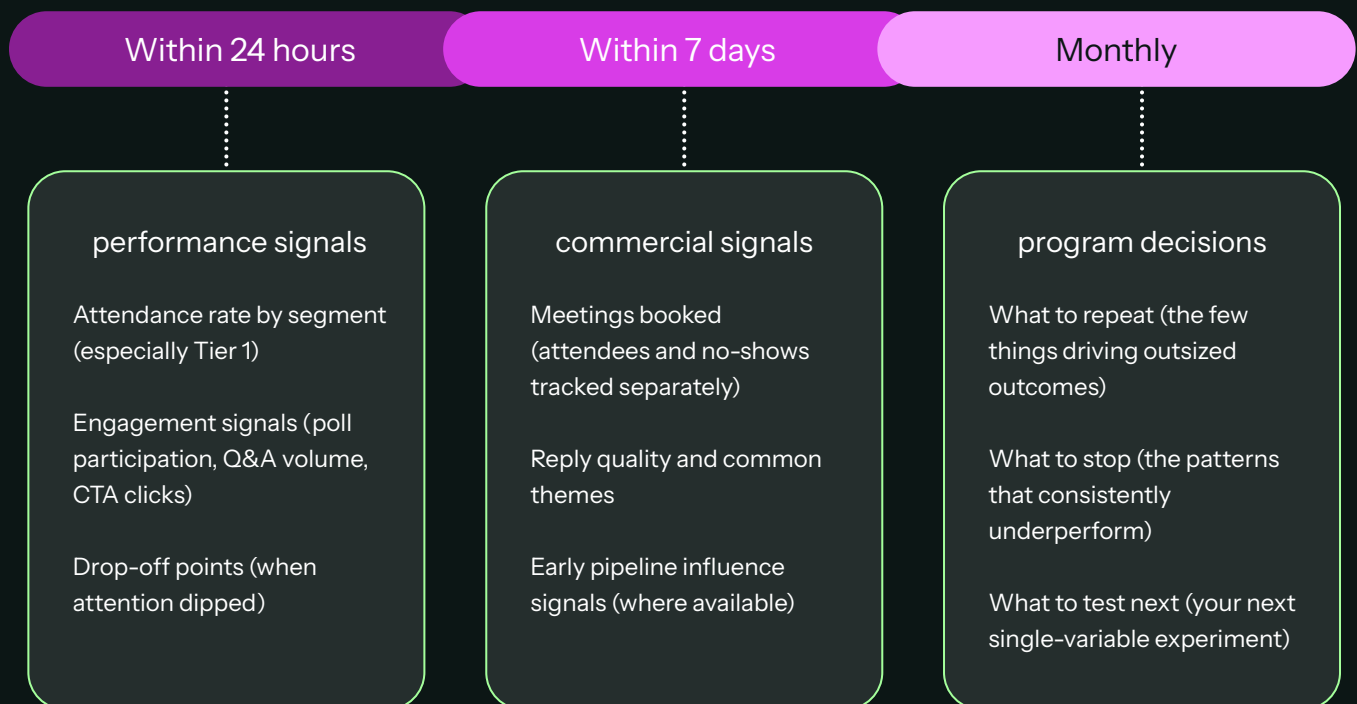
Guardrails:

what can't be sacrificed (e.g., deliverability health, complaint rates, audience fit)

This keeps the program aligned. You're not chasing vanity improvements that hurt pipeline outcomes.

## Build a review loop that makes improvement automatic

Experimentation only compounds if you have a tight feedback cadence. Treat review like an operational habit, not an occasional retro.



Over time, this becomes a strategic advantage: you're not guessing why something worked — you can explain it, repeat it, and scale it.

## Optimise engagement like a product team would

Engagement isn't "nice to have." It's a leading indicator of intent. Treat it as a design problem:

- Move your strongest value earlier (don't hide it behind a long intro)
- Build in interaction points (one early poll, one mid-session prompt, structured Q&A)
- Tighten pacing (fewer slides, clearer transitions, more specificity)
- Use questions as signal (what they ask tells you what to build next)

When engagement improves, downstream actions usually improve as well—because attention is the prerequisite for conversion.

## CHAPTER 9:

# Cascading content (marketing side)

A webinar shouldn't peak when you hit "Go Live." If all you get is one hour of attention and a registration report, you've left most of the value on the table.

Treat the live session as the start of the content lifecycle. The objective is to keep the story in circulation for weeks, across the channels your buyers actually pay attention to without rebuilding everything from scratch.

## Build a content cascade, not a recap

Most teams default to "here's the replay." A cascade works because it breaks the webinar into watchable, repeatable units, each with a clear job to do: earn attention, reinforce your point of view, and drive the next step.

Think in outputs that match modern consumption:



**Short-form** for discovery (clips, standout moments, strong opinions, frameworks)



**Mid-form** for clarity (POV posts, "what changed," tactical breakdowns)



**Practical assets** for action (one-page summaries, checklists, frameworks)

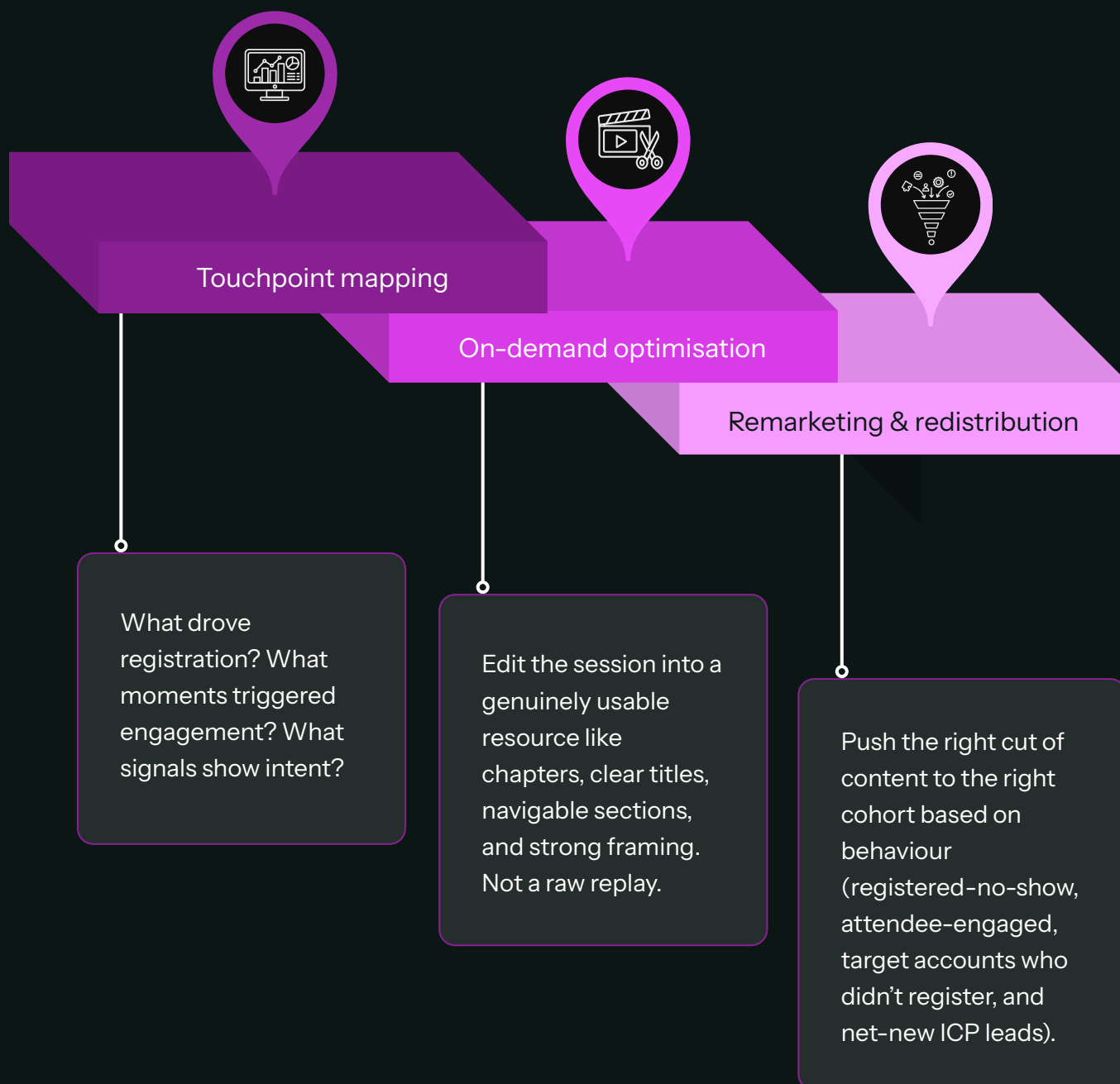


**Long-form** for depth (a clean on-demand asset with chapters, titles, and strong positioning)

## The OrbitalX approach: Watchable Waterfall

This is where Watchable Waterfall comes in, OrbitalX's structure for turning one webinar into an always-on engine.

Instead of treating repurposing as a creative brainstorm, Waterfall is operational:



This is how a webinar stops being an event and becomes a persistent asset that keeps opening conversations.

## Tie distribution to the audience you defined

The fastest way to waste good content is to distribute the same clip to everyone.

Keep it simple: segment the cascade the same way you segment the webinar program.



Different cuts for different **personas** (what a VP cares about isn't what an operator cares about)



Different angles for different **industries** (the pressure points change)



Different next steps depending on **funnel intent** (top/middle/bottom)

## Make it operational (so it happens every time)

If cascading is optional, it won't be consistent. Treat it as a standard workflow with a clear handoff:

**Extract** the moments (hooks, frameworks, proof, objections, best Q&A)

**Package** into a defined set of formats (clips, POV post, one-pager, on-demand asset)

**Schedule** distribution across owned and paid (and enable sales to share it)

**Track** what drives outcomes (replies, clicks, meetings, influenced pipeline)

A good cascade increases efficiency where every webinar gets more valuable over time.

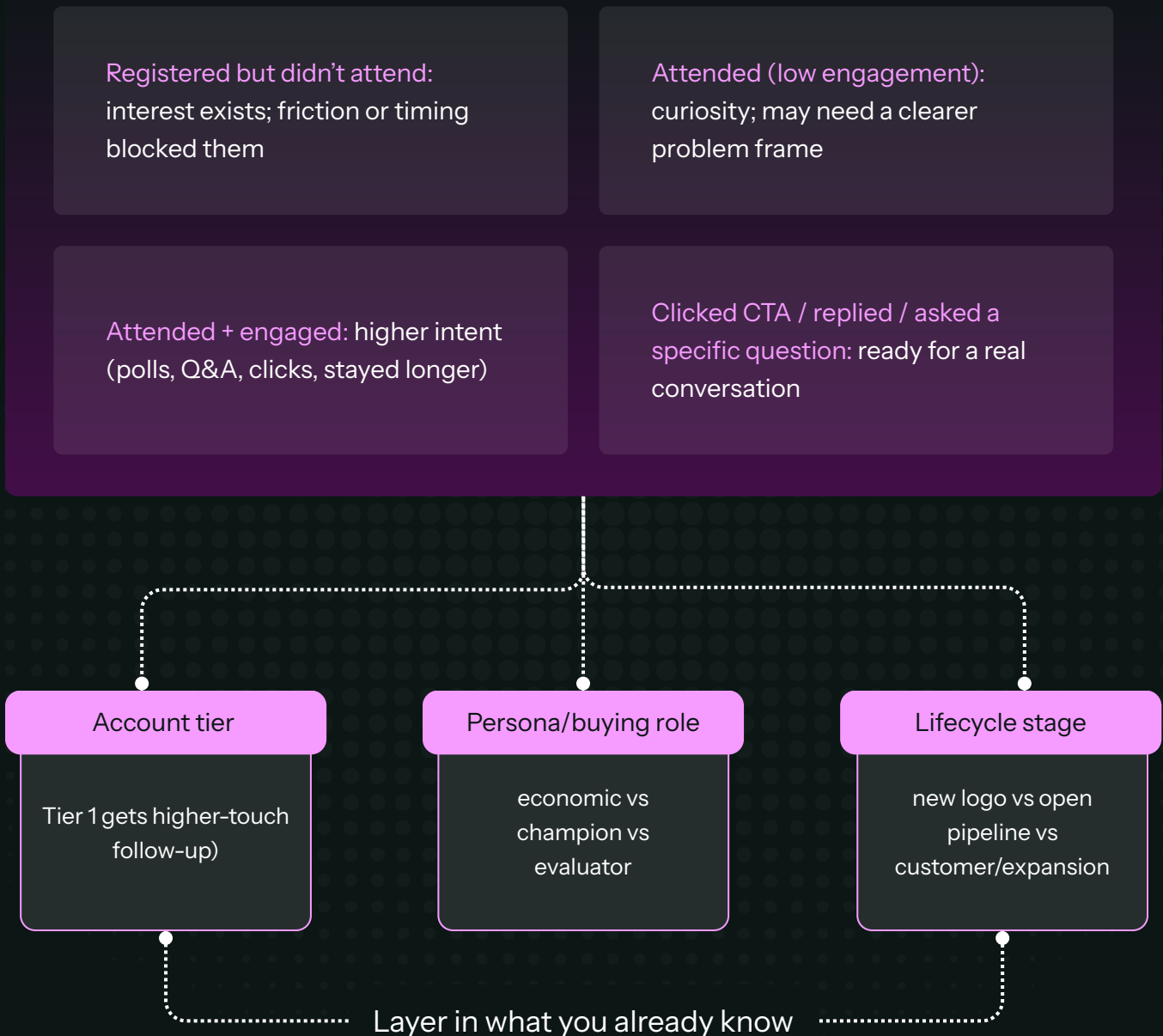
CHAPTER 10:

# Nurturing the leads

A webinar doesn't create pipeline by itself. It creates signals — who leaned in, what they cared about, and how close they are to taking action. Lead nurturing is where you turn those signals into consistent progression, without defaulting to either an aggressive sales push that burns trust, or a generic drip that gets ignored.

## Start with intent signals, not just attendance

Attendance is useful, but it's not the whole story. Treat nurture as a response to intent. A simple signal stack looks like this:



## The nurture structure: value-first, then progressive commitment

High-performing nurture flows follow a simple pattern: give value, then invite a small step forward, then earn the right to ask for a bigger step.

A practical sequence:

01

### Immediate recap (same day / next day)

Share the key takeaways and the core framework. Keep it skimmable. Link to the on-demand version.

02

### The “you might have missed this” follow-up (for no-shows)

Don't guilt them. Give the best 2–3 moments and a clean way to catch up quickly (chapters, timestamps, short cuts).

03

### Progressive value (next 1–2 weeks)

Send 2–4 follow-ups that deepen the story:

- One practical asset (checklist, one-pager, decision criteria)
- One proof-based piece (customer outcomes, benchmarks, “what works in practice”)
- One objection handler (common failure modes, risks, trade-offs)

04

### A next step that matches intent (not a generic demo ask)

Offer the most logical continuation of value:

- “Want the template?”
- “Should we benchmark your current approach?”
- “Want a short working session to map your 30/60/90 plan?”

## Make sales follow-up easier (context wins)

Where many programs break is the handoff. Sales gets “leads” with no context, follows up with a generic message, and the momentum dies.

A strong handoff includes:

- ✓ What they registered for and/or watched
- ✓ What they clicked
- ✓ What question they asked (if any)
- ✓ Which story angle they engaged with
- ✓ The recommended next step based on that behaviour

This turns “following up” into a relevant conversation starter.

## Use webinars to nurture accounts, not just individuals

Demand generation happens at the account level. Even if one person attends, the nurture plan should help you widen reach:

Invite additional stakeholders to the on-demand asset

Share role-specific cuts of content

Use the webinar theme to re-open stalled conversations

This is how a single attendee becomes multi-threading inside the account.

## Nurture is part of the learning system

Your nurture sequence is the feedback for the whole engine. Track what happens after the webinar:



Which segments book meetings



Which assets drive clicks/replies



Which story angles create the most “next step” behaviour



Which accounts progress stages faster after engagement

That data informs your next webinar, your next offer, and your next content cascade.

## Closing:

If you're ready to put this into motion, start with one focused move:

**Choose one audience segment and one story lane, then build a 90-day series around it.**

Run it with disciplined outbound and post-event nurture. Measure what changes in meetings booked, deal velocity, and expansion conversations.

If you want OrbitalX involved, the right starting point is Story Onboarding. It gives you the narrative spine, the segmentation clarity, and the first campaign angles so you're not improvising as you scale.

The goal isn't "a successful webinar." It's a market that expects to hear from you, and a pipeline that proves it.