ReadyTalk for ExactTarget
User Guide

July 2013

CONTENTS

OVERVIEW

Save time and drive better results with ReadyTalk. Our easy-to-use webinar solution seamlessly integrates with ExactTarget so you can send emails, capture registrations, manage activities, and view key metrics right from the Interactive Marketing Hub.

- **Speed Set-Up**

  Save valuable time by instantly creating ExactTarget webinar invitations, confirmation, reminder, and follow-up emails using your own existing ExactTarget templates or ReadyTalk's easily customizable templates.

- **Send Webinar Emails and Capture Registrations through ExactTarget**

  Take advantage of ExactTarget's customizability, deliverability, and reporting capabilities when you send all event-related emails from ExactTarget.

  Quickly create and customize a polished webinar registration page using your own ExactTarget landing page template or a ReadyTalk-provided registration form. Once a prospect completes the form, they will be automatically registered in ReadyTalk and instantly receive a confirmation email from ExactTarget.

- **Increase Webinar Attendance**

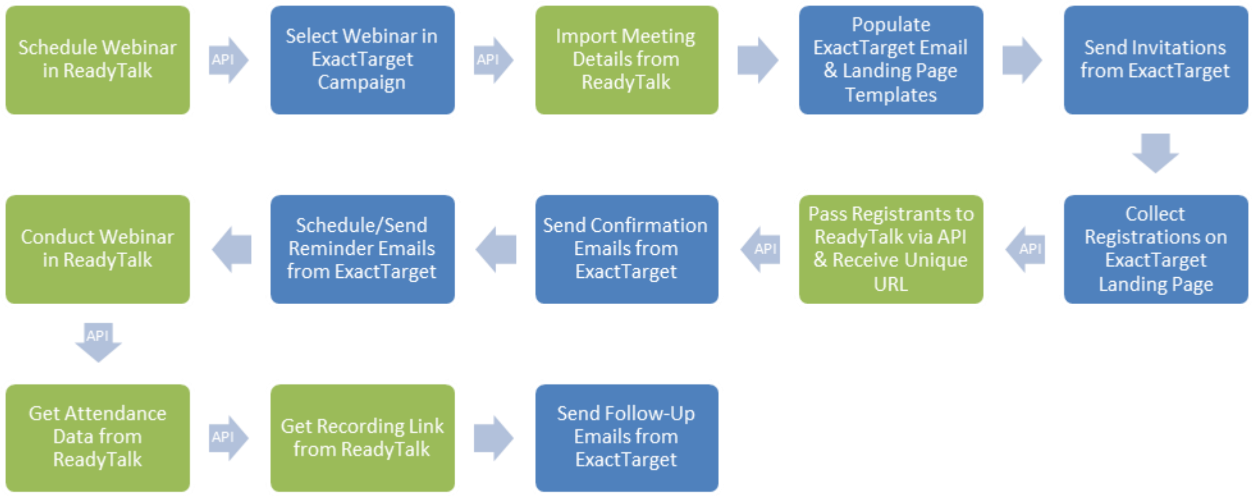
  Drive higher attendance rates by making it easy for prospects to add the event to their calendar. Include an ICS file with all of the information people need to join the event (including their unique 'Join Meeting' link) in confirmation and reminder emails sent from ExactTarget.

- **Follow-Up Faster**

  Timely follow-up is essential for driving higher conversion rates. Automatically capture attendance data and the recording link in ExactTarget so you can send post-event emails to attendees and non-attendees immediately after the webinar.

The ReadyTalk for ExactTarget application enables webinar registration, attendance and recording information to be automatically passed between ReadyTalk and ExactTarget.

HIGH-LEVEL WORKFLOW



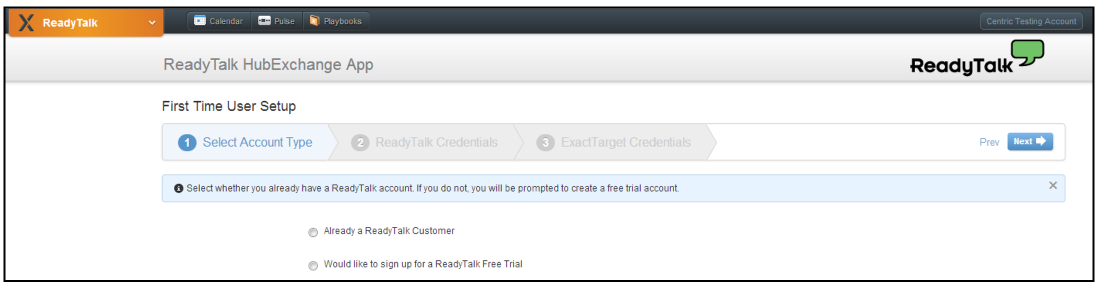
GETTING STARTED: SIGN UP FOR READYTALK FOR EXACTTARGET

To get started with ReadyTalk for ExactTarget, go to www.hubexchange.exacttarget.com/readytalk and click the ‘Get App’ button.

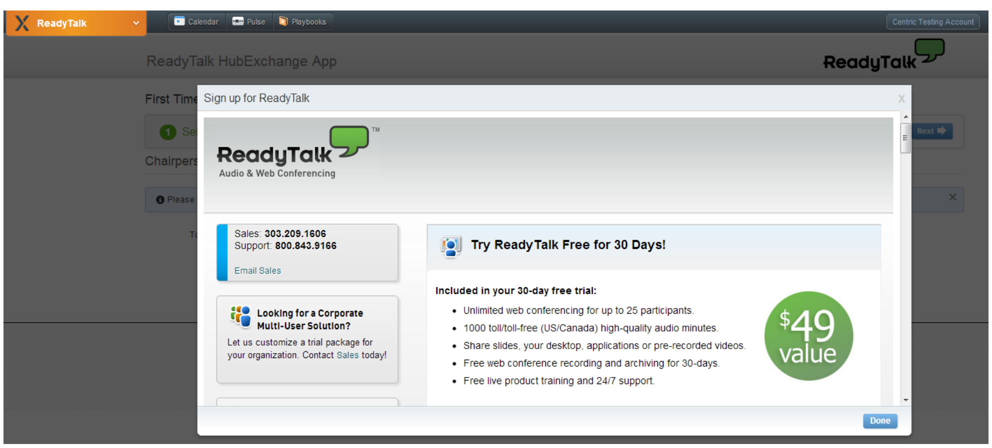
Please note: Your ExactTarget account must have data extensions configured to use the ReadyTalk for ExactTarget integration. Please contact your ExactTarget administrator or account manager to add this feature to your account.

The ReadyTalk for ExactTarget application will be placed in the HubExchange section of your Interactive Marketing Hub. Click on the ReadyTalk application within the navigation menu on the left-hand side to display the following screen:

Step 1: Select Account Type



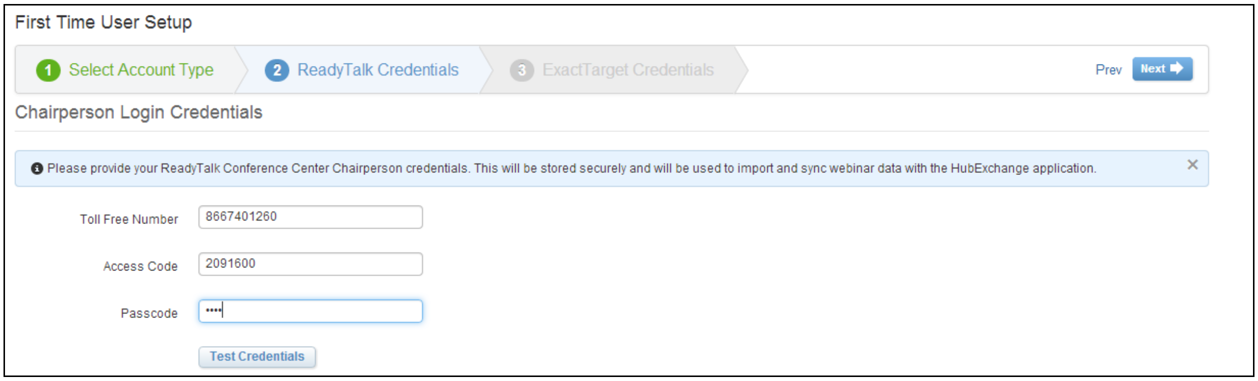
- If you have an active ReadyTalk account, select the first option and hit **Next**.
- If you do not have a ReadyTalk account and would like sign up for a free 30 day trial, select the second option and complete the form to request a free trial.



  - **Note**: You will receive a verification email with your ReadyTalk account credentials within 1 business day of submitting your request.
    - Please ensure that you use a valid email address and phone number so a ReadyTalk representative can follow-up with you in a timely manner.

- After receiving your ReadyTalk credentials, select the ReadyTalk application within the navigation menu and select the first option, "Already a ReadyTalk Customer" and hit 'Next'

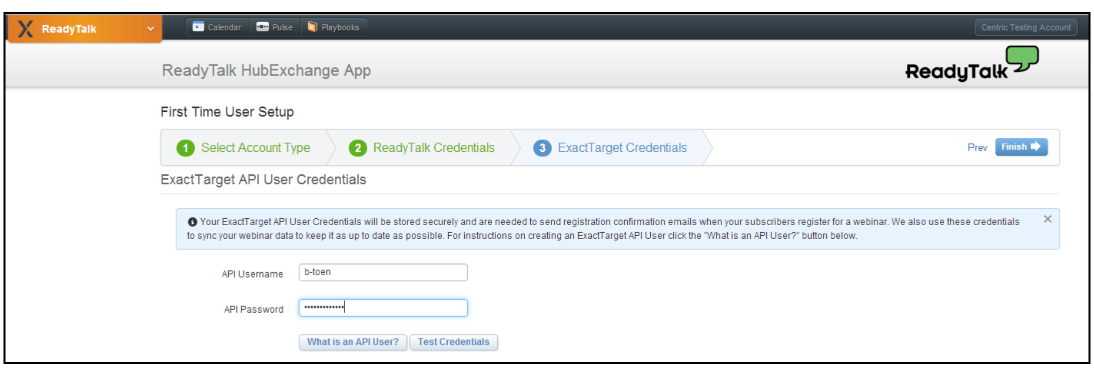
Step 2: Enter your ReadyTalk Chairperson Login Credentials



- **Toll Free Number** – enter the phone number you use to connect to ReadyTalk.
  - This is your On-Demand Toll-Free Conferencing Phone Number (ie. 866.740.1260)
- **Access Code** – enter your ReadyTalk access code.
- **Passcode** – enter your ReadyTalk passcode.
  - To ensure the information you entered is valid, click on the 'Test Credentials' button
    - **Credential Check Succeeded** Notification: ReadyTalk credentials are valid
    - **Credential Check Failed** Notification: ReadyTalk credentials are invalid
      - Please double check the information and hit 'Test Credentials' again
      - If your credentials are still invalid, please contact ReadyTalk Customer Care

- After entering your credentials, hit **Next**.

Step 3: Enter your ExactTarget API User Credentials



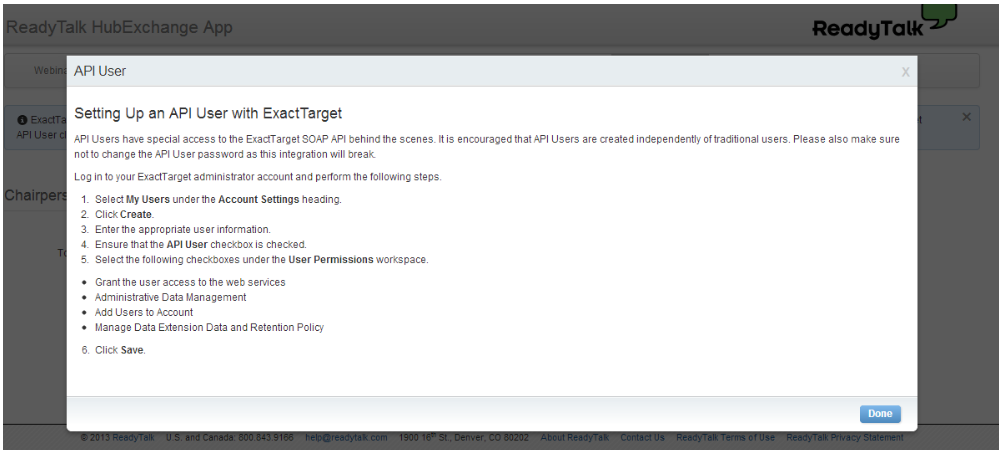
Note: API Users have special access to the ExactTarget SOAP API behind the scenes. Please check with your ExactTarget administrator to see if you have API Access on your ExactTarget account.

- It is encouraged that API Users are created independently of traditional users.

- If you update your API User password in ExactTarget, you will need to make the same update within the ReadyTalk for ExactTarget application.

Learn more about various configurations that should be enabled on your ExactTarget account to use all available features within the application.

How to Setup an API User with ExactTarget



Once you have your API username and password, enter in the following information:

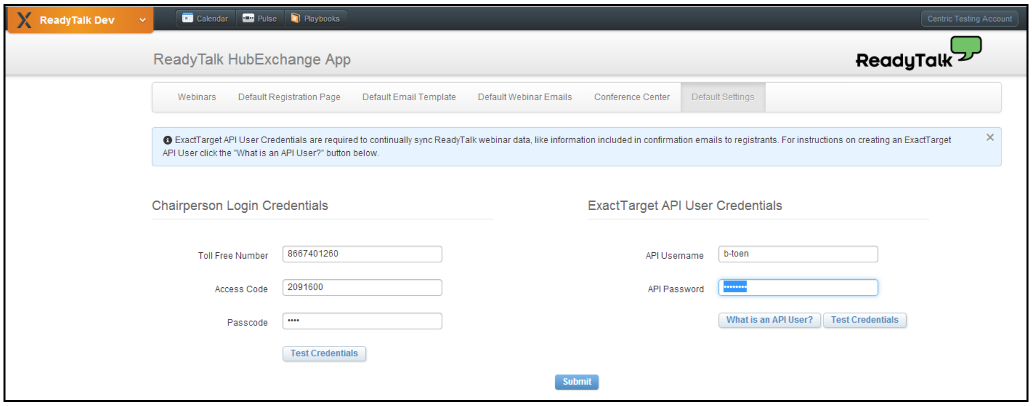
- **API Username**: Enter the username associated with the ExactTarget API-enabled account
- **API Password**: Enter the password associated with the ExactTarget API-enabled account
    - To ensure the information you entered is valid, click on the 'Test Credentials' button
        - **Credential Check Succeeded** Notification: ExactTarget API credentials are valid
        - **Credential Check Failed** Notification: ExactTarget API credentials are invalid
            - Please double check the information and hit 'Test Credentials' again
            - If your credentials are still invalid, please contact ExactTarget Customer Care
- After entering your ExactTarget API credentials, hit **Submit**.

Congratulations! Now you are ready to setup your default email templates and registration pages for your upcoming ReadyTalk webinars!

STEP 2: SETUP YOUR DEFAULT SETTTINGS AND TEMPLATES

DEFAULT SETTINGS

The **Default Settings** information will automatically populate with the credentials you entered during the one-time setup for the ReadyTalk for ExactTarget application.



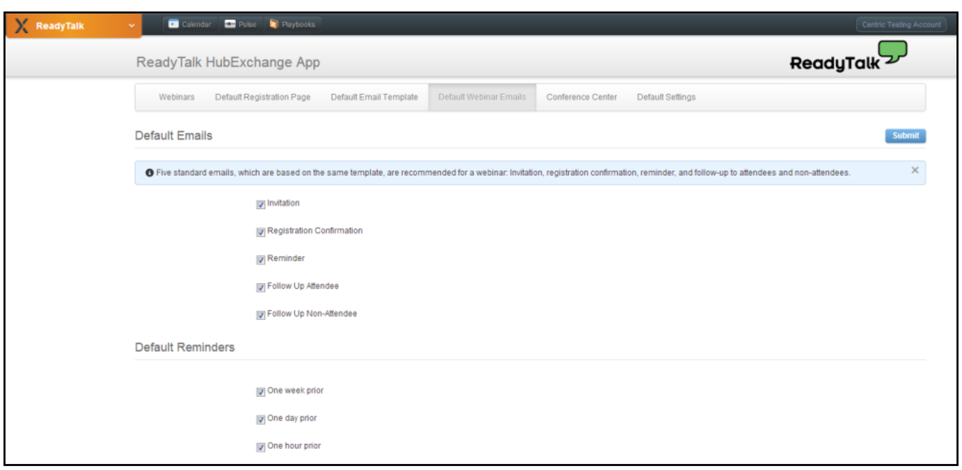
- Chairperson Login Credentials on the default settings page can be changed at any time. In addition, chairperson login credentials can be updated on a per webinar basis.

DEFAULT WEBINAR EMAILS

ReadyTalk recommends creating five standard emails to associate with your webinar:

- Invitation
- Registration Confirmation Email
- Multiple Reminder Emails to Confirmed Registrants
- Follow-up Email to attendees
- Follow-up Email to non-attendees

The **Default Webinar Emails** page enables you to select which emails should be generated for each webinar as well as the timing for reminder emails to confirmed registrants.



How to configure your default email preferences:

- To disable an email, uncheck the associated box next to the email type
    - **Note**: If you uncheck the email type **Reminder**, the scheduled times for the default reminder email(s) will also be unchecked and disabled.
    - Email preferences can be updated on a per webinar basis
- After updating your email preferences, hit **Submit.**

DEFAULT EMAIL TEMPLATES

ReadyTalk recommends five standard emails to associate with your webinar.

Each email contains similar information about the webinar:

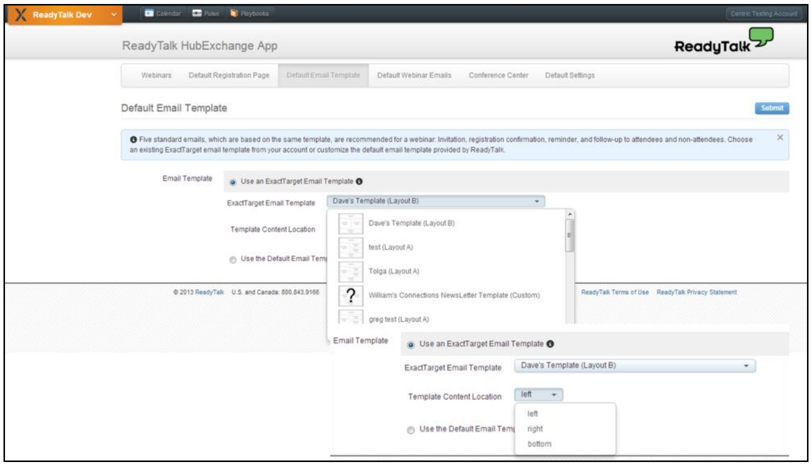
- Webinar Title
- Webinar Date, Time, and Time Zone
- Branding elements
    - Header Image
    - Alternate Header Image
    - Header/Footer Background
    - Text/Line Colors
    - Presenter Information (Name, Bio, and Image)
    - Body/Footer Text

Users can select an existing ExactTarget email template from their account or customize the default email template provided within the ReadyTalk for ExactTarget application.

Using ExactTarget Email Templates

ExactTarget templates reside in your ExactTarget account and can be fully customized with ExactTarget's editing tools.

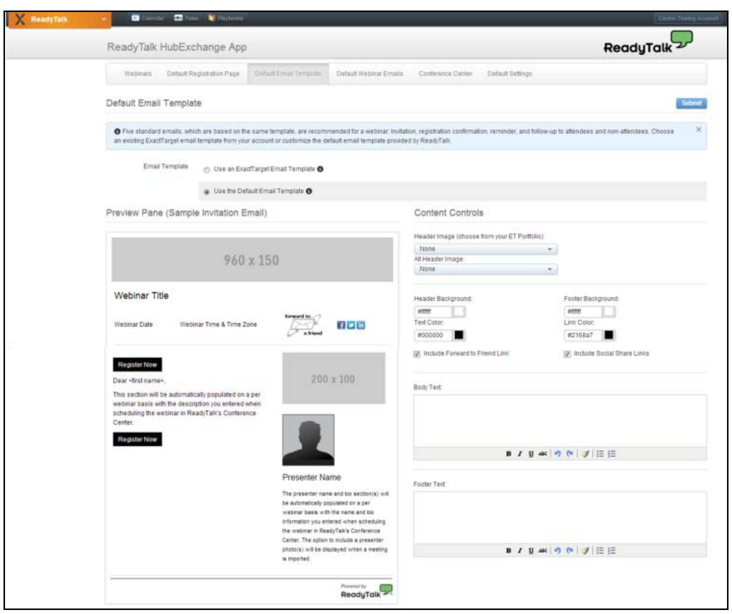
- **Note:** The ExactTarget template must be configured and edited within ExactTarget. The templates cannot be customized within the ReadyTalk application.



- Choose the template you would like to use from the **ExactTarget Email Template** drop-down menu
    - **Note**: The drop-down menu will display all email templates that are currently setup on your ExactTarget account and/or business unit
- Choose the **Template Content Location**
    - Specific webinar information from ReadyTalk (ie. Webinar title, date/time/time zone, and description) will populate in the chosen content area
- Hit **Submit**

Using the ReadyTalk-provided Default Email Templates

As part of the ReadyTalk for ExactTarget application, a single set of email templates have been provided within the HubExchange to help get your webinar program up and running quickly.



Customization Options for the Default Email Template

- **Header Image**: Select the default header image from your ExactTarget portfolio.
  - Recommended dimensions: 960 X 150
  - Recommended best practice: Resize the image before uploading into your ExactTarget portfolio
- **Alternate Header Image**: Select the alternate header image from your ExactTarget portfolio. This may be an additional logo or a sponsor logo.
  - Recommended dimensions: 200 X 100
  - Recommended best practice: Resize the image before uploading into your ExactTarget portfolio
- **Header/Footer Background Color:** Input your HEX (color) number to match your branding or choose the color from the provided pallet.
- **Text Color:** This color will apply to the following:
  - Meeting description that is entered in Conference Center
  - Presenter Name and Bio information that is entered in Conference Center
    - **Note:** If you set a different font color on the meeting description and presenter names/bios when creating your webinar in Conference Center, it will be automatically updated to the default text color that you set within the application
- **Link Color:** This will apply to the background color of the **Register Now** button
- **Forward to Friend Link:** Including this button will allow subscribers to forward your webinar invitation to a friend. Learn more about Forward to a Friend functionality in ExactTarget.
- **Social Sharing Link:** Including this button will allow subscribers to share your upcoming webinar, like the title and registration link, to their social networks (Facebook, Twitter, and LinkedIn). Learn more about Social Forward functionality in ExactTarget.
- **Body Text:** Use this area to include additional information about your webinar, new products, company news, etc.
- **Footer Text:** Use this area to include additional information like asking users to add your email address to their safe list
  - **Note:** The minimum CAN-SPAM Requirements such as unsubscribe instructions and your company address will be automatically included on every email sent from ExactTarget
- Hit **Submit**

The preview pane will display each of the above options as you customize your template. In addition, when a webinar is imported, the following webinar details will be imported and saved in the ReadyTalk application to populate content areas in the email templates.

- Webinar title, date, time, and time zone
- Webinar Description
- Presenter Name and Bio
- Audio and web information for joining the webinar

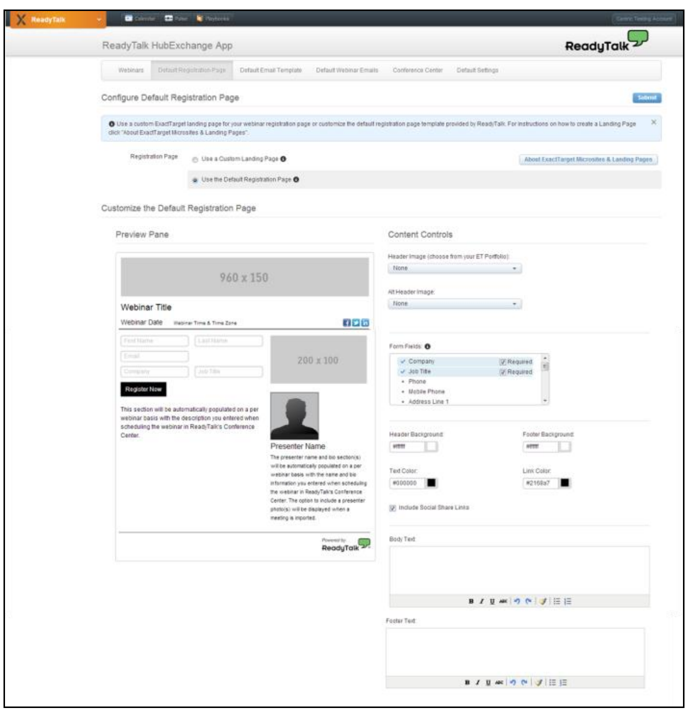
All customization options on default email templates can be changed or updated on a per webinar basis.

DEFAULT REGISTRATION PAGE

Users can use a Custom ExactTarget Landing Page or customize the default registration page template provided within the ReadyTalk for ExactTarget application.

Using Default Registration Pages

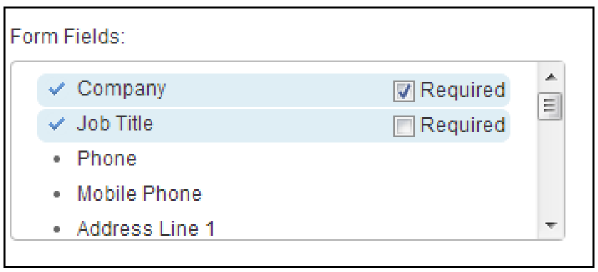
- Choose the **Use the Default Registration Page** option and customize the following content options:



  - **Header Image**: Select the default header image from your ExactTarget portfolio.

    - Recommended dimensions: 960 X 150
    - Recommended best practice: Resize the image before uploading into your ExactTarget portfolio

- **Alternate Header Image**: Select the alternate header image from your ExactTarget portfolio. This may be an additional logo or a sponsor logo.
    - Recommended dimensions: 200 X 100
    - Recommended best practice: Resize the image before uploading into your ExactTarget portfolio
- **Form Fields**: Select the registration fields that should be included on the registration form



    - First Name, Last Name, and Email are the default required fields and are required for the integration
    - To add additional fields, check the box next to each field.
    - To make a field required, check the corresponding **Required** box
        - **Note:** You must setup the exact same registration question configuration in Conference Center to accurately capture the information in ReadyTalk's Registration reports.
    - Up to 19 standard registration fields are enabled
- **Header/Footer Background Color:** Input your specific HEX (color) number to match your branding or choose the color from the provided pallet.
- **Text Color:** This color will apply to the following:
    - Meeting description that is entered in Conference Center
    - Presenter Name and Bio information that is entered in Conference Center
        - **Note:** If you set a different font color on the meeting description and presenter names/bios when creating your webinar in Conference Center, it

will be automatically updated to the default text color that you set within the application

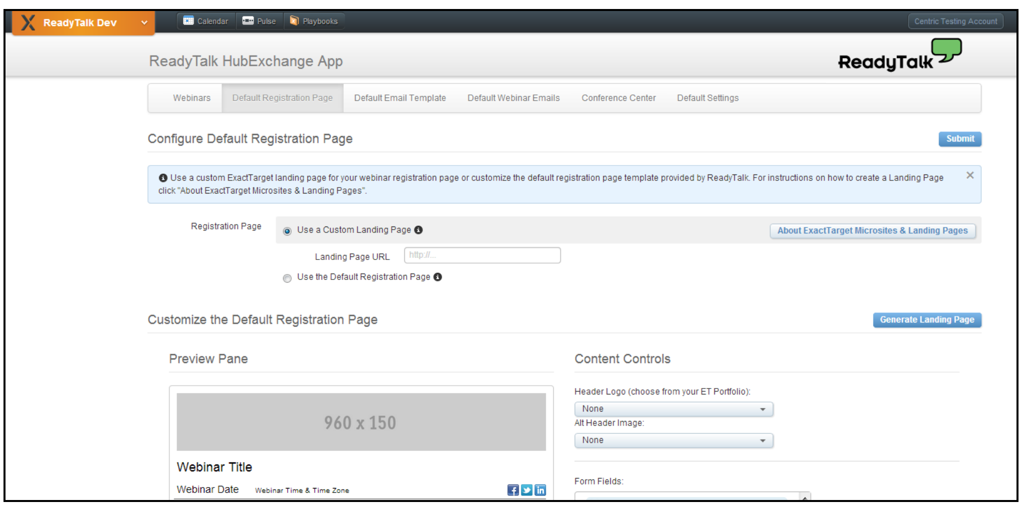
- **Link Color:** This will apply to the background color of the **Register Now** button
- **Social Sharing Link:** Including this button will allow subscribers to share your upcoming webinar, like the title and registration link, to their social networks (Facebook, Twitter, and LinkedIn). Learn more about Social Forward functionality in ExactTarget.

- **Body Text:** Use this area to include additional information about your webinar, new products, company news, etc.
- **Footer Text:** Use this area to include additional information like asking users to add your email address to their safe list
- Hit **Submit.**

Using Custom ExactTarget Landing Pages

Note: Please check with your ExactTarget administrator to ensure you have access to ExactTarget landing pages and microsites.

- Choose the **Use a Custom Landing Page** option
  - **Note:** You must setup the **Default Registration Page** before setting up a Custom Landing Page



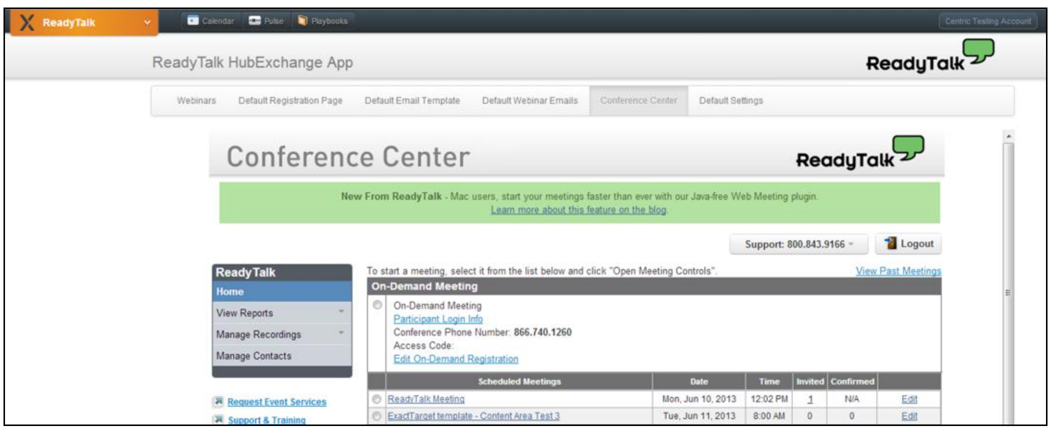
- Click on the blue **Generate Landing Page** button. Copy and paste the HTML code into a new landing page within ExactTarget.
  - Get complete instructions on creating a custom landing page in ExactTarget.

- After publishing the custom landing page in ExactTarget, copy and paste the landing page URL in the **Landing Page URL** box in the ReadyTalk application.
    - Once the page is published in ExactTarget, you can utilize ExactTarget's editing tools to further customize the landing page within ExactTarget.
- Hit **Submit.**

CREATE YOUR WEBINAR IN EXACTTARGET

SCHEDULE YOUR WEBINAR IN CONFERENCE CENTER

Before importing your webinar into the ReadyTalk for ExactTarget application, you will need to schedule the webinar in Conference Center. Conference Center can be accessed from within the application, or you can choose to sign in to Conference Center from www.readytalk.com.

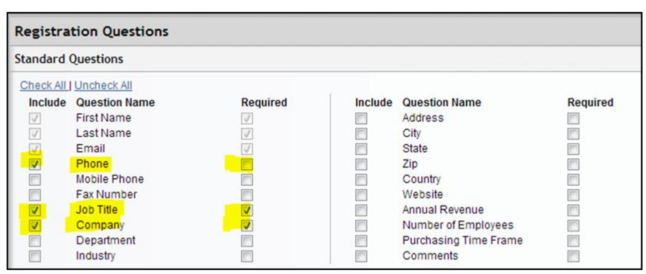


The following information is **required** to ensure that information syncs correctly with the ReadyTalk for ExactTarget application and the associated registration page/invitations/emails:

- **Meeting Title** – enter the webinar title
- **Host (s)**: This field defaults to the chairperson's name that is associated with the access code. Update if needed.
- **From Email**: This field defaults to the chairperson's email that is associated with the access code. Update if needed.
    - **Note:** The **from email address** can be updated on a per email basis for any emails initiated out of ExactTarget.
- **Date/Time/Time Zone/Duration**
- **Registration Type:** Always set to 'Pre-Register before the Meeting' and 'Automatically Confirm all Registrants.'

- Leave **Notify me of new registrations via email** unchecked as you will be using an ExactTarget form to register leads

- **Meeting Type:** Web & Audio, Audio Only, or Web Only
- **Audio Type**
    - **On-Demand:** Choose this option if your meeting has *less than 150 participants* and does *not* require operator assistance
    - **Operator-Assisted:** Choose this option if your meeting has *more than 150 participants* and/or *you require operator assistance or Broadcast Audio*
        - A two-step process is required to request operator-assisted services:
            - Complete the request form
            - After receiving a confirmation email from the ReadyTalk events team with your webinar details (ie. Audio join details like the Broadcast Audio code), enter the information into Conference Center
        - **Note:** Manual updates to confirmation and reminder emails will be needed
- **Meeting Description**: The meeting description will populate the registration pages, invitations, and emails associated with the webinar. If this information is not completed in Conference Center, it will be **blank** in the various registration pages and emails.
    - **Note**: To ensure consistency on the ExactTarget registration pages, invitations, and emails, the font type for the meeting description will automatically be converted to Arial. The other formatting properties will be maintained (ie. Font color and size, bulleted/numbered lists, hyperlinks, etc)
- **Standard Registration Questions** (Within Registration Form Option): To ensure all registration information that is collected on an ExactTarget registration form is also captured in Conference Center, you must select the same standard registration questions in both Conference Center and ExactTarget, including the same designation for optional vs required questions.



- **Presenter Information:** Enter the presenter name and bio information for each presenter on your webinar. After importing the webinar into the ReadyTalk app in ExactTarget, you will be prompted to choose a presenter image from your ExactTarget Content Portfolio to associate with each presenter.

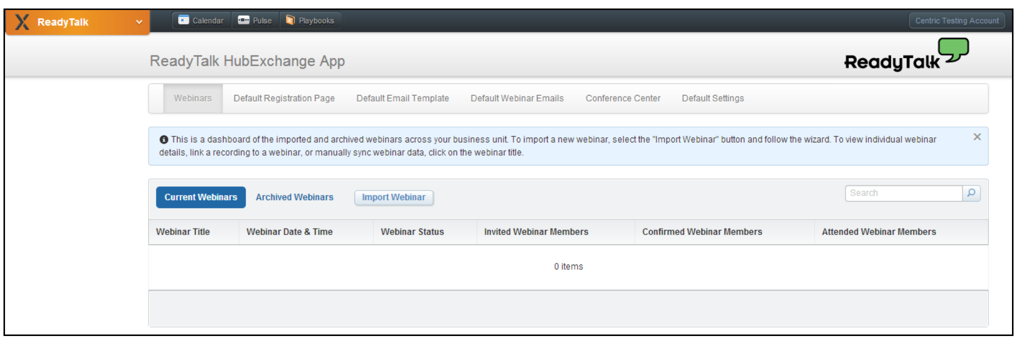
The following information is **optional** for your webinar setup in Conference Center:

- **Security Passcode for Web Meeting**: This is an additional layer of security that will be included in confirmation and reminder emails to registrants. Attendees will need to enter this passcode to gain access to your webinar
    - Note: If a security passcode is enabled for your webinar, you must enter the ***same*** passcode when importing the meeting into ExactTarget.
- **Custom Branding**: This includes a header image, alignment options and the header web link
    - **Note**: These branding elements will be included on the post-event survey page and post-meeting archive page, which are not included as part of your webinar templates in ExactTarget.
- **Presenter Photos**: These branding elements will be included on the post-meeting archive page, which is not included as part of your webinar templates in ExactTarget.

IMPORT THE WEBINAR

Now that your webinar is setup, it's time to import the webinar into the ReadyTalk for ExactTarget application to build out the invitation, registration page, and emails.

Go to the Webinars Tab.



The **Webinars Dashboard** gives you a snapshot of the current webinar activity that has been synced between ReadyTalk and ExactTarget, including:

- Webinar Title
- Webinar Date & Time
- Webinar Status (Scheduled, Cancelled, or Closed)
- Count of Invited Webinar Members
- Count of Confirmed Webinar Members
- Count of Attended Webinar Members

The Archived Webinars tab shows a list of any ReadyTalk webinars that were imported into ExactTarget, and then archived through the application.

- Note: The archived webinar section can be used to organize webinars that have already occurred. Learn how to archive a webinar.

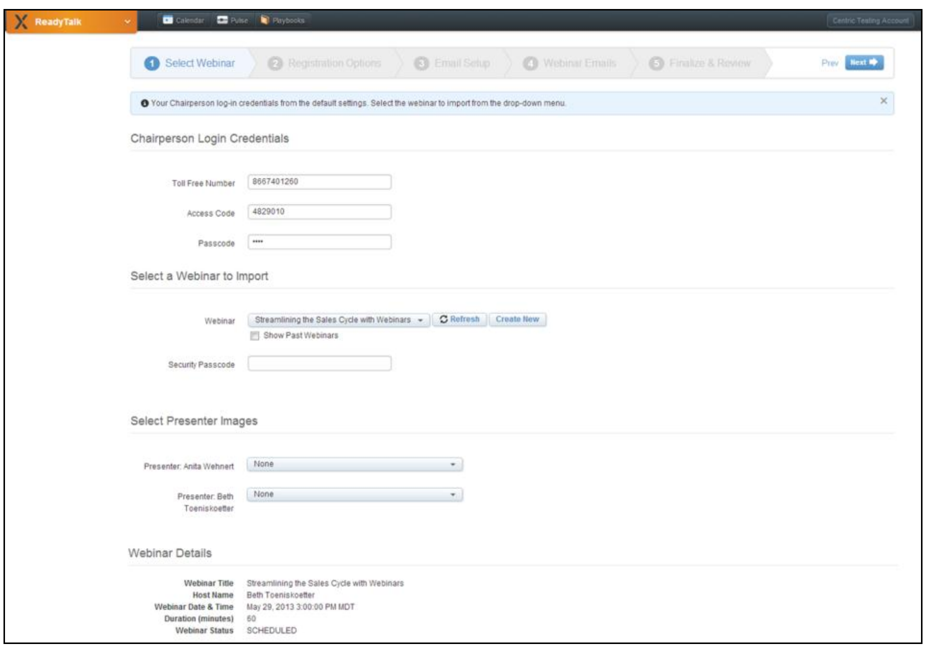
Click on **Import Webinar**

Step 1: Select Webinar

The **Chairperson Login Credentials** will automatically populate with the information from your **Default Settings**. In addition, the scheduled webinars associated with the displayed ReadyTalk credentials will appear in the Webinar Drop-down list under **Select a Webinar to Import**.

Note: Information is *not* saved during the webinar import process until the final step.

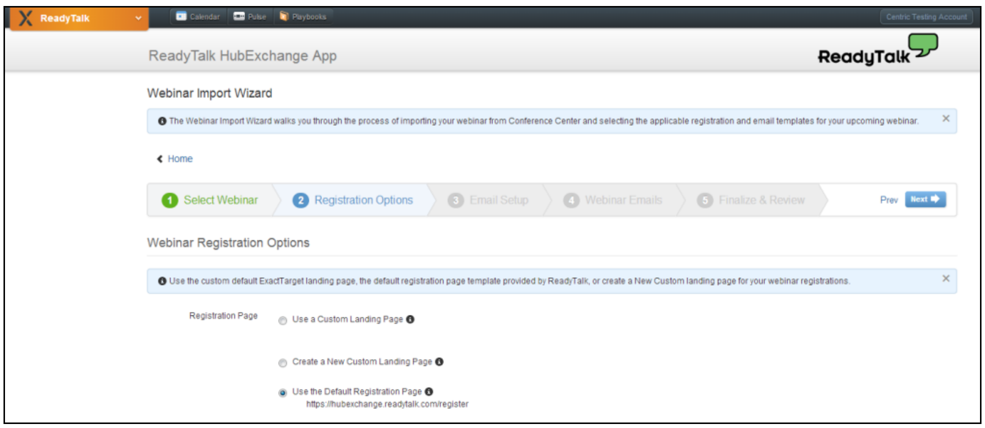
If you would like to import a webinar that resides on a different set of ReadyTalk credentials, just update the fields with the applicable toll free number, access code and passcode. Click the **Refresh** button to display the scheduled webinars on the updated chairperson credentials.



- From the drop-down **Webinar** menu, select the webinar that you wish to import.
  - **Note:** If you choose to setup a security passcode for your web meeting in Conference Center, make sure to setup the exact same security passcode within the ReadyTalk for ExactTarget application.

- Select the **presenter image(s)** associated with each presenter name & bio from your ExactTarget portfolio
    - Reminder: Presenter name(s) and bio(s) must be setup in Conference Center prior to importing the webinar.
- The **Webinar Details** show a snapshot of the details associated with your webinar, such as Title, Host Name, Date/Time/Time/Zone, Duration, and Status of your Webinar
- Hit **Next.**

Step 2: Choose Registration Page Options



You have three options to choose from:

- Use a **Custom Landing Page**
    - This is the Custom Landing page that was created during the initial setup of the application.
- Create a **New Custom Landing Page**
    - Click on the blue **Generate Landing Page** button. Copy and paste the HTML code into a new landing page within ExactTarget.
        - Get complete instructions on creating a custom landing page in ExactTarget.
    - After publishing the custom landing page in ExactTarget, copy and paste the landing page URL in the **Landing Page URL** box in the ReadyTalk application.
        - Once the page is published in ExactTarget, you can utilize ExactTarget's editing tools to further customize the landing page within ExactTarget.

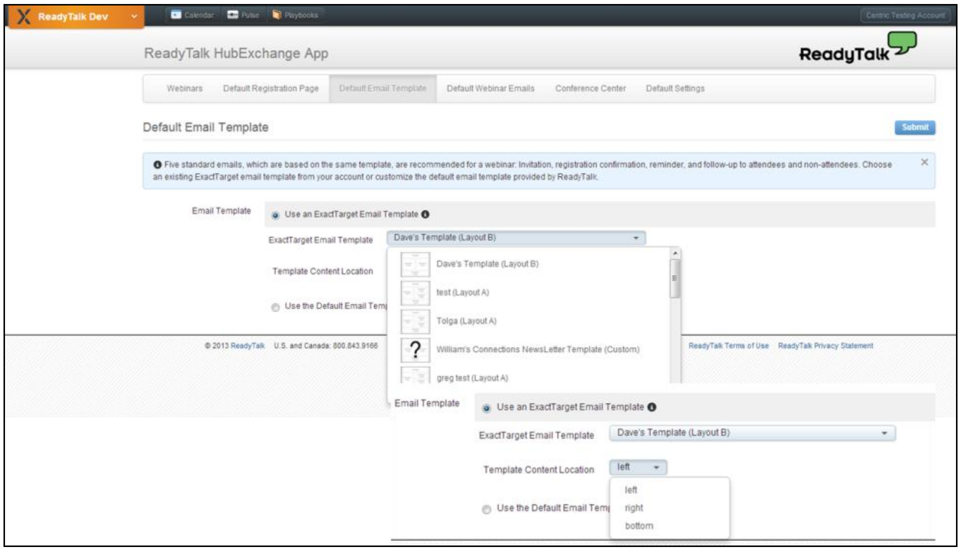
- Use the **Default Registration Page**
    - This is the default registration page that was created during the initial setup of the application.
    - This page *cannot* be edited or updated from within the ReadyTalk for ExactTarget application. To edit on a per webinar basis, exit out of the Import Webinar workflow by clicking on **Home,** then on **Default Registration Page.**
- Once you have chosen the registration page type, hit **Next.**

Step 3: Email Setup

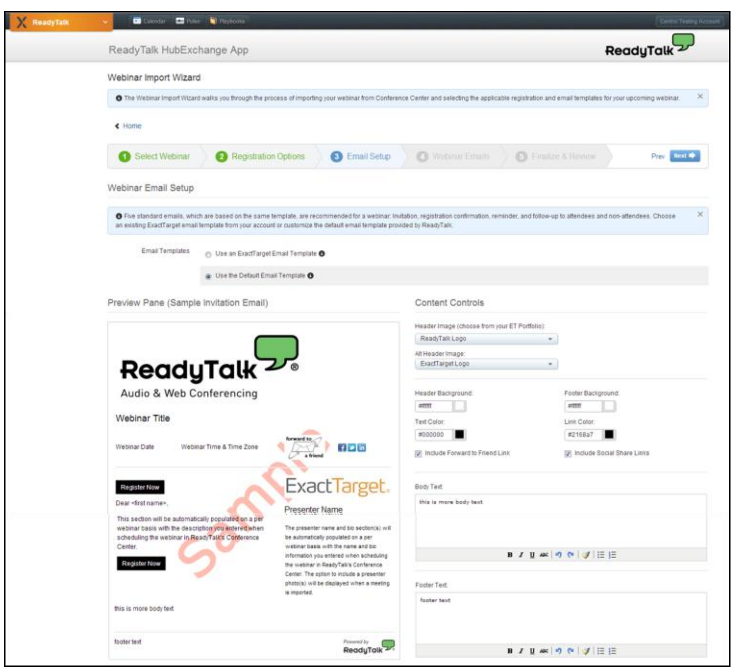
You have two options to choose from for your email setup on a per webinar basis.

Remember, each email contains similar information about the webinar:

- Webinar Title
- Webinar Date, Time, and Time Zone
- Branding elements
    - Header Image
    - Alternate Header Image
    - Header/Footer Background
    - Text/Line Colors
    - Presenter Information (Name, Bio, and Image)
    - Body/Footer Text
- Use an **ExactTarget Email Template**
    - ExactTarget templates reside in your ExactTarget account and can be fully customized with ExactTarget's editing tools.
        - **Note:** The ExactTarget template must be configured and edited within ExactTarget. The templates cannot be customized within the ReadyTalk application.



- Choose the template you would like to use from the **ExactTarget Email Template** drop-down menu
  - **Note**: The drop-down menu will display all email templates that are currently setup on your ExactTarget account and/or business unit
- Choose the **Template Content Location**
  - Specific webinar information from ReadyTalk (ie. Webinar title, date/time/time zone, and description) will populate in the chosen content area
- **Using the ReadyTalk-provided Default Email Template**
  - If desired, update the various customizable options for the [Default Email Template]



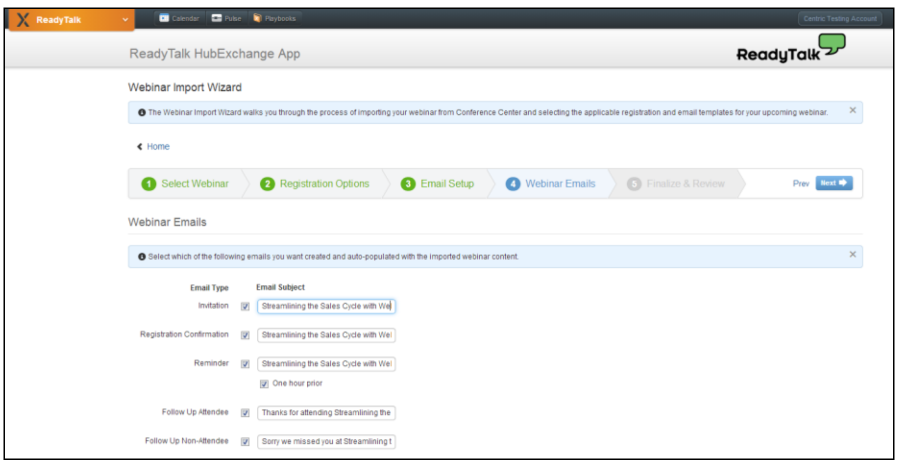
- Once you have chosen the registration page type, hit **Next.**

Step 4: Select the emails to be created for your webinar

ReadyTalk recommends creating five standard emails to associate with your webinar:

- Invitation
- Registration Confirmation Email
- Multiple Reminder Emails to Confirmed Registrants
- Follow-up Email to attendees
- Follow-up Email to non-attendees

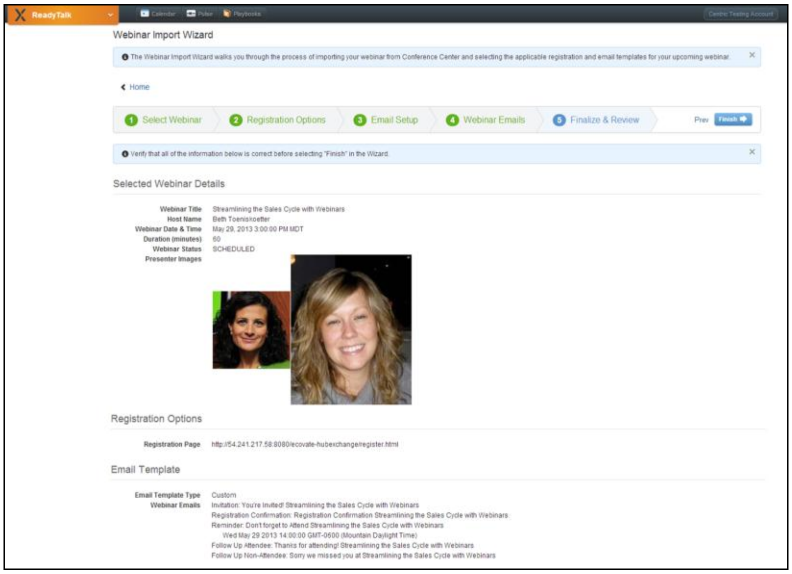
The **Webinar Emails** page enables you to select which emails should be generated for this particular webinar as well as the timing for reminder emails to confirmed registrants.



- To disable an email, uncheck the associated box next to the email type
    - **Note**: If you uncheck the email type **Reminder**, the scheduled times for default reminder email(s) will also be unchecked and disabled.
- If desired, update the **Email Subject** heading for each **Email Type**.
- After updating your webinar emails, hit **Next.**

Step 5: Finalize & Review your Webinar Import

Verify that the webinar details, registration options, and email types/templates are correct. Need to make changes? Click on **Prev** to return to the previous step, or click on any step to navigate within the workflow.

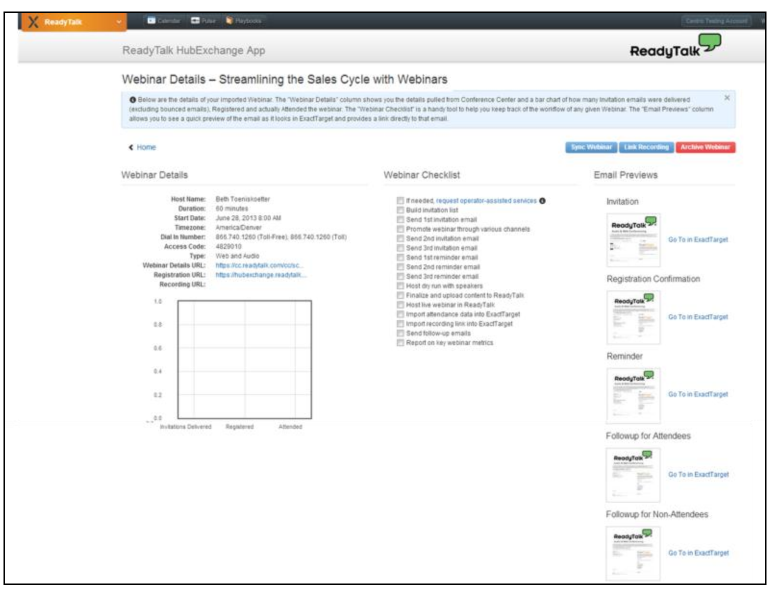


- After verifying that all of the information is correct, hit **Submit.**
- The webinar registration page and associated emails will be created within ExactTarget with the information from Conference Center, as well as any customization that was implemented during the webinar setup process. This process will take several seconds.

Confirmation Page

The confirmation page displays the various details associated with your webinar, as well as a helpful checklist on the next steps you should consider for planning your upcoming event.

In addition, you can easily link out to each of the emails created for the webinar to send invitations, edit content of emails, or update the delivery time for reminder emails.



Webinar Details

- The following fields are populated based on what you entered for the specific webinar in Conference Center:
    - Host Name
    - Start Date, Time, Time Zone, and Duration
    - Audio Join information (ie. Dial-In numbers and Chairperson Access Code)
    - Link to webinar details in Conference Center
    - Link to Registration Page
        - This will link to the default registration page or the custom landing page, depending on the option that was chosen during the setup process
- Webinar Statistics (Bar Graph)
    - Invitations Delivered: Count of webinar invitations delivered from ExactTarget
    - Registered: Count of webinar registrants
    - Attended: Count of webinar attendees

Note: The ReadyTalk for ExactTarget application automatically syncs once an hour. You can also initiate a manual sync at any time by clicking the **Sync Webinar** button.

Webinar Checklist

The **Webinar Checklist** is a comprehensive list of recommended next steps to ensure you have a successful webinar.

Pre-Webinar Checklist

- Request Operator-Assisted Services
    - You need operator-assisted services if:
        - You expect more than 150 attendees for your webinar
        - Require Broadcast Audio so your participants can listen to the webinar through their computer speakers
        - You want personalized operator services, like custom greetings or Q&A Support

        - Learn more about the services offered with [ReadyTalk Operator-Assisted Services]()

    - All operator-service require a five-hour turnaround. Requests received after 12pm Mountain Time (Monday-Friday) will be processed on the next business day.

        - After requesting operator-assisted services, you will receive an email that includes audio join details such as toll and toll-free dial-in numbers for any requested phone numbers.

        - You will need to manually update the confirmation and reminder emails to include the correct audio join details.

Operator-assisted services must be requested prior to sending out invitations and promoting your webinar.

- Build invitation list

- Send 1st Invitation email

    - Recommendation: Use the ExactTarget Guided Send Program

- Promote webinar through various channels

- Send 2nd & 3rd Invitation Emails

    - As participants register for your webinar, registration status is automatically updated in ExactTarget through data extensions, which enables our application to segment lists for additional invitations to those who have not registered.

- Send 1st, 2nd & 3rd Reminder Emails

    - If you selected to have reminder emails be sent out one week, one day, or one hour prior to the webinar start time, those emails will automatically trigger to confirmed registrants without further action from you.

    - Want to update the text in the reminder emails? Or change the timing? Check out how to do that here.

- Host a dry run with your speakers

    - Conduct a brief dry run a few days before your webinar with your moderator and speaker to cover day-of logistics.

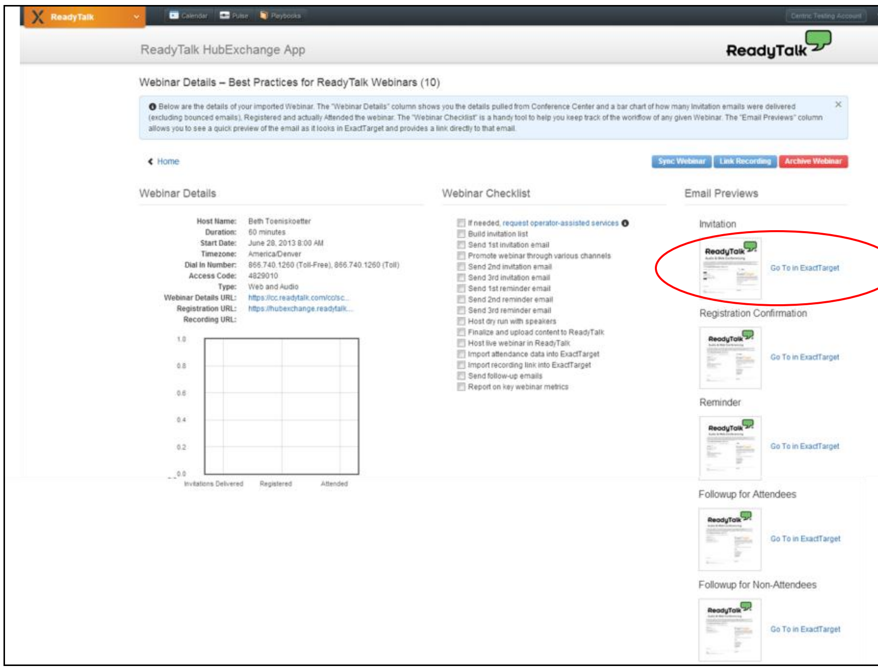
- Finalize and upload content to ReadyTalk

  - If you plan to share PowerPoint Slides or a video clip, upload those assets to ReadyTalk prior to your event.

- Host Live Webinar in ReadyTalk

  - You've done all the prep, now it's time for the big production. Congrats!

Post-Webinar Checklist



- Import Attendance Data into ExactTarget

  - After your webinar is over, attendance data is automatically imported into ExactTarget so you can trigger follow-up emails to attendees and non-attendees.

Note: The ReadyTalk for ExactTarget application automatically syncs once an hour. You can also initiate a manual sync at any time by clicking the **Sync Webinar** button.

- Import Recording Link into ExactTarget

  - To include a playback recording link in your follow-up emails to attendees and non-attendees, click on the **Link Recording** button

- Send Follow-up Emails

  - After your webinar is over, attendance status is automatically updated in ExactTarget through data filters, which enables our application to separate attendees and non-attendees for follow-up email segmentation.

VIEWING SCHEDULED WEBINAR EMAILS ON THE IMH CALENDAR

After you have imported a webinar, and the associated emails have been created and scheduled, they will display on your ExactTarget calendar along with the other campaign emails scheduled across your company or department.

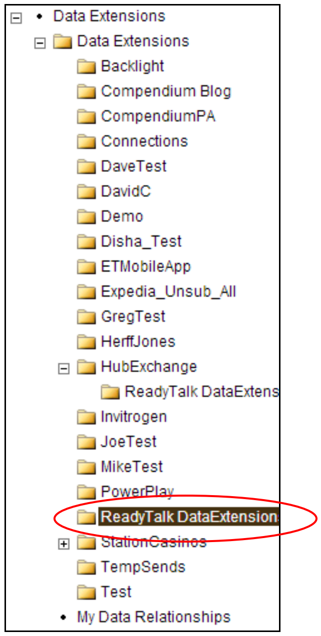
The following information is available for each webinar:

- All scheduled emails will be visible on the date they are scheduled to be sent
    - Invitation (if scheduled for a future date)
    - Reminder emails
- All previously sent emails for the webinar will be visible on the date they were sent
    - Invitation (if scheduled to send immediately)
    - Follow-up emails to attendees and non-attendees

REPORTING FOR KEY WEBINAR METRICS

Summary and detail reporting is available for your webinar.

- The following reporting is available within ExactTarget:
    - The **Webinars Dashboards** displays summary level data for each webinar
        - # of invitations sent
        - # of confirmed registrants
        - # of attendees
    - Select registration and attendance data is available within related data extensions for the specific webinar
        - In the ExactTarget Email interface, click on the **Subscriber** drop-down menu, then **Data Extensions**
        - Open the **ReadyTalk DataExtensions** folder



- Locate the associated Webinar Title and check the corresponding box
- Click on the **View Data** button to view the following information:
  - Email, First & Last Name
  - Attendance Status & Duration
  - Unique Join Meeting URL

ReadyTalk > E2E Test with Anita Registrants Data

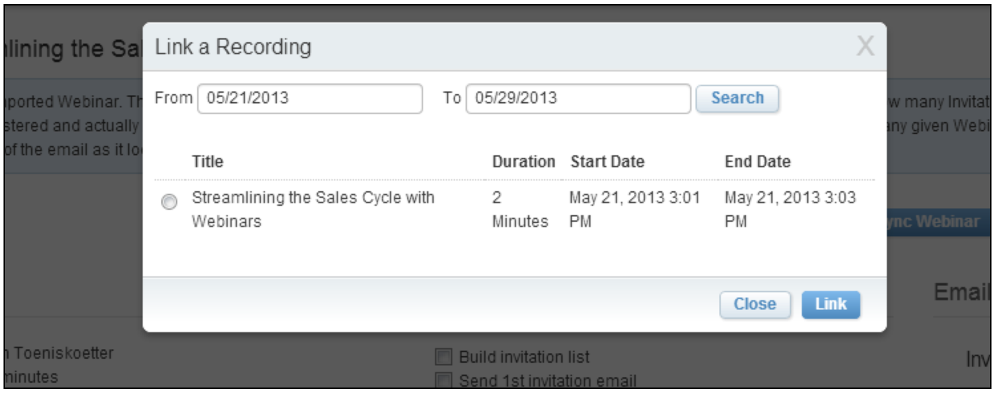
Email	FirstName	LastName	Attended	Status	JoinMeetingURL	ParticipantMeetin
anita.wehnert@...	Anita	Wehnert	true	CONFIRMED	https://cc.readyt...	4
anitawehnert@...	Anita	Wehnert COMC...	true	CONFIRMED	https://cc.readyt...	2
beth.toeniskoett...	Beth	Toeniskoetter G...	false	CONFIRMED	https://cc.readyt...	0

- The following reporting is available within Conference Center:
  - To view all reports associated with your webinar, like detailed registration and attendance information, polling questions/answers, chat logs, and post-event survey data, click on the **Webinar Details URL.**

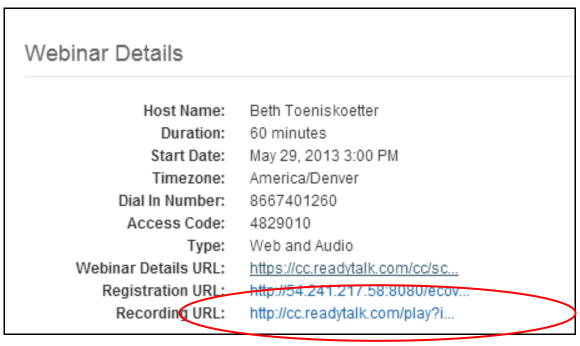
LINK A RECORDING FOR FOLLOW-UP EMAILS

After the webinar is over, you can link the applicable recording to the webinar to be automatically included in follow-up emails to attendees and non-attendees.

- Click on the **Link Recording** button.
- Choose the appropriate date range to locate the title of the recording associated with your webinar
    - Note: If you need to edit your recording, access the **Manage Recordings** section of Conference Center



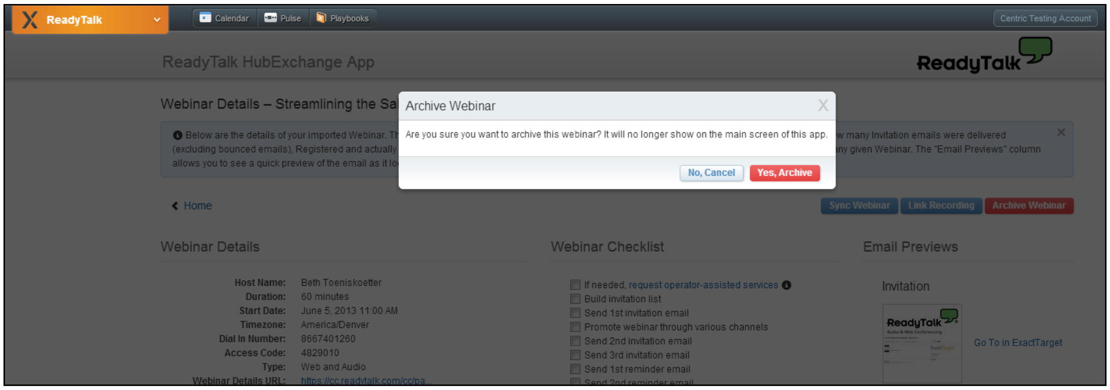
- Select the applicable recording to link with your webinar. Hit **Link**.



- The **Recording URL** will appear in the webinar details and will be automatically included in the follow-up emails to attendees and non-attendees.

ARCHIVING A WEBINAR

The **Webinars Dashboard** will show all webinars, regardless of status (scheduled, closed, canceled). If you would like to archive a webinar, click on the applicable webinar from the **Webinars Dashboard.** On the webinar details page, click on the **Archive Webinar** button.



You will then be asked to confirm that you would like to archive the webinar. The webinar will then be moved to the **Archived Webinars Dashboard.**

EXACTTARGET EMAILS

As stated earlier, ReadyTalk recommends five standard emails that should be created and sent for your webinar. Every email template contains similar information, with some minor adjustments depending on the type of email.

EMAIL TYPES & WHAT'S INCLUDED

- **Email Invitations**
  - Forward-to-a-Friend functionality
  - Social Sharing Links
  - **Register Now** button: Directs the invitees to the default registration page or custom landing page that was chosen during the import webinar process
- **Confirmation & Reminder Emails**
  - Unique 'Join Webinar' Link, which enables ReadyTalk to accurately track attendance, in-meeting, and post-event survey data
  - Audio Join Details such as the dial-in number(s), access code, or instructions to listen over their computer speakers
  - ReadyTalk Technical Support Information
  - Add to Calendar Options for Outlook, Google, and Lotus Notes
    - A calendar item is generated for the registrant so they can easily add your webinar to their calendar

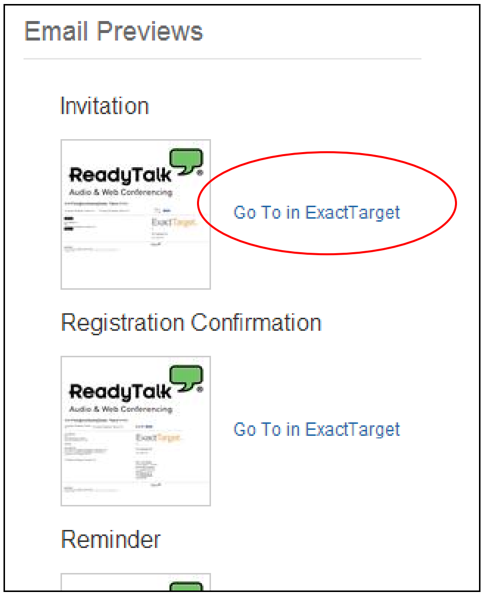
- The ICS (Calendar) file includes:
  - Meeting Description
  - Unique Join Webinar Link
  - Audio Join Details
  - ReadyTalk Technical Support Information

- Follow-up to attendees and non-attendees
  - Link to recording playback URL
  - Placeholder for file attachments, such as the PowerPoint Slides that were shared during the webinar

EDITING AND SENDING WEBINAR EMAILS FROM EXACTTARGET

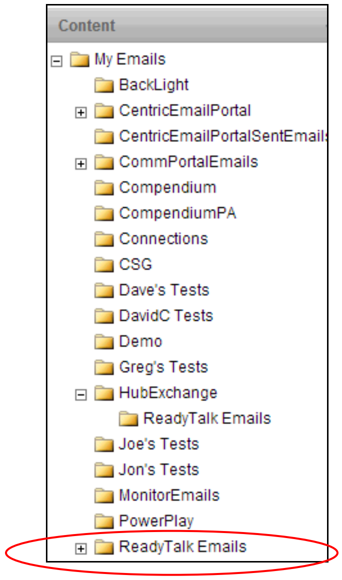
After you finish importing your webinar, the five standard default email templates are created in your ExactTarget account.

The emails can be accessed in the following ways

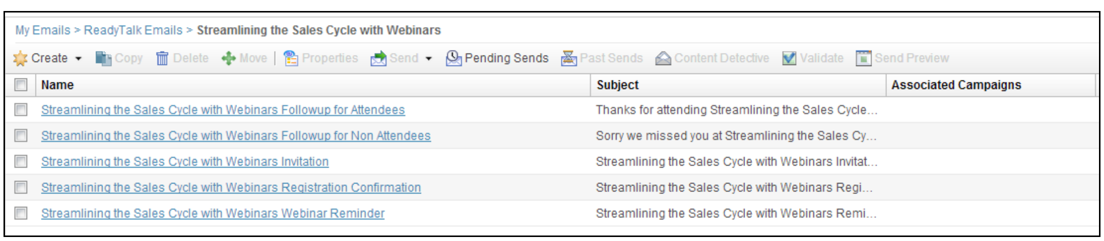


- Click on the link associated with each email
- From the IMH App Switcher, click on **Email** under Channel Apps, then **Emails** under the Content Tab.

- The ReadyTalk for ExactTarget application has automatically created an email folder called **ReadyTalk Emails**. Each imported webinar and its associated emails are categorized by the webinar title.



- For example, if the title of the webinar is ‘Streamlining the Sales Cycle with Webinars’, there will be a folder created with the same webinar title and will contain the emails created for that webinar.



Name	Subject	Associated Campaigns
Streamlining the Sales Cycle with Webinars Followup for Attendees	Thanks for attending Streamlining the Sales Cycle...	
Streamlining the Sales Cycle with Webinars Followup for Non Attendees	Sorry we missed you at Streamlining the Sales Cy...	
Streamlining the Sales Cycle with Webinars Invitation	Streamlining the Sales Cycle with Webinars Invitat...	
Streamlining the Sales Cycle with Webinars Registration Confirmation	Streamlining the Sales Cycle with Webinars Regi...	
Streamlining the Sales Cycle with Webinars Webinar Reminder	Streamlining the Sales Cycle with Webinars Remi...	

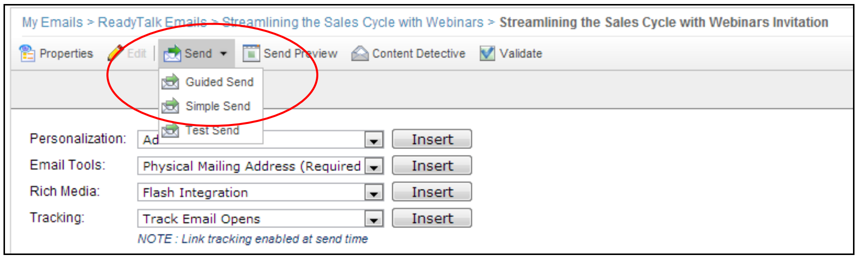
HOW TO SEND INVITATIONS

1st Invitation

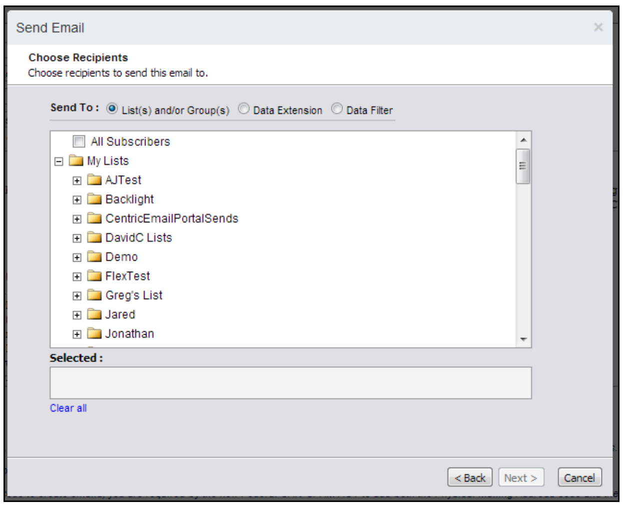
Open the associated email (ie. Streamlining the Sales Cycle with Webinars Invitation). After creating your subscriber list(s), use the Guided Send option to send your 1st webinar invitation.

Follow-up Invitations (ie. 2nd and 3rd Invitations)

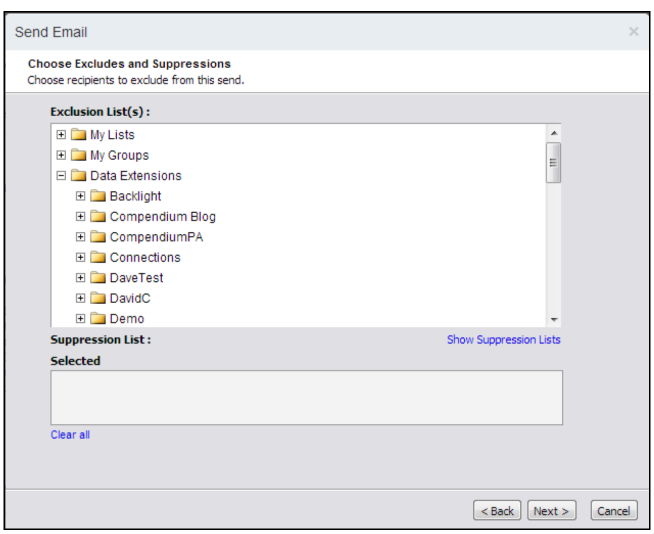
To send follow-up invitations to those who have not yet registered, open the associated email (ie. Streamlining the Sales Cycle with Webinars Invitation) and follow the Guided Send option, using the data extensions feature.



Step 1: Choose the recipients for the invitation



Step 2: Choose excludes and suppressions



- Expand the **Data Extensions** folder, then locate and expand the **ReadyTalk DataExtensions** folder

- Check the associated webinar title (ie. Streamlined the Sales Process with Webinars Registrants). This step will exclude any subscriber that has already registered for the upcoming webinar.
- Click **Next** and complete the Guided Send process.

CONFIRMATION AND REMINDER EMAILS

Registration Confirmation Emails

After a webinar registration form is completed, the registrant's information will be passed automatically to ReadyTalk to register them for the associated webinar. A confirmation email will be triggered to automatically send from ExactTarget.

- Webinar confirmation emails have been automatically set to 'high priority' via the ReadyTalk for ExactTarget application

Reminder Emails

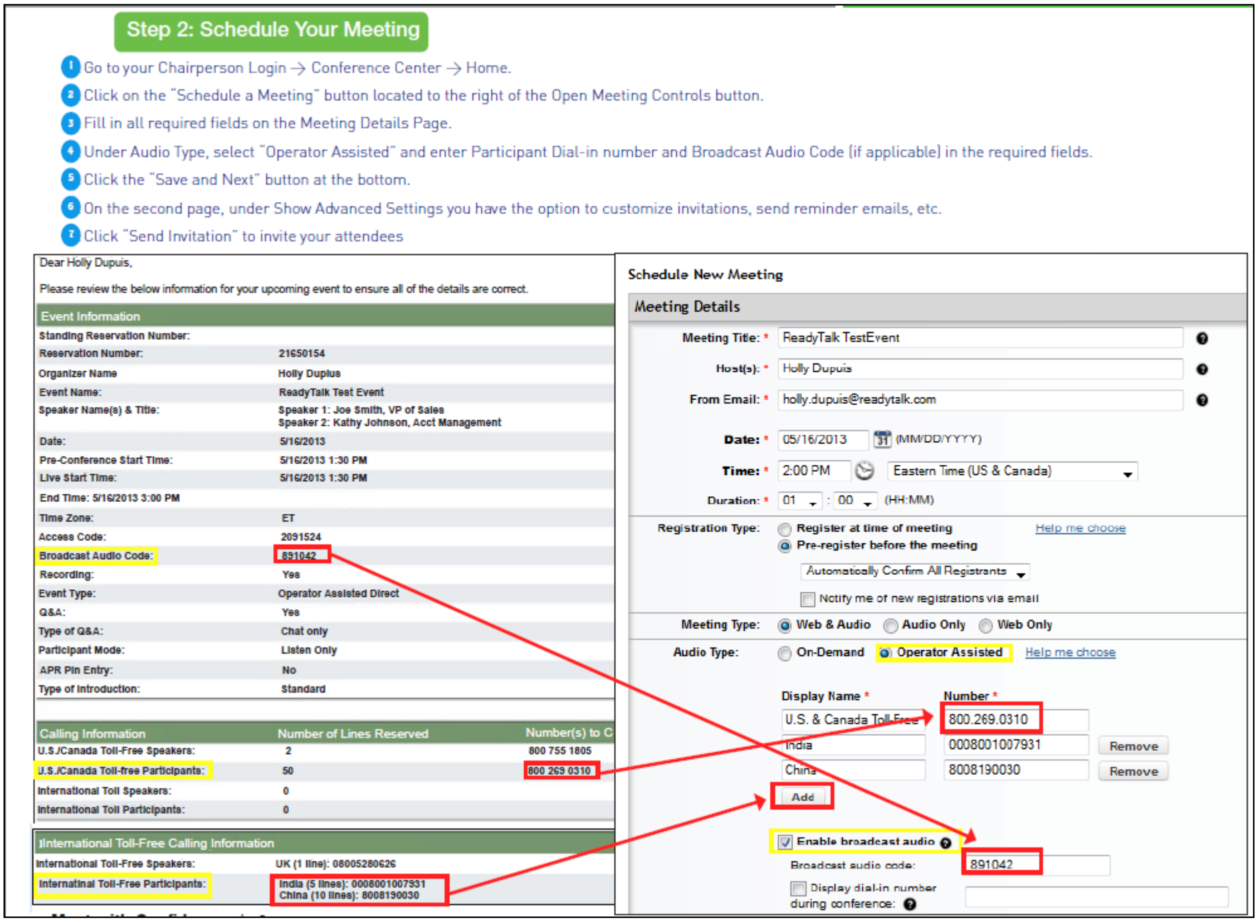
If you chose to create and schedule reminder emails, the emails will be automatically sent 1 week, 1 day, and 1 hour prior to the webinar start time to confirmed registrants.

- Cancel a scheduled send for reminder emails
- If you would like to schedule an additional reminder email, open the associated email and complete the Guided Send process.

Updates to Confirmation & Reminder Emails for Operator-Assisted Webinars

If you are using operator-assisted services, such as Broadcast Audio, for your webinar, you will need to manually edit the confirmation and reminder emails that were created in ExactTarget for the specific webinar.

- First, ensure that you have successfully requested operator-assisted services before setting up the webinar in the ReadyTalk for ExactTarget application. After requesting operator-assisted services, you should receive a confirmation email from ReadyTalk with all of the details of your webinar.
- The confirmation email from the ReadyTalk Events team will contain all of the details needed for your webinar. The following screenshot provides instructions on what information needs to be entered into Conference Center for the specific webinar:



- After your webinar has been successfully setup in Conference Center, complete the [import webinar] process in the ReadyTalk for ExactTarget application. After the emails are created in ExactTarget, you will need to manually edit the **Audio Join Details** in the confirmation and reminder emails.

- In ExactTarget, open the confirmation email associated with the webinar. Click in the edit area and locate the highlighted html

```
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);">Your registration has been confirmed.</p>
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);">Please use the information below to join.</p>
    <br>
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);"><a style="color: rgb(0, 0, 0);" href="%%HTML__RegJoinURL%%">Web Login</a></p>
    <br>
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);"><strong>Your Audio Login</strong></p>
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);">Dial In Number: %%=Field(@rowMeetingDetails, "DialInNumber")=%%</p>
    <p style="margin: 2px 0px; color: rgb(51, 37, 74);">Access Code: %%=Field(@rowMeetingDetails, "AccessCode")=%%</p>

%%[
if @passCode != "" then
]%%

    <p style="margin: 2px 0px; color: rgb(51, 37, 74);">Security Passcode: %%=v(@passCode)=%%</p>
```

- If you are using Broadcast Audio on your webinar:
    - Insert the following text after the Web Login link to instruct users on how to join the webinar and listen over their computer speakers:

- You will be connected to Broadcast Audio after joining the meeting.

- If you want to include dial-in number(s) as alternatives to Broadcast Audio so registrants can connect via telephone:
    - The dial-in numbers will automatically populate in the confirmation and reminder emails. However, ***delete*** the access code html that is used for on-demand calls as it is not applicable for your op-assist webinar.
- If you want to exclude any dial-in number(s), delete the audio join and access code html

FOLLOW-UP EMAILS TO ATTENDEES AND NON-ATTENDEES

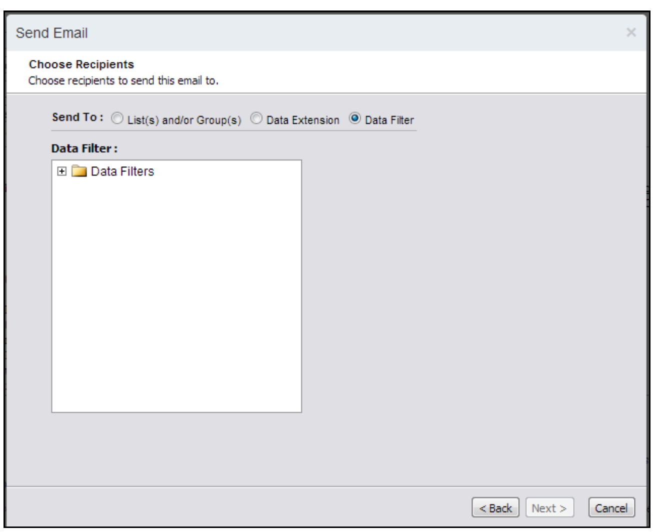
After the webinar is over, immediate follow-up is imperative. With the ReadyTalk for ExactTarget application, attendance status data is automatically updated from ReadyTalk to ExactTarget so you can send your follow-up emails from ExactTarget.

- If you linked a recording to the webinar within the application, it will be automatically included in the follow-up emails to attendees and non-attendees
- Learn more on how to attach files, such as PowerPoint slides, or other materials requested from your webinar.

Follow-up Email to Attendees

Open the applicable email template and follow the Guided Send workflow to apply data filters so the correct email is sent to those that attended.

Step 1: Click on data filter



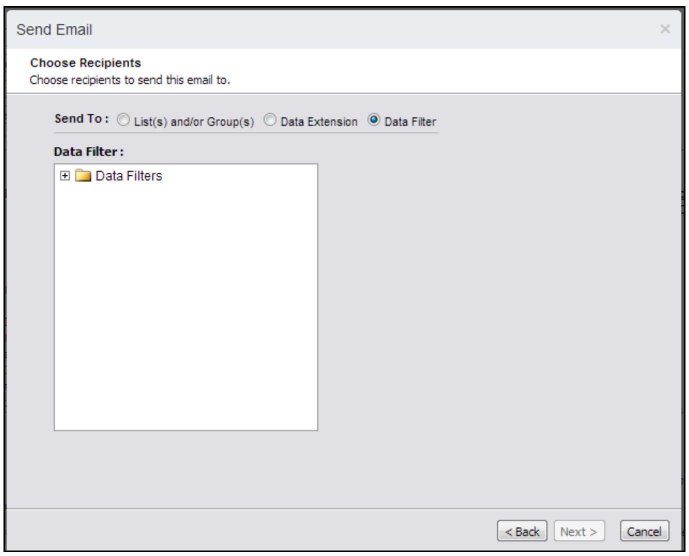
Step 2: Expand the data filters folder

- Check the associated webinar title and applicable status (ie. Streamlining the Sales Cycle with Webinars – Who Attended)
- Click **Next** and complete the Guided Send process.

Follow-up Email to Non-Attendees

Open the applicable email template and follow the Guided Send workflow to apply data filters so the correct email is sent to those that attended.

Step 1: Click on data filter



Step 2: Expand the data filters folder

- Check the associated webinar title and applicable status (ie. Streamlining the Sales Cycle with Webinars – Who Did NOT Attend)
- Click **Next** and complete the Guided Send process.

EDITING EMAIL CONTENT AND TIMING

To make a modification to any content within an email, click on one of the applicable links for additional information.

- HTML-Based Emails
- Text-Only Emails

To edit the send time of a scheduled email (ie. A reminder email), click on the below link for additional information.

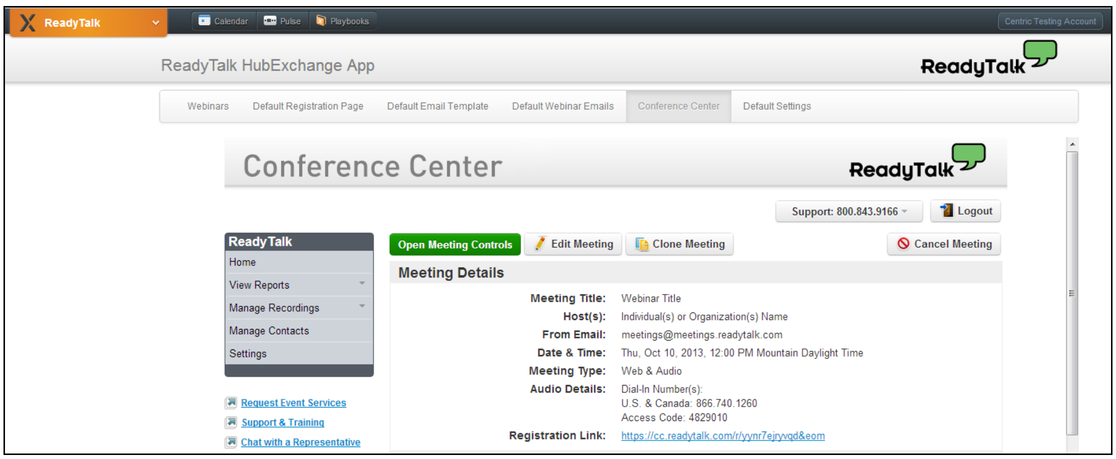
- [Cancel a scheduled send for reminder emails]
- If you would like to schedule an additional reminder email, open the associated email and complete the [Guided Send] process.

UPDATING AND CANCELLING A READYTALK WEBINAR

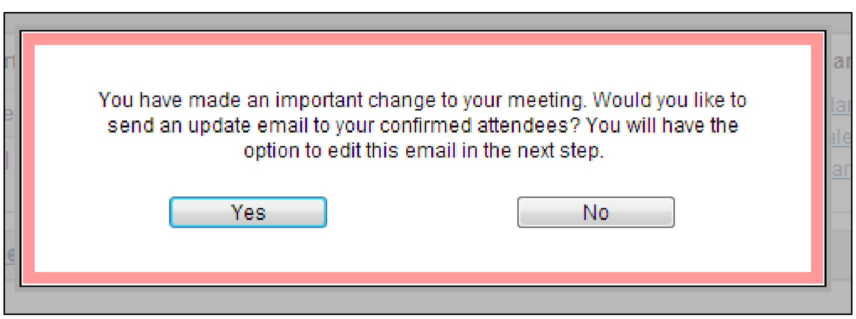
Updating a ReadyTalk Webinar

If you need to make updates to a ReadyTalk webinar, such as a change in the webinar start time, you will need to make the change from Conference Center.

- From Conference Center, navigate to the applicable webinar and click on **Edit Meeting**

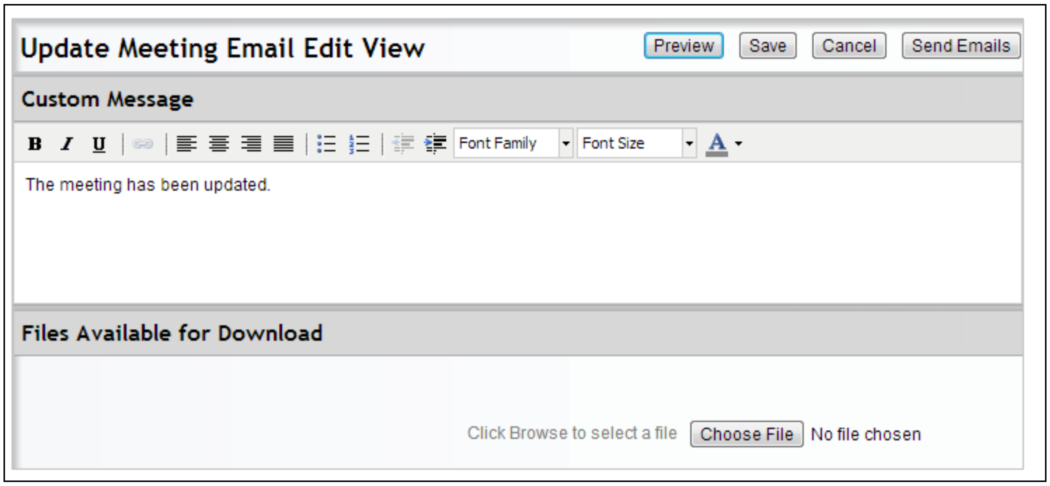


- Update the applicable webinar information, such as the start time.
- Click **Save and Next**
    - If you have any confirmed registrants, you will receive the following message:



- **Recommended Option**: Click **Yes** to have ReadyTalk initiate the update email to confirmed attendees.

- ○ You will then be presented with the option to include a custom message with the update email, as well as a preview of the email.
- ○ After creating the optional custom message and/or attaching any files, click on **Send Emails** to initiate the update email from ReadyTalk to all confirmed attendees.



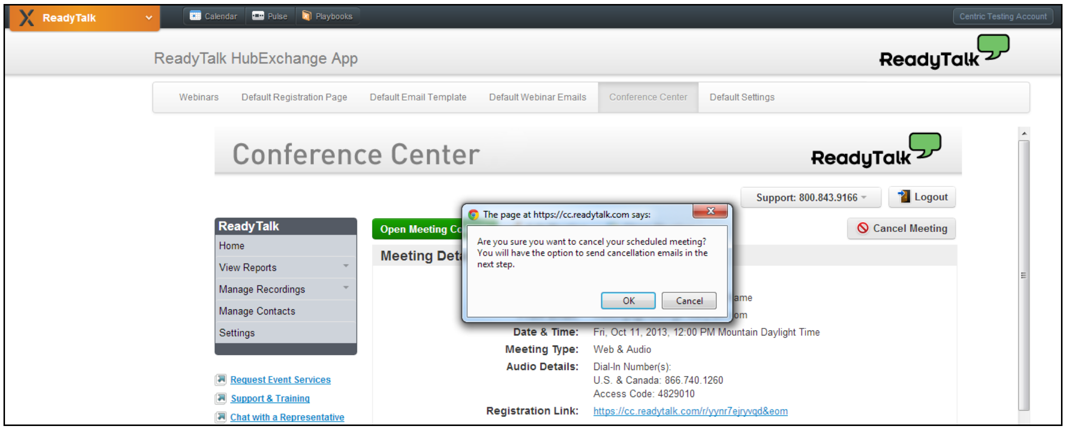
- ○ If you would like to send the update email to confirmed attendees from ExactTarget, click **No** and create an email within ExactTarget.

- As discussed previously, ReadyTalk manually syncs with ExactTarget ever hour or a manual sync can also be initiated. The manual sync is recommended to ensure the updated webinar information is displayed on invitations, registration pages, confirmation and reminder emails.

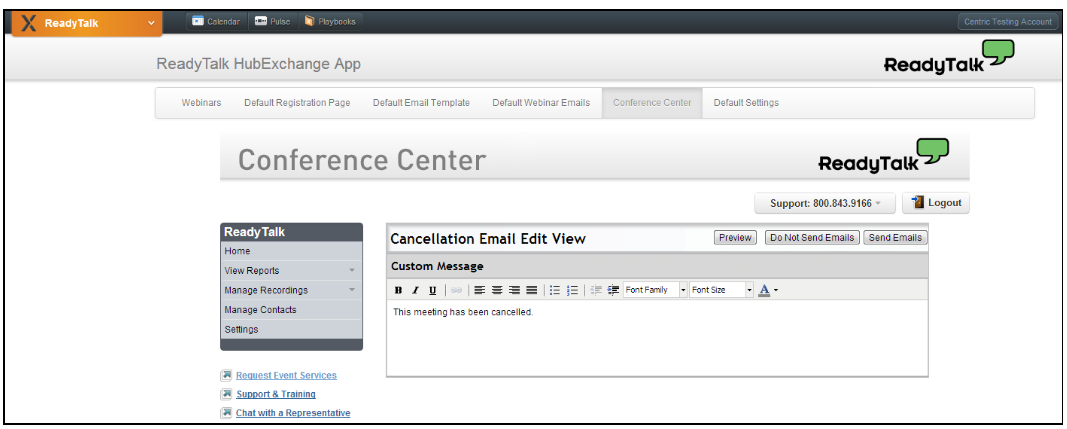
Cancelling a ReadyTalk Webinar

To cancel a ReadyTalk webinar, you will need to make the change from Conference Center.

- From Conference Center, navigate to the applicable webinar and click on **Cancel Meeting.** If you have any confirmed registrants, **y**ou will be presented with the following message:
  - ○ *Are you sure you want to cancel your scheduled meeting? You will have the option to send cancellation emails in the next step.*



- You will then be presented with the option to include a custom message with the update email, as well as a preview of the email.
- After creating the optional custom message, you have two options:
- Recommended Option: Click **Send Emails** to initiate the cancellation email from ReadyTalk to all confirmed attendees.
  - If you would like to send the cancellation email to confirmed attendees from ExactTarget, click **Do Not Send Emails** and create an email within ExactTarget.



- As discussed previously, ReadyTalk manually syncs with ExactTarget ever hour or a manual sync can also be initiated. **The manual sync is recommended.**
- The ReadyTalk for ExactTarget application will automatically remove all emails related to the webinar from within ExactTarget. The webinar will still be listed in the Webinars Dashboard within the app with a status of **Cancelled.**

FREQUENTLY ASKED QUESTIONS

1) What configurations should be enabled on my ExactTarget user account for the ReadyTalk for ExactTarget application?

    a. API Access – This enables access to the SOAP web services. The majority of ExactTarget user accounts have this access turned on by default.

    b. DataExtensions – This holds ReadyTalk webinar and registrant details.

    c. Interaction Sends – This allows the application to create the **Triggered Sends** which power the Registration Confirmation emails

    d. AmpScript Business Rule - This allows the application to create dynamic email messages. The majority of ExactTarget user accounts have this access turned on by default.

    e. Landing Pages & Microsites - This is an optional feature depending on your account type, but is required if you want to create custom landing pages for webinar registrations.

2) How is the ReadyTalk for ExactTarget application installed into my ExactTarget account?

    a. Enterprise Level Account: The application is setup at the business unit level.

    b. Core Level Account: The application is setup at the account level.

3) Which internet browsers is the ReadyTalk for ExactTarget application compatible with?

    a. The ReadyTalk for ExactTarget application provides the same browser capability that ExactTarget supports.

Interactive Marketing Hub Browser Support

	Supported			
	Best choice (A Grade)	Untested but functional (B Grade)	Some features will not work (C Grade)	Unsupported (F Grade)
Internet Explorer	9	8, 10		7 and below
Firefox	Current Version	>=14		<14
Chrome	Current Version	<20		
Safari	6, 5.1, 5		4	<4
Opera		12		<12
IOS		Current Version		All
Android		Current Version		All

Grades

- **A** – Browsers tested in at least one operating system with a baseline set of functionality
- **B** – Browsers not fully known about (new) or tested but assumed to be current and functional
- **C** – Unsupported browsers with active migration programs
- **F** – Explicitly unsupported and untested browsers that cannot access an application

b. http://help.exacttarget.com/en/documentation/interactive_marketing_hub/graded_browser_support/

4) If a registration occurs on a ReadyTalk registration page, does this information sync with ExactTarget?

   a. Yes, their registration and attendance data will be captured in the data extension, as well as in the data filter to send out follow-up emails (data filter queries data extension)

5) If someone registers for a webinar that is not an existing subscriber, is a new subscriber created in ExactTarget?

   a. Yes, they are created as a new subscriber when the registration confirmation email is sent. The email address is only captured.

   b. **Note:** A subscriber will not be created if there are required profile attributes. These would need to be adjusted in order for the new subscriber to be created