

Mastering Quarterly Webinars: Best Practices for Investment Firms

A Comprehensive Guide to Planning,
Hosting, and Maximizing the Impact
of Your Client Communication



OUTLINE

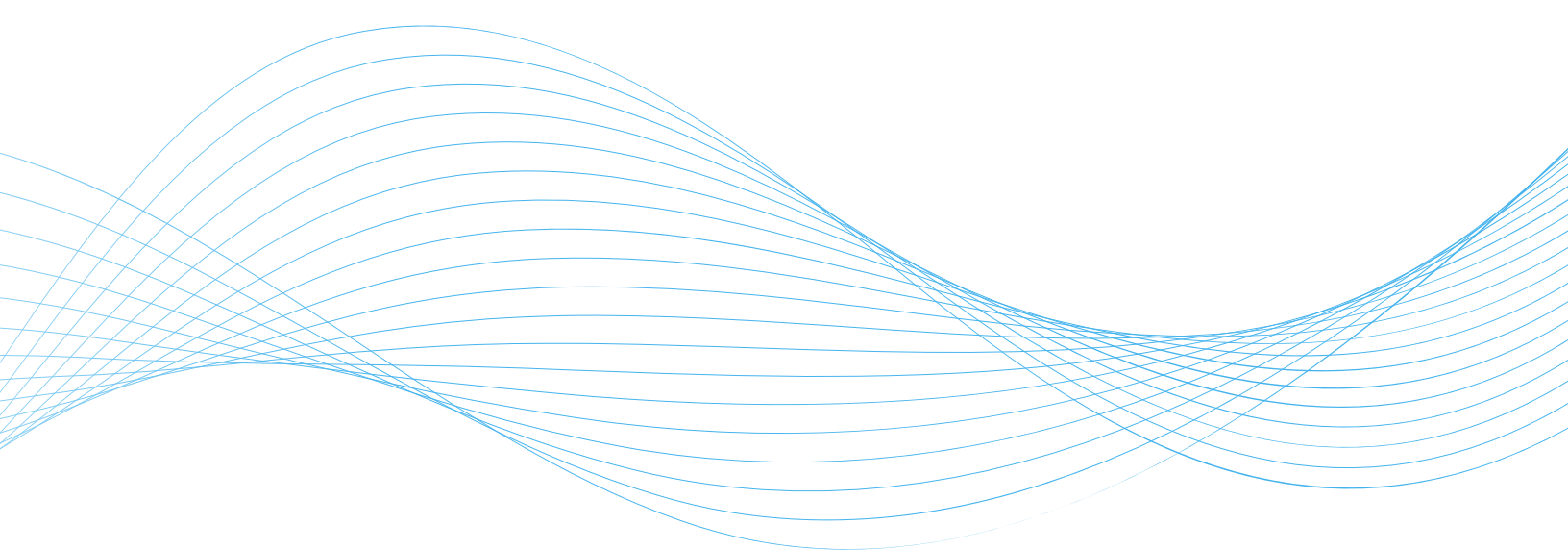
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1. Introduction

As each quarter comes to a close, many investment managers face the familiar scramble: how to effectively communicate the quarter's results, address client concerns, and highlight their firm's strategy. With an endless stream of reports, emails, and market updates, you might be wondering - is there a better way to keep clients informed and engaged?

The answer is yes.

But we understand the challenge: How do you find the time to prepare and execute meaningful client updates while managing your day-to-day responsibilities?

For many firms, the thought of adding quarterly webinars to their list of client communications can feel overwhelming, especially if resources are tight or you're unsure where to start.

You're not alone - many firms struggle to balance the demands of running their portfolios with staying connected to their clients in a meaningful, efficient way. The good news? Quarterly webinars can offer a powerful solution: an opportunity to communicate your performance, outlook, and strategy in a more engaging and scalable way.

At Dakota, we've spent over 15 years fine-tuning the art of hosting quarterly webinars that not only simplify client communication but also drive deeper trust and transparency. We know that for many firms, getting started can be daunting, which is why we created this eBook. [Here, we'll guide you through a step-by-step approach to planning and delivering quarterly webinars that are impactful, professional, and most importantly DOABLE.](#)

» *By the end of this guide, you'll have the tools and best practices you need to overcome the common challenges of quarterly updates and establish a clear, consistent communication strategy that enhances client relationships and reinforces your firm's reputation.*



2. Planning Your Quarterly Webinar

When it comes to keeping clients informed, quarterly webinars offer a platform for sharing updates and insights. But a successful webinar doesn't happen by accident.

Structuring your quarterly webinar with intention allows you to communicate clearly, provide valuable information, and maintain a predictable format that clients can count on.

Here's how to structure your webinar to ensure it's both engaging and effective.

FIRM UPDATE

Every quarterly webinar should start with a brief but comprehensive update on your firm. This segment gives clients a snapshot of any recent changes or developments, providing transparency and reinforcing your commitment to keeping them informed. Cover key topics like:



» **PERSONNEL CHANGES:** Mention any new hires or changes in senior management that clients should know about.



» **OWNERSHIP AND AUM:** Highlight changes in ownership structure or assets under management, as these details can be significant to clients' overall view of your firm.



» **OTHER KEY DEVELOPMENTS:** Share any additional firm-wide updates that impact your investment strategy or client relationships.

This portion of the webinar sets the stage for a transparent dialogue, building trust by keeping clients informed about the firm managing their investments.

PHILOSOPHY AND PROCESS REFRESH

After the firm update, take a few moments to revisit your firm's investment philosophy and process. Clients appreciate this regular reminder, especially newer clients or those who may need clarification on the strategic approach guiding their investments. Keep this segment brief and focused – about one to two minutes is generally sufficient.



Remind clients who you are, what you stand for, and what your team strives to achieve through your unique investment approach. This segment reinforces the consistency of your methodology and assures clients of the steadfastness of your philosophy, even as market conditions fluctuate.

QUARTERLY RESULTS

One of the most important segments of the webinar is the quarterly performance review. Here, you'll walk clients through what happened over the last quarter, breaking down both performance metrics and attribution. Focus on the key performance drivers, including the primary contributors and detractors within the portfolio. Providing both absolute and relative performance context helps clients understand how the portfolio performed and why.

During this section, aim to connect performance results to the decisions made by your team. Explain the reasoning behind significant portfolio moves and discuss how those decisions align with your broader investment strategy. This transparency provides clients with a clear picture of the decision-making process and helps them feel more connected to their investments.

PORTFOLIO POSITIONS AND ADJUSTMENTS

After reviewing quarterly results, shift to discussing how the portfolio is currently positioned and any adjustments made over the past quarter. In this segment, cover:



➤ **ADDS AND TRIMS:** Explain which assets were added or trimmed, and the strategic reasoning behind these adjustments.



➤ **SECTOR ALLOCATIONS:** Highlight any significant shifts in sector allocations, providing context for why certain sectors were increased or decreased.



➤ **NOTABLE NEW HOLDINGS:** Dive deeper into any newly acquired assets that have a meaningful impact on the portfolio, and explain how these additions support your overall strategy.

This section allows clients to see how your team is positioning their assets for future performance. It also demonstrates your active management approach, showing clients that their investments are being thoughtfully adjusted in response to market changes.



CONCLUDING REMARKS AND MACRO OUTLOOK

Wrap up the webinar with a summary of your expectations for the coming quarter or year. Offer insights into broader market conditions, trends, or macroeconomic factors that could impact the portfolio. When discussing the macro outlook, always connect these insights back to the portfolio's positioning – clients want to know not only what you expect from the market but also how you're positioning their investments to respond to these conditions.

Be mindful to present your macro outlook as it relates to the specific goals of your portfolio, helping clients understand what they might expect in terms of future performance. This portion helps clients see the bigger picture, providing a sense of stability as they consider how their investments will be managed in varying market conditions.

Q&A SESSION

The Q&A segment is an essential part of engaging your audience and addressing any lingering questions. Open up the floor to clients for real-time questions, allowing them to clarify points, dive deeper into topics, or express any concerns. If you're expecting a quieter group, prepare a few softball questions in advance to prompt discussion and get the Q&A session started.

For the Q&A session, make sure you're well-prepared to address a range of client inquiries. By answering their questions directly, you create a personal connection and strengthen the sense of partnership. This interactive component can be one of the most impactful parts of the webinar, fostering trust and demonstrating your commitment to client transparency.

Structuring your quarterly webinar thoughtfully ensures that you deliver a clear, concise, and comprehensive update that clients value. By including a firm update, revisiting your philosophy, sharing quarterly results, discussing portfolio positioning, offering a macro outlook, and engaging in a Q&A, you create a format that clients come to expect and rely on each quarter.



3. Best Practices for Hosting Quarterly Webinars

Once you have your quarterly webinar's content and structure in place, the next step is to ensure a professional, engaging delivery that resonates with clients.

Hosting a webinar involves more than just presenting information – it requires attention to technical details, audience engagement, and preparation for potential issues.

Here are best practices to elevate your webinar, ensuring it's seamless, impactful, and memorable for clients.

MAXIMIZING TECHNICAL QUALITY

» Professional Video and Audio Setup

The technical quality of your webinar can significantly impact the audience's experience. Start by investing in basic, reliable equipment for video and audio. A good-quality webcam and microphone, along with proper lighting, help create a polished presentation. Apply the rule of thirds to position yourself in the frame, and use a simple backdrop that minimizes distractions.

» Leverage Zoom Settings

If you're using Zoom, take advantage of features that improve video quality. Options like "Touch up my appearance" and "Adjust for low light" can help optimize your visual presentation. Ensure that settings such as "HD Video" and "Optimize for third-party video editor" are enabled, so you're recording a high-quality video that can be easily repurposed.

» Test, Test, and Test Again

To avoid technical issues, conduct multiple tests leading up to the event. Test different equipment, try logging in from different devices, and run through your presentation with the team to ensure that all elements work smoothly. This will give you confidence in the technical setup and help you catch any potential issues in advance.



ENGAGING YOUR AUDIENCE

» Create Visually Compelling Slides

An engaging presentation should be visually appealing but not overwhelming. Use slides that enhance your message rather than distract from it. Keep text minimal and use visuals, charts, and graphics that support the content without overcrowding the slide. Think of your slides as an accompaniment, highlighting key points to keep your audience focused.

» Incorporate Interactive Elements

Adding interactive elements can significantly improve audience engagement. Polls, Q&A, and live chat features allow clients to interact with the content and with you directly. For instance, use a poll at the beginning to gauge clients' priorities for the quarter, or open a Q&A session halfway through to keep the discussion dynamic. These tools also allow you to address real-time questions, giving clients a sense of personal connection.

» Encourage Questions Throughout

Instead of waiting until the end, invite clients to submit questions throughout the webinar. This will encourage ongoing engagement and allow you to address pressing topics in real-time. If possible, assign a team member to monitor the Q&A and chat functions, helping filter through questions and flag those that align with the presentation flow.

PREPARING FOR THE UNEXPECTED

» Have a Backup Plan for Technical Issues

Live events can be unpredictable, so it's essential to have a backup plan. Keep backup dial-in numbers handy for clients and speakers, and have an alternative device available in case you need to switch due to technical issues. If the platform allows, appoint a co-host or technical operator who can manage the backend during the event, handling issues like audio disruptions or screen-sharing difficulties.

» Contingency Plans for Speakers

If you're working with external speakers or team members joining remotely, confirm all technical details with them in advance. Have a quick pre-call to run through their setup, the platform, and their role in the webinar. Gather each speaker's phone number in case of any last-minute connection issues, and prepare a backup speaker to fill in if needed.



Be Ready to Address Common Questions

Clients may have common or recurring questions, especially during volatile periods. To avoid any surprises, prepare answers to frequently asked questions and be ready to speak confidently on topics like market fluctuations, specific portfolio decisions, and your outlook. Having pre-prepared responses for common questions ensures that you can handle these moments smoothly and provide well-thought-out answers.

A well-hosted webinar is about more than just sharing information – it's an opportunity to engage clients, demonstrate professionalism, and reinforce trust in your firm. By focusing on technical quality, actively engaging your audience, and preparing for the unexpected, you set the stage for a webinar that clients will find both informative and enjoyable. These best practices allow you to make a lasting impression, showing clients that your firm is committed to excellence in both its communication and its service.



4. Post-Webinar Follow-Up

The value of your quarterly webinar doesn't end once the session concludes. Effective follow-up is essential to maximizing the impact of your efforts, reinforcing your key messages, and extending the life of your content. A thoughtful post-webinar follow-up strategy will keep clients engaged, provide additional value, and help establish your firm as a reliable source of insights.

Here's how to structure your follow-up for maximum effectiveness.

SHARING THE RECORDING AND KEY RESOURCES

» Distribute the Webinar Recording

Send a follow-up email of the webinar to all participants, as well as those who registered but couldn't attend live. Include a link to the recording, allowing clients to review the presentation at their convenience. This recording can serve as an ongoing resource, giving clients the flexibility to revisit the content and refresh their understanding of your insights.

» Post the Recording on Your Website

Consider uploading the recording to a designated client portal or a gated section of your website. By housing the recording online, you provide easy access for clients who may want to reference the webinar later. This also creates a resource library that prospective clients can explore, showcasing your firm's expertise and commitment to transparency.

» Provide Additional Resources

Enhance the value of your follow-up by including resources that complement the webinar. This could include a PDF of the presentation slides, related articles or research reports, or even a short recap video summarizing key points. The more tools you provide, the more value clients can gain from the session, reinforcing your firm's role as a trusted source of investment insights.



OFFERING TRANSCRIPTS AND SUMMARIES

» Include a Full Transcript of the Webinar

Some clients may prefer reading over watching, so providing a transcript of the entire webinar can be valuable. This document allows clients to quickly scan for specific sections they want to revisit and offers an alternative for those who may not have time to watch the full recording. Additionally, a transcript can improve accessibility for clients who may have hearing impairments.

» Create an Executive Summary

For clients short on time, include an executive summary in your follow-up email. This one-page overview should cover the most important takeaways from the webinar, such as quarterly performance highlights, major portfolio adjustments, and your outlook for the next quarter. A concise summary makes it easy for clients to grasp the essentials, even if they're unable to dive into the full recording or transcript.

ENCOURAGING FURTHER ENGAGEMENT

» Invite Questions and One-on-One Discussions

Encourage clients to reach out with follow-up questions or to schedule a one-on-one call to discuss their portfolios in more detail. Some clients may have specific questions they weren't able to address during the live session, or they may need clarification on certain points. Offering personalized follow-up calls shows clients that you value their engagement and are committed to addressing their individual concerns.

» Create a Follow-Up Survey

Gain valuable feedback on your webinar by including a short survey in your follow-up email. Ask clients about the topics they found most useful, any areas they'd like to see covered in future webinars, and whether they have suggestions for improving the experience. Feedback from your audience can help you refine your approach and ensure that each webinar meets your clients' needs.



Effective post-webinar follow-up doesn't end with simply sending out a replay link. Your quarterly webinar can be leveraged in multiple ways to keep conversations flowing with clients and prospects, making it a powerful tool for ongoing engagement. The recording is just one piece; consider sending the transcript as a resource for clients who prefer to review in detail or need a written reference.

Offering a survey in the follow-up also provides valuable insights and keeps the dialogue open, giving clients a chance to voice their thoughts on both the content and format of the session. Additionally, inviting clients to schedule one-on-one discussions not only personalizes the experience but also shows your commitment to addressing individual concerns.

Together, these points of follow-up serve as multiple touchpoints that reinforce the insights shared, demonstrate your accessibility, and streamline ongoing conversations with both clients and prospects. By strategically using each element of your post-webinar follow-up, you continue to provide value, build trust, and keep your firm top of mind as a responsive, client-focused partner in their investment journey.



5. Ready to Get Started With Your Quarterly Webinar Update?

Consistency is the cornerstone of effective client communication, and quarterly webinars offer an excellent framework for building that consistency. With each quarterly update, your firm is presented with an opportunity not only to share valuable insights but to keep clients and prospects connected to your brand in a meaningful way. Every time you send an email invite, a day-of reminder, a replay email, or a follow-up summary, you're reinforcing your firm's presence.

By establishing a rhythm of regular webinars and structured follow-ups, you create multiple touchpoints that keep your firm top of mind for clients and prospects alike. The more frequently your name appears in their inbox, the more familiar and trusted your brand can become. These consistent communications build brand awareness, subtly reminding clients and prospects of your firm's dedication to keeping them informed and engaged.

Furthermore, each point of follow-up – whether it's a replay, a transcript, or a one-on-one conversation – adds another layer of transparency, strengthening the foundation of trust you've established with your clients. When clients feel they can rely on you to deliver honest, relevant updates each quarter, their confidence in your firm grows, as does the strength of your relationship.

Through these quarterly webinars, you're not just delivering information; you're building a relationship based on trust, consistency, and genuine value. Over time, this approach transforms your firm from a service provider to a trusted partner, one that clients and prospects know they can count on to guide them through every market condition. So embrace the power of consistency – each email, each follow-up, each webinar brings you one step closer to building lasting, impactful relationships that set your firm apart.

» **Now is the perfect time to begin harnessing the power of quarterly webinars. By hosting regular updates, you'll not only simplify your client communication but also elevate your firm's presence and reliability in the eyes of clients and prospects alike. Start planning your first webinar today, and experience firsthand how this consistent, engaging format can strengthen your client relationships and set your firm apart as a trusted leader.**

