

Identifying Your Target Audience

	Demographics	Worked With Before	Technology Skills	Why Are They Attending	Any Additional Information
Primary Target Audience					
Secondary Target Audience					



This program is made possible by a grant from the FINRA Investor Education Foundation.

Content Planning

Topic(s) to be Covered			
Number of Sessions		Length of Each Session	
How will materials be available to participants			
Continuous or Stand-alone sessions			
Device Audience Will Participate From			
Other Ways to Access Same Information			

Selecting Features

Feature	Benefit for Your Series
<input type="checkbox"/> Application Share	
<input type="checkbox"/> Audio for Participants	
<input type="checkbox"/> Audio Sharing from Applications	
<input type="checkbox"/> Chat	
<input type="checkbox"/> File Sharing	
<input type="checkbox"/> Guest Presenter	
<input type="checkbox"/> Host	
<input type="checkbox"/> Introduction Slides & Music	
<input type="checkbox"/> Question & Answer	
<input type="checkbox"/> Poll Questions	
<input type="checkbox"/> Recording	
<input type="checkbox"/> Registration	
<input type="checkbox"/> Reminder Email Notifications	
<input type="checkbox"/> Screen Share	
<input type="checkbox"/> Video (content video)	
<input type="checkbox"/> Video (presenter)	
<input type="checkbox"/>	

Marketing Plan

Marketing Tool	Reason
<input type="checkbox"/> Press Release	
<input type="checkbox"/> Email to List Serves	
<input type="checkbox"/> Brochures	
<input type="checkbox"/> Flyer/Poster	
<input type="checkbox"/> Informational Booth	
<input type="checkbox"/> Website	
<input type="checkbox"/> Partner Organization	
<input type="checkbox"/> Giveaways	
<input type="checkbox"/> Wellness Program	
<input type="checkbox"/> Word of Mouth	
<input type="checkbox"/> Paid Advertisement	
<input type="checkbox"/> Newsletter	
<input type="checkbox"/>	
<input type="checkbox"/>	

Evaluation Plan

Outcomes	Description
Evaluation Goals	
Participant Immediate Outcomes (Knowledge Gained)	
Participant Intermediate / Long-Term Outcomes (Actions Taken)	



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