ELC 058: Virtual Training Is Much More Than A Presentation
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Connie: Hello, learning people. Welcome to episode 58 of the eLearning Coach podcast. How do you translate the in-person learning experience to a virtual classroom? This episode answers that question. Author and virtual training expert, Cindy clarifies the misconceptions that people have about the virtual classroom, and she provides fantastic tips and techniques for facilitating an effective virtual learning event.

Connie: You'll hear how to increase the interactivity and collaboration of the virtual classroom so that participants get involved, which should lead to better learning outcomes. Cindy has been providing virtual training solutions since the early two thousands and is a recognized industry expert in teaching training professionals how to design and deliver interactive online classes.

Connie: She's the author of several books, including the updated Virtual Training Basics and Virtual Training Tools and Templates. As always, you can find the show notes with lots of resources and a transcript at the elearningcoach.com/podcasts/58. Here's our conversation.

Connie: Hi Cindy. Welcome to the eLearning Coach podcast.

Cindy: Hey Connie. It's so good to be here with you today.

Connie: We're talking about virtual training today, an important topic that you've devoted a lot of time to. Just to make sure everyone thinking about it in the same way, how do you define virtual training?

Cindy: It is something that so many people think of so many different things when it comes to virtual training, so I'm really glad we're starting here, and when I think about virtual training, I think automatically something that's highly interactive, something that has learning objectives, so we're looking for learning outcomes. We're looking for behavior change, or a new skill, something that we want our learners to go do in the workplace.

Cindy: That there's a facilitator, whether we call that person a trainer, instructor, or a facilitator, but that person who's leading through the process, and the participants, the learners, are dispersed. There's one person, one device. They're connected to a virtual classroom through their tablet, or through their laptop. We don't have people gathered around a conference table all trying to share a common connection.

Cindy: And, I think it's worth noting that that definition of virtual training, for some people, they think, "Oh, right. That's what I mean, too.", but really the word webinar, or the word webcast, often comes into play and when I think about those, a webinar or a webcast, it's usually one person, or a panel of experts talking about something and they're talking, they're presenting, they're sharing information to a really large audience and there's really little interactivity.

Cindy: So, I distinguish virtual training from those, and please don't hear me say that webcasts or webinars are bad. They're not, they're just not the same as virtual training. It's really the difference between a presentation and a learning event.

Connie: That's a great definition. And, one thing I think that is so important that you mentioned is that it's not people sitting around a conference room table.

Cindy: No. Even if they're in the same building, if we have people who come to a virtual class, I'll tell them, stay at your desk so that you have access to your laptop, or your device, and that you're having the same learner experience that everybody else who is connected remotely is going to have.

Cindy: Anytime you bring those people together in the same room, they're having a different experience than those who might be connected individually, and when we think about the user experience and design, which I know we'll talk about a little bit later on, I'm thinking we want a very similar environment.

Connie: As someone who does teach virtually, I notice how limiting it is when people are sharing one device. It just doesn't work as well.

Cindy: No.

Connie: When you think about virtual training, what are some of the signs that enable you to say, this is successful? This was a successful virtual training event.

Cindy: What a great question, because we all want our learning to be successful. And, when it comes to virtual training, I think there's three key components that create a successful learning event.

Cindy: And, the first one is that it's designed interactively, that whoever's putting the program together, that instructional designer, or the person responsible for it, that they're creating a design that is interactive, that's going to draw in the learners, it's going to get them

involved, it's going to make use of all the platform tools have to offer. So, number one is interactive design.

Cindy: Number two, it's an engaging facilitator. It's a facilitator who can connect with a remote audience, who can facilitate the learning experience, who can speak well and present well, knowledgeable about the subject, but most importantly that they're not afraid of the technology and they can engage that remote learner.

Cindy: And then, number three, which is the one we often forget about, is the participants, the learners, and I go back and forth, I call them the same thing. I mean the person who is learning the new skill, that they're prepared. And so, a prepared participant is somebody who shows up ready to learn. This isn't just another meeting on their calendar that they're trying to fit in, that they can multitask throughout, but instead they recognize that this is a learning event.

Cindy: And, that's a mindset shift for many of our learners because we've got remote employees, we spend, at least in the knowledge worker category, show much time in front of our desktop, or in front of our laptop, or using technology that we need to make sure they recognize this isn't just another meeting or presentation, that this is something that we're trying to help you learn or want to enable that learning for you.

Cindy: So, in summary, it's interactive design, engaging facilitators, and prepared participants. You put those three things together, you are more likely to have a really successful learning event.

So, what are some best practices for preparing participants to be ready to learn, and do you always do that?

Cindy: Yes, and we have to do that. That's really part of the preparation. That's part of what happens before the learning event. And, maybe we should back up and just say one thing, that a learning event could be just one virtual training class, but often, it's a group of events over time. It's a series of events. It's very rare you're going to learn a brand new skill by attending a 45-minute virtual training class. Right?

Cindy: But, over time, chunked down, so just being aware of that. So yes, we need to prepare our participants in advance. It starts from registration and the first communications that they're receiving, calling it learning or training and not calling it something else. Giving them the preparation tasks. And, I would recommend don't call it pre-work. Pre-work does

not sound important. Call it part one. Call it action assignment. Call it something other than pre-work.

Cindy: And, there are many different organizations doing different things. It could be that there's a prerequisite learning program they go through. It could be a checklist, it could be a message from the facilitator. It's usually something in addition to the automated messages people receive from the learning management system if an organization has one of those, that preparing participant.

Cindy: So, here's a quick example. I did a class just last week and it was the beginning of a series, and so, the participants had got their registration notifications from the learning management system. In addition to that, they've got a welcome note from me, and the welcome note was really clear. I'm going to be your facilitator. Here are three things to do between now and our first date.

Cindy: They were short, I wasn't asking them to do hours of work. One of them was to do their introduction to introduce themselves. Two was to look at a quick short reference guide that had some of the knowledge we were going to be going through, and then, three was to respond, and then, I included the link and a test link for them and told them, go to a quiet place. You're going to be on webcam.

Cindy: If you need to find a conference room or work from home that day. In that organization that was acceptable, so I knew it was okay to offer those as suggestions.

Cindy: Then, I heard from most of the participants, that's why I asked for a response. I want to know if they've read my message. For those that didn't, I sent another quick reminder, "Hey, just want to make sure you're prepared for our program that starts tomorrow.", and it wasn't in a nagging kind of way. It was just in a helpful, "I want to be sure you are ready to go." And, every single one of them responded with, "Oh, yeah. Getting to it.", or, "Just now."

Cindy: Anyways, they did it and that type of preparation is what I'm looking for. So, whatever the organization needs to do to help participants get ready, if it's a new-hire orientation program, it's that person's supervisor who might be preparing a space or a device for them. If it's work from home employees, giving them a checklist of what type of environment, where might you go in your home, if you have a room that you can close the door for this.

Cindy: If they're in a retail setting, where should they go, or what kind of device they should use. If there's any software they need to download. And, as part of that, the commitment that this is a learning program and not just a meeting.

Cindy: I find that if you do that, you're going to have a much more engaged audience. There's a couple other things you need to do as well, but that's step one.

Those are some really good best practices. Thank you. What are some of the biggest challenges you see people face when they're trying to turn in-person classroom training into a virtual learning event?

Cindy: You know, you would think, virtual training has been around for a long time now, and a long time being 15 almost 20 years now. And, there are still many organizations who are just getting started with virtual training, and I hear, frequently, "Are you sure we're not the only one?", type of questions.

Cindy: And so, if you're just getting started, you're not alone. I find the biggest challenge is an organization who's going to take an interactive classroom program and think we can reach a wider audience if we move online.

Cindy: So, let's just take it as it is, take the slides, take our facilitators, put it into a virtual classroom platform and they think they're done. When, really, you need to go back and look at your learning outcomes, decide what belongs in a self-directed activity that we're asking learners to do. What should go in a virtual classroom with the facilitator, and what types of activities make sense for them to do?

Cindy: You run the risk, if you don't step back and do that, of taking an interactive classroom program, moving it online, and your facilitator just lecturing through the slide, when that's not really an effective learning event. We both know that.

Cindy: So, you really do want to overcome that challenge. Going back, looking at your design, and deciding that overarching, what belongs in the virtual classroom? What will we ask our learners to do? What's the blended curriculum that results from that?

Cindy: The second thing that I find is challenging our facilitators, if facilitators are used to seeing somebody's face, when we go online, you may or may not have the web cams on, and if you have them on, you're able to see each other. I find it to be very engaging. I recommend that you use webcams when you can, but it's a new technology. It's a new way of learning. It's a new way of facilitating. So, making sure that those facilitators are equipped, and I find

some organizations just assume that facilitators can jump in and start facilitating, but there's a real skill to it.

Yes, yes. It's not the same thing at all. It really isn't. Cindy, I know that you updated your book, Virtual Training Basics. What is different now than when you wrote the first edition?

Cindy: I'm so glad this came up in our conversation, Connie, because I wrote that first edition back in 2008 and 2009, and it came out in early 2010, over 10 years ago, and one of the things I wrote in that first edition, it was a guide for virtual facilitators who are just getting familiar with virtual training.

Cindy: I wrote in that first book, don't turn on your webcam. That webcams really don't have a place. And, when you think back, at that time, bandwidth was not as robust as it is today. It's still a challenge for many, but it was even more so back then. Web cams were a rarity. They were not very common. Video was just not where it is today. And so, the book was still getting a lot of traction and lot of people were interested in it. And, in talking with the publisher, we decided that technology had changed quite a bit over that eight, nine, 10 year period. Let's make some updates.

Cindy: And, Connie, the very first thing I did was change turn on your webcams. It was the first thing I did, and I was really glad to have the opportunity to update some of the technology that's available. Organizations have increased bandwidth, and so, we can turn those webcams on.

Cindy: And, when we're talking about virtual training for a smaller audience, 20 people or less, then I turn the webcams on, and you can have a much more engaging experience when everybody is looking at one another and sharing their webcam. I know some people are still a little apprehensive about turning it on.

Cindy: I think fast-forward a few years from now, that's not going to be an issue. My five year old son, he doesn't understand making a phone call without video. He asks where the person is, and it's just becoming so much more common in today's workplace that we do our conference calls and other meetings on video, and it's really a direction that we're heading. So that's the first thing I changed.

Cindy: Some of the other things that are updated, I added in a chapter on design because I'm finding that facilitators are often the ones who are doing design. I've been a one-person training department before and even in the larger organizations, when it comes to really

high quality interactive training, we want facilitators to be involved with the design, even if it's just adding their own style as they're facilitating the program.

Cindy: So, there's a new chapter on design, as well as updates to the platforms and the tools that we have available.

Yeah, things really have changed. I agree with you that when you have your webcam on it makes the environment so much more intimate.

Cindy: It does. And, I have a one-pager on tips for using your webcam that I'd be happy to link to for anyone listening to this podcast. If you are one who does not like being on webcam and you're looking for some tips to make it better or easier, I'd be happy to share that one-pager with the audience.

That's great cause I always have resource links in the show notes, so that would be awesome. Perfect. What kinds of virtual activities do you think are more effective for a small number of participants?

Cindy: Well, when it comes to activities and thinking about our audience size, I go back to the definition of virtual training. Usually the larger audience, if we're getting into 40, 50, 60, a few hundred people, then we're probably doing more of a webcast, a presentation, than we are a small group interactive learning event. And, that's true both in-person as well as online.

Cindy: Think about speaking to a large audience in an auditorium versus being in a training room where we're doing role plays and skill practices. So, I translate that to the online classroom. In a small group, you can put people into breakout rooms, you can have them do that practice or role play. You can have the webcams on much easier in a small group than you can with 40, or 50, or 300 people. And, in those audiences, it's just the speaker who would turn their webcam on.

Cindy: You can do things like open up your drawing or annotation tools, some platforms call them, in a small group and you can have your participants writing on the screen, make use of it like a whiteboard or a chart paper, if they're taking notes. For example, if I have a slide that has a lot of words on it, which is so rare, but if I do, I'll turn those drawing tools on, have the participants read and mark on screen what's standing out to them. One example of how we might use that.

Cindy: With a really large group, you're relying much more on polling and chatting. Those are the two things that, with larger groups, I rely more heavily on. I do have some organizations, some trainers, who will say, well, I had a group of 60 and I put them in breakout groups. Create that small group environment. You can get really creative with the tools, but chatting, polling, raising hand, forgot that one for the larger groups, and then, much more interactive and immersive for the smaller groups.

           In that case, what happens in a face-to-face environment is somewhat similar to what happens in a virtual environment.

Cindy: Yes. There's so many parallels. I tell trainers when they're converting that, think of it like this, if you know how to drive a car, you've got your driver's license, and you're being asked to try a truck or a bus. All the basics are the same, but there's some new things you have to add on. New things to be aware of.

Cindy: Facilitating in the in-person classroom and facilitating online are kind of like that. We don't forget the basics. The basics are still the same. We just have to add on some new skills, some new features, some new things to get comfortable with, so things like being interactive in person, they're going to be the same. Being interactive online. That same mindset.

           Right. You mentioned breaking people into small groups. I was wondering what you think is a very effective way to get people to break up into small groups without it taking a lot of time and having technical and logistical problems.

Cindy: Yeah. Again, another good question. And so, I mentioned earlier that preparing participants, not only just sharing with them in advance what they should do, but how do we build their mindset that this is going to be interactive? And, one of the things we need to do is to remember we're meeting together at the same time, and therefore, it is a social experience.

Cindy: You've got a facilitator and a group of learners together at the same time. Therefore, it should be social, it should be a dialogue, it should be interactive with each other. So, there are lots of really simple ways you can get people to come together in a virtual classroom. The most simplest one is to get them in the chat window, turning on their private chat and assigning a partner to them. When they have a partner, they can then have a private discussion. It's not audio, it's simply by typing, but it's the equivalent of the in-person room. Turn to the person next to you and talk about X.

Cindy: So, in the virtual classroom, it's Alison and Julie, you're partners, Sarah and Sam, you're partners. Turn on your private chat, have a conversation with each other. I'll be silent for 90 seconds while you do, and then, we'll debrief that conversation. It doesn't require any special tools, just that facilitator who can explain what to do, and then, the participants who are connecting with each other.

Cindy: I do that as one of my very first activities when we first get started in a class, because you're buddied up, you're no longer isolated. You've got a connection, a personal connection with somebody, and they can continue that conversation throughout the class. I sometimes have facilitators say, "You mean you let them private chat and you don't know what they're saying?" And, I think, "Yes, that's what happens in the in-person classroom, why not online? I'm happy that they're here, they're participating, they're communicating." So, that's one way to do it.

Cindy: Connie, one other way to do it, and obviously we have, in many platforms, a breakout functionality.

           Right.

Cindy: It should be really easy to use. If a facilitator has practiced with it, it should not be a difficult thing to do. So, we use the breakouts, but here's an intermediate thing. I might put on screen a whiteboard divided in two parts, or whiteboard divided in three parts. Sometimes it's my slides, sometimes it's a whiteboard, depends on what platform we're using. And, I'll just tell the group, "Okay, half of you have the left side, the other half of you have the right side. I have two questions at the top. Use your drawing tools, answer the question. Work as a team. Team who gets the most listed on their side in the next 60 seconds wins."

Cindy: Or, sometimes I don't turn it into a competition, depending on the question. I just subdivide that board. I tell them they're working in teams. I don't have them come up with a team name. We're doing anything special. But, you would be surprised at that camaraderie, that, "Hey, Joe had a great comment and showed it to Sally." And then, once they add in, I'll ask them, "Okay, someone from team one, what's your synopsis? Debrief this for us." And, they jump in and it's a great way to create that social connection to get people working together without anything fancy related to the tools.

           That's such a nice, easy way to get people talking, to get the social interaction happening, without going into creating groups and doing the whole thing. Because often you've only got 45 minutes to an hour.

Cindy: Right.

           What would you say about managing virtual environment and allowing the participants to use audio for asking questions and discussions?

Cindy: Yeah. Let's talk a little bit about audio because, obviously, with the large group, most of the time the attendees and participants will be muted. It just practically is how we need to do things, and so, if you have that large group, and by large group I mean 20, 25 or more, so it could be 40, 50, 60. It could be a few hundred. I think the largest group I've ever spoken to is about 3000.

Cindy: Obviously, those larger groups, you are going to have everyone on mute and so you could say, "Raise your hand if you've had this experience, or raise your hand if...", and then, allow that person to unmute and join in the conversation. You would use that sparingly, but it's something that could be done.

Cindy: For the smaller groups, though, when we have 20 or less and it's truly a learning event, then I never ask participants to mute in the first place. If they're muted, they're much more likely to be multi-tasking, or much more likely to think that I'm the one that's going to do the talking.

Cindy: When I'm facilitating, my mindset is, this is a dialogue. We are in this together. Now, if you have someone who's working in a noisy environment, they're in an open office space, and the nature of their workplaces is that there's a lot of background noise, or they're at home and they don't have a place to join in, or they're in some other environment, they're a construction company and the nature of the workplace is noise.

Cindy: So, in those cases, I might sparingly ask a participant to mute, and then, make sure that they know the button, what do they quickly pressed to unmute so that they can participate in the conversation or in the dialogue.

Cindy: Most platforms these days will give you a choice. You can use a voice over IP, the audio through the computer, or through the telephone. My advice is to use whichever one is simplest for your audience and whichever one the bandwidth is going to support. If you've got enough internet bandwidth to support audio by computer, it is simplest, it's easiest.

Cindy: In the places where that's not possible, then you may have teleconferencing or people joining by telephone. Sometimes there's a little cost involved with that, but you want to have just crystal clear audio. One more thing about this, I could talk about audio for a long

time, is that I find people are more forgiving of video that is fuzzy, or choppy, or something's not 100% perfect about it, but when it comes to audio, not so much.

Cindy: We don't want to hear static in the background. We don't want to hear background noise. We deal with more cognitive dissonance when we're trying to figure things out. What is that scratching noise or that static? And so, the more you can have a crystal clear audio connection for both you and your learners, the better.

That is so true. And, I've read that, in general, that's true about all video and audio. Even when you're producing something for e-learning. We're a little bit more forgiving about the video, than we are the audio.

Since you mentioned platforms, do you have recommendations of which virtual training software you prefer?

Cindy: You know, this is a question I get asked all the time. What's the best platform to use? And, every year for the past couple of years I've actually done a study, a global survey of a few hundred virtual training professionals. And, one of the questions I ask is, what platform are you using? And, it's been really interesting to see over the past couple of years which ones have risen to more popularity than others.

Cindy: And, my response in what's the best platform to use is always, it depends, because it depends on what you need. It's like asking somebody what's the best car to drive? And, if you're in northern Minnesota and you are driving in the winter time, that's a different answer than if you're in southern Florida in the hot, sunny summer where a convertible two-seater might make sense. Right? So it depends.

Cindy: And, it depends on your audience and the platform tools you use. As a general recommendation though, there are virtual classroom platforms out there that are really just meeting platforms. They're web conferencing platforms. They're a conference call with a few extra features like screen sharing or chatting.

Cindy: Then, there's the webinar or the webcast products that are designed for the large audience. And then, there's the virtual classroom, or the virtual training platforms. And, just one example. Anyone who is familiar with WebEx. There's WebEx Meeting Center. There's WebEx Event Center, and there's WebEx Training Center. We call them WebEx, but they're really three different programs. Another example, there's GoToMeeting, there's GoToWebinar, and there's GoToTraining.

Cindy: There's a couple platforms out there that do have the same features, the same tools, that are available regardless of meeting, or webinar, or webcast, but I'm going to recommend if you're going for a training or a learning platform, find whichever one is designed for learning. That's going to get you a step in the right direction.

Because it's going to have more features.

Cindy: Yes, it's going to have more features. It's going to have more tools for interaction, for collaboration. For example, it may have breakout rooms, whereas the meeting version might not. It will do things differently sometimes with the drawing or the annotation tools. Sometimes it's a matter of what status indicators you have like raising hand or agreeing, so sometimes it's testing or quizzing that gets incorporated in. Just depends on which platform it is, but make sure you're thinking about what we need, and then, which of these online platforms have the features that we're looking for.

Something I've been wondering about are what are some of the most creative activities you've done or seen in the virtual classroom?

Cindy: Ooh, that's a good question, and when it comes to getting creative, that's really what we need to do with the tools is, not just really take them at face value. Yes, we can all type in chat, for example, or we can all click on the raise hand button, but what I see people doing that gets really creative is taking those tools to the next level.

Cindy: Simple example. This may not be very creative for some who have been doing this for a long time, but let's take raise hand and say, "Let's encourage Joe for his contribution. Click on that raise hand button over and over again." It looks like you're giving him a virtual high five, right? It's so simple, but it's creative.

Cindy: Or, let's use chat. I'm going to put a scenario on screen and I want you to decide what should the character say next. What's the manager's next line in this employee conversation? Type in what you think that is and chat. When I say go, hit enter, and we'll all compare what we think the manager should say next.

Cindy: Or, we're taking the drawing tools. We're creating a whiteboard that's creative, that's broken into sections, if you will. Each participant takes a section and they do something. I'll have my participants draw their self-portrait and stick figures are fine, and then, we'll turn on the and we'll have fun with what it looks like, or what somebody drew and make use of that.

Cindy: So, overall creativity is really about getting creative with the tools to draw people in. I always prefer activities that draw more people in as opposed to just one or two because I'm thinking of, how do I interact with everybody to help them learn?

            I love those ideas. Well, to wrap things up, what trends do you see coming in the future of virtual training?

Cindy: So, one of the buzzwords, Connie, that we're hearing a lot of today is immersive environment, and often those immersive environments are referring to virtual reality, or augmented reality, in the context of learning. And, I am right now researching, well what then are the facilitator skills that are needed in these immersive environments?

Cindy: I've been hearing and seeing a lot about the learning experience designer and I'm interested in the learning experience facilitator. What does that look like? And so, one platform that's available right now, Zoom, it's a pretty popular virtual classroom platform. I just, a few weeks ago, was in a Zoom virtual reality room sitting on top of the Zoom platform.

Cindy: And, some of the other platforms, I think of Skype, Microsoft came out with HoloLens that had a Skype add-on where you could be in that immersed environment for it.

Cindy: And so, I think it's very premature right now. We're very, very early in that. But, let's talk in a few years, at the speed of technology change, and talk about what that looks like, what the skills for facilitators are.

Cindy: The other trend that I'm seeing, which maybe parallels it, it's gotten a head start is, we are now for so many industries using devices as opposed to laptops and desktops and the virtual classroom is a little bit different when you look at it on a mobile device than you do on your computer.

Cindy: And so, there's some changes I think coming down the road as participants are connecting to the virtual classroom using devices, they could be anywhere their device is. Whether it's in a hotel room, in a coffee shop, in a home office, on the shop floor in a manufacturing facility, and thinking about adapting designs for that, creating shorter programs, shorter just-in-time facilitated programs. We're moving in that direction as well.

            That is exciting, particularly that immersive environment. I cannot wait to see that, and it's amazing that Skype and Zoom already are partially there. I haven't seen it yet.

Cindy: Partially there. Yes. The add-on for Zoom is being done by a third-party, but I know that they're cooperating and working with Zoom, and the other platforms are not far behind, if they're not there already. They're creating the behind the scenes technology so that we can add in virtual and augmented reality on top of those platforms. So, fascinating, interesting. Stay tuned.

              Yeah, that's really exciting. Well, thank you so much, Cindy. I think you've been really helpful to a lot of people who were already doing, or planning on doing, virtual training.

Cindy: Well, I hope so. One of my favorite things is to hear from somebody who has read a book, or watched one of my webcasts, or downloaded some of the resources on my site to say, "I used these things to help design an interactive program, and the tools guided me along, or the resources that were available helped us have a successful program." and I love that. That's why I do what I do. I'm pretty passionate about the fact that virtual learning can be a great way to disseminate learning throughout the organization, and just thrilled when I hear that people are being successful in doing it.

              Right. That's very fulfilling. Well, thank you.

Cindy: Thank you, Connie. Nice chatting with you.

              I hope you enjoyed this episode. No matter what your current job responsibilities are, there's a good chance that, at some point, you will be facilitating a virtual classroom, or helping someone facilitate virtual training.

              I think Cindy's recipe for success is something to remember. A successful virtual training event needs an interactive design to get participants involved, a facilitator who was engaged and comfortable with the technology, and participants who are ready to learn.

              Be sure to check out the many resources Cindy provides. There's a link to them in the show notes, which you can find at the elearningcoach.com/podcasts/58. That's the number 58.

              I'll talk to you soon. Take care.