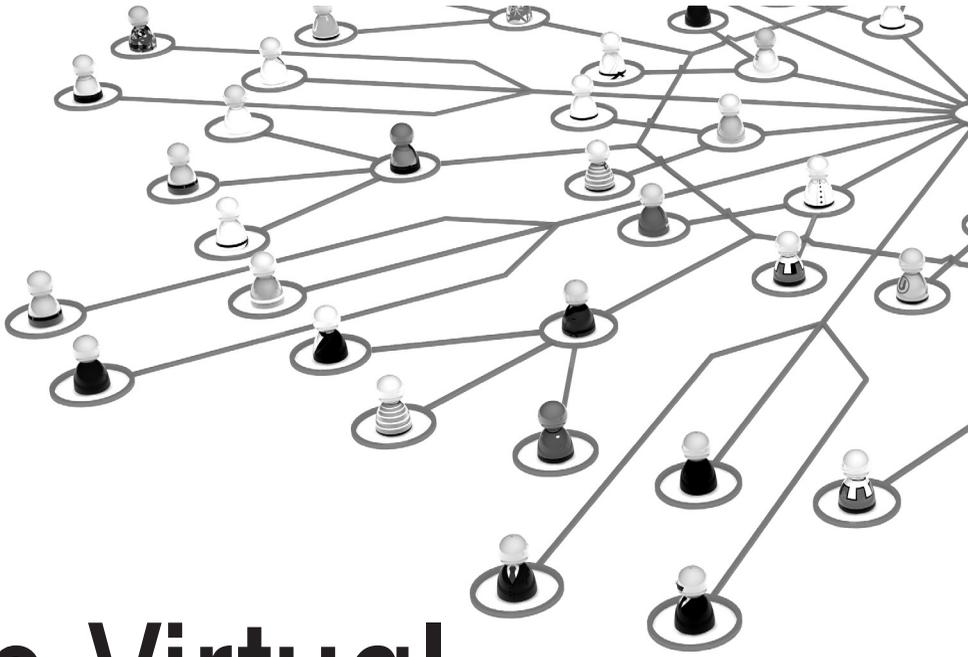




The Virtual Training Guidebook

How to Design, Deliver, and Implement Live Online Learning

Cindy Huggett



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Foreword

Cindy Huggett grabbed my attention the first time I saw her present at an international conference for the American Society for Training & Development (ASTD). She was presenting on webinars and made it look easy and engaging. I could tell a lot of preparation and experience had gone into her session.

Impressed with her techniques for making webinar instruction and learning interactive, I introduced myself after class. Since then, we've had many conversations and I appreciate the insight and skill she has in making virtual learning become more alive. Out of these conversations came a foundation of trust and respect, and that led us to collaborate on *SCORE for Webinars*, which will come out in early 2014.

Cindy is such a valuable asset to the training industry, and I really value the time I spend working with her. She is a tremendous sounding board for ideas and has provided so much valuable guidance for me as a trainer, an author, and a company CEO.

In *The Virtual Training Guidebook*, Cindy provides a comprehensive guide to live online learning in an easy-to-follow, step-by-step format. The book begins with simple definitions and ends with how to measure online training effectiveness as well as a discussion on future trends.

However, I feel this book is such an excellent resource because, while detailing her process for virtual training, Cindy stays true to the most important aspect—interaction and engagement in the learning process. Throughout her work, she emphasizes the need to facilitate instruction and ensure participants are actively engaged in their learning.

After reading this book, I believe you will feel more comfortable and confident in handling the technical and technological aspects of virtual training.

Becky Pike Pluth
CEO of The Bob Pike Group
Author of *Webinars with WOW Factor*

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I'm also extremely grateful to Wendy Gates Corbett for all of the time and effort she spent reading early versions of the manuscript and for sharing her thoughts and suggestions on the content. Her insights were invaluable and made this book much better than it would have been otherwise.

Thank you also to Justin Brusino and Ashley McDonald at ASTD Press for their enormous patience during the lengthy book writing process. Their encouragement and advice carried this book through from concept to completion.

Finally, I dedicate this book to my best friend and husband, Bobby Huggett, who endured hearing me type on the keyboard for hours on end over many nights and weekends. Without his love and support this book would never have been written.

Cindy Huggett
Psalm 115:1
October 2013

Chapter 2

Get Ready

In this chapter, you will learn four things you should do to get ready for a virtual training implementation:

- Ask yourself, “What’s your end goal?”
 - Define virtual training for your organization.
 - Get the right people involved.
 - Build an implementation plan.
-

Whether you want to have an extensive virtual training course curriculum that will require months of planning or only want to have one single online session, an implementation plan will help you get ready to use virtual training in your organization.

The first task in any implementation is to plan for success. As well-known author Stephen Covey once wrote, “Begin with the end in mind” (1989). The same thought is true for a virtual training implementation. Begin by thinking about the end goal.

Discover Your End Goal

The planning journey will start with your first step, which should be to ask yourself questions such as: What’s our goal for this training program? What are we trying to accomplish? What do we want to be different as a result of it? Do we need participants to be more knowledgeable about a topic? Do we want them to behave differently? Take action on something? How will our organization change or improve as a result? What’s the best way to achieve these goals? How specifically would *virtual* training help achieve these outcomes?

By answering these questions, you define your vision of virtual training success. You determine the purpose of your initiative and articulate your desired end result. By intentionally setting goals, you can increase your likelihood of achieving them. These questions can also help you determine if virtual training is the appropriate solution for your situation. Virtual training is not the answer just because everyone else is doing it or because it’s a shiny object that captures your passing interest.

It may surprise you to hear that virtual training may not be the right solution for your organization. If by answering these questions, you realize that you're implementing virtual training just because you have heard it's a cheaper alternative to traditional training, or just because your employees are dispersed throughout the globe, or just because a competitor is doing it, then those are not the right reasons. All of these might be *contributing* factors to your reasons for wanting to implement virtual training. But the best reason to implement virtual training is that it will be the best solution to meet your organization's needs.

When done well, virtual training can transfer knowledge, increase productivity, help you gain competitive advantage, and positively affect business results. Virtual training can help you reach a global audience. It can reduce travel costs for training budgets. It can create opportunities for dispersed learners to interact with each other and a facilitator. And it can help provide training to participants who may otherwise not have access to instructor-led learning.

The point is that you should be clear about the reasons for using virtual training implementation. By beginning with the end, you can define what success will look like for your organization.

“Be really intentional about choosing {virtual training} as a modality. You both gain and give up. We’ve never promised that virtual training is the same learning experience as face-to-face training, but with a team located in cities around the world it’s the most efficient way to deliver a consistent learning experience.”

—Dan Gallagher, Vice President of Learning at Comcast;
and author, *The Self-Aware Leader* (ASTD, 2012)

Let's say, for example, your organization decides to decrease administrative costs worldwide by switching to a new online expense reporting system. End users need to learn how to use this new system in order for the costs savings to be realized. After looking at travel costs, participant locations, and trainer time, you determine that live online sessions will be the best way to both demonstrate and answer questions about the new features. You realize that virtual training will help you reach your geographically dispersed audience. And you believe the software skills content is suited to a virtual method.

So you might define the goals and objectives for this initiative by factoring in the organization's aim to decrease administrative costs and determining what end users specifically need to know and do with the new system features. These goals will help you define the learning objectives. But more importantly, they will help you design and deliver the appropriate type of virtual training for this initiative.

What type of virtual training will you deliver? That takes us to the next step in getting ready.

Define Virtual Training

One of the other most important things to do near the start of your journey is to define what your organization means by “virtual training.”

Virtual training conjures up a myriad of definitions. While it probably means only one thing to you, it is certain to have a different meaning to someone else. You might think virtual training is any type of online course, while the person sitting next to you thinks virtual training is self-paced asynchronous learning. And the person down the hall might think virtual training is a webcast that has one presenter and hundreds of audience participants. Due to these disparate definitions, it makes sense to start by defining what you and your organization will mean when you say “virtual training.”

No one is to blame that we have so many meanings of virtual training. If you look to how we use the term *virtual* in everyday life, the same pattern emerges. We talk about virtual reality, virtual teams, virtual wallets, virtual meetings, and virtual presentations, just to name a few. A cursory web search of the word “virtual” turns up over 1.2 billion hits. The lexicon of virtual training follows suit.

So what is virtual training? The definition I typically use is:

a highly interactive synchronous online instructor-led training class, with defined learning objectives, with participants who are individually connected from geographically dispersed locations, using a web-based classroom platform.

We'll peel apart that definition in a moment, but first, let's talk about what else virtual training could be.

To some, virtual training is any type of training delivered online. This definition would include asynchronous self-paced e-learning, as well as synchronous online classes. In this case, virtual training is considered to be synonymous with online learning. If it happens on the web, either alone or together with another person, then it would fit into their definition.

To others, virtual training encompasses any type of knowledge transfer that happens to be in an online environment. This definition includes webcasts, webinars, and online presentations. If any type of information is shared using a web conferencing platform, then it might be considered virtual training.

And still to others, virtual training refers to video conferencing or any type of telecommunication. A group of learners could be huddled together in a conference room in Pittsburgh, Pennsylvania, while another group could be together in Seattle, Washington, and a third group could be in Paris, France. They could be using their company's official video camera setup installed in each room, or a more informal online video sharing software. Just because participants are dispersed in multiple locations, some would consider this style of video conferencing to be virtual training.

The list of examples could go on. There are as many definitions of virtual training as there are types of training classes—**which is why you need to establish up front what you mean by virtual training, and get everyone involved on the same page.**

You might decide to use more than one type of virtual training in your organization. In fact, you probably will. Yet for each session, you should define exactly what your goal will be, and what method (that is, type of virtual training) you will use to get there.

I can't stress enough: Set the appropriate expectations with everyone involved. Be intentional about your goals for each virtual session and ensure that everyone is aware of those intentions. The success of your virtual training implementation will depend upon it.

“It's really important to call things by the right name and set those expectations. What you call something really influences the design and sets the stakeholders expectations.”

—Peggy Page, Design Group Manager, TD Bank

Let's return to dissecting my definition of virtual training. It's one of the most common descriptions used. To remind you, the definition is: *a highly interactive synchronous online instructor-led training class, with defined learning objectives, with*

participants who are individually connected from geographically dispersed locations, using a web-based classroom platform.

In other words, virtual training is (or has):

- *Highly interactive*—participants engage frequently, at least every few minutes, with the facilitator, with the learning content, and with the virtual classroom tools.
- *Synchronous*—participants meet together at the same time. Sometimes referred to as “live” or in the case of virtual training, live online.
- *Instructor-led*—facilitated by a professional trainer or instructor.
- *Defined learning objectives*—clearly stated performance expectations that learners will be able to achieve as a result of actively participating in the session.
- *Geographically dispersed participants*—learners are distributed and apart from one another. Moreover, each participant joins from his own device and has his own audio/telephone connection.
- *Web-based classroom platform*—a software program used for training that allows for online screen and file sharing, and has participant interaction tools such as polling, chatting, and annotating.

So a typical virtual training class might meet on a Thursday at 10 a.m., last 90 minutes, and have 18 participants from various locations around the country. The group would meet online using a synchronous tool, such as Adobe Connect or Citrix GoToTraining. The class would be led by a facilitator, and would result in the participants learning a new skill that could be immediately applied to their jobs.

Of course, your virtual training might not look like the one described above. You might have an alternate set of standards for timing, or number of participants, or even the learning outcomes. What’s most important is that you define what your organization means by virtual training, and that everyone involved is on the same page.

Other Types of Live Online Sessions

Since so many of the tips found in this book can be applied to the various types of synchronous online sessions, let’s also expand upon those common definitions.

What Does a Virtual Training Class Look Like?

In case you are brand new to virtual training, here is an illustration, adapted from my first book *Virtual Training Basics*.

Michelle is a trainer for a large telecommunications company. She's located in Cincinnati, Ohio and will be facilitating a 60-minute virtual class on Thursday morning at 11 a.m. Eastern time. About a week prior to the training date, she sends an email message with directions and logistics to her participants. About an hour prior to the start time, she sits at her office desk, logs into the virtual classroom software, and gets ready for the event. She uploads slides, opens the first polling question, and prepares the virtual whiteboard. She completes all of her pre-class preparation and waits for everyone to arrive.

Around 10:50 a.m. Eastern time on Thursday, the participants start entering the classroom. They do this from the comfort of their own respective offices: sitting at their own desks, opening up their Internet browsers, and clicking on the link from Michelle's email message.

One participant—Maira—is in her office in Dallas, Texas. She clicks on the link and goes straight to the login page. She types in her name and email address, and waits for the classroom software to load on her screen. Once connected, she sees the conference call number on screen, picks up her phone, and dials in, using her unique attendee ID displayed on screen. Maira hears Michelle's voice on the line, and says hello to greet her. The other participants follow the same steps to join the class.

The participants are able to see what Michelle has prepared for them on the screen. They see the names of the other attendees, the slides, a chat window, and the first polling question.

The participants communicate with each other verbally and online through frequent activities such as typing in the chat window, responding to polls, and writing on the whiteboard. At one point, Michelle assigns the participants into virtual breakout groups, and Maira is able to talk privately with her class partner Julie. They practice one of the new skills before returning to the large group for a debrief discussion.

By 12 p.m., class finishes, and Michelle asks everyone to complete a follow-up assignment to apply what they've just learned.

Webcast

A webcast primarily disseminates information from a speaker to a large audience. A speaker uses slides to present and share information. Sometimes a webcast includes multiple speakers or a panel of experts. And usually a webcast has a large audience, anywhere from a few dozen to a few thousand attendees.

A webcast is solely one-way communication from a presenter to attendees. Think about a traditional television newscast—with a news anchor reading from a script, using visual aids to illustrate stories, and interacting with other news presenters. A traditional newscast has little to no interaction with the audience, which is also true of a webcast.

If your organization were to pull a large audience together for a scripted town hall meeting, with presentations on the company strategy and only a short time for Q&A at the end, then this type of meeting—if held online—could be called a webcast.

Webinar

In its traditional definition, a webinar is an online seminar. Like a webcast, a webinar is also primarily one-way communication from a presenter to attendees. However, webinars often employ interactive techniques such as polling, chatting, or whiteboard annotating. If you think about how television newscasts have evolved over time, many modern news programs now incorporate audience interaction through social media and other techniques. For example, a reporter might respond to viewers' on-air questions or invite listeners to vote online and then report on the collected results.

It's the same with a webinar. The information shared is mostly one-way from speaker to audience. The speaker(s) use slides to present, while periodically involving attendees through polls and other brief interactions. While some webinars can be highly interactive, most are not.

You might think of a webinar like a university class, with an expert professor behind a podium and hundreds of students sitting in an auditorium. The class will have some interactivity through questions-and-answers, assignments, and quizzes. But the large class size limits the type and frequency of interaction available. If your organization's human resources department decided to hold informational sessions about a new company travel portal, and throughout the event they offered several

opportunities for discussion and dialog, then this type of session—if held online—could be called a webinar.

Attend a Free Webinar!

A popular current trend is a specialized online session: the marketing webinar. Organizations use these marketing events to share information about their products and services to hundreds or even thousands of people. Organizations contract with thought leaders who speak on a subject, and invite everyone in their target market to this free event.

Attendees register for a session so they can hear from the expert speaker. Organizations use this registration data so they can capture interest and follow up with participants. At some point during the session, a sponsor's commercial is usually shared with attendees.

The positive trade-off is obvious—attendees learn something for free, while organizations capture valuable marketing data, and sponsors generate advertising.

The term *webinar* is so popular that many people believe it is synonymous with virtual training. It's increasingly common for organizations to call their virtual training sessions a webinar. Many popular speakers, authors, and trainers interchange the word webinar for virtual training. I've even done it myself on numerous occasions.

The intent behind calling virtual training a webinar is good—yet the effect can potentially create challenges for several reasons. First, participants who have attended passive webinars may expect to do the same in a virtual training class named a webinar. Second, presenters may assume the session should be lecture-based, and design and deliver the session accordingly. Third, administrators may unknowingly set up the event using a meeting platform instead of a training platform, which can affect the available features. When these expectations are mismatched—your intent is an interactive virtual training class but the result is a passive presentation—then there is higher risk for failure. Therefore, if you choose to call your sessions a webinar, as many organizations do, be prepared to climb any extra communication hurdles that may be required for success.

Webcast, Webinar, or Virtual Training?

The first main difference between a webcast, a webinar, and a virtual training class is the amount of participant interactivity in each one. Webcasts typically have the least amount of interaction, followed by webinars, then virtual training classes. The second main difference is the number of participants. Webcasts tend to be the largest, then webinars, followed by virtual training classes. There is not a simple black-and-white calculation that will tell you which is which; instead it's more like shades of grey on a continuum.

Video Conference

When participants are huddled together in a conference room using a video camera and viewing a screen that shows other groups huddled around other conference tables with the same setup, it would be called a video conference. Some would call it a virtual meeting. If this setup is used for learning, then it could be called remote training or distance learning.

Video conferencing systems used to be found only in sophisticated technology-enriched office meeting rooms; however, with new technologies and decreased costs, it's becoming more common for this same setup to substitute for virtual training.

If participants are together, and can see each other via video conference, then a trainer could join in and with the right design, facilitate a training class. It's synchronous, online, instructor-led, and has geographically dispersed participants. If you replace the video camera with a web conferencing platform then some would call it virtual training. But unfortunately, that's where defining this type of setup as virtual training can become confusing.

Most web conferencing platforms are designed for one person to use one computer. When a group of participants are sharing the same connection to a virtual training class, they have to combine their responses when responding to a poll, and take turns typing in the chat window. It's a different experience than each person connecting on their own.

The extra challenge is when you try to combine virtual training (one person with one computer) with video conferencing (groups sharing one connection in a conference room). This setup creates stress on the design because activities have to be designed in multiple ways for them to work. Single participants feel even

more alone when they hear a room full of active learners, and the grouped together learners usually miss out on the platform's interactive features since they are not touching the keyboard.

If video conferencing is your definition of virtual training, then design, deliver, and implement for that type of training. It's not a good idea to mix and match the two methods in the same class.

“The worst mistake I have seen is treating a virtual webinar/training just like a meeting.”

—Jill Kennedy, Learning & Development Specialist, Ally Financial

Blended Learning

When multiple delivery methods, including virtual events, are thoughtfully combined together into a training curriculum, the result is blended learning. Allison Rossett and Rebecca Vaughan Frazee define blended learning this way: “Blended learning integrates seemingly opposite approaches, such as formal and informal learning, face-to-face and online experiences, directed paths and reliance on self-direction, and digital references and collegial connections, in order to achieve individual and organizational goals” (Rosett and Frazee, 2006).

It's typical to find a combination of asynchronous self-paced activities and synchronous live instructor-led events in blended learning. For example, a learner in a blended interpersonal skills curriculum might receive instructions to complete a self-paced assignment, then attend two live virtual training events with another self-paced assignment in-between. Each of these components in the blended learning program is an important piece to the overall learning outcome. Learners need to complete all components to realize full results.

Blended learning is mentioned in this book because it's so common to find live online virtual training events as a significant component of a blended learning curriculum. You can apply the common phrase—*learning is a process, not an event*—by including virtual training in a blend. Stringing together multiple virtual events in a series allows for more flexible learning implementations. Instead of a single six-hour training session, the curriculum could be four 90-minute sessions spread

out over time. It's also an opportunity for participants to learn something on their own and then meet together with a facilitator and other learners for skill practice.

For example, last year I designed a blended communication skills training program for one of my clients. The participants began by attending a virtual kickoff session to meet one another and learn about what to expect in the curriculum. They also received a short, self-paced assignment to help prepare themselves for the learning topics. Two weeks later, they met for an in-person workshop to learn and practice fundamental skills, again receiving an assignment at the end. Over the next four weeks, the participants met for two virtual training classes with application assignments in-between. The entire blended curriculum was approximately 24 hours of training time (including the assignments), and each component contributed to the learning outcomes.

What About a MOOC?

MOOC stands for "massive open online course." A MOOC is typically offered by colleges and universities as a way to open up education to all. Anyone with an Internet connection can sign up for a MOOC and participate in an online class, alongside traditional university students.

While MOOCs are currently popular, they are largely asynchronous, blended learning curriculums. Only if the MOOC instructor offered an interactive, live online segment would that piece of the course fall under our definition of virtual training.

Our Definition of Virtual Training

From this point forward, this book will refer to virtual training using my definition expressed above: *a highly interactive synchronous online instructor-led training class, with defined learning objectives, with participants who are individually connected from geographically dispersed locations, using a web-based classroom platform.* However, regardless of what your organization implements—virtual training, webcasts, webinars, video conferencing, or blended learning—the general principles outlined in this book will help you have a more successful online initiative.

Frequently Asked Questions About Virtual Training

Q: How long should a live online session be?

A: Virtual training classes tend to be shorter than their in-person classroom counterparts. A typical virtual session is 60 to 120 minutes in length. If you have more content than that length of time allows, consider chunking the content into smaller parts. It would be better to have three 90-minute virtual classes than to have a 4.5 hour continuous session. However, if you need to have a lengthy virtual class, be sure to take regular breaks throughout! We'll talk more about virtual class design in chapter 4.

Q: What about asynchronous e-learning? Isn't that considered virtual training?

A: In the sense that self-paced asynchronous e-learning can occur online, then some might consider it to be virtual training. However, it's most common to distinguish virtual training as synchronous, or live online, training. So this book follows that conventional format.

Get the Right People Involved

Once you have set forth your goals for virtual training and defined what you mean by it, get the right people involved with your virtual training initiative. Successful virtual training depends upon many parts of an organization. So getting the right people involved from the start will increase your chances of success.

There are at least three reasons for getting the right people involved at the start of your virtual training initiative. First, to gain their support. Second, to gain their input. Third, to make use of their available resources—both tangible (hardware, technology, funding) and intangible (wisdom, knowledge, experience).

How do you know who to include in these initial conversations? In smaller organizations, the answer will probably be obvious. In larger organizations, the answer will mean doing your homework and finding out who the stakeholders are for each part of your virtual training initiative. Either way, it's better to invite more input than needed than to keep the information to yourself and potentially miss a key player.

“My advice? Involve everyone in the organization up front. Different teams have different roles to play in the virtual training initiative.”

—Danielle Buscher, Director of Global Learning, Marriott International

The typical roles involved with a virtual training rollout are listed below. Note that these may not be job titles, per se, but are job functions that carry out responsibilities that affect the success of virtual training. Also, in some organizations, one person may play more than one role. For example, the instructor who delivers virtual training may also have been the person who designs it. Or the facilitator and the administrator might be the same person. The smaller the organization, the more likely it is to have one person spanning multiple roles. And on the flip side, there may be more than one person for each function, such as an IT representative for each location.

- **Content owners:** Sometimes referred to as a subject matter expert (SME), this person has deep knowledge of the training topic. They might be an employee in the field, or a manager with responsibility for the subject matter. They can help design the training and ensure topic relevancy.
- **Designers:** Instructional designers create the training. This role might include graphic designers as well as workplace learning professionals who specialize in adult learning methodologies and instructional technology.
- **Facilitators:** Also called trainers or instructors, this is the person in “front” of the class who delivers the virtual training sessions.
- **Producers:** These are the technical experts who assist a facilitator during a live online session. Some producers specialize in technology-only assistance (working with participants who need help connecting), while other producers co-facilitate sessions along with the trainer. In some cases, a producer may be called a host or session moderator.
- **Coordinators:** As the administrative person who handles logistical details of virtual training events, this person might administer the organization’s LMS (learning management system), as well as communicate with participants before and after an event.

- **Technicians:** Usually called IT (information technology) or IS (information services), this role owns the technology—both hardware and software—needed for virtual training success.
- **Participants:** They are otherwise known as learners or in some cases, program attendees. Since they are the “customer” or “end user” of the virtual training initiative, consider including a representative sample in your initial planning stages.
- **Managers:** As the participants’ managers, they need to support the full participation of their employees. This group’s buy-in is critical to success because they will allow participants time to attend training, as well as reinforce the skills learned.
- **Resource Owners:** These stakeholders control resources needed for creating, designing, delivering, and implementing virtual training. This group could be training management, who directs the training function and its associated resources. Or it could be general management who controls budget and other needed resources.
- **Executive Sponsor:** The senior executive is the individual who can support and champion the virtual training initiative at the highest levels of the organization.

We will explore many of these roles in more detail in other places in this book. For now, it’s most important to realize that each one can contribute to the success of your virtual training initiative. Involve them in the earliest stages.

“Our project team included human resources, IT, training design and development, and all of the subject matter experts for each part of the curriculum.”

—Erin Laughlin, Senior Director Global Learning Delivery,
Marriott International

Once you have invited the right people to the table for discussion, have an open dialogue with each about what it will take for success from their perspective. This dialogue could be one-on-one conversations, or it could be a cross-functional project

team discussion. The communication format is not as important as actually having communication with key players.

Which Comes First?

Should you start with determining your goals and defining what you mean by virtual training, and then get the right people involved? Or should you get the right people involved first, so that they can help you establish goals and define virtual training? The answer...it depends. There's not a right or wrong answer. What's most important is that you actually do all of these things.

In your communication with these stakeholders, start by sharing the answers you already uncovered: what is the end goal of this initiative and how you define virtual training. Depending on the exact timing of these conversations and your organization's unique situation, you might even gain their input to these questions.

After sharing the overarching goals, select the appropriate discussion questions from this list below:

- What suggestions or recommendations do you have?
- What questions or concerns do you have?
- From your view, what will it take to be successful?
- What resources do you need for your part of the initiative? What resources can you contribute?
- Who else should be involved with this initiative?
- Will I have your support?

If you form a cross-functional team, follow standard project management processes for your implementation. Hold a kickoff meeting, create a project charter, and clearly define each person's role in the project.

Build a Plan

The fourth step to getting ready is to build an implementation plan. It's possible that when you gather stakeholders to discuss the plan, you may need to step back and start with a business case—just to gain support for the initiative. However, if you are fortunate enough to already have financial and resource support, that's fantastic! You could still benefit from working through the suggestions in this step even without needing to follow through on them, to help crystallize your training implementation plans. On the other hand, if you do need to build a business case—to gain support for the program or to negotiate for resources—use the momentum created so far to move forward with your proposal.

If you need to build a business case for virtual training, start with your objectives. Articulate who will benefit from the initiative, and exactly how they will benefit. Spell out the anticipated positive impact to the organization. Identify both the costs and the potential return-on-investment.

A typical business case includes the following items:

- overview of the business problem to solve
- recommended solution to the problem
- benefits of the recommended solution
- resources needed, including cost and financial details
- expected results to be realized.

The business case for virtual training should be presented to whoever controls resources needed and has the authority to share those resources. All or some of the business case might also be presented to key stakeholders to help them see the benefits of virtual training.

Wendy Gates Corbett, a global training director, created a business case to establish virtual training as a method to help her company's global customer base learn about their software products. Her proposal to her executive team included facts about the potential for virtual training, suggested solutions for realizing that potential, and the resources they would need. She established the benefits and outlined the expected return on their investment. Spelling out these details gave her the momentum and approval needed to launch the plan for virtual training.

Building a Business Case at the World Bank Group

To build the business case for virtual training at the World Bank Group, Learning Officer Darlene Christopher wisely connected virtual training to an important corporate initiative. At that time, her organization was looking to reduce its carbon footprint to create a more sustainable environment. Darlene calculated the carbon emissions savings that would be realized by conducting virtual training instead of in-person training. She converted the emissions savings into tangible results (for example, “By hosting one virtual session we will avoid 44 tons of carbon emissions, which is equivalent to recycling 13.8 tons of waste or growing 1024 trees for 10 years”). The excitement over the potential for virtual training literally grew out of this message, which was tied to helping the business achieve its goals.

Darlene’s advice to others is to start small. Find a willing stakeholder or two within your organization who will support a simple virtual training initiative. Get an early win, and then think about what story you can tell from that experience. By starting small, you can get others interested and excited about the initiative, and then build traction from there. Think about what corporate initiative you could tie into for support, and how virtual training can help your organization achieve its goals.

Calculating the Costs of Virtual Training

You may be part of an organization that chooses virtual training to save costs. For example, travel budgets have been slashed and flying to deliver or attend in-person training is no longer allowed. In this case, a traditional business case is probably not needed because key stakeholders gave instructions to reduce funding as opposed to granting it.

What *is* needed in this scenario is a business case that explicitly outlines the true costs of effective virtual training. Since the expectation would be to reduce or even eliminate funding, you will need a solid business case to clearly illustrate the costs of implementing virtual training. Virtual training is perceived to be less expensive than traditional in-person training; however, that perception is not always reality.

Virtual training does reduce travel expenses when learners are able to stay at their desks instead of hop on a plane or drive to a training location. However, virtual training includes costs that did not exist for in-person training. These costs could

include new telephone headsets for all participants, increased administrative fees for the additional logistics, significant conference calling charges, additional design time, and the cost of two facilitators (or a facilitator and a producer) for each virtual event.

Use the following chart to compare how your costs may change as a result of using virtual training:

Table 2-1 The Costs of Virtual Training

Costs	Increase or Decrease (as compared to traditional classroom training)
Virtual classroom software platform licenses	Increase
Integrated telephone/conference call subscription and per-event costs (if not using VoIP)	Increase
Computer hardware needs, such as hands-free telephone headsets for participants	Increase
Printing costs of classroom materials	Decrease
Printing costs for learners (who are often asked to print their own materials)	Increase
Two facilitators, or a facilitator and a producer, for each virtual event (See chapter 5 for more information about this item)	Increase
A second laptop for facilitators who should be logged into the platform twice (once as a presenter and once as a participant)	Increase
Training for staff (designers and facilitators) who need to learn the new virtual classroom software platform and how to design/deliver virtual training	Increase
Design and development time of the training curriculum ¹	Increase
Travel fees for both participants and facilitators	Decrease
Classroom materials that no longer need to be purchased (i.e., chart paper, markers, etc.)	Decrease
Productivity for participants who do not have to leave their desks to attend training in another location	Increase

1. According to research by Karl Kapp and Robin Defelice, it takes on average 43 hours of development time to create one hour of instructor-led training, and it takes approximately 49 hours of development time to create one hour of interactive virtual training. For more information, visit <http://www.astd.org/Publications/Newsletters/Learning-Circuits/Learning-Circuits-Archives/2009/08/Time-to-Develop-One-Hour-of-Training>.

“We took a two-day performance management course and converted it into a blended learning program. The new converted program included six virtual sessions along with self-paced assignments. This new solution created efficiency for learners; however, it increased the administrative work required for the trainer and the program manager. Don’t assume that because you’re saving on airfare that virtual training will be less expensive. While you save on learner expenses, you often increase your design, delivery, and administrative costs.”

—Dan Gallagher, Vice President of Learning at Comcast;
and author, *The Self-Aware Leader* (ASTD, 2012)

By fully considering the true costs of virtual training in your organization, you can 1) request appropriate funding in your business case, and 2) set yourself up for success in your initiative.

Creating an Implementation Plan

Once you have support and resources to move forward with virtual training, the next step is to create an implementation plan. This project plan will detail your strategy for rolling out virtual training in your organization. To create it, you’ll need input from key stakeholders, as well as timelines and deliverables for each step of the process.

The complexity of your implementation plan will match the complexity of your project. The strategy and detail needed to establish a comprehensive virtual training curriculum will differ from the amount of detail needed to plan a one-time virtual class.

Regardless of the size of your virtual training initiative, a typical implementation plan will include considerations for design, delivery, and administration. We will explore each of these topics starting with the next chapter.

One Organization's Story

Way of Life Coaching, LLC based in Raleigh, North Carolina, offers an eight-month group coaching course called "Promised Land Living." Founder Cheryl Scanlan's vision was to expand the reach of this program beyond the local community. She wanted to make the curriculum available to anyone regardless of their geographic location.

After careful consideration of various options, Cheryl decided to convert the program to an all-virtual curriculum. Together with her team she started planning what it would take to make it happen. They worked together for months as they planned out the implementation strategy.

They:

- budgeted resources for the new delivery methodology
- redesigned the content for virtual delivery
- involved subject matter experts and stakeholders for advice and input
- researched and selected a virtual training platform
- created a marketing plan to communicate the new program format
- worked with participants and facilitators to help them get comfortable with virtual training.

Cheryl's advice to other organizations who are considering the move to virtual? "Get familiar with the virtual training platform, and how often the vendor makes updates to it. Be sure you test drive the platform after upgrades to make sure there are no surprises. I would also highly recommend that you have a producer for every virtual class so that you can be about the business of delivering your material. That made all the difference for us and our clients!"

In Summary: Key Points From Chapter 2

- Determine if virtual training is the right training solution for your organization.
- Define what you mean by virtual training and ensure everyone in your organization shares that same definition.
- Get the right people involved in your virtual training, as close to the project start time as possible.
- If needed, create a business case to secure enough resources for your virtual training plan.

Checklist 2-1 Is Virtual Training the Right Solution?

To help determine if virtual training is the correct solution to use for your organization, consider the following questions:

- **Are the participants centrally located or dispersed?** If your organization is not going to save on travel expenses because everyone is in the same location, then consider sticking with in-person training. It may be just as fast for them to walk down the hallway to your training room as it would be for them to log in to a virtual classroom.
- **What technology barriers affect success?** Participants need to have the appropriate technology available to them. The exact technology needed will vary depending upon the virtual software program used; however, a typical technology setup requires a high-speed Internet connection, a sound card and speakers to hear streaming media, and administrative privileges to install software. Our next chapter addresses technology factors.
- **Do you have qualified trainers and producers to facilitate the virtual training event?** Classroom trainers need a new skill set to effectively deliver virtual training. They need to be comfortable with technology, able to multitask well, and know how to engage participants who they can't see. These skills come with training and practice; however, this trainer preparation time should be factored into the decision. In addition, a virtual training event will go much smoother with producer involved with the facilitation. The producer is a second person who assists the trainer with technology, troubleshooting, and running the virtual event. They help create a seamless experience for participants. We will consider trainer and producer qualifications in chapter 5.
- **Will every participant have an appropriate learning environment?** Participants need to have their own individual computer connection and telephone line to attend the virtual event. They should be in a quiet area conducive to learning. If they are in an open space or cubicle environment, they will need headphones or another way to tune out external noise. Chapter 6 provides a comprehensive look at how to set up participants for effective online learning environments.
- **Who will administer the logistical details for the training program?** The online environment creates a long list of logistics that need to be executed for a successful class. This includes creating the virtual classroom event(s) within the software's administrative tools, getting links and passwords to everyone who needs them, distributing handouts and other class materials to participants, and helping participants troubleshoot technical problems prior to class. Chapter 7 covers all of the administrative details that will be needed for your initiative.
- **Do all participants speak the same language?** Virtual training can be an excellent way to provide training to an international population, as long as language barriers do not get in the way. Note that chapter 8 focuses on other global considerations.

Worksheet 2-1 Goal Setting

What's our goal for this training program? What specifically are we trying to accomplish?

What do we need participants to do as a result?

- Be more knowledgeable about the topic?
- Behave differently?
- Take action on something?

How will our organization change or improve as a result?

What's the *best* way to achieve the above goals?

How specifically will *virtual* training help achieve these outcomes?
