



## Trainer's Guide

### Finding Success in Virtual Training





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# Introduction

***“Global pandemic or not, we need to be ready to act on short notice to modify our training materials to accommodate shifting environments...”***

The COVID-19 pandemic has thrust talent development (TD) professionals into the world of virtual training—and for some of you, perhaps it’s happened quicker than you expected. For many TD professionals, virtual training has always been part of their employee development toolkit; although usually it’s combined with in-person training.

Virtual is the only way to go right now, but with employees experiencing Zoom fatigue and other distractions while working from home, it is critical that TD professionals rethink how to deliver training.

Participants retain 20 percent of what they hear but almost 70 percent of what they write, so maximizing learner engagement, energy, and motivation is a must when facilitating online events. TD professionals also need to be fluent in software and able to manage technical and participant challenges.

**This e-book offers guidelines and solutions about how to create and facilitate virtual training, move training from an instructor-led in-person event to a virtual classroom setting, optimize the experience and empathize with learners, and use software tools to make your training event a success.**

“Global pandemic or not, we need to be ready to act on short notice to modify our training materials to accommodate shifting environments,” writes Nikki O’Keeffe in a [May 13, 2020, ATD blog post](#). “Maybe you have company travel bans, a global workforce, or a lack of facilitator resources. I have seen these all at some point during my talent development journey, so being able to train employees virtually or with e-learning in an invaluable must-have resource.”

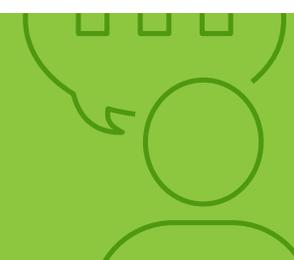
# What You Need to Get Started With Virtual Training



Facilitating a virtual classroom is not the same as facilitating a face-to-face event. Those facilitating virtual classrooms must focus on ensuring participant satisfaction, engagement, and learning transfer while understanding the technology and what is needed for success for you and the learners.

Facilitators may need to change, engagement exercises may need to be different and more frequent, and a redesign of the entire course may be necessary. Whatever needs to be done, this may be new for you and your learners, so patience is essential.

# Are You Ready to Facilitate in the Virtual Classroom?



By **Nikki O’Keeffe**

You’re about to facilitate your first virtual classroom session. You’re familiar with the content, have delivered it face-to-face in a classroom setting, and have been a participant in the virtual classroom before. Surely it can’t be that hard to facilitate online.

As an ATD facilitator for the traditional classroom and the virtual classroom, I’ve seen how important it is to prepare differently to lead the virtual training experience. It has taken me many years to build up my skill set to perform flawlessly in the online environment.

Whether you are about to lead your first virtual classroom facilitation or have been facilitating virtually for a while, freshen up on best practices to ensure superb participant satisfaction, engagement, and learning transfer.

Here are five essential best practices for a positive experience for yourself and your learners.

1

## **Set up your technology for success.**

Connectivity is critical. You need a stable Internet connection, a landline phone, a backup mobile phone, and a headset.

Two monitors are key—and laptop ones are not ideal. Their screens are small, they feel clunky, and you cannot view the facilitator guide electronically. Do yourself a favor and splurge on the second monitor.

Have a backup plan for when technology fails. I have a hot spot that I can connect to if my power goes out. I have ear buds in case my headset battery runs out. I have extra batteries for my mouse in case the originals die. And yes, your technology will fail at some point.

2

### Ask to work with a producer (or partner).

It pays to have a technical partner in the virtual classroom. A good producer allows you to focus on the content and the learner experience while they handle logistics and technical snags. I give sincere thanks to all the producers I have worked with in the past.

Discuss expectations with your producer before the course. Talk through how you want to communicate, ask for timing reminders, and review how the producer should handle participant questions in the chat while you are facilitating. For instance, I communicate with my producer via text rather than WebEx chat to keep the communication lines different from the participants.

3

### Leverage interactive features.

Use a conference platform that allows for interactivity, like Adobe Connect or WebEx Training Center. When these tools are used appropriately, the virtual classroom experience can be as interactive as a typical classroom experience.

Try to include an interactive element every three to five minutes. Use whiteboard annotations, chat, agree/disagree, and emoticons. Having a balanced mix of these features sprinkled throughout the session will keep learners engaged. For example, it could be as simple as, “*Who has facilitated in the virtual classroom before? Green check for yes, red X for no.*”

Use breakout groups to send learners into small groups just as you would in the face-to-face classroom. For example, separate learners into virtual breakout groups and ask them to discuss key findings on different topics. Instead of asking learners to use flipcharts, add whiteboards to virtual breakout rooms so that learners can draw, type, and annotate thoughts. At the end, bring everyone together and share the whiteboards as part of a large group debrief.

4

### Use a discussion board.

Use the discussion board to send a warm welcome to the group with your photo before the class. Share facts about yourself and expectations for the course. Ask learners to respond with photos and similar information.

After each session, use the discussion board to post follow-up resources or respond to questions that you did not have time to fully address. Post discussion questions to keep the conversation going between sessions and grow peer relationships. For example, in my instructional design class learners share design materials—PowerPoints, participant guides, infographics—

and respond to each other by giving and receiving feedback on the materials. Some designers never get this type of experience at their day-to-day jobs, so they love bouncing ideas off like-minded peers.

When the class is finished, post a congratulations, note recommended next steps, and create a thread for learners to share contact information.

### Personalize the experience.

Try calling individuals by their first names and initiating conversations before and after class. Remember experiences and questions that learners share so that you can refer to them in later conversations.

Think about what you do in the face-to-face classroom and work to create that same vibe in the virtual space. For example, I do a pace-checker activity in the face-to-face classroom where I have a flipchart that has three circles on it: 1. Slow Down, 2. Just Right, 3. Speed Up. Learners leave sticky dots to indicate what they need changed in relation to pace. I use this same technique as a slide in the virtual classroom. Instead of a sticky dot, learners use their drawing tools. Another activity I do in the face-to-face class is called One Word. I ask a question and ask someone to catch a ball and respond with one word. For example, “One word: What’s your favorite travel destination?” Then, we take turns passing the ball around. I do this same activity in the virtual chat when we return from a break. I ask each learner to reply with one word in chat to various questions. This allows us to learn more about each other and re-energize the room.

As you gear up for your next virtual facilitation, commit to trying one new tip or technique to elevate the learner experience. Once you master one technique, add another and build from there. Over time, the best practices become habits and part of your normal virtual classroom preparation and execution routine.

Please reach out to me directly at [nokeeffe@td.org](mailto:nokeeffe@td.org) if you need further details on this content. I will gladly assist. You can also connect with me via LinkedIn.

*(March 11, 2020, ATD blog post)*

***Nikki O’Keeffe is an internal ATD facilitator who has experience creating strategies and visions to ensure training requirements and deliveries are in line with quality, probability, and client need.***

# Best Practices for Converting Your Training



## How prepared are you to convert your classroom training into a virtual event?

In this chapter, Nikki O’Keeffe and Cindy Huggett share some of the dos, don’ts, and myths floating around about how to successfully make this conversion.

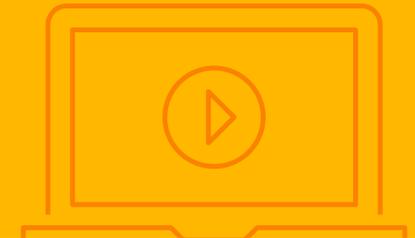
Tim Slade, in a March 17, 2020, [Ask the Trainer blog post](#), gave some tips about how to successfully convert classroom training into a virtual environment:

### When converting in-person training for virtual delivery:

- ✓ Include additional opportunities to check for understanding. Ask participants to respond verbally, via chat, or by using emoticons.
- ✓ Solicit specific and regular interaction from the entire class. Don’t be afraid to call on specific names when asking questions.

- ✓ Use breakout rooms (if your virtual training platform allows) for small group activities and discussions.
- ✓ Turn on your webcam and, if you're facilitating a small class, encourage your participants to do the same.
- ✓ Recruit a second facilitator to act as a producer during the virtual session to assist with technical issues (if your resources allow).
- ✓ Break your virtual training sessions into shorter, smaller chunks. Don't force your participants to sit for an eight-hour webinar.
- ✓ Record each session and make them available for replay.

# What I Learned From Designing & Developing E-Learning



By **Nikki O'Keeffe**



When I first started creating e-learning courses, I had never designed an asynchronous learning experience and had not taken one click in an e-learning software program. Talk about a challenge! I learned by jumping in.

Sometimes my designs worked and sometimes they didn't. I learned what participants liked and what they didn't like through course evaluations and from talk around the office. The true results, however, showed on the job.

It didn't take long for me to realize that a decent e-learning program requires more than a set of clickable PowerPoint slides. The learner needs to experience real-life scenarios, try out tasks, and get feedback along the way. An extrinsic smiley face and a thumbs up icon at the end aren't enough.

Here are the top five lessons I learned from designing and developing e-learning programs:

1

### Training resources are abundant if you look for them.

Take a solid e-learning instructional design training program to learn the fundamentals, such as the [ATD E-Learning Instructional Design course](#). Attend a training program with like-minded peers. You'll get prime references for the latest and greatest tools. And take advantage of online resources. Two of my personal favorites are:

- *ZEEF* by Tracy Parish, which curates the best of the best e-learning tools—think storyboards, images, project management, audio narration, and 508 compliance.
- *Articulate E-Learning Heroes* has examples, challenges, and a forum. Get fresh design ideas, see what others are doing in the field, and troubleshoot development issues.

2

### Assess the size and diversity of your skill set. You'll need to do more than you realize.

Is your job title instructional designer? If so, get ready to add a few more titles underneath it. Narration actor. Graphic designer. Investigative journalist. QA tester. Writer. Surprise! You may need to be all these roles when designing and developing an e-learning course.

Evaluate your strengths and weaknesses. If it is not possible to be proficient in all the skills required, consider outsourcing one or two elements of the project to experts. For example, you could use Voice Bunny for professional voiceover services or subscribe to E-Learning Brothers to gain access to their slick graphics.

3

### Check your work before you deploy to an entire cohort.

Once I had to roll out a series of e-learning modules without a full QA review or pilot due to tight timelines. In fact, I was the only reviewer before implementation. Can you guess what happened? The learners emailed me suggestions for improvements. *"Nikki, I wanted to let you know that I could not proceed past the fifth slide. The e-learning sent me in a loop."*

If you run into a similar scenario, try this technique: Ask an intended learner to take the course while you observe. You will be amazed at the small hiccups that arise when someone else is navigating the course.

4

### **File management is key to long-term success.**

Do you have organizational process changes? Of course! What does that mean for your e-learning courses? Updates will be needed. If you don't have access to the original e-learning course files, you are back at square one.

I remember when a team member of mine went on maternity leave. I was asked to fix one quiz question. Easy—if you have the file! It was on my team member's desktop, and I had no way to get it. I had to completely rebuild the course to amend that single quiz question.

5

### **Authoring tool expertise is not enough.**

Participants in my authoring tool classes walk away with confidence because they can use variables and markers, add animations and triggers with grace, and create quizzes with ease. However, what they may not have mastered is the art of the design. The technical knowledge is one piece. It doesn't mean it is a good design decision to add all the bells and whistles on every slide.

What do you want the learner to be able to do at the end of the e-learning course? Typically, it is not to be amazed by how many interactive features the developer was able to execute within the authoring tool.

For example, if the learners need to be able to cosign a document at the end of the training, have them practice it. Do a screen simulation with a try-it mode to have them perform the steps. Don't create a complicated *Jeopardy!* game that quizzes them on the process of how to cosign a document. The memory quiz is not what they will end up doing back on the job.

*[\(May 8, 2019, ATD blog post\)](#)*

***Nikki O'Keeffe is an internal ATD facilitator who has experience creating strategies and visions to ensure training requirements and deliveries are in line with quality, probability, and client need.***

# Convert Your Classroom Training to Virtual Training



By **Cindy Huggett**

Make your classroom training content virtual-ready by following three simple steps and avoiding three common mistakes.

- ✘ **Mistake number one** is taking an interactive, instructor-led classroom program and turning it into a presentation-style webcast. That happens if you are short on design time or if you don't have skilled designers who are able to thoughtfully repurpose the program. While it may be tempting to just take the program slides and dump them into an online classroom, don't.

Keep in mind that you are converting a training program, not a presentation. Just because participants are dispersed doesn't mean that your live online class should be a lecture. Remember what you know about adult learning and how to engage participants. Those guidelines apply to all types of training, including virtual. Your virtual training design should be just as engaging and interactive as if it were delivered in person.

- ✘ **Mistake number two** is thinking that an eight-hour, instructor-led class will be an eight-hour, live online virtual session. The reality is that one minute of classroom time does not equal one minute of virtual time.

Most live online classes are 60 to 90 minutes long. That means an eight-hour class would be broken into smaller chunks of time, with a mixture of self-directed and facilitated activities. Also, the activity times will differ in the online program.

When you convert in-person classes, especially lengthy ones, recognize that often you can find ways to shorten activities and economize time. While every activity may not move faster, you can use technology tools to your advantage.

For example, in an in-person class, you may have participants go around the room and introduce themselves one by one. But in the virtual classroom, participants can type their introductions in the chat window. The in-person introductions could take more than 20 minutes, while the online chat introductions may only take two minutes.



On the other hand, when showing a video during an in-person class, the facilitator can just dim the lights and click “play.” But in the virtual classroom, the facilitator needs to set the stage for the video, explain how the video will play, mute everyone’s telephone lines, and give instructions in case of technology issues.

❌ **Mistake number three** is to inflate the number of participants in the live online class. Most traditional in-person training classes are designed for a small number of participants. Usually programs have 10 to 25 participants, depending on the subject matter and other logistics.

The temptation to vastly increase participant numbers in the equivalent live online class seems difficult to resist. But just because you can put hundreds of participants in an online classroom doesn’t mean you should.

It’s possible to have an interactive session with large participant numbers. However, you lose out on the small-group dynamic that’s often necessary in a training class. And perhaps more importantly, if your training design is for a small group and you apply it without modification to a large group, you will not achieve the intended learning outcomes.

You can avoid these common mistakes when transferring your training classes to the online environment by making better choices about your virtual training design. And now that you know what mistakes to avoid, let’s learn how to move your traditional training to the online classroom.

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### Three Steps to Convert

There are three simple steps to convert your traditional training classes to the live online classroom.

Start with the learning objectives. When you’re ready to adapt the program, the best place to begin is with the learning objectives. Review them to confirm your answers to these key questions: *What do learners need to know or do at the end of the session? What skills should they have? What changed behavior should there be? What do they need to start doing or stop doing?*

Then, examine each learning objective to decide which ones belong in the virtual class versus which ones might better translate to pre- or post-class activities. In other words, ask if learners need a facilitator to help them with the task or if it’s something they can learn on their own.

For example, could participants read a case study on their own and then come to the class for a small-group discussion about it? Or could they watch a demonstration video on their own then come to class to role-play it?

## Three Steps to Convert

1

**Review Learning Objectives.**

2

**Select the Right Activities.**

3

**Engage Participants.**

The ability to chunk and break down components of your in-person program into a well-designed blended curriculum is one of the greatest benefits of converting to the virtual classroom. It provides flexibility and a better overall learning experience.

Think of your program as a set of building blocks that can be pulled apart and put together in different ways. You can chunk the class into topics or sections then build it back together in ways that make the most sense to your participants and their learning needs.

Select the best activities for each learning objective. Once you have determined which learning objectives belong in the live online event, the next step is to select the best activity (or activities) for each one.

The process of selecting activities for a virtual program is similar to the process for a traditional training class. What's different are the tools available in the virtual platform: chat, polling, whiteboarding, breakout groups, file transfers, annotating, and so on.

Some activities in a traditional training class easily translate into the live online environment. For example, a paired discussion activity could become an online paired chat activity. Or a classroom competition between teams to answer questions could become an online competition using poll questions. Or a small-group brainstorming session could become a breakout activity. And a live software demonstration could become a virtual demonstration through screen sharing.

Your use of the technology tools is limited only by your imagination and creativity. For example, if you usually toss a foam ball from one participant to another in the in-person classroom, think about how that could work in the virtual classroom. You might select the first person by typing their name in the chat window, then ask them to select the next person, and so on, until everyone has been chosen.

Also, think about ways participants can use all the online tools available to them. Have participants “raise their hands” when finished with a worksheet exercise. When asking questions, direct participants to respond via chat. When surveying the group, create challenging poll questions to check for knowledge or get participants thinking.

Engage participants with tools and dialogue. The biggest benefit of virtual training is that participants don't need to leave their workspace to attend a class. However, it's also the biggest challenge. Distractions abound and participants may be tempted to multitask.

An interactive design is one of the best ways to overcome this obstacle. Create a program that engages participants at least every four minutes. Keep their attention on the screen and away from the distractions around them.

## Tackling the Tech

Be sure to consider the technology capabilities within your organization and of your participants when selecting activities. Some of your virtual training design will be driven by these technology capabilities (or limitations).

For example, if you want participants to watch a demonstration but their Internet bandwidth is too slow for streaming video, you may need to use another method, such as still screenshots, to show the demonstration.

Or if you want participants to practice a skill in small groups but your organization's web-conferencing platform does not support breakout groups, you could design the training program so that small groups meet on their own after a virtual class then report back to the large group the next time.

To ensure your technology capabilities match your training needs, partner closely with your organization's IT department to select and implement the appropriate virtual classroom platform.

Of course, your goal isn't to keep participants busy but to engage them in their learning. As you design for interactivity, ensure that everything in the class leads toward the learning outcomes.

Pay special attention to the opening moments of your virtual session. Within the first few minutes, participants will decide if they will stay engaged or if they will turn their attention to other things. Planning a meaningful and engaging activity within the first few moments of class will start you off on the right foot and set the tone for an interactive session.

### A Few Final Tips

One common question is about converting lengthy, in-person classes into virtual ones: What should you do if you start with a two-week orientation program? Or a six-week in-depth technical series?

In both cases, you would follow the same process: return to the learning objectives, select the best activities, and engage participants in the online classroom. You most likely will break the training class into many smaller chunks. The two-week orientation may become 10 live online sessions with assignments in between. The six-week technical series may become a shorter, in-person class, with follow-up virtual sessions and on-the-job coaching. Your possibilities are endless, provided you engage participants in their own learning.

In addition, remember to apply good design principles when sequencing activities in your virtual classes. Create a pattern, such as "introduce it, practice it, and apply it," that's repeated throughout the session. Use various interactive exercises and technology tools to keep participants interested. By following a logical order and engaging participants frequently, you will help them learn.

Online training is an effective way to reach more learners and expand your program offerings. By following these steps and avoiding the common conversion mistakes, you will be on your way to achieving success with your virtual training classes.

(Source: [February 2018, TD magazine](#))

***Cindy Huggett, CPTD, is an independent consultant, professional speaker, instructional designer, classroom facilitator, and author who has more than 25 years of experience in workplace training and development.***

# Optimizing the Experience & Empathizing With Learners



Empathy has never been more important than it is right now. Most learners are stuck at home during the pandemic, and many are trying to juggle work and learning with family responsibilities, distractions, and anxiety about the health and well-being of family and friends.

Developing a sense of community among participants will go a long way toward enhancing the learning experience and engaging the learners.

*As Jennifer Hofmann summarized in the following article, “Intellectual and environmental engagement are powerful in modern learning. But nurturing emotional engagement increases their effectiveness and effect by personalizing the [learning] experience.”*

# 7 Ways to Nurture Emotional Engagement in the Virtual Classroom



By Jennifer Hofmann



We often frame corporate training as a compulsory process: complete these requirements and move on to the next task. It's a reinforcement of a "push" learning culture that is content-centric and an impersonal experience.

Effective learning involves an emotional component, especially during these times of uncertainty. Employees want to do well on the job, but they also stress about the challenges that come with working from home and taking care of their families. The training function has an obligation to recognize these emotions, and facilitators can improve virtual training experiences by addressing them in their delivery approach.

It's important to realize that the learning experience is changed by how learners feel about it. Facilitators should strive to enable individuals to feel good about the experience and even nurture a sense of community.

Charles Dye's research shows that emotional engagement serves as the third influential component of learner engagement as well as addresses environmental and intellectual factors. Dye clarifies:

*"Experienced facilitators focus on activities that might exemplify this aspect of learner engagement, including positive collaboration with peers (McDonald & MacKay, 1998; Calvani, et al., 2010), articulation of shared experience and social modeling (Bandura, 1986), scaffolded development/demonstration of skill/expertise with a facilitator (Vygotsky, 1986), and the sense of self-worth that comes from participation in a learning experience (Cooper, 2010)."*

To nurture emotional engagement, facilitators can:

1

## Inspire confidence in the virtual classroom experience.

When a facilitator is fluent in the use of the tools, the virtual classroom fades into the background and learners start to ignore the technology. This makes them feel as if they are in a "real" learning environment, encouraging them to engage more fully in the training experience.

2

### **Demonstrate that all contributions and interactions are valued.**

When learners' contributions are acknowledged and reinforced, they realize they are not anonymous and their participation in the learning environment matters. This helps them feel confident, and they tend to contribute even more. This is especially important in the virtual classroom, where learners rarely see the facilitator or their peers.

3

### **Nurture an environment in which learners feel safe about offering opinions and asking questions.**

When learners feel intellectually safe, they may feel more inclined to contribute to conversations and ask questions. Training should offer a safe space for making mistakes and questioning for understanding. Facilitators can contribute to the learners' beliefs that their contributions have value, even if they miss the mark.

4

### **Create an environment where individuals enjoy learning.**

When learners enjoy themselves, they feel better about being part of the experience. Spark interest! Spread joy! Even technical training can include an element of fun. Advanced facilitators can inject passion into their delivery and the environment to create a more exciting event.

5

### **Encourage learners by providing positive, personalized feedback on contributions and progress.**

When learners recognize that individual contributions are noticed, they feel valued. They will potentially contribute more, enhancing the experience for everyone. Facilitators should provide positive reinforcement throughout the process. It can be as simple as saying, *"Thank you, Sally, for sharing. Your point aligns with the content we will discuss after our break."*

6

### **Bolster emotional engagement by reinforcing why the content is important.**

When learners recognize and internalize why certain content is important, they feel good about participating and are more open to learning. The importance of content produces a positive emotional response because the learner feels that if the content is important, the fact that they're in the classroom learning it means they are important as well. In this sense, training assumes the role of reward and recognition for the learner.

## Encourage a community among learners.

When relationships start to build between learners, there is an increased likelihood that they will work cooperatively within the learning experience to make it more effective for themselves. Learners “get outside of their own heads” and start thinking about “we the learners” within the learning experience. They will build on each other’s contributions, develop and articulate positive contributions, and seek to adapt the materials to both themselves and the entire class.

Bottom line: Intellectual and environmental engagement are powerful in modern learning. But nurturing emotional engagement increases their effectiveness and effect by personalizing the experience.

*([January 8, 2020 ATD blog post](#), originally published on InSync Training blog)*

***Jennifer Hofmann, a pioneer in the field of virtual classrooms, is the president of InSync Training, a consulting firm that specializes in the design and delivery of virtual and blended learning.***



# Tools to Help You



Although there is more to virtual training than just the technical side of it, tools and templates can help the experience go smoothly for the facilitator and the participant.

The article in this chapter offers tools that can help you mimic in-person training, design online training experiences, develop activities to keep your learners engaged, and work with producers.

# Common Tools in Virtual Training Software



By **Cindy Huggett**

Most virtual training and classroom software programs have similar features and functionality. Please note that this is not an exhaustive list of all features found in every platform nor is it an endorsement for a particular platform. In selecting a platform, you should research and discover the nuances for each of these tools and how they specifically work in each program.

## Sharing Documents

Sharing documents is one of the most commonly used features in a virtual class. The facilitator uploads a file into a viewing window and all participants can see it. When the trainer navigates through the document, moving from one page to another, the participants' screens follow along.

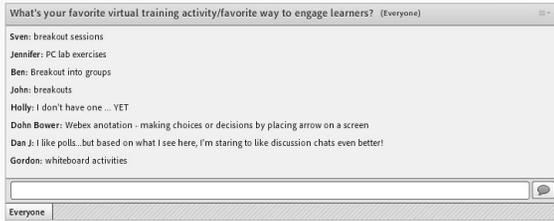
Almost all virtual training classes use document sharing to display slides. In addition, other documents, such as training manuals or pages from the class handout, also can be displayed.

Each platform has compatibility requirements for documents shared. Most programs can share Microsoft Office documents (Word, Excel, PowerPoint), plus Adobe Portable Document Format (PDF) files. Many also can share an audio or video media file, which means that prerecorded videos can be shown during a class. If you know you will need to share certain file types, check for file compatibility when considering your platform.

Some platforms have participant privilege settings that give the participants greater control over the shared documents. They may be able to draw on the document, move the document independently, or share their own documents for a group collaboration exercise.



Adobe Connect Share Pod



Adobe Connect Chat Pod

## Chat

Chat enables communication between and among participants through real-time typed messages. Chat can be public so that everyone can see or sent privately to one individual user. Chat allows for participant engagement during a training class. Participants can send feedback, ask questions, and make comments. The chat window can be a running commentary for participant dialogue throughout the session. Chat also can be used during activities for participants to answer questions. It creates another way for participants to respond when questions are posed by the facilitator.

The chat window also can be useful for the trainer to pass messages along to the participants during activities. For example, during a breakout session, the trainer can use the chat window to give timing reminders, such as, “*Three minutes remaining*” or, “*It’s time to begin round two.*”

Rules about private chat vary from program to program. In many cases, the facilitator can choose whether or not private chat is allowed, and if it is allowed, if participants can privately chat with the facilitator only or also with each other.

Private chat also could be used to create a paired discussion opportunity in class. Similar to a classroom session where a trainer says, “*Turn to the person sitting next to you and discuss your response to this question,*” a virtual class activity could direct participants to have a private chat. This is one of my favorite ways to use the chat feature because it involves every single participant in the dialogue.



Adobe Connect Draw Tools

## Annotate

Annotation allows for real time drawing and typing on top of shared documents or a whiteboard. The exact annotation tools available vary from platform to platform; however most allow you to:

- ✓ Highlight words or graphics.
- ✓ Draw lines and other shapes.
- ✓ Draw freehand with an electronic pencil or marker.
- ✓ Type text on the screen.

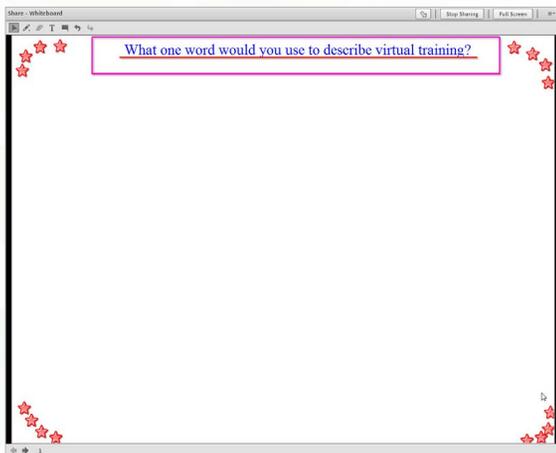
Most platforms can turn on or off the annotation rights for participants and facilitators. They also include varying degrees of erasers—some allow a person to erase only their own added content, while others have only an “erase all” command.

The annotation tools help keep the screen interesting when the facilitator “highlights” key words while speaking. When participants can draw or mark on the screen, they’re engaged with the learning content. A facilitator can ask learners to draw or type on screen in response to a question or ask them to highlight something on screen that stands out to them.

For example, at the end of a class, it’s a common practice to ask participants to share an insight they gained or an action they will take. Using the annotation tools, participants could write these items on screen for all to see. They also could draw a picture that represents their insight or action.

There are many ways to use annotation tools during a virtual class. One of my favorites is to create a grid on screen and allow participants to choose a grid space to personalize in response to a question. Once participants have selected their spot (by typing their name or some other identifying mark), then I’ll ask them to respond to a question.

## Whiteboard



Adobe Connect Whiteboard with Annotations

A virtual whiteboard is similar to classroom chart paper or whiteboard. It’s a blank screen that can be typed, written, or drawn upon using the program’s annotation tools. Whiteboards are typically used for brainstorming and other class drawing activities that engage participants.

Although the whiteboard screen starts as a blank page, a facilitator can set it up ahead of time by adding drawings or other marks for an activity. For instance, they may draw two straight lines to divide the whiteboard into three sections and place a question or word to distinguish each one. They would then ask participants to fill in details.

In one of my class activities, I ask participants to think about benefits to three groups: employees, managers, and the organization. I use a divided whiteboard with one of the three group names at the top of each column. Participants then type on screen to brainstorm the benefits.

As you review the whiteboard capabilities of your virtual training platform, check to see which participant annotation privileges can be granted. Also check to see if there are any limitations to how many participants can annotate at one time and how many whiteboards can be open or shared during a session.



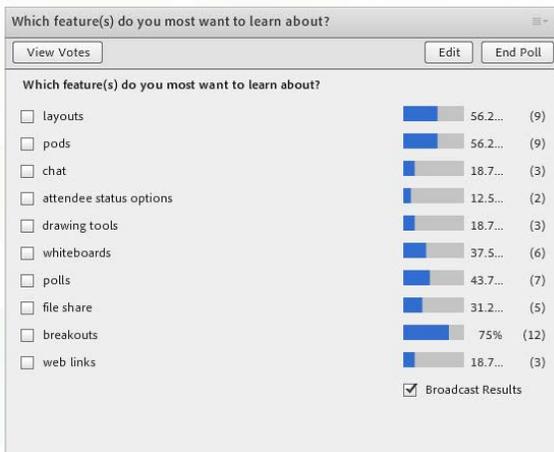
Adobe Connect Status Indicators

## Status Indicators/Raise Hand

Participants who use this feature can click on a button to raise their hands or indicate a particular status such as “agree,” “disagree,” “laughter,” or “stepped away.” This feature is often used for responding to closed-ended questions and quick yes/no polls. In some platforms, only the facilitator can see the status change or vote of the participants. Other platforms allow everyone to see the hand raised or status change.

Facilitators often use this feature to get a quick response from every participant. For example, when showing a software demonstration, they may ask, “*Who has used this feature before? If you have, please ‘raise your hand.’*” Or the facilitator may ask, “*Who agrees with this statement? Click the agree button if you do.*”

A facilitator can also quickly read the group using this feature. If participants are working on a short individual activity, then the facilitator may say, “*Click on the agree button as soon as you finish the exercise so I will know you’re ready to move on.*” Once most of participants have responded, the facilitator can continue to the next activity.



Adobe Connect Poll

## Polling

Polls are used to ask participants real-time survey questions. The questions can be multiple choice, multiple answer, or in some programs, open-ended text responses. Polls can be used to question participants in an unlimited number of ways. They can:

- ✓ Quiz participants’ knowledge and understanding of a topic.
- ✓ Generate discussion using opinion questions.
- ✓ Solicit feedback from participants.

Some virtual classroom software programs allow for multiple questions in the same poll. Other programs limit each poll to one question only but allow you to have more than one poll open at a time. In addition, some platforms allow you to create polls prior to the session and store them as separate files that can be uploaded to the classroom when needed.

Polling questions can be a fun way to engage participants during class. For example, you may create a contest with points awarded for every correct answer, and the person or team with the most points at the end wins a “virtual prize.” Or, you can pose a case study scenario related to the content and ask participants via poll to select the character’s correct course of action.



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## Breakouts

Breakout groups mimic small group activities in the face-to-face classroom. They allow participants to divide into smaller groups to complete a learning exercise such as a skills practice or brainstorm activity. For example, a class with 15 participants may split into three teams of five people each.

The number of breakout rooms available depends upon the virtual classroom software. Some platforms allow only five breakouts while others allow up to 25 or more. Note that if you are using an audio conference in conjunction with your training platform, you will have access to the lowest number of breakouts available from the combination. In other words, if your software allows for 25 breakout rooms but the integrated audio conference only allows 15 audio subconferences, then only 15 breakout rooms would be fully available during the session.

During breakouts, participants move into a virtual private meeting room where they only hear their own private conversations with each other. They can share documents and whiteboards among themselves and collaborate. The facilitator can move in and out of the breakouts, just like they would walk around the room to check on small groups in an in-person session.

Breakout groups help enable engagement and small group discussion. They can be used to practice skills learned during the training event. For example, if the class learns techniques for how to start a coaching conversation with an employee, the individuals could then practice those techniques in a small-group setting.

In a practice breakout, one participant could practice the new coaching skill, another participant could be on the receiving end of the practice, and a third participant could be the silent observer. The participants could then rotate roles, each having a chance to practice the new coaching skill.

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## Application Sharing

Application sharing allows a facilitator to display their computer screen to participants. They can choose to share a certain software program, a web browser, or their desktop. Facilitators make the selection, and then participants visually see it on their screen. What the facilitator sees, the participants see.

The purpose of application or desktop sharing is typically to demonstrate the features of a software program or to share a website. For example, participants could learn how to enter numbers into a new expense report form by watching it demonstrated on screen.

Another use of application or desktop sharing could be to display a file that is not compatible with the document sharing feature of the virtual classroom platform. Many presenters will use this as a workaround to the platform when needed.

(Excerpted from *The Virtual Training Guidebook: How to Design, Deliver, and Implement Online Learning* [ATD Press]).

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## A Selected List of Virtual Classroom Software Vendors

Here are a few examples of common virtual classroom software platforms. Please note that this is not an exhaustive list.

### Adobe Connect

[adobe.com/products/adobeconnect](https://adobe.com/products/adobeconnect)

### Blackboard Collaborate

[blackboard.com/platforms/collaborate/overview.aspx](https://blackboard.com/platforms/collaborate/overview.aspx)

### Cisco WebEx Training Center

[webex.com/products/elearning-and-online-training.html](https://webex.com/products/elearning-and-online-training.html)

### Citrix GoToTraining

[gototraining.com](https://gototraining.com)

### Jigsaw

[jigsawme.com](https://jigsawme.com)

### Saba Classroom

[sabameeting.com/mar/virtual-classroom-software](https://sabameeting.com/mar/virtual-classroom-software)

### Zoom

[zoom.us/](https://zoom.us/)

## ATD Virtual Training Resources

Click any of the items to the right to be directed to resources referenced in this training guide.



- + [Virtual Training Tools and Templates: An Action Guide to Online Learning \(ATD Press\)](#) by Cindy Huggett
- + [Virtual Training Resources \(ATD\)](#)
- + [Virtual Training Basics, 2nd Edition \(ATD Press\)](#) by Cindy Huggett
- + [TD at Work, “6 Steps to Moving Your Training Online”](#) by David Smith
- + [New! Producing Virtual Training Certificate](#)
- + [Designing Virtual Training Certificate](#)
- + [Facilitating Virtual Training Certificate](#)



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