2nd Edition

Virtual Training
BASICS

Cindy Huggett

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About the Training Basics Series

ATD's Training Basics series recognizes and, in some ways, celebrates the fast-paced, ever-changing reality of organizations today. Jobs, roles, and expectations change quickly. One day you might be a network administrator or a process line manager, and the next day you might be asked to train 50 employees in basic computer skills or to instruct line workers in quality processes.

Where do you turn for help? The ATD Training Basics series is designed to be your one-stop solution. The series takes a minimalist approach to your learning curve dilemma and presents only the information you need to be successful. Each book in the series guides you through key aspects of training: giving presentations, making the transition to the role of trainer, designing and delivering training, and evaluating training. The books in the series also include some advanced skills, such as performance and basic business proficiencies.

The ATD Training Basics series is the perfect tool for training and performance professionals looking for easy-to-understand materials that will prepare nontrainers to take on a training role. In addition, this series is the consummate reference tool for any trainer's bookshelf and a quick way to hone your existing skills.

Foreword

I once worked with a client who had a "Basic Tactics for . . ." class that he knew—from both experience and research—his trainees needed. Very few people signed up for it. After scratching our heads and doing more research, we figured out that while trainees needed it and—even better—they knew they needed it, they didn't want their boss to know that they needed it, because they were already supposed to know that material. It was *assumed* that they knew it.

Before I share what we did to transform results, let me tell you why I think you're smarter than the trainees in this story. One, unlike the employees in the story I just shared, I've never met a trainer who wasn't hungry to be a learner themselves. Two, unlike the 100-year-old industry in the story, virtual classroom technology is relatively young historically speaking. It's OK to be learning the basics right here and now. For *real* trainers, learning the basics is not a sign of weakness; it's a sign of wisdom and strength.

I've known Cindy Huggett a long time because we're both old pros when it comes to the conferencing technology that powers virtual classrooms. You're in good hands. *Virtual Training Basics* is brilliantly put together. You'll learn more stuff than you even knew to ask about; plus, the book's organization itself reveals a lot about how virtual training works, and how to navigate the choices in front of you. Best of all, for a seriously scant amount of money, you'll grow your mastery and add a new modality to your repertoire.

Oh, and the magic fix for the low response rate of the course in my story? Changing the title—and only the title—of the class to "Advanced Tactics for. . . ." The content didn't change, but both attendance and smile-sheet ratings for the course increased.

You can add that one to your bag of tricks, too. Because if you're smart enough to buy this book, you're smart enough to beg, borrow, or steal a good idea anywhere on your own journey to mastery.

Enjoy!

Roger Courville
Chief Content Officer, EventBuilder
April 2018

Foreword to the First Edition

Only Perfect Practice Makes Perfect

The concept of e-learning in many formats has been around since 1997, as Cindy aptly describes in her first chapter. Age, however, isn't a precursor for maturity, and repetition isn't a synonym for expertise.

So while the training profession is moving into its second decade of "practicing" the concept of e-learning, and more specifically virtual learning, few of us have been "perfecting" our design and delivery. As Vince Lombardi said, "Practice does not make perfect. Only perfect practice makes perfect." Cindy gives us the tools in this book to begin to perfect our virtual training skills.

Why is this important? Most organizations are seeing an increase in the use of virtual training. Travel restrictions, budget cuts, and an increasingly technology-savvy workforce have led most organizations to rethink how they continue to meet the learning needs of their employees. Organizations are asking their trainers to deliver more content online. Trainers are expected to have the skills to design and deliver virtual training.

Unfortunately, the concept of virtual learning is still not very well understood by either organizations or practitioners. Virtual training often falls short of the quality standards expected in traditional settings. Most of these instances are due to a lack of appropriate design and limited knowledge of the skill variations required. It seems that many are still under the misperception that virtual training is simply classroom training set to a different tune. Although almost anything can be taught virtually, those who design and deliver training have not always attended to the translation considerations for both the material and the delivery skills required. Cindy addresses these differences in a way that every reader will understand.

Too often I pick up a book about technology that is way over my head. I may be lost while reading the first chapter! The most unique aspect of this book is that it doesn't assume the reader knows anything about virtual training. It starts with the basics, including definitions and explanations of the necessary hardware and software. It walks us through every aspect of virtual training, from how to set up for a class, to what the trainer needs to know about technology, to what to do when everything goes wrong.

Cindy convinces us that virtual training is "still training" and requires us to tap into all the good things we do in the classroom. And she takes it one step further. She addresses the differences between classroom and virtual training, providing techniques to address the differences. Not only is this practical, but it gives us a calming sense of "I can do that!"

I remember the first virtual training that I conducted. It took me quite some time after it was over to realize that I had treated the session differently. I had thrown out many of the basics of good training, such as facilitating discussion and engaging participants, just because the participants were not in the same room with me. One of the greatest concerns for trainers is that they cannot "see" the participants. One of the most valuable aspects of this book is that Cindy describes other methods of "observing" participants that are available to the virtual trainer. There are ways to "see" your participants. I sure wish I had read this book before my first virtual training session!

Throughout the book, Cindy combines her experience with the experience of other training colleagues. She uses other virtual trainers' quotes to share tips and lessons learned. What I loved about these quotes is that they often present varying views. So even if her colleagues have a different approach from Cindy's, she presents both sides and allows readers to select what will work best for them. The 10 steps in this guide will prepare you better than any other book I've read for your role as a virtual trainer.

If you are searching for professional development that is practical, enabling you to put it to use immediately, you have found the right book. Spend the weekend reading and you'll be a more knowledgeable virtual trainer by Monday. The book is chock full of worksheets, activities, basic rules, assessments, and checklists that ensure ease of understanding and implementing the concepts.

Here's a sample of the topics I found most helpful to perfect my virtual training skills:

- managing your virtual classroom time
- engaging participants in the virtual classroom
- juggling all the elements of virtual training and advice for multitasking
- asking well-thought-out questions

- giving instructions for group activities
- using your voice and speaking skills to enhance the participants' learning.

Cindy personalizes each of the topics through stories that illustrate her advice, making your learning come alive. You will feel as if she is writing directly to you when she asks a question you've been thinking about or when she highlights one of her slipups that matches one of your fears. This is Cindy's way of telling us that she has been there, too. She illuminates our learning by taking us by the hand and walking us through each of the concepts in her reassuring way.

The best reason for any product is to fill a need and Cindy has done that with this book. I don't think there is anything on the market that hits the mark quite like *Virtual Training Basics*. Cindy is an early adopter of technology, starting her training career as a software instructor. She has delivered hundreds of virtual training classes for more than a decade. She is passionate about developing trainers and helping them be the best that they can be. Who better to coach all of us to be better virtual trainers? You are in good hands with this book by your side and Cindy as your guide to *perfect* your virtual training skills.

—Elaine Biech
Author of *ASTD's Ultimate Train the Trainer*

Preface

So you've been asked to deliver training in a virtual classroom, and you don't know where to begin. Or you've delivered a few online classes, and are not quite comfortable with the technology. Or maybe you keep hearing that virtual training is the wave of the future and you want to stay current. If any of these scenarios describe you—congratulations! You've come to the right place. *Virtual Training Basics*, second edition, will help you deliver successful virtual classes. It is designed for classroom trainers who are migrating to virtual delivery. This book will also help first-time virtual trainers, and anyone who is asked to present or facilitate online.

💬 Noted

We'll look at our definition of virtual training in more depth throughout the chapters; however, this book defines virtual training as a synchronous online event, with participants and a trainer meeting together at the same time, using a software program designed as a virtual classroom.

The Move to Virtual Training

Over the past decade, industry studies have shown a trend toward increased virtual training. ATD's 2017 *State of the Industry* report indicated that instructor-led online learning made up approximately 10 percent of all formal learning hours last year. While that may not seem to be a significant number, it has more than doubled in the last 12 years, when only 4.24 percent was reported in 2006.

Another interesting ATD research report, *Virtual Classrooms Now* (2016), found that 64 percent of all organizations were using some form of virtual training; of those who don't use it, 22 percent said they will do so soon. Most organizations expected their use of virtual training to increase in the future, with survey respondents citing reasons such as reaching geographically dispersed employees, building workers' agility, and saving on training-related travel costs.

While virtual instructor-led training is not the only online option available, it still represents a significant portion of training delivered to learners. More and more trainers are being asked to use technology in training implementations. Traditional classroom training is not going away; however, training professionals must diversify their skill set to stay relevant in the new economy.

Just because a trainer is effective in a traditional classroom does not mean they will be effective in the virtual classroom. It is a new delivery environment. Many trainers—especially those who are not technology savvy—need to learn the nuances of the online classroom. Virtual training delivery requires an updated skill set for trainers. This book helps both new and experienced classroom trainers get started in the virtual classroom.

So why a second edition? It's been more than eight years since the original *Virtual Training Basics* book went to press, and a lot has changed during that time. Technology platforms have changed, mobile devices are more common, and the Internet has evolved into a more social experience. When I first wrote *Virtual Training Basics*, virtual training was maturing as a delivery method. It wasn't new, yet it also wasn't commonplace. It was still a novelty to many organizations and trainers. Some organizations were early adopters and thriving in their virtual training success. Yet many organizations were fumbling their way through it, or avoiding it altogether.

Fast forward to today. As a whole, virtual training is a mature delivery method, but it is still evolving. Some organizations and industries are just getting started. Several of my clients have said to me, "You would think an organization like ours would be more experienced with virtual training." Another common sentiment that I hear is, "We tried it before but weren't very successful. So now we want to focus on it again."

The basics of virtual training have not changed much since I designed and delivered my first live online programs in the early 2000s. Much of what I wrote in the first edition still applies to today's virtual training classes. The overall content remains quite relevant to training professionals, and even more so as virtual training adoption continues to spread.

Why This Book?

When I talked with fellow trainers about virtual training, the question was always the same—"How did you learn?"—which really meant, "How can *I* learn?" After having this same conversation over and over, it became apparent to me that a basic "how-to" book was necessary for those brand-new to virtual training. They needed a resource to tell them:

- Where should you start when learning how to deliver in the virtual classroom?
- How do you learn to deliver in the virtual classroom?
- What's different about virtual training as compared with classroom training?

This book seeks to answer those questions. It represents my experience in delivering thousands of virtual classes over the years. It also contains advice and stories from my training colleagues. We hope you can learn from our consolidated experiences, and that they lead you toward becoming an effective virtual trainer.

Although this book is primarily written for classroom trainers who are new to virtual training, anyone needing to facilitate virtual events will benefit from the tips found here. In addition, trainers with limited experience in the online classroom may also discover new tips and techniques that will benefit them.

How This Book Is Organized

Virtual Training Basics is divided into 12 chapters. They can be seen as the 12 steps you should follow to become a great virtual trainer. Each chapter outlines a necessary skill or preparation step for effective online delivery.

This book's chapters are loosely organized in the order you should follow them. I say "loosely" because many of them occur simultaneously when you are delivering a virtual class. For example, "Harness Your Voice" (chapter 7) and "Engage Participants" (chapter 8) both happen during delivery. Some of the steps need to be done prior to the class, such as "Prepare Your Workspace" (chapter 5) and "Practice, Practice, Practice" (chapter 9).

While I recommend that you read and apply all the steps outlined in this book, if you are short on time, just look at the beginning and ending of each chapter for the basics. It's also OK to jump to the chapter you need, especially if you have done this for a while or just need help with a specific topic. You will find this book is full of checklists and worksheets to get you up to speed quickly.

Here is a brief overview of the chapters:

Chapter 1: What Is Virtual Training? There are varying definitions of virtual training, and it's important to know the options available to you as a training professional. In this chapter, we'll define what "virtual training" is, and what it isn't.

Chapter 2: Virtual Training Is Still Training. What's similar between face-to-face classroom training and virtual training? It's still about training! Improving productivity and getting better business results are still the goals. Technology is just a tool to get us there. You can rest assured that you still need training skills in the virtual classroom. In this chapter, we'll review the training skills needed to be a successful virtual facilitator.

Chapter 3: Learn About Technology. To be an effective virtual trainer, you need to be 100 percent comfortable with your computer, both its hardware and software. You'll also need basic technical troubleshooting skills. In this chapter, we'll focus on the necessary technology background when training in the online classroom.

Chapter 4: Master Virtual Classroom Software Programs. Just like a craftsman masters the tools of his trade, a virtual trainer must expertly know the software programs used in online delivery. In this chapter, we'll cover the typical capabilities of virtual classroom software and how to use its features in an online class.

Chapter 5: Prepare Your Workspace. What a trainer does prior to each class affects its success. A virtual trainer's preparation includes learning the content and learning about the participants, as well as setting up the classroom. In this chapter, we'll go through a recommended preparation process, starting with your initial look at the material through getting ready for a virtual class.

Chapter 6: Get Really Good at Multitasking. Virtual trainers need to talk, type, and click at the same time, juggling the course material, technology, and participants all at once. In this chapter, we'll review 10 tips to be a better multitasker.

Chapter 7: Harness Your Voice. In the virtual classroom, trainers connect with participants using their voice. In this chapter, we'll consider ways to use your voice—and how not to use it—so that it's an asset to your virtual delivery style.

Chapter 8: Engage Participants. Trainers must engage participants in any class, and even more so in the virtual classroom. In this chapter, we'll learn how to get participants' attention and keep them involved throughout a virtual class.

Chapter 9: Practice, Practice, Practice. When you learn a skill, practice makes perfect. While you may never be "perfect" in the classroom, you will gain confidence and experience when you practice. In this chapter, we'll review practice tips and ways to get quality feedback on your delivery.

Chapter 10: Know What to Do When Everything Goes Wrong. Virtual trainers can and should expect technical challenges. In this chapter, we'll cover what types of things typically go wrong in the online classroom, and what you should do when these problems happen.

Chapter 11: Design Interactive Programs. Whether you design your own virtual training classes, or partner with a design team who creates them for you, it's important to know the basic rules of interactive design. In this chapter, you'll learn a three-step design process for engaging virtual classes. You'll also learn creative ways to use virtual classroom tools.

Chapter 12: Present With Polish. The difference between good virtual trainers and great virtual trainers is often found in a few small but significant details. This chapter pulls together a series of techniques used by expert virtual trainers, who demonstrate how to make these techniques your own.

Each chapter opens with a quick access guide—What's Inside This Chapter—to introduce you to the contents of the chapter. Use this section to identify the information it contains and, if you wish, skip ahead to the material most useful to you.

The final section of each chapter—Getting It Done—offers you a chance to practice some of the concepts discussed in the chapter and provides closing tips and pointers to help you apply what you have learned.

Icons throughout the book help you identify key points that can mean the difference between a virtual training success or failure.

Basic Rules
These rules cut to the chase. They are unequivocal and important concepts that form the foundation of virtual training.

Noted
This icon is used to give you more detail or explanation about a concept or principle.

Think About This
These are helpful tips for how to use the tools and techniques presented in the chapter.

Acknowledgments

I dedicate this book to my best friend and husband, Bobby Huggett. Without his love and support, neither edition of this book would have been written.

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Cindy Huggett

Psalm 115:1

April 2018

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1

What Is Virtual Training?

In this chapter, you'll learn:

- common terms associated with virtual training
- guidelines for moving from traditional to virtual training
- what virtual training looks like
- how to determine if virtual training is the right solution.

1

What Is Virtual Training?

If you ask 10 different trainers to define virtual training, you will probably get 10 different responses. To one person it might mean a self-paced e-learning course, and to another it might mean a video conference. *Virtual training* is a broad term with many different interpretations.

In some ways, it's like the word *health*. When you tell someone that you want to "get healthy," they might think you will be changing your eating habits. To someone else, it might mean exercising, getting more sleep, or losing weight. In reality, the full scope of the word *health* encompasses all aspects of a person's well-being: physical, social, emotional, and spiritual. Yet when people talk about their health, they are usually referring to just one specific aspect of it.

It's the same with virtual training. Virtual training is multifaceted, and could mean many things depending upon the context and who is talking about it. Because this book's definition of virtual training might not be your definition of virtual training, let's spend some time clarifying various elements of it and defining some terms.

Starting With the Basics

Training classes help people learn new skills. Traditional training classes have predefined learning objectives, are held at a set time and place, and are taught by a trainer. Participants register for the class, show up at the preassigned time, and leave with new knowledge and skills they can apply back on the job.

These traditional training classes vary in style, length, and format. They may be highly participatory or lecture based. The class size may be small enough for intimate discussion around a table or large enough to fill an auditorium. The class may be two hours or two days in length. It may be contained in a single meeting or span several months.

Virtual training has the same types of options. It can vary in style, length, and format.

The most common terms associated with virtual training include:
- online learning
- e-learning
- synchronous virtual classroom
- asynchronous training
- webcast
- webinar
- blended learning
- web 2.0 and social learning
- informal learning
- virtual instructor-led training (vILT).

Let's review each one in context, so that we can establish the boundaries for our definition of virtual training.

Online Learning Versus E-Learning

When computers were introduced into the workplace and our daily lives, we used them to automate processes and simplify routines. It was natural for training to follow suit. Trainers began looking for ways to automate learning, and traditional training adopted the computer.

At first it was called electronic learning, or e-learning for short, because it was learning using a computer. The term *e-learning* has since evolved to refer to any type of training that requires a computer. Some people use the hyphenated spelling—e-learning—while others run it together—eLearning. Both versions are still widely accepted.

After the introduction of the Internet and web browsers, trainers took advantage of this new technology. When you accessed training through the Internet, it was called online learning.

Many people consider online learning and e-learning to be the same thing. Online learning naturally requires a computer and therefore uses electronic tools. However, you can distinguish between online learning and e-learning by looking at learner interaction. It's a subtle yet important distinction.

Some online learning is self-paced, completed individually without any interaction with others. However, most types of online learning occur in conjunction with other learners. Learners collaborate with one another and with a trainer. *Online learning* is an umbrella term that refers to all types of interactive training that use an Internet-connected computer.

On the other hand, e-learning more commonly refers *only* to self-paced or self-directed individual training. Participants taking an e-learning course would log in to a website and complete an assignment on their own. There is usually no interaction with other learners, or with a trainer. While the e-learning course uses a website, it is distinguished by its individual, self-directed nature.

Virtual training requires a computer with Internet access and has interactivity between the learners and a trainer. Because it's so similar to an in-person classroom event, it's often called live, online learning. Therefore, throughout this book, I will use the terms *virtual training* and *online training* interchangeably.

Synchronous Versus Asynchronous

Synchronous and asynchronous refer to the meeting time of the training session. In a synchronous training event, the participants and trainer meet at a set day and time. Synchronous training events normally use an Internet-based software program specifically created to host online meetings, events, and training. A participant in a synchronous training class would receive a welcome announcement such as, "Class begins at 9 a.m. Eastern Time on Thursday, August 20. See below for location information and directions for accessing the online classroom."

In asynchronous training, the participants and trainer do not meet at the same time. *Asynchronous* refers to self-paced learning that occurs over time as the participants' schedules allow. Common tools used in an online asynchronous training event include threaded discussion boards, email messages, on-demand videos, podcasts, and wikis. A participant in an asynchronous training class would receive a welcome announcement that might say something like, "Sometime before Friday, August 14, log on to our class website discussion board and post an introduction. Your first class assignment will be due by Thursday, August 20. Send an email to your trainer with any questions or concerns."

Both synchronous and asynchronous training events usually include opportunities for collaboration and interaction between participants. In a synchronous event, the collaboration happens together in real time; in asynchronous training, the collaboration occurs intermittently over time. The two main differences between them are the software tools used to conduct the training and the timing of the events.

This book's definition of virtual training applies to synchronous online events only.

Face-to-Face Training Versus Virtual Training

When the participants are together with the trainer in the same room, it's called in-person or face-to-face training (sometimes abbreviated as F2F). When participants are separated by distance and meet online, it's called virtual training.

Virtual training can be audio-only by conference call. A training colleague recently told me that one of his clients wanted to do "virtual training." He assumed they meant an online synchronous delivery, only to find out they simply meant training using a conference call. However, most virtual training also includes a visual connection through a shared website or collaboration software program.

Some might consider videoconferencing to be a type of virtual training. Participants are separated by distance yet are able to see one another on a video screen. Sophisticated videoconferencing systems may be used in a corporate boardroom. Or a simple video connection on a mobile device could be used. One distinguishing factor between videoconferencing and virtual training is the audiovisual platform required to make a videoconference happen. In addition, videoconferencing usually has a group of people gathered around a shared screen, while virtual training has only one person per online connection.

The type of virtual training covered in this book does not include videoconferencing. Virtual training may or may not include video, and instead uses a computer's Internet connection and web browser to connect to a virtual classroom software platform.

In addition to the distinction between face-to-face and virtual training, "hybrid" classes are becoming more common. A hybrid class mixes in-person and virtual participants; some participants are in person and others are remote. The remote participants may be connected individually or they may be together, sharing a computer connection. Hybrid classes combine two types of programs—instructor-led training and virtual training.

Hybrid classes create a challenge for virtual trainers because some participants are hands-on with their computer, while others are not. That means the participants will have different learning experiences, and therefore may have different learning results. Some participants may be neglected because the trainer—consciously or not—focuses on one group over the other.

While hybrid training may be efficient in some cases, it's not a recommended solution because of its challenges. If you have to do it, take extra time and consideration when putting together the program design so that both audiences will be accommodated and the expected learning outcomes achieved.

A Successful Example of Hybrid Training

I recently facilitated an in-person virtual training design workshop at a client location. One of the key participants, a manager on the instructional design team, was on a work-from-home medical restriction. She wanted to participate in the program but couldn't come into the office to join us. So, we invited her participation using a virtual classroom.

To make this situation work successfully, we turned on the webcams so that we could see her and she could see us. I asked the in-person participants to connect to the virtual classroom so that everyone had a similar hands-on experience. For small group and partner activities, the remote manager was always included on a team. And as the trainer, I made extra effort to include her in all large group discussions.

Online Presentations, Meetings, and Webcasts

An online presentation, sometimes called a webcast, could be compared to an in-person seminar, where a presenter speaks to the attendees. There is little interaction between the presenter and participants, except for possible Q&A opportunities during the program.

I once attended a webcast sponsored by a well-known financial institution. At the designated start time, I logged on to a website and saw the speakers and their presentation slides. I estimate there were at least a thousand other participants logged in as well. There was limited interaction between the speakers and attendees, except for the ability for attendees to submit questions electronically. The speakers addressed a few of the questions during the program, but the rest went unanswered.

It was an expertly produced, informative webcast, but I would not consider it to be virtual training. If we had met face-to-face instead of online, this webcast would probably have been called a meeting. It would have been held in a large auditorium, with the speakers on stage behind a podium and screens hanging overhead to display the visual aids.

While it is possible to create limited interactivity in this type of event, it's mostly just a talking head who is sharing information. This is not considered training in a face-to-face environment, and therefore would not be considered training in the virtual environment. A webcast is not the same as a virtual training class.

While many of the tips contained in this book will help you be more effective at leading webcasts and online meetings, our focus is specifically on virtual training.

Webinars and Virtual Training

Most people use *webinars* and *virtual training* interchangeably. The word *webinar* sounds like *seminar,* and it has become the word du jour for synchronous online training.

While most people do not distinguish between webinars and virtual instructor-led training, in my experience they have different intended outcomes and therefore are not the same thing. The goal of a webinar is to impart knowledge, while the goal of virtual training is to improve performance. This difference may seem slight, but it is significant enough to warrant discussion.

> ### Think About This
>
> A webinar differs from a webcast in two ways:
>
> 1. A webcast usually has a very large audience. The attendees stay anonymous and usually cannot see one another online because the attendee list is hidden from view. Alternatively, webinars could have any size audience.
> 2. A webcast has little, if any, interactivity. It's designed for one-way communication from the presenter to the attendees. Conversely, a webinar may have some interactivity built into its design. Webinars are always more engaging than webcasts.

Webinars raise participant awareness of a topic. They are used to impart information to the attendees. For example, if a corporate human resources department needed to share information with employees about an upcoming annual benefit enrollment period, it may choose to share that information in a webinar. This webinar could include interactivity, with polling questions and chat, but it would not be considered a training class. While webinars may have two-way communication between presenter and participants, they may or may not ultimately result in the participants' behavior changing or have an impact on participants' performance after the event. Webinars are simply an online opportunity to interactively share information.

Webinars are helpful and useful in the right context. They have their place and purpose. There are times when participants simply need to gain awareness of new information, and interactivity will help communicate it. Most of the tips covered in this book will be as useful to a webinar facilitator as to a trainer leading a virtual class.

A virtual training class is different from a webinar because it has predefined learning objectives. These objectives are tied to performance outcomes. And ideally, these performance outcomes will have a positive impact on business results. During a virtual training class, the trainer will check for knowledge transfer. In addition, participants will have an opportunity to practice and apply their new skills.

Even though *webinar* is a popular term and many people use it to describe virtual training, this book will distinguish between them and focus on virtual training.

Refer to Table 1-1 to help you distinguish between a webcast, a webinar, and virtual training.

Table 1-1. Differences Between a Webcast, a Webinar, and Virtual Training

	Webcast	Webinar	Virtual Training
Relative size of audience	Large	Any size	Small
Interactivity?	No	Yes	Yes
Predefined, performance-based learning objectives?	No	Usually not	Yes
Face-to-face equivalent	Presentation or meeting	Seminar	Training class

Think About This

Webinar and *webcast* are popular terms, and many people use them to describe virtual training interchangeably. Ask about the intended outcome of the event so that you share a mutual understanding.

Blended Learning

When a training class combines multiple delivery methods, it's considered blended learning. A blended learning solution might include a mix of traditional face-to-face classes, coaching, and participation in a discussion board. Or, it could be a series of synchronous online training events with self-paced assignments in between. Even assigning a reading before coming to class could be considered blended learning. It is a "blend" of various activities to achieve a learning outcome.

Blended learning usually takes place over time—several weeks or even several months. For instance, if a new employee orientation program took place in a blended format, it might look like this: Employees receive a packet in the mail containing materials to read prior to class. They are directed to log on to a website and post an introduction message on the company's new hire discussion board. On their first day of work, they attend a face-to-face, instructor-led class. Afterward, they are given two homework assignments to complete. These activities make up the overall blended new hire orientation.

Many years ago, I facilitated a leadership class for a group of managers who were dispersed in many locations. I used a blended format for the program. It spanned six months and included a series of self-paced e-learning courses with assignments in between. In addition, we met every three weeks in a synchronous virtual classroom so the managers could collaborate to practice new

skills and compare their notes. By the end of the program, the managers had completed approximately 26 hours of training through the various activities.

Virtual training is frequently one component of a larger blended learning curriculum.

Web 2.0 and Social Learning

The Internet was originally called the World Wide Web because it allowed computers to connect to one another in patterns reminiscent of a spider web (notice the *www* at the beginning of many Internet addresses). It was commonly referred to in its abbreviated form, the web.

Even though the underlying technology of the Internet has not changed much since its inception, the way we use the Internet has evolved. In the early 2000s, as functionality increased and Internet usage spread, people started sharing content and interacting with one another. Websites and programs that allowed this type of user-generated content became known as the second generation of Internet, or web 2.0.

Internet sites like Facebook, Twitter, and YouTube allow users to share content and comment on one another's posts. Internal corporate sites like Yammer and Chatter allow for similar sharing, but behind greater security protections. These types of sites have changed the way we use the Internet. It has shifted from viewing static information pages to collaborating and sharing among users.

Because of their collaboration and information-sharing properties, web programs that can be used for social learning are a fertile source of learning possibilities. For example, a class could have a sharing site set up, and ask participants to introduce themselves to one another before attending a virtual training class. Or, during a virtual class series, participants could ask questions and collaborate in between sessions. One of my colleagues regularly uses a social collaboration site to post discussion and reflection questions after her virtual training classes to help participants apply what they've learned. The possibilities for shared social learning using these Internet collaboration tools is endless.

Informal Learning

Much of what someone learns takes place outside the formal classroom. This is called informal learning, which can be on-the-job training, where someone learns by doing; reading a book; or asking a colleague for assistance. Most informal learning is not captured or recorded as training. It simply happens out of necessity. In fact, it's estimated that more than 80 percent of the way people learn their jobs is informal (Cross 2015).

Informal learning is in our virtual training vocabulary because of its relationship to the Internet. Much of it takes place online as learners visit websites and collaborate with one another.

For example, I once needed to learn more about digital audio recording devices. I searched the web for information and learned a little about them in the process. I also found a tweet about a recording device, and contacted the person who wrote it. He recommended one of his colleagues with expertise in these types of devices, so I followed up with that person. We connected first on Twitter and then by telephone. Through these connections, I learned enough about the devices to complete the task I needed to do without ever participating in a formal training event.

Informal learning should be on the minds of trainers who are paying attention to trends in workplace talent development. Informal learning significantly influences organizational knowledge and employee performance. However, it is beyond the scope of what we'll focus on in this book. Our definition of virtual training will stay in the synchronous online classroom.

Virtual Instructor-Led Training

So, what is virtual training? As I've mentioned, virtual training occurs as a synchronous online event, with participants and a trainer meeting together at the same time. Because a training professional facilitates the event, it is sometimes called virtual instructor-led training, or vILT.

Virtual training uses a software program specifically designed for real-time collaboration on the web. This software application is called a virtual classroom. We'll cover the intricacies of virtual classroom programs in chapter 4. Some common virtual classroom programs are:

- Adobe Connect
- AirClass by Lenovo
- Blackboard Collaborate
- Cisco WebEx Training Center
- GoToTraining
- Jigsaw
- Saba Virtual Classroom
- Zoom.

Virtual training can be a one-time event or part of a blended learning solution. It has learning objectives and performance-driven outcomes. The participants attend to acquire new knowledge, close a performance gap, and practice new skills.

Remember, virtual training is not a meeting held over videoconference. Nor is it a webcast or a self-paced web course. Virtual training is also not traditional classroom training transferred to the web. It has more nuances than a face-to-face class and a different set of interaction dynamics.

✓ Basic Rule 1
The term *virtual training* has many meanings. When discussing virtual training with someone, ensure that you're using the same definition. Ask questions to understand what they mean when they say virtual training.

Moving From Traditional to Virtual Training

If you are asked to take the material from a physical classroom training course and deliver it in the online classroom, make sure to do it properly. It's not a matter of just moving slides from the classroom projector to the virtual platform, nor is it a one-to-one translation of activities or of time. Some face-to-face activities simply don't make sense online. And one minute of classroom time does not equal one minute of virtual classroom time.

For more information about designing virtual classes, see chapter 11. See Table 1-2 for a comparison between a traditional face-to-face class and a synchronous virtual training class.

Table 1-2. Differences Between Face-to-Face and Virtual Training

	Traditional Face-to-Face	Synchronous Virtual
Based on learning objectives and performance outcomes	✓	✓
Participants and the trainer meet at the same time	✓	✓
Participants are dispersed in various geographic locations during the event		✓
Participants connect to the class using a computer with an Internet connection		✓
Can be part of a blended learning solution	✓	✓

What Virtual Training Looks Like

When I describe virtual training to people not familiar with it, it's hard for them to visualize the experience. Here's a quick snapshot:

Michelle is a trainer for a large telecommunications company. She's located in Cincinnati, Ohio. She schedules a 60-minute virtual class for Thursday at 11 a.m. ET. About a week prior to the training date, she sends a welcome email message with instructions and confirmation of logistics to her participants. About an hour prior to the start time, she sits at her office desk, logs in to the virtual classroom software, and gets ready for the event. She uploads her slides (if they were not set up already), opens the first polling question, and prepares the virtual whiteboard. She completes all her preclass preparation and waits for everyone to arrive.

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

One participant, Moira, 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 to the virtual classroom, she dials the telephone number seen in the onscreen dialog box, and enters the conference call passcode and her unique ID when prompted. Moira 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 (see Figure 1-1 for an example). They see the names of the other attendees, slides, and a chat area. They are also likely to see an introductory activity, inviting them to engage right away.

The participants speak with one another over the audio connection; they can also type in the chat area or use the drawing tools. Throughout the class, Michelle asks them to respond to poll questions, type onscreen for input, and participate in activities. At one point, Michelle assigns the participants into virtual breakout groups, and Moira is able to talk privately with her partner, Julie. They practice one of the new skills before returning to the large group for a brief discussion.

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

As you can see, there seem to be many similarities between a virtual class and a face-to-face one. Each class is scheduled for a specific time, and participants are engaged through activities

and exercises. However, participants in a virtual session typically don't leave their workspace to attend, and they usually cannot see one another during class. Also, virtual classes tend to be shorter in length than their face-to-face counterparts.

Figure 1-1. Sample Virtual Training Classroom Using Adobe Connect
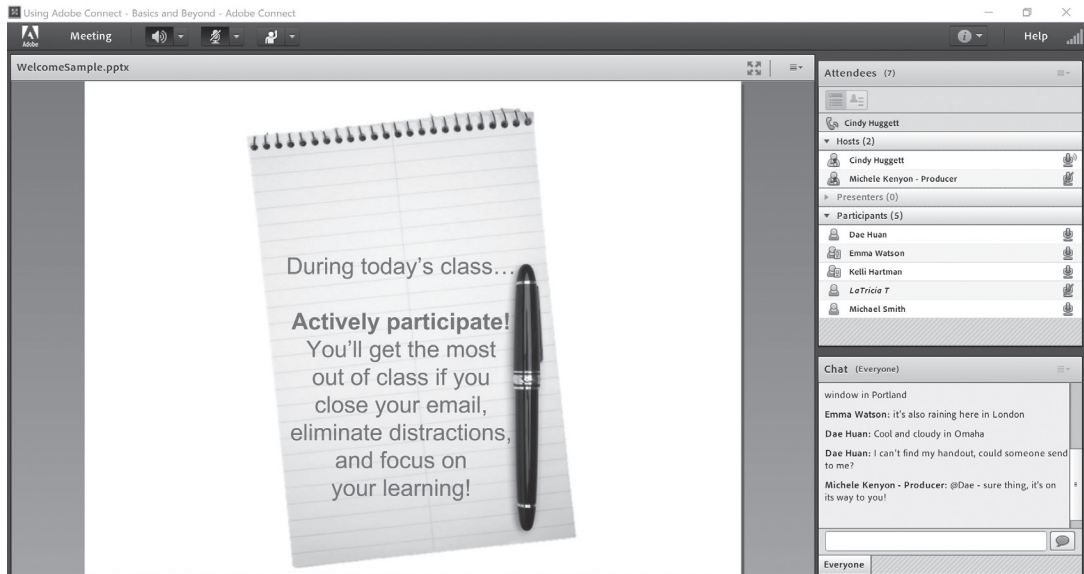
Keep in mind that not every virtual training class is exactly like the one just described. This story simply illustrates a typical experience for the trainer and participants.

Is Going Virtual the Right Solution?

As mentioned earlier, many organizations see virtual training as an opportunity to save time and money. There's no need for participants to travel or even leave their workspace to attend training. Virtual training is convenient and can be cost effective.

But is it really the right solution for your training need? This is a question that every training professional should ask before implementing a virtual training solution. To determine if virtual training is the correct delivery method, consider these questions:

1. **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 stick with face-to-face 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.

2. **Do all participants speak the same language?** Virtual training is a great way to provide training to an international population, as long as language barriers don't get in the way.

3. **Will every participant have an appropriate learning environment?** Participants need to have their own computer, Internet 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.

4. **What technology barriers will 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.

When virtual training is done well, it can strengthen an organization because participants from various departments and multiple locations build relationships in the classroom. They might realize that other participants are dealing with the same types of problems they are, and therefore they might be able to more easily relate to one another. Virtual training can break down regional and departmental silos when participants from various locations collaborate. When virtual training is done well, it can lead to increased communication and, in turn, more effective business results.

Unfortunately, some trainers implement virtual training in situations that do not make sense. For instance, one organization wanted to save on conference-call costs by having everyone bring their laptop to a conference meeting room so they could share a speakerphone. This setup reduces participation because it prevents appropriate breakout groups and makes it difficult to hear anyone speak. Another organization had participants attend using a computer on an open table in the frequently used employee break room. Participants reported so many external distractions that they could not stay focused on the training session.

When such potentially disastrous implementations occur, it's not always the trainer's fault—sometimes it's the organization that forces the decision, and sometimes it's simply a lack of understanding about virtual training. Regardless, you should take steps to avoid these unfortunate situations.

Of course, in the face-to-face classroom, trainers frequently face implementation conditions that are not ideal. You might not have enough resources to properly execute a training plan. Or you might deal with participants who are not

> ### ✓ Basic Rule 2
>
> Virtual training can be an effective learning solution. However, it is not the right learning solution for every learning initiative in every organization.

supported in their quest for training. In these situations, especially when things are beyond your control, manage them to the best of your ability. And it's the same in the virtual classroom. Despite our best efforts, sometimes a virtual training solution is not well supported or well designed, but the trainer needs to make the best of it and manage the situation.

See Table 1-3 for a few ideas about conducting virtual training in scenarios that are not ideal.

Table 1-3. Virtual Training in Tricky Situations

Situation	Suggested Solutions
Participants are in a cubicle or other less than ideal learning environment	• Supply stereo telephone headsets for participants to use. • Create "Do Not Disturb" signs for cubicle walls. • See if participants can borrow an office or room with a closed door.
Two or more participants have to share the same computer	• Plan ahead and request loaner laptops for participants. • Schedule more than one virtual training session and have participants attend different classes.

Getting It Done

In your transition to delivering in the online classroom, you should be aware of the multiple definitions of virtual training. What one person considers to be virtual training may not be what someone else considers to be virtual training. Therefore, always take time to discuss training needs and intended outcomes so that everyone has a common understanding of the goal and the chosen method to get there. Once you are certain that the synchronous online classroom is part of the training solution, your next step is to learn how to transfer your training skills to this new platform.

Now that you have learned some of the basics about virtual training, use Worksheet 1-1 to help guide your journey. Then, use Worksheet 1-2 to assess your readiness.

In chapter 2, we'll review the training skills needed to be a successful virtual facilitator.

 Noted

Joe Willmore's Story: Discovering Virtual Training

Many years ago, I attended a conference presentation with four speakers. Two were expert organization development professionals, and two used technology for decision making. What I took away from that presentation was that interaction in a virtual environment is not the same as it is in the face-to-face environment. Around the same time, I read some research on the dynamics of virtual teams, specifically that virtual teams build trust differently than face-to-face teams. This helped me realize that virtual training is not just face-to-face training with computers. It's a whole different dynamic.

—Joe Willmore, President and Founder, Willmore Consulting Group

Worksheet 1-1. Goal Setting

Use the following questions to guide your journey to virtual training success.

How will learning to be an effective virtual trainer benefit you personally?

How will learning to be an effective virtual trainer benefit your organization?

Why is learning to be an effective virtual trainer important to you right now? What are the short-term benefits?

How might learning to be an effective virtual trainer help you in the future? What are the long-term benefits?

Use SMART (specific, measurable, achievable, realistic, timely) goal-setting guidelines to create a learning plan for yourself.

Goal 1:

Goal 2:

Goal 3:

Revisit these goals frequently throughout your journey, adjusting them as necessary.

Bonus

What might get in the way of accomplishing your goals?

How can you overcome these obstacles?

Worksheet 1-2. Preparedness Checklist

Use this worksheet to assess your readiness for virtual training. The higher your overall score, the more prepared you will be for virtual training.

Organizational Readiness	Never	Rarely	Sometimes	Usually	Always
The organization currently uses technology for learning initiatives (i.e., self-paced e-learning for compliance training).	1	2	3	4	5
The organization is open to trying new methods and techniques for organizational learning (i.e., early adopter of new training techniques).	1	2	3	4	5
The organization supports learning initiatives (i.e., visible executive or key leadership support).	1	2	3	4	5

Technology Readiness	No	Yes
Each learner has access to a personal computer with an Internet connection and all necessary software.	1	2
There are no connectivity issues for virtual classroom access (or if there are issues, they can be resolved).	1	2

People Readiness	No	Yes
Each learner has a private location—free of disruptions and distractions—to participate fully in virtual training.	1	2
Learners have basic computer skills (i.e., keyboard typing and basic navigation skills) and are comfortable using technology.	1	2

Glossary of Virtual Training Terms

Term	Description
Annotation	Drawing on top of shared documents or a whiteboard. The exact annotation tools available vary from program to program. However, most allow you to: • Draw lines and other shapes. • Draw freehand with an electronic pencil or marker. • Type text on the screen. • Highlight words or objects.
Application Sharing	Allows viewing of the presenter's desktop or other selected application. Typically used when a presenter needs to demonstrate use of a software program or show a document that's not able to be loaded into the virtual classroom due to file type limitations.
Asynchronous	Refers to learning activities that take place on the learners' own time; "self-paced" or "self-directed" learning that occurs at a time and place chosen by participants.
Audio	The ability to hear sound during a virtual class. Audio connections could be over a telephone through a conference line, or computer or device through Voice over Internet Protocol (VoIP).
Blended Learning	A training curriculum that combines multiple components and uses a variety of delivery methods. A blended learning solution might include a mix of virtual classes, coaching, and participation in a discussion board. Or, it could be a series of virtual classes with required self-paced assignments in between. It is a "blend" of various activities sequenced together to achieve a learning outcome.
Breakouts	Dividing attendees into smaller subgroups for a discussion or an activity. Participants are temporarily moved into a separate online space where they only hear participants who have been assigned to the same group. The group can share documents and whiteboards among themselves and collaborate. These documents and whiteboards can then be displayed in the main classroom room for report-outs and debrief discussion among the larger group.

Synchronous	Refers to a time-based learning event. In a synchronous online training class, the participants and trainer meet at a set day and time.
Telephony	A broad term referring to overall audio connection and telephone equipment used for verbal communication during a virtual class. See *audio*.
Videoconferencing	A live meeting where participants are separated by distance, yet can see and hear one another on a video screen. Videoconferencing is distinguished from virtual training because it usually has a group of people gathered around a screen, while virtual training has only one person per online connection.
VILT	An acronym for *virtual instructor-led training*.
Virtual Classroom	The online meeting "room" for a virtual training class. Virtual training uses a software program specifically designed for real-time collaboration on the web. This software application is called a virtual classroom, and is sometimes referred to as a *platform*.
Virtual Trainer	The main session leader in a virtual classroom, who is a skilled professional with a good command of the subject matter. This person enables participant learning and application back on the job. Sometimes called the *virtual facilitator* or *virtual presenter*.
Virtual Training	A highly interactive online synchronous facilitator-led class that has defined learning objectives, with participants who are connected individually from geographically dispersed locations, using a web-based virtual classroom platform.
VoIP	An acronym for *Voice over Internet Protocol*. It's a communication method that allows for hearing audio through computer speakers and speaking into the computer's microphone. See *audio* or *telephony*.
Webcast	A one-way presentation held online with a presenter and participants. In a webcast, there is typically little interaction between the presenter and participants, except for possible question and answer opportunities during the program. A webcast usually has a very large audience.
Webinar	A live online program that may or may not be interactive. *Webinar* is a loosely defined word that still has several meanings. Some consider it to be a highly interactive live online event, while others consider it to be the same as a passive webcast.
Whiteboard	A common feature found in most virtual classroom platforms. It allows the trainer and participants to draw on the screen using annotation tools.

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