



# Producing Virtual Training, Meetings, and Webinars

Master the Technology to  
Engage Participants

**Kassy LaBorie**

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# Foreword

I've known Kassy LaBorie for the better part of the last decade. Like many of the L&D professionals I see often at industry events, it's difficult to pinpoint the first time we met, but I do vividly recall one of our early interactions that built the strong respect and admiration I have for Kassy and her work.

When Kassy was at Dale Carnegie, there was a role being filled that I was interested in. It was a role tied to the organization's increased focus on using digital technologies, and Kassy and I spent a good amount of time talking about the company, the new focus, and—most important to the context here—her role in what was being built.

It was one of the first opportunities I had to really listen to Kassy talk about her work in detail. Unlike the well-rehearsed conference presentations I had seen in the past, this was just two L&D people talking shop. She described the work she was doing and what she was hoping to do in the future. Her passion was contagious, and our talks left me excited for the possibility of working together. I remember leaving one of our first discussions thinking, “This is someone who really gets it.”

While that opportunity to work together didn't come to pass, I like to think I did get the chance to work with Kassy through her first book, *Interact and Engage! 50+ Activities for Virtual Training. Meetings, and Webinars*, co-authored with Tom Stone.

At the time the book was published, I was supporting the technology-based learning efforts of a local nonprofit. Much of the live training I supported used Webex, so Kassy and Tom's book was always on the shelf above my desk, ready to be referenced as I looked for interesting and engaging activities to include in the sessions I was building. It's a book that has

plenty of highlights, earmarked pages, and Post-It flags sticking out of it as a testament to the practical solutions it provides me, and it still resides on my bookshelf today.

My personal journey as a learning and development professional took an unexpected turn almost a decade ago when I had the opportunity to join the eLearning Guild, known today as The Learning Guild. My work at the guild includes supporting our webinars and online conferences, and it has definitely made me look at a side of virtual sessions that I—like many in L&D—had not prioritized enough in my work: production.

For many of us, “producing” a virtual session simply means that we press “start” and hope it works out. I’ve lost count of how many sessions I’ve conducted, from design to technology-supported delivery, all on my own. While I was “producing” these sessions, in hindsight that production wasn’t strategic or intentional; it was producing as defined simply by the technical requirements of making the virtual session happen.

It wasn’t until I joined the guild, and began working with expert virtual session professionals, that I truly discovered what virtual session production means. One of the first things I noticed wasn’t the feedback I got on our speakers; it was the feedback I got from our speakers, talking about how much the process used by our team made things run smoothly, allowing them to focus less on the technical administration and more on the learning experience.

There is so much that our virtual session producers and hosts do that had never been on my radar before, from the way they prepare speakers and attendees, to designing room layouts, to troubleshooting. It’s all part of a strategic and intentional approach that raises the bar for virtual session production, increasing trainers’ ability to deliver learning and performance outcomes in the process.

Had it not been for my work at the guild, I’m not sure if I would ever have understood just how important virtual session production is, and why it is its own critical skill set above and beyond what’s required to facilitate a virtual session. But there’s never been a resource that narrowly focused on the ins and outs of the production side of virtual sessions, emphasizing its importance in the work that we do as learning professionals.

Until now.

*Producing Virtual Training, Meetings, and Webinars* is the definitive guide for building a virtual session production strategy. It explores what makes a producer's role different than that of a presenter, the skills required to deliver upon that value, and the specific tasks that get delivered each step of the way. This book is a must-read not just for those who are interested in exploring a career as a virtual session producer, but for anyone whose work involves supporting virtual events.

I want to personally thank Kassy for placing a spotlight on an important role that doesn't get enough attention in our industry. It's my hope that by reading this book, and sharing it with our peers, we can greatly improve the virtual sessions we produce as an industry.

David Kelly

Executive Vice President and Executive Director

The Learning Guild

December 2020

The image features a large, dark, irregular shape on the right side, resembling a stylized mountain or a jagged block. To its left, a vertical gray line is surrounded by various horizontal and diagonal gray bars and segments, creating a complex, layered effect. Small black and gray squares are scattered throughout the composition, particularly along the edges of the main shapes.

SECTION 1

# Getting Started



# What Is Virtual Training, Meeting, and Webinar Production?

## In This Chapter

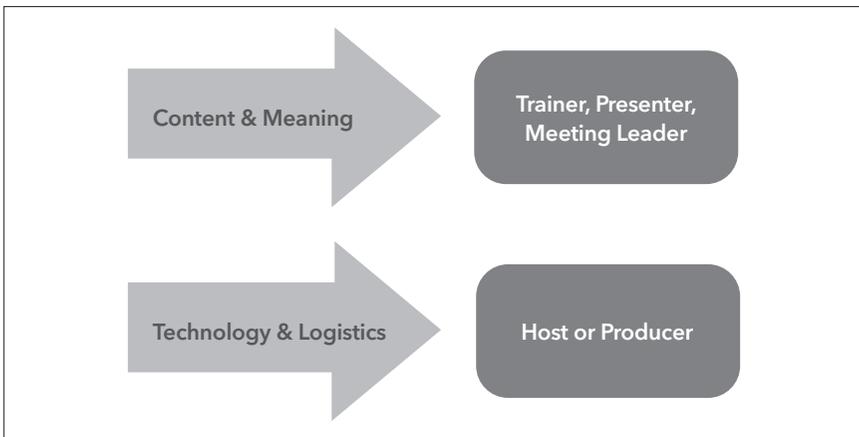
- ⬠ Virtual session production defined
- ⬠ The difference between a presenter and a producer
- ⬠ Session types and the most common production tasks for each

Have you ever led a virtual training session, webinar, or online meeting and found yourself happily delivering the content only to have a participant drop off and frantically message you about how to get back on? Or, you're in the middle of speaking when your audio cuts off and you need to troubleshoot your device while still trying to engage the participants in the chat? Or, you bravely launch the breakout sessions and most participants go into them but then some do not, and everyone is confused so you decide to forget the whole thing and lecture instead? The scenarios I've just described illustrate the convergence of virtual session facilitation and production.

By now, most trainers, presenters, and meeting leaders have facilitated a virtual session. They very likely took what they knew about facilitating in-person and adapted that to the online setting. But while much attention in books, articles, and webinars is paid to the facilitation side of virtual sessions, significantly less is devoted to producing them. I've written this book to rectify this gap. So, what is virtual training, meeting, and webinar production?

Virtual session production—the key to engagement for online trainers, presenters, and meeting leaders—is the planning, setup, in-session management, and follow-up of all the logistical and technical details required for a successful and engaging virtual event. Production refers to the tasks required to deliver an online training, webinar, or meeting that are not directly connected to the content, but rather to the delivery of it in the live online environment. A simple breakdown of who is doing what is presented in Figure 1-1.

**Figure 1-1.** Presenting Versus Producing Virtual Sessions



It is the responsibility of the trainer to take the lead on the learning content, the participant's connection to it, and ideally how they make meaning and apply it to their real-world environments. Likewise, it is the responsibility of the presenter to command presentation messaging and inspire audience members to action or other intended outcomes. And in the case of meetings, a meeting leader or facilitator takes the lead on agenda items and discussions related to the topics at hand.

But virtual classroom sessions, webinars, and meetings all require technical setup and focus that is not necessarily within the knowledge or skill set of the trainers, presenters, and meeting facilitators leading them. An individual who performs these tasks is often referred to as a producer. Other titles for those who perform production tasks include but are not limited to host, moderator, virtual classroom assistant, and event specialist. This book focuses on the production tasks that someone in the role of producer might do or that a facilitator might be responsible for covering themselves.

Production tasks include demonstrating, managing, and teaching effective use of the web conferencing platform's tools; guiding participants to connect and manage audio; using chat to communicate; annotating whiteboards and shared presentations; and participating in breakout activities. These tasks support presenters, trainers, facilitators, meeting leaders, and participants during the preparation, launch, and debrief of presentations and activities during a live session. A person in the role of producer may help with engagement in exercises and activities by role playing, commenting in chat, participating during discussions, and assisting with progress checks as needed.

Let's look at what can happen when a training facilitator doesn't feel comfortable with the production tasks. To put online participants into breakout rooms, the trainer needs to know where to click within the online training platform and how to manage the process of getting participants in and out of the breakout group. Without that skill or another person assisting with setup, they would need to stop instructing to do these tasks correctly. They also need to set up the activity so that participants can quickly master the technical process of entering, working in, and returning from the breakout group to debrief the learning and make connections. It's a process of moving from content to technology and back to content to successfully deliver a small group

collaborative activity. This back-and-forth makes it obvious why many virtual trainers do not use breakout room functionality.

Unfortunately, participants are not engaged online when the trainer dominates the session—they want more collaborative and creative ways to learn. The trainer who avoids using breakout rooms is not deploying a proven strategy of engagement, small group learning, because the technology got in the way. By removing the obstacle of using the technology, producers clear the way for trainers to do what they do best, which is to facilitate learning moments with content and with one another in creative, relevant, and engaging ways.

This rings true for webinar presenters and meeting leaders as well. Webinar presenters typically perform to larger audiences, sometimes thousands of people at a time. How can a presenter focus on working up energy and enthusiasm to inspire engagement if they must simultaneously troubleshoot internet speeds, sound settings, and system connections experienced by audience members?

Meeting leaders face timing and planning challenges. It is not uncommon to have a day full of back-to-back meetings. Added to their list of responsibilities, they must also log in to the online meeting site with leader access, locate the scheduled meeting, and quickly find the start button. Online meeting technologies continue to make this process smoother by adding these controls to calendar entries, but the fact remains the meeting leader needs to start a meeting in order to take control, and that usually involves knowledge of where exactly to click to initiate everything, even when those buttons are on their calendar. The point is, it's usually more than just clicking on a link; it requires some level of technical knowledge on how to run an online meeting.

Trainers, webinar presenters, and meeting leaders all face production-related questions during their virtual sessions. How well they master the knowledge and skills of virtual session production (as covered in this chapter and the rest of the book) determines the success and engagement of their events.

## **Production Tasks for Different Session Types**

Production tasks and responsibilities are similar in some ways but also can differ based on the session being delivered. Expectations from participants, from the organization, and from leaders of the sessions themselves change based on what is planned for the session, as well as the level of experience of those who

will be speaking. Among the common features within a platform, the production tasks that will be required are listed in the next section. Someone needs to lead the effort of ensuring each of these features and tasks are addressed and are working properly throughout the session.

## Commonalities

Here are common elements of all virtual sessions. First, virtual sessions need a link for participants to use when joining a session. This is typically referred to as scheduling the session and is done by an account holder, often referred to as a host. (Refer to chapter 4 on platform roles and features for more details on logins and host accounts.) This can be done either by logging in directly to the designated virtual event site or from an account holder's email program if they have chosen to integrate the software.

Second, virtual presenters need a way to share documents, slides, and their computer screens with their attendees; this is done in different ways depending on the technology. Third, it is common for sessions to have a way for leaders and participants to be seen via webcams, to communicate via a chat messaging process, and to get some form of instant feedback, usually via raised hands or buttons like green checks and red x's.

Fourth, all sessions must have an audio option, and this varies depending on the setup of the virtual meeting account. The options could be that the audio is integrated, separate, open, one-way, broadcast, a teleconference, computer audio, or voice over internet protocol (VoIP), to name a few!

Management of the production tasks is required to fulfill the purpose of the session being conducted, whether it's a training session, a large presentation, or an online meeting. Here is a list of common production tasks that must be addressed no matter the type of session:

- Generate an invitation with a link for participants to join the session.
- Select audio options.
- Provide technical support throughout, but primarily upon joining.
- Test audio hardware and internet connections for speakers and participants.
- Determine session options such as annotation tools, lobby settings, and welcome messages.

- Test how to share or show documents, slides, and computer screens.
- Connect and share webcams.
- Communicate using chat messaging.
- Determine when to use feedback options like raised hands, checks, and x's.
- Track registration and attendance.
- Start, pause, end, save, and share recordings.

## Virtual Classroom Training

In my book with Tom Stone, *Interact and Engage! 50+ Activities for Virtual Training, Meetings, and Webinars* (2015), I define virtual classroom training:

“At its essence, it is a training experience that most frequently has multiple participants and one or more facilitators (such as a trainer and a producer) together at the same time in an online classroom that allows them to communicate, interact, and collaborate with one another; view presentations, videos, or other content; and engage in large and small group learning activities.”

The production tasks of a virtual training session include those common tasks in addition to all the support and logistics it will take to deliver the learning activities planned for the training:

- Communicate pre-session learning assignments.
- Upload or confirm asynchronous assignments and content.
- Create logins to learning management systems or other required technology.
- Send learning materials and logins to participants.
- Test all systems with participants.
- Build, load, and connect all polls and tests.
- Plan for breakout groups and materials.
- Plan follow-up and check-in communication methods.
- Track participation and assignment completion.
- Finalize course completion, including required certificates, accreditations, and units earned.

## Webinars

A webinar (sometimes called a webcast) as I define in *Interact and Engage!* “is a live presentation that occurs over the web. It is different than a virtual meeting, because while there can (and should) be interaction with the audience, a webinar presentation is largely in one direction: from one or more presenters to a potentially very large audience.” Webinars are commonly delivered as marketing and sales events because they are highly effective ways to generate brand awareness and host product releases. Announcements to the company such as quarterly financials or meetings where all employees are being called together are another example where the webinar format is quite effective. Learning organizations often deliver webinars to share information to as many people as possible; when skill building training sessions will be delivered in smaller workshops either in person or live online.

It’s not my practice to deliver a webinar on my own, given how many people are usually in attendance and the amount of technical assistance that is often needed as people begin connecting to it. Production tasks for a webinar are usually quite involved at the start of the session, slowing down in the middle, and picking up again at the end. Most of the production tasks will be related to audio connections when participants are trying to connect to the audio broadcast, computer audio, or teleconference depending on the type of audio that has been selected. In addition to the common list shared by all virtual events, here are production tasks specific to webinars:

- Perform a technical check (systems, hardware, software, location, connectivity) for all presenters.
- Perform a content rehearsal and logistical walkthrough with all presenters.
- Send out attendee materials or make them available as needed.
- Assist presenters and attendees connecting to the session with technical issues.
- Record the session.
- Plan a question-and-answer process, ensuring members of the panel know how to see questions and respond properly.
- Manage all role transitions, changing presenters as needed.

- Build, load, connect, run, and save all polls.
- Plan a process for follow-up communications, including the recording and any transcript information needed.

## Online Meetings

Meetings require production tasks, but depending on the size of the meeting, they are usually nowhere near what a webinar or virtual training requires. A typical team meeting is likely to be smaller than 20 participants, perhaps only five to 10 participants. The common tasks listed earlier are usually all that need to be done and may not require a dedicated person to manage or moderate. Meeting leaders can manage opening a meeting once it has been scheduled, starting the audio, loading an agenda, and sharing on webcam and audio as needed. Some meeting leaders may require assistance with taking notes and saving files, but it depends on the needs of the meeting, and again, the level of experience the meeting leader has running online sessions.

An all hands, or all company meeting, on the other hand, is more like a webinar, given the likelihood that there will be a large audience in attendance and high-stakes presenters speaking during the session. I follow the expectations and model the same practices for this type of meeting as I do with all webinars. As mentioned, the common tasks listed earlier are likely all that is necessary, but it is possible the following might be needed as well, depending on the meeting:

- Save whiteboards used during the meeting.
- Save chat conversations.
- Take, save, and distribute notes.

Now that I've shared the key production tasks for these virtual session types, let's return to the question of what falls under the role of facilitator versus the role of producer, and the corresponding production tasks.

## Differences Between Facilitation and Production Roles

When it comes to the actual tasks that make up virtual session production, it stands to reason that the following questions need to be addressed: What needs to be done, who does it, and when should it be done? Assuming the “content and meaning” is the primary responsibility of the trainer, presenter, or meeting

leader, and the “technology and logistics” is the main responsibility of the producer, host, or meeting moderator, I have outlined the specific examples and aligned them with one another indicating who leads on what, or who does what and when.

Before breaking down the specifics of what is being done when and by whom, it is important to note that not all online events have or even require a dedicated person to manage the technology. This is of course where the challenge of maintaining engagement and managing the technology at the same time comes into play. Some presenters choose to run sessions alone and are successful doing it. Those who manage it alone typically have two things going for them:

- **Less technology to manage.** They have less to do and less people to do it for, as in the case of leading an online team meeting. It is the rare team meeting that uses formal polling or requires breakout session management. Most meetings simply require connecting to the audio; sharing slides, screens, and other visuals; using chat; and maybe managing whiteboard tools at most. Audio, slides, chat, and whiteboards are not that much technology to manage alone, especially for one hour. These features are also the first features to learn when using online meeting technology such as Zoom, Webex, or Adobe Connect.
- **More platform experience.** They have more experience using the online meeting and training technologies and they know how to use most of the tools without having to first think about them. I have been working online for more than 20 years, leading virtual meetings, training sessions, and webinars at least once each week. I was a software trainer early in my career, so I am accustomed to clicking on features and making them work, even if I don't really know how to use them in detail. I am comfortable with the tools, even if they are new to me. I can usually figure out how to manage the technology, but even for me, when I have an audience that is larger than 20 people, I will not work without someone helping me manage the production tasks. I don't want to risk participant engagement dropping off because I'm distracted by anything technical.

Like with the production tasks covered earlier, I break this down into the three main virtual session types: virtual classroom training, webinars, and online meetings.

## Virtual Classroom Training

When learning teams are implementing virtual classroom strategies, it typically becomes apparent they need a person dedicated to managing all the production tasks associated with successful virtual classroom engagement. When asked who does what exactly, or what needs to be done specifically, it is helpful to have a list of examples. Table 1-1 charts the common virtual trainer tasks to facilitate a learning event and their accompanying producer tasks or production requirements to manage the technology.

**Table 1-1.** Tasks for Virtual Classroom Training

<b>Train: Facilitate Learning</b>	<b>Produce: Manage Technology</b>
Welcome participants to the class; get to know them and why they are attending.	Welcome participants to the class and help them technically connect to the session through audio, chat, and so on.
Lead group discussions.	Direct participants to the raise hand and feedback icons and watch for comments that may come in the chat.
Coach participants during skill practices.	Assist participants with using annotation tools, webcams, or feedback icons.
Ask questions to help make content connections.	Remind participants to answer questions by using the tools properly, such as chat or feedback icons.
Listen to responses from participants and comment appropriately.	Ensure audio is clear and is working properly.
Clarify participant questions, ideas, and responses to help make connections.	Type what the trainer and participants say on the whiteboard or in the chat.
Deliver clear activity directions related to the purpose.	Give clear technical directions to complete the activity in the online classroom.
Take the lead in the class by creating an environment that is safe, inclusive, collaborative, interactive, and effective.	Follow the lead of the trainer by ensuring the technology being used supports the safe, inclusive, collaborative, interactive, effective, and fun classroom!

## Webinars

Webinars are sessions delivered to larger audiences where knowledge and comprehension level objectives are the goal. Since production tasks for a webinar are usually quite involved, I previously mentioned that it is not my practice to deliver a webinar on my own. It is simply too much for one person to do on their own, and having a dedicated person for technical support issues, as well as content management logistics, is the most effective way to ensure an engaging webinar experience for all attendees. Listed in Table 1-2 are common tasks for webinar presenters to share and inspire participants and the accompanying host tasks that support an effective experience.

**Table 1-2.** Tasks for Webinars

<b>Present: Share and Inspire</b>	<b>Host: Manage Technology</b>
Greet attendees, make general connections, and establish likability and credibility.	Assist attendees with their technical connections so they can hear and participate.
Engage the audience with thoughtful imagery, key points, and demonstrations.	Ensure visuals (slides and screen shares) are working properly for everyone in the webinar.
Ask questions to inspire attendees to think and respond.	Enable questioning tools and teach presenters and attendees how to find and use them.
Acknowledge and react to comments and ideas received via chat and feedback.	Help presenters monitor responses: Read them out loud or help draw attention to them in a pre-determined way such as raising a hand or sending a private message.
Poll the audience, providing clear setup and debrief of the questions and responses.	Prepare and upload or connect the poll, launch it, share the results, and save them as needed.
Deliver presentations and demonstrations that are effective and accurate, according to the topic and the audience.	Follow the lead of the presenter by ensuring the technology being used to deliver the session works smoothly and effectively for everyone.

## Online Meetings

An online meeting is the one place where a producer is perhaps not needed, unless the online meeting involves presenting to a large audience, as in an

all-hands or all company meeting. In this case, follow the guidelines and recommendations of webinars instead. So, although a producer is likely not necessary for online meetings, it does not mean there are not production tasks required to effectively lead and run them. Most production tasks are connected to the efficient setup and connection processes needed to run the meeting. Others include using the platform features to record notes, see meeting attendees, and communicate with one another in a way that involves attendees rather than boring them. Some common mistakes meeting leaders will often make include, but are not limited to:

- Excluding the online meeting link in the invitation
- Not setting up or communicating the audio connection requirements
- Failing to test internet connections
- Lack of knowledge of platform features such as notes, webcams, and chat

Table 1-3 shares the common tasks for meeting leaders and the moderator tasks that help ensure meeting objectives are met.

**Table 1-3.** Tasks for Meetings

Lead: Dialogue and Thinking	Moderate: Manage Technology
Welcome attendees to the meeting.	Help attendees technically connect to the session, including internet connection and audio.
Introduce the meeting, review the agenda and timing.	Share webcams, and show a visual of the agenda.
Encourage questions and seek clarification.	Confirm raise hand, audio, and chat work properly for all attendees.
Listen to responses from attendees and comment appropriately.	Ensure audio is clear and use the whiteboard or note-taking features for reference.
Lead interactive discussions including report outs, project updates, and brainstorms.	Use chat, whiteboard, notes, webcams, and audio to keep track of discussion results.
List actions and next steps, and plan for a follow-up process.	Use chat, whiteboard, notes, and audio to capture actions, next steps, and plans.

## Conclusion

Having a clear understanding of what virtual training, meeting, and webinar session production is and the similarities and differences between the types of sessions, it is now time to take a look at what it takes to perform these tasks. In the next chapter, let's examine the specific skill set required of producers or of those performing the production tasks and how they go about developing these capabilities to support a live online session with confidence.

## Reflection Questions

- ▶ What live online session experiences would have been more engaging if a producer had assisted or if there had been more attention paid to the production side of things?
- ▶ What is the most common type of live online session you will be delivering?
- ▶ Which of the production tasks for your main type of session will you need to learn first?

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