

The Virtual Trainer's Guide to Online Course Design:

# **The Doctor is In: A Prescription for Virtual Training Success**

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A white paper by Cindy Huggett, CPLP

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## A Picture of Virtual Training Success

What is “healthy” virtual training? What does it look like, and why is it important?

Healthy virtual training is more than just a straightforward lecture or simple online presentation. Typically, virtual training is a highly interactive, live online, synchronous instructor-led class. It has defined learning objectives and participants who are individually connected from dispersed locations. It uses a virtual classroom software platform that has been designed for online training. Virtual training events tend to be short – usually 60 minutes in length. And, most of the time, virtual training classes have a small number of participants – under 20 – to allow for maximum interaction and dialogue.

Whether the above description is how you currently define virtual training or not, the single most important feature of all virtual training is that it's about *learning*.

- It's about participants learning a new skill or acquiring new knowledge.
- It's about participants engaging with a facilitator and other attendees while connecting together in their learning journey.
- It's about participants changing their behavior back on the job as a result of what they learned during virtual training.

Whether your virtual training events are part of a larger training initiative, a series of virtual sessions, or part of a blended learning solution—it's important for your virtual training to be a success.

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## Benefits of Successful Virtual Training Include:

- reaching a dispersed audience
- spending less time away from work
- learning more in shorter spans of time
- immediately applying lessons learned on the job

So how do you know if and when your virtual training is successful? When it meets the goals you have set out for it. For example, if a group of first-line managers attend your virtual training series on effective managerial coaching skills, and their employee retention scores increase as a result, then your virtual training probably played a large part in that success. Or, if your virtual training sales curriculum teaches how to overcome objections during a sales call, and participants start to successfully overcome objections, then your efforts paid off. In other words, you know successful virtual training has occurred when lessons are learned, behavior is changed and skills are applied.

This white paper will help you determine if your virtual training is as successful as it could be – if it's "healthy" virtual training. It will look at several common challenges and offer prescriptive solutions for each one.

## Symptoms of “Unhealthy” Virtual Training

You might be reading this paper for preventive medicine. You're getting ready to start virtual training and want to be sure it gets off on the right foot. Congratulations on investing the time and resources up-front to make sure you have success!

You might also be reading this paper thinking that your virtual training is going well, but a closer look under the hood reveals otherwise. Maybe you just know it could be better. Or it might have a *general malaise* ... it's good but not great.

Perhaps you just know something isn't quite right but you can't quite put your finger on it... you just know you want it to be better.

Or, finally, you might be reading this paper because you know your virtual training initiative is obviously suffering from ill health. It's not realizing results. Or worse, you've had to spend more time and resources than originally planned because you have had to go back and retrain your employees.

Regardless of your reason, if you observe any of the following symptoms, then your virtual training needs a checkup:

- Speaker asks a question and no one responds (silence /“crickets”)
- Attendees don't participate in polls, chat, or other activities
- Attendees show up late
- Attendees don't do pre-work
- Speaker just “clicks through” their presentation without dialogue or other interactivity

## A Prescription for Success

Each of the items listed above is typically a symptom of something larger going on in your virtual training program. Therefore, let's connect these symptoms to some common challenges, along with their underlying root causes—and prescribe solutions for each.

### The 4 Common Challenges:

1. Undefined Expectations
2. Unengaged Participants
3. Unable to Login
4. Unexpected Events

## #1. Undefined Expectations

### **The Problem:**

You have undefined expectations when...

Attendees join a virtual training session expecting to remain anonymous, passive participants, while facilitators expect attendees to speak up and interact. Or, an instructional designer creates an interactive session, but the speaker just clicks through slides reading the text with no vocal inflection. Or, the facilitator wants to make use of public chat during a live online session, but it's not an available feature. These are all classic cases of undefined—and mismatched—expectations.

### **The Solution:**

*Define your goal, then design, plan for and communicate those expectations.*

Begin by defining success for your virtual training initiative. Determine exactly what you hope to achieve. Ask yourself, “What’s the overarching goal for the session?” and “What information should be shared, or what skill needs to be learned?” as well as “What do attendees need to know or do as a result of participating?” By answering these questions, you will begin to define success. You’ll discover what type of virtual session would work (Large-group webcast? Small-group training class?) and how much interactivity is required. You’ll also determine how to best achieve the learning objectives.

Not only should you define success, you also need to make sure everyone involved with the virtual training is aware of your definition. This point is key! Contract with your instructional designers to create the sessions you intend. Prepare your facilitators to deliver on expectations. Let your participants know ahead of time via email or text message if you expect them to interact and engage. Educate participants’ managers on the importance of supporting the learning event. Ensure everyone involved knows what’s expected.

### Tip for Success:

Communicate with participants in advance! Send a personal email or pick up the telephone and call them. Consider requesting a response, such as their answer to a content-related question, to begin interaction in advance.

Then, select the appropriate technology platform that corresponds to your goal. Think through the features you need and ensure your platform matches it. For example, if you will be sharing information to a large size audience, in a one-way presentation-style format, then choose a platform known for its rich presentation features (such as GoToWebinar). But if you plan to conduct interactive training with small groups of participants, then choose a platform known for its engaging interactivity tools (such as GoToTraining).

Next, after you determine your goal and the type of session you will have, you should design a session to match. Mismatched expectations often happen when session types are mixed in thought and design. In other words, you might think you are designing a training class when actually it's just a webcast—a presentation with one-way communication. Break through this common challenge by designing an interactive training class that builds on your established framework and desired outcome.

## #2. Unengaged Participants

### *The Problem:*

You have unengaged participants when...

Participants don't answer your questions and stay silent when expected to respond. They don't participate in poll questions, or type in chat, or connect with each other during activities. They don't interact or engage with the platform or the facilitator. They remain anonymous throughout the session. And they are most likely multitasking, only paying partial attention to the virtual training class, checking their email or doing other work tasks instead.

### What is a Webcast?

If the main goal is for a speaker to share information with a large size audience, with one-way communication and presentation style, then you have a webcast.

### ***The Solution:***

*Design relevant, interactive virtual training sessions that engage participants from the start.*

While this challenge on the surface might seem to be a problem with facilitation or with the participants, its underlying cause is almost always due to a non-interactive design. Specifically, the interaction doesn't start soon enough, and/or doesn't continue throughout the virtual training session.

First, just to be sure, step back and ensure that expectations are clear from the start (see #1 above) so that participants join the class knowing that they need to participate. Otherwise, participants will assume they don't need to interact and therefore they won't engage. Set expectations well in advance of your virtual training session. Let participants know that they should prepare to be hands-on during the session and that you'll expect them to respond often.

Then, consider the virtual class design and how soon the interaction is scheduled to begin. In truth, it's probably not starting soon enough.

NOTE: If the facilitator goes through 5 or 10 minutes of introductory or administrative information, by the time they ask the first question, the participants will have already checked out. Or if the facilitator waits 5 minutes for everyone to join, then spends several minutes talking about the agenda before beginning the first activity, the participants will have already decided that their full attention won't be required.

If your class design is already set to begin with interactivity – within the first three minutes – then another possibility could be that interaction doesn't occur often enough. If activities occur only sporadically during a session, then there's not sufficient frequency to maintain engagement.

Design a dialogue,  
not a monologue.

Finally, the content might not be relevant or interesting to participants. That's why the prescriptive solution to this problem is to design relevant and interactive virtual training sessions.

Use the following design principles to create an interactive session:

- *Engage participants from the start.* An interactive virtual class should be engaging from the moment that your participants log in – even if it's 5 or 10 minutes prior to the official start time. Greet them with a warm personal welcome from the facilitator. Encourage them to respond to a poll or use the chat feature to answer an on-screen question. Create an interactive learning environment – one that involves participants immediately.
- *Interact at least every 4 minutes.* Participants need to interact with the tools and with each other within the first 3 to 4 minutes, or you will have lost the opportunity to set the stage for an interactive experience. And then the interactivity should continue at least every 4 minutes throughout. This frequency keeps attention and keeps focus on the learning. It helps keep participants from getting bored or distracted by what's going on around them in their physical environments. It also keeps them engaged in their own learning.
- *Use all of the platform tools.* Think about ways participants can use all of the online tools available to them. If you use handouts, have participants “raise their hand” 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 to get participants thinking.

### Tip for Success:

*Teach tools as you use them.* Instead of taking 10 minutes at the beginning of each session to explain the virtual platform tools, spend just a moment directing participants to the tools as they are used.



### #3. Unable to Login

#### **The Problem:**

You have login challenges when...

Participants show up to an online session late because they had “connection issues.” They might even claim that they can’t log in to the virtual session. Participants might call or email looking for the session details – the web link and/or telephone number. In some cases, participants might join by audio but not the visual on-screen portion of the event, or vice versa. Participants might say they are waiting for a software download in order to join, or worse, they may never join.

#### **The Solution:**

*Give participants the information and support they need to be successful.*

While on the surface this challenge seems like a technical issue, it usually isn't. Instead, it's often due to unprepared participants who don't have connection details easily accessible when the virtual training event is scheduled to start. While masquerading as a technical issue, in reality, it's usually a participant preparation issue. Or better said: a lack of preparation issue. Participants might not realize that class will begin on time based on their past experience with other virtual events. Or they might not believe they are expected to participate, and therefore it doesn't matter if they show up on time. Or they might be searching through their email to find information about the class and be unable to find the correct connection details. Regardless of the actual reason, there are several things within your control that will help with this situation.

These solutions include the following:

- *Make sure it's not a technical issue.* First, most virtual platforms have very minimal outages or downtime. On the off chance that there is a technical problem with the software, check in with your provider just to verify. Second, check in with your organization's IT department to eliminate any network connectivity or other technical challenges that may prevent attendees from joining the virtual event.
- *Include complete connection details in all communication.* Upon registration for the virtual class, participants should receive the full connection details, including a web link and audio connection instructions. Then, with each reminder message, include the same connection details. That way, participants will be more likely to find the instructions when needed.
- *Hold a kickoff session.* Prepare participants by inviting them to attend an initial virtual training event that introduces them to the training curriculum. Give an overview of the topics to be learned, and establish rapport between the facilitator and fellow participants. Review connectivity tips and establish group norms. Keep this session short but extremely interactive to help set the stage for engaged learning. And most importantly, use this time to smooth out any technology issues that could get in the way of effective virtual training.
- *Consider sending a countdown email.* Because they remain in their normal work environment, participants may let the time for training sneak up on them. If you send an email 15 minutes prior to the class time, you stand a better chance of making sure they are ready when you are. A helpful email might remind them to gather any materials they'll need, suggest they put their phone on "do not disturb," or encourage them to get a glass of water.

### Tip for Success:

Send reminder messages before virtual events to help keep the training top-of-mind. Use these messages to build rapport between the facilitator and participants, and to begin introducing training topics.

- *Start 10 minutes early.* Invite participants to join the virtual class 5 or 10 minutes early. Use automated invitations to post this advance start time on participants' electronic calendars. Having this extra few minutes will allow the program to have a "soft" start with an opening interactive exercise that takes place while everyone settles in for class. It also gives you buffer time for any technology issues that may need to be handled. As long as this time includes interactivity for all participants, then you will get the class off to an engaging start while still lowering the threshold for any connection challenges.
- *Use a producer.* Producers are the technical experts who assist facilitators during virtual training events. They might be a co-facilitator who actively engages with participants, or they could be a silent partner who stays behind-the-scenes. Either way, the producer's role is to help participants get connected and stay engaged with the virtual classroom platform. By using a producer, the facilitator will be free to lead the virtual session while the producer can help individuals who need personalized assistance.

## #4. Unexpected Events

### **The Problem:**

You have challenges with unexpected events when...

The virtual training event doesn't go as planned. It might be interrupted by a power outage, a telephone drop, or even a disruptive participant. It could be a surprising distraction, or maybe just an activity that does not happen as planned. What these situations have in common is that they are unforeseen, unplanned and disruptive to the virtual training event.

### **The Solution:**

*Over-prepare for unexpected events, stay calm when they occur and manage them gracefully.*

You might think that unexpected events are simply a natural part of live online training. Things happen and technology can fail. While this may be true to an extent, advance planning and preparation will minimize these events and reduce any potential negative impact on the learning. As they say in show business, "the show must go on." Here are several ways to mitigate unexpected events:

- *Learn the platform features.* One cause of unexpected events is a facilitator who does not know the platform tools well enough to run a virtual session. They may accidentally click on the wrong button or forget to turn on a feature. Every facilitator should expertly know the software and all of its features, including what every menu command means and what every button does. Facilitators should be able to help participants find the tools and be able to use everything with ease.
- *Prepare participants in advance.* Use your pre-event communication opportunities to share technology information with participants. Ask them to use headsets and

avoid using speakerphones for clear audio connections. Advise them to use wired connections when possible to minimize any potential wireless connectivity issues. Consider sending a simple technology checklist for them to follow.

- *Give clear directions for every activity.* Another cause of unexpected events is participants not knowing how to use the platform tools. When a facilitator provides instructions for virtual training class activities, they need to be extra clear on exactly how the participants should respond. For example, a facilitator might ask a question and then say, “choose your answer in the poll question responses found in the lower right corner of your screen and then click the submit button.”
- *Have backup options planned.* Make plans for contingencies or unusual situations that could possibly occur. For example, if lightning storms are forecast for your area and power outages are possible, then have fully charged battery backups for your equipment. Or, if you plan to use webcams but think bandwidth may be a challenge, have photos that could be shared if needed. Since virtual classes rely on technology and the Internet, create redundancies and backup plans as your “just in case.”

If, despite all your advance planning, an unexpected event still arises during a virtual class, then do one or more of the following: <sup>1</sup>

- Stay calm and take a deep breath.
- Let participants know what's going on, if appropriate.
- Spend just a moment or two troubleshooting the issue.
- Take a short break to deal with the situation.
- Use one of your backup plans.

### Tip for Success:

If something unexpected happens during a virtual class, go to Plan B. And if Plan B doesn't work, then go to Plan C. Of course, this advice assumes that you have thought through backup plans for common contingencies.

<sup>1</sup> This list is adapted from my book, *Virtual Training Basics*, ©ASTD Press, 2010.

If you have a producer or co-facilitator on board, then you could assign them the task of troubleshooting or handling any unexpected challenges that arise during class. That way, the facilitator can stay focused on the participants and their learning while the producer works with the individual who needs extra care.

Of course, if it's a situation that affects the entire class and it's not possible to continue, then keep participants informed, take a short break if necessary, and regroup when possible. Most challenges are temporary and can be easily overcome.

## In Summary

Healthy virtual training is a vibrant place of activity and learning: Participants engage in the training topic, learn something new and are able to apply the acquired information back on the job.

Make your virtual training a success by applying all the tips in this paper because healthy training really is up to you!

## About Cindy Huggett, CPLP

Cindy Huggett, CPLP, is an independent consultant, professional speaker, instructional designer, classroom facilitator and author who specializes in workplace training and development. With over twenty years of experience, Cindy has successfully designed curriculums, facilitated classes, and led training rollouts in almost every industry and every size organization.



Cindy is the author of *The Virtual Training Guidebook: How to Design, Deliver, and Implement Live Online Learning* and *Virtual Training Basics*. Cindy is also a past member of the ASTD National Board of Directors and was one of the firsts to earn the Certified Professional in Learning and Performance (CPLP) designation.

You can find Cindy sharing training tips on Twitter as @cindyhugg or on her website ([www.cindyhuggett.com](http://www.cindyhuggett.com)).

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