

It takes more than technology to effectively launch virtual training; a culture change also is necessary.

# MAKE virtual TRAINING a success

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BY CINDY HUGGETT

Six years ago, Sodexo's talent acquisition leadership team sought to enhance the quality of onboarding for new recruiters. They recognized how influential this can be to success, especially when working in a virtual environment. Since the program's restructuring, new Sodexo recruiters now participate in a two-week all-virtual session that combines short, live, online sessions with a dedicated team trainer, interspersed with hands-on practice and work with a mentor in the virtual classroom.

"I was able to propose to the leadership team a new approach to onboarding via virtual training that resulted in reduced new hire ramp-up time," says Anne Scott, former training program developer for the team.

Successful virtual training is more about changing hearts and minds about learning than it is about implementing new technology. In many cases, it's necessary to change your organization's cultural mindset about learning to have virtual training success.

So what factors contribute to the success of a virtual training initiative? There are three critical steps: Define it, set the stage for success, and prepare people.

### Define it

First, step back and define two things: What do you mean by virtual training, and what's your vision of success for it?

Start with your vision of success by asking: What's important to the organization? Is it saving time? Decreasing costs? Improving a particular business metric, such as reducing manufacturing errors or increasing sales?

Once you have identified an important goal, use it as your guidepost for virtual training success. That way, virtual training will receive more organizational support than it might otherwise.

For example, if this year's target is to increase productivity, then focus on how virtual training will help increase employee productivity by allowing employees to stay at their desks for shorter chunks of learning.

As you define success, be sure to talk with all of the stakeholders involved or interested in your virtual training program. These individuals range from designers to facilitators, to participants, to participants' managers. And of course, remember to include your organization's IT department in the conversation as well. Get them involved with the conversation early so that they will be more likely to support it.

Not only is it important to define success, it's also essential to determine your organization's exact definition of virtual training. Almost everyone has a different understanding of what virtual training actually is.

From a one-way presentation style webcast, to video conferencing with groups of participants huddled around a conference room table, to individuals learning and practicing a new skill—all of these could be considered a type of virtual training. By getting clear on what your organization means by virtual training, you can set appropriate expectations with everyone involved.

It is important to get clear on your definition because mismatched expectations almost always lead to disaster under almost

## Defining Virtual Training

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

These virtual training classes are typically 60 to 90 minutes in length with 10 to 15 people per session and interactivity every four to five minutes. In comparison, a 60-minute presentation-style webcast might have thousands of participants with little interactivity, and a short marketing webinar might have 50 to 200 participants with some limited interactivity.

any circumstances. When applied to virtual training, lopsided expectations can lead to presentation-only-style sessions and passive participants who don't engage in learning.

Think of it this way: If you intend that virtual training be an interactive experience for learners, but the speaker thinks he will be giving an online lecture, then there are bound to be disappointed and disengaged learners. Or, if your participants think it's a passive webinar but the facilitator expects engagement, the event will not go well.

Nip these common problems in the bud by defining what your organization means by virtual training, and communicating it to everyone involved. It's part education and part communication, all adding up to clear expectations.

### Set the stage for success

Next, it's essential for you to set the stage for virtual training success. There's more to it than just putting a class on the calendar and sending out a meeting link. That's like throwing spaghetti on a wall and hoping that it sticks. Instead, it takes thoughtful planning for the change with clear intention.

Most successful change management initia-



## BY GETTING CLEAR ON WHAT YOUR ORGANIZATION MEANS BY VIRTUAL TRAINING, YOU CAN SET APPROPRIATE EXPECTATIONS WITH EVERYONE INVOLVED.

tives start small and then build momentum. Do the same with your virtual training—start small with a successful pilot and then grow. Identify and involve early adopters who are comfortable with technology and excited about virtual training. Create a short, meaningful, interactive virtual training class that is extremely relevant to this intended pilot audience. And find an eager facilitator who can have enough time to fully prepare with available resources to support what they need.

For example, when Cheryl Scanlan, founder of Way of Life Coaching, decided to expand the geographic reach of her coaching classes, she changed an eight-month in-person program to an all-virtual one. She set the stage for success by starting with a small pilot.

Her first group of participants knew they were part of the inaugural virtual program and were eager to try it out. Scanlan and her team spent several months planning and testing almost every aspect of the program. They then worked with this pilot group, tweaking things along the way and gathering feedback to improve upcoming sessions. By using this technique, Scanlan was able to figure out what did and did not work, and laid a solid foundation for future virtual programs.

Another part of setting the stage is testing the technology to ensure everyone and everything is prepared. In Scanlan's case, every pilot participant was asked to join a 30-minute "tech check" session to ensure their computers were set up and ready to go prior to the first virtual training session. They also learned the web-based classroom platform features so that the first class could run smoothly without needing to stop and explain basics, such as how to chat or annotate on the whiteboard. Since all of the pilot participants were new to the virtual class-

room, this small yet important time investment set the program up for success.

Test virtual training technology by:

- getting participants comfortable with the virtual classroom platform so that they're not focused on it but instead can focus on the learning that will take place online
- ensuring participants will have a good learning experience rather than become frustrated over not being able to connect and participate.

In addition, creating a positive participant learning environment has the potential to make or break future training sessions. Simply put, you want the pilot participants to become champions, and share and spread good news about their virtual training experience. Setting the stage properly creates momentum for virtual training success.

### Prepare people

Although properly functioning technology makes virtual training work as it should, it's the people involved who ultimately will determine whether virtual training becomes a sustainable success in your organization. Consider these individuals who will play a role in your organization's culture shift:

- designers, who need to design interactive, relevant sessions that match your definition of virtual training
- facilitators, who need to engage participants using expert online delivery techniques
- participants, who need to change their mindset about live online learning at their desks.

For all of those roles, virtual training is a new way to learn and requires new skills and methods. To prepare each of these people

groups to more easily adapt and accept change, use the following five proven techniques.

**Educate everyone on your definition of virtual training.** Realize that it's not just a one-time definition exercise, but instead requires continual reinforcement on what virtual training success looks like. This strategic emphasis will help you and everyone involved stay focused on the end goal.

**Communicate frequently with stakeholders and keep them informed about progress.** It's important to share progress toward goals, as well as successes and challenges along the way, for transparency. Lack of information can contribute to lack of adoption, whereas intentional communication contributes to intentional success.

**Enable designers and facilitators to become experts in your virtual classroom software platform.** Give them time to learn it inside and out, so that they can make use of all available features and tools. That way, they'll feel comfortable and equipped.

**Keep initial virtual training designs both simple and interactive.** Aim for creating relevant programs that solve measurable business problems, with interactive engagement every four to five minutes. This will allow your virtual training to be more interesting than whatever potential distractions going on during a session.

**Equip everyone with needed resources.** Keep the following tips in mind.

- Facilitators should have technical support from a co-facilitator or producer. A best

practice for virtual training is to allow the facilitator to focus on participants' learning while someone else takes care of the technology.

- Participants and facilitators alike need headsets for their audio connections, so that they can use their hands to type and click without having to uncomfortably cradle a handset on their shoulder for 60 to 90 minutes. (Note that speakerphones are not the best solution for virtual training due to unclear quality and echoes.)
- Participants need to connect using their own computers so that they can individually participate in planned activities, unless your virtual training definition and design explicitly allow for shared connections (such as a team sharing a conference room link).

When you follow these five techniques, it gives people confidence in your virtual training solutions and makes it easier for everyone to accept and embrace it as a viable way to learn.

## Overcoming challenges

When your organization decides to implement virtual training, follow through with it even when challenges arise. It might be tempting to take a shortcut, such as skimping on design resources or not giving facilitators enough time to prepare. However, do what you say you'll do by delivering on your promises. For instance, if you defined and communicated that virtual training will be an interactive

## Technology Considerations

Even though culture shift is about hearts and minds, there are still some important technology items to consider for successful virtual training.

**Meeting or training software product?** Most common virtual platforms have several variations: a meeting product, a webinar product, or a training product. Based on your definition of virtual training, select the one most appropriate for your needs.

**Teleconference or VOIP?** Most common virtual platforms also have the option to use integrated teleconferencing or voice-over-

IP for audio. Select what's most appropriate for your needs depending on your participants' bandwidth capabilities and how you want learners to interact via audio.

**Mobile devices or computers?** Most common virtual platforms now offer a mobile app for easy access. However, most of these apps have limited functionality, which means learners may not be able to fully participate in an interactive session. Based on your definition of virtual training, decide whether you will support participant use of mobile devices for training classes.



experience, then deliver it that way. That builds credibility and contributes to the long-term viability of your initiative.

As with any culture change, there are bound to be challenges along the way. You might have a virtual class that doesn't go as planned or you might run into an unexpected technology issue. When these setbacks occur, don't abandon the effort. Stay focused on the positive, and celebrate what is working well.

Collect even small success stories, share them with your stakeholders, and keep moving forward. Ultimately, virtual training will take hold in your organization as a viable and sustainable way to learn.

Learn from the success story of Andi Campbell, head of learning and development at LAZ

Parking. She has built virtual training into her organization's learning strategy. It's not a big event or production, but instead is just the way learning happens in the organization. She defined it, set the expectations, and prepared everyone appropriately. "We're learning, and we just happen to be doing it online," says Campbell.

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