

HOW TO...

DESIGN FOR VIRTUAL DELIVERY

Increasingly we are expected to deliver training virtually, to remote delegates rather than in a Face-to-Face environment.

It isn't as easy as taking your face to face content and delivering it via a screen. Anyone who has attended virtual fitness, music or craft classes knows that it just isn't the same. For training to WORK in a virtual environment, it has to be DESIGNED with that virtual environment in mind.

Here are my tips for designing training for virtual delivery.

1. **Participants First** – Just as with a live event – start with your participants needs and learning objectives. Keep this in the front of your mind at all times, or you can quickly go off track.
2. **Independent Learning** – Think about what content will be covered and how much of it can be covered through independent learning prior to the online session. Asking people to do some reading (or watching) and consider some key questions in advance helps to create a level playing field and means that people are primed to contribute when asked.
3. **Know your Platform** – Wherever possible know what platform will be used to deliver the training – is it Zoom, Skype, Microsoft Teams, GoToMeeting, Adobe Connect? Each platform has slightly different functionality to you need to know what tools you have at your disposal. If you aren't sure, stick to the methods that are available on all.
4. **Write JIs** – When delivering Face to face Training, people just need to know where to be and when to be there. When delivering virtual training they may need to do some setting up in advance. Create a "Getting set up" guide and orientation notes that can be sent in advance and introduce the tools that they will be using during their virtual session.
5. **Orientation** – Either record a video to introduce delegates to the platform and tools which can be accessed independently OR (in the case of programmes or longer sessions) set up an orientation meeting where people can get to grips with the platform and get to know each other, so when the course starts properly, the trainer doesn't have to worry about the tech..
6. **Overview** – Create an overview document for the trainer explaining what tools they will be using during the session and a quick reference guide to using them. As you would create an equipment and support materials list for a live course so the trainer can check they have everything they need, creating this overview allows the trainer to check they are familiar with all the tools.
7. **Preparation** - Provide instructions about what the instructor should set up in advance e.g. polls or breakout rooms, so they can be properly organized for the session..
8. **Icebreakers** – Unless the group is small (8 or less), avoid traditional icebreakers. They take too long. Instead utilise the chat function to encourage people to say a little about themselves when they arrive or create a poll or quick quiz to get a feel for participants and make their first contribution an easy one.

9. **Ground Rules** – Perhaps more important than in Face-to-Face training, ground rules need to be explicit. You can create standard ones to be sent out in advance and then make sure time is built in to the start of the session to discuss them and add any others that people feel would be helpful.
10. **Plan exercises in detail** – One of the main differences between online and face-to-face DELIVERY is the reduced agility. In a Face-to-face session the facilitator can almost decide on the spot how to run an exercise (within certain limits) e.g. they could do a flipchart exercise in groups, a pairs discussion, use picture cards, give everyone the same questions to consider or different groups different things to consider. In the online world, these things have to be designed and set up in advance – particularly if you are using breakout rooms or small groups. Clear assignments have to be created for each group in advance or the facilitator will lose time and engagement as they try to set things up, and delegates are likely to get confused.
11. **Guide the facilitator** – Write DETAILED facilitator notes. Highlight when slides should be advanced, suggest the questions that should be asked and so on. For each interaction, suggestion which tools they should be using, e.g. “ask participants to annotate the slide”, “ask participants to answer in chat” or “ask participants to raise their hand and select two to share their examples verbally”. Giving this guidance means that the facilitator is less likely to keep falling back on the same tools and helps the session to maintain flow.
12. **Build in Interaction** – In a face-to-face environment, you can SEE whether people are engaged or not. You don't always have that in a virtual environment. Build in some sort of feedback or interaction every 3 minutes to keep participants focused. This may be simply “give me a thumbs up if you've come across this before”, or “give me a tick if you're happy to move on”. Discussion or more detailed activity should be included every 15 minutes or so.
13. **Keep the Session Short** – As a general rule, keep online sessions to a couple of hours where possible. It IS possible to run full day sessions, but running a 2 hour session for 3 consecutive days may be easier to manage than one 6 hour session.
14. **Build in Breaks** – Obviously, we build in breaks in face-to-face training but in the virtual world, you should build in more breaks (albeit shorter ones) more frequently. Taking 10 minutes every hour is better than 30 minutes every 3 hours. Encourage the facilitator to keep the meeting room open during these breaks so if delegates want to chat they can. The facilitator can also make themselves available for private chat during breaks if they wish.
15. **Create great supporting materials** – Even the best designed virtual session won't engage the senses in quite the same way as a face-to-face session, and this means it may not be as memorable. Creating appealing and detailed supporting materials to accompany the session provides a very useful reference document that delegates can refer back to in their own time.