Designing Virtual Training Sessions

A checklist for success

Designing for virtual training isn't so different to designing face-to-face sessions. The same principles apply – we simply have to take more care around accessibility, technical know-how, learner maturity and make sure that our exercises work well in a virtual environment.

Here's my step-by-step guide to designing a successful virtual training session– whether you are designing from scratch OR converting a face-to-face workshop.

1. **OUTCOME –** Is your outcome clear? Your outcome is the ONE reason why someone will want to attend your session. It sells it to them – it solves a problem or gives them an advantage. It is the WHY. You should be able to write this is one sentence.

2. **OBJECTIVES** – Your objectives are the specific things that people will be able to do as a result of the course. Objectives are linked to the main chunks of your content (not every bit). They provide the WHAT will be learned. Use Bloom's Taxonomy to make your objectives clear and robust.

3. **AUDIENCE** – Who are they, what are they like and what do they expect? Understanding their starting point (in terms of the content you are covering and familiarity with online tools) will help you to shape your course. Profile your audience if you can before you begin to design in detail. The more it speaks directly to them, the more successful it will be.

4. **PLATFORM** – What will you be using to host your session? If you know this in advance it will make the design easier as you know what functionality you have built in. It's also important to consider whether the participants are familiar with it. If they AREN'T you need to think about how you can get them up to speed before the session so that they can participate fully. Note – it may not be YOUR job to educate them, but it IS your job to plan for this.

5. **SCOPE** – Will your course offer breadth or depth? Because we (generally) need to keep virtual sessions short, it's unlikely you can do both. Are you providing an overview of a topic or covering one specific thing in detail? Either is fine – be guided by your outcome.

6. **CONTENT** – What content needs to be covered? Bearing in mind the profile of the audience and the OUTCOME you want to achieve. Virtual training needs to be direct and to the point as sessions need to be kept short. Be ruthless. Plot the straightest line from where participants are now to where they need to be at the end. Include only this in your session.

7. **ACCOUNTABILITY** – What can participants do on their own? Instead of doing everything in a 7 hour workshop, think creatively and break the session down into multiple bite-size learning experiences. What can be done as independent learning before the virtual session or after it? Stress that this independent learning is a vital part of the programme, and make sure people have enough time to complete it.

8. **OPTIONAL CONTENT** – Identify content that enhances your course and offer it as extra learning. In a face-to-face workshop we often have the luxury of being able to go into more detail on some topics, or explore a related issue. These topics should be signposted as independent learning or offered as an additional webinar/mini course – something that adds value but isn't critical.

9. **STRUCTURE** – Make sure your content FLOWS. Just as with a face-to-face session, following a brain-friendly structure gains and retains attention and helps with transfer of learning. Use the MASTER structure and you won't go wrong! Master stands for Mindset, Acquire Information, Sift for Meaning, Trigger the Memory, Exhibit the Learning and Review/Reflect. There is a separate "How to" Guide on this.

10. **BREAK IT DOWN** – Attention spans are shorter than they are in face-to-face sessions so we need to break each part down into the smallest size chunk possible. No-one will listen to a 30 minute lecture and then complete a 1 hour activity. Intersperse information giving with interaction – however small. Aim to have a small interaction every 2-3 minutes and a larger activity or discussion every 15-20.

11. **EASE** – How can you make the actual session as easy for participants AND yourself as possible? In a live session you can distribute handouts, show video, create break-out groups and complete questionnaires "in the moment". This is not so easy in the virtual environment so plan ahead and send out as much as possible in advance OR place everything on a shared drive (e.g. in Microsoft Teams or GiraffePad) to make everything easily accessible.

12. **RED-THREAD -** Signposts and milestones are important in any course, not just virtual ones. Make frequent references to how each part of the session helps them achieve their objective and where you are in terms of the objectives and agenda. Clearly link content together so people can see how each part relates to another. Again, this helps the content to stick and aids transfer of learning.

13. **ACCELERATE LEARNING** – As with face-to-face training, follow accelerated learning principles to maximise engagement and learning. This means working WITH the brain's natural habits rather than against them. There is a separate "How to" Guide about what that means.

14. **KEEP IT SIMPLE** – Don't over-complicate it. Remember that people are there to learn about your topic and achieve a specific outcome, NOT to be wowed by your technical prowess. The challenge should come from the content, NOT from the tools so when selecting methods, use the simplest one that will do the job (ideally one that is integral to your hosting package) without being too repetitive. It makes it easier to facilitate and easier for participants to engage. There is a separate "How To" Guide on that. If you decide to include external tools, make sure that you (and the facilitator if it isn't you) and participants can all access it and know how to use it. Going in and out of different packages can cause technical problems so only use them if they will really add value.

15. **VISUALISE** – It can harder to react in the moment when running a virtual training session than it is in a face-to-face one. You have to know EXACTLY how each section will work. Visualise yourself running the course. Even if you aren't going to be the facilitator, visualising running it makes sure that you think of everything, and don't write anything that will be too difficult to do. Visualisation is mental practice, which has been proven to be almost as effective as physical practice.

16. **STAGE DIRECTIONS** – Write down what exactly you need to do in detail. You may be able to use very scant instructions for your face-to-face courses because you have years of experience to fall back on. Until training virtually is second nature, writing detailed instructions means that you won't get lost or forget how to do things. It will help the session run much more smoothly.

17. **ALTERNATIVES** – Because it's harder to react in the moment, identify alternatives for **key** exercises in advance of the session and plan them as if you are going to run them. For example, what if only 3 people attend when you were expecting 6? What if people attend via their phones instead of laptops?

18. **TIMINGS –** Even though you won't be physically moving people around during the session, be realistic with timings. Allow a bit of settling in/chat time in break-out exercises for example; accept that people may need a few minutes to work out how to use and save a whiteboard. The tools are probably not yet second nature to participants so allow them time to adjust.

19. **SESSION PLAN** – Write your session plan as a separate document rather than as notes on slides. Use something like SessionLab - it's far easier to use – but make sure that your slides and any other resources are clearly referenced so you know when to move to them.

20. **PREPARATION SHEET** – In a face-to-face session, it's good practice to have a separate list of all the handouts and supporting equipment you will need to run the session. It aids preparation. For virtual sessions, you will still need that list – as well as identifying the handouts and other resources that you will need and when you will send them to participants) you should also list all the OTHER preparation you should do e.g. have a YouTube clip ready to play, or set up a poll. It may seem excessive, and maybe if you are only running a session once it is, but if it's something you will run multiple times, it will save you a lot of time and take a lot of stress away.

Designing Virtual Training - Summary Checklist

Have you…

1.	Expressed you OUTCOME in one sentence?	❑
2.	Used Bloom's Taxonomy to write clear learning OBJECTIVES?	❑
3.	Profiled your AUDIENCE?	❑
4.	Found out (or decided) which PLATFORM will be used?	❑
5.	Decided on the SCOPE of your course – will it offer breadth or depth?	❑
6.	Selected the core CONTENT that links directly to the outcomes and objectives?	❑
7.	Identified learning that participants can do INDEPENDENTLY?	❑
8.	Identified OPTIONAL content and considered how that might be provided?	❑
9.	Structured your session using MASTER?	❑
10.	Broken the content down into SMALL CHUNKS allowing minor interaction every 2-3 minutes?	❑
11.	Identified what can be sent out in ADVANCE to make it easier for everyone?	❑
12.	Woven a RED THREAD through the session linking each part to the outcome and objectives?	❑
13.	Followed ACCELERATED LEARNING principles as much as possible?	❑
14.	KEPT IT SIMPLE – without making it boring, and selected any external tools carefully?	❑
15.	VISUALISED running the course?	❑
16.	Written clear STAGE DIRECTIONS?	❑
17.	Considered ALTERNATIVES for you MAIN exercises?	❑
18.	Checked that your TIMINGS are realistic?	❑
19.	Written everything in a separate SESSION PLAN?	❑
20.	Created a PREPARATION SHEET that lists everything you need to have and do before starting the session?	❑