

General Zoom tips

- Don't forget to press record if you are planning to record the session!
- You can leave a post-it note on the screen to remind you or you can set to 'record automatically in settings in zoom.us.
- Ensure participants are ok with it being recorded. This can be agreed in advance and reminded on the day.
- Recording can be done locally to computer or in the cloud.
- Remember to pause the recording during breakout sessions.
- You don't need to have your slides on all the time. It is really nice for the participants to see more of you and less of the slides. This will help with transitions too.
- Do more of a running commentary than you would in F2F e.g "I am going to share my screen" "I am going to ask you a question". "I shall give you two minutes to think about the question, then I shall come to you individually for your answer". "Simon, I will come to you first." "I am going to send you into breakout rooms now." etc etc.
- Make sure people are very clear about the task in the breakout rooms. You could have this on a slide. Be explicit about what they have to do including the time available.
- Say that one person should take responsibility for making notes and be prepared to share their ideas when they return to the main room. I might tell them to bring back their ten top tips for.....
- Visit the breakout rooms in person to check they are doing the above.
- Let them know how they can call you for help if necessary - there is the function for them to simply 'ask for help' when they are in the breakout room
- You can decide how long they have in the breakout room. You can use the timer on your phone.
- Remind them to hit the 'join breakout one' button
- Explain that there will be a 60 second warning before they return to the main room.
- Whilst they are in breakout rooms you can broadcast messages to all rooms. You may have forgotten to mention something, or you may be adding the next step in the task (I would do this for problem solving).
- You can move a person from one breakout to another.
- Talk through explicitly what you are doing. "I am going to run a poll" "You will see a question come up and the option to choose 1- 10." "Please select one option and press xxx."
- Reassure the participants that their answers in the polls are anonymous.
- State "I can see that 90% of the group has submitted their answers..."
- Consider setting up **xGary2** as a participant on a separate device so you can see what the participants see. Keep him muted and video off.
- Consider an internet Plan B e.g using 4G on your phone.
- If you have a second screen/webcam, this could be pointed at your flip chart.
- Remember the hide self view and show self view
- Video settings - 'Spotlight you' function - so you stay the main person on screen even if someone else is talking - a very useful feature.

- Also in video settings - 'touch up my appearance' function (makes them laugh)
 - Clear desktop before starting the session.
 - If you want them to annotate, be clear re instructions. "Go to the top of the screen. You will see 'sharing GG's screen. Next to that is 'more options' Click on that and you will see the 'annotate' function.
 - Then briefly show what they can do in annotate e.g text, draw, stamp, heart.
 - If they annotate a slide or a whiteboard, save before clearing.
 - If they start getting silly with annotating, disable the ability to annotate and/or show names of annotators.
 - As host you can drag the annotations around the screen, but they can't.
 - Have a pre-prepared slide divided into six with their names on. They can annotate that
 - If there is a later spontaneous task you can ask them to use the same area as last time.
 - Be clear about what the chat is for.
 - If they or you want to save the chat, click on 'file' in the chat function.
 - I get them to provide feedback towards the end of the session in the chat. I ask them to do this via a private chat with me.
 - I mention this at the beginning and ask them specifically for feedback about the content and also the tech. I ask them to use two headings - WWW (what worked well) and EBI (even better if).
 - I then copy and paste individual bits of feedback and send through to the client. I can also use snippets on my website.
 - Consider a coffee cup slide. I got one from Canva. Happy to share if you want it.
 - I also tell the participants in the joining instructions that I will be on the call 30 minutes before we start if they wish to come early and check their audio etc. This can be reassuring for technophobes.
 - I have a sheet ready with their names plus roles and I can note each time they contribute.
 - Ask people to use speaker view, not gallery so they can see the trainer in the full screen
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- Ask questions that are easy to answer
 - Breakout rooms are intuitive
 - Clear the desktop
 - Look at Zoom's YouTube channel
 - Zoom's own free tutorials
 - Gallery view/speaker view - get CPs to spotlight me
 - Ability to pass admin rights to a producer (larger groups)
 - Ask for one confident person to collate the points in the breakout room and/or using the whiteboard.
 - Do a sound check. Helps getting people used to talking very early in the session. Or check their sound individually as they enter the room
 - Can co-host on Zoom.

End of session

- “I shall encourage you when we hang up to make some notes on your action plan about what you are going to do to make this work for you whilst it is fresh in your mind.”
- “Whilst we are all still on the call, please give me one takeaway from the session. I am going to go top to bottom on my screen.

Breakout rooms

- B/O - can do random or choose who.
- Cannot pre-set. Got to be from the people online.
- Having same people in the B/O rooms keeps things simple. But you can just press recreate B/O if you want to mix up the groups and you can easily swap people round (once you have created the B/O room)
- Having small numbers in the B/O groups allows good discussions
- You can even put them in individual B/O rooms to do a longer task alone, then bring them back.
- One person in B/O can create the whiteboard - the owner.
- That person can press save
- It shows in Folder
- Ability to annotate own slide
- I prefer not to use the whiteboard function. I simply ask them to discuss the topic and to make sure one person is taking notes and is prepared to feedback in the larger group (just like I would do in F2F)
- “I have an exercise for you. I am going to give you three mins. Will break you into B/O rooms randomly. You will be with three or four others. You will see something pop up on the screen. Please just click on it.”
- In groups come up with three benefits of F2F and three benefits of Virtual.
- I will drop in the rooms as a facilitator.
- Do timing myself.
- Then use the one-minute countdown to give notice to finish the B/O.
- When people return from B/O your slide disappears. Need to re-share.

Breaks

- Use the break to get people away from screens.
- Take care with breaks - when they are gone, they are gone!
- Be very clear about time to restart and stick to that.
- I use bigtimer.net and share my screen
- Can get them to do stretches
- Encourage the group to do that at least every 30 minutes.

Length of session

- Do shorter sessions - more often
- Don't run full-day sessions - too long.
- Nice to do 2-hour sessions.

- Brings better learning outcomes (and also not being a day in hotel)
- Chunk it up!
- Then let people go off and practise that skill.
- Zoom has a great balance between simplicity and features,
- **Hardware** - a good headset or microphone, separate mouse and keyboard, pen mouse, pen and paper.

Single key objective with virtual training

- Ensure everyone takes part - use tip re logging how often people comment on pad.
- Reproduce human delivery
- Set scene before course - LinkedIn post? GiraffePad? Clear joining instructions
- Get people to be as prepared as possible.
- Offer to be on the call 30 minutes early for anyone who is nervous about joining/using the tech.

Logistics

- Log-in information
- Start and end times
- Pre-course activities
- Need to download Zoom app?
- Technical JIs
- How to join the audio
- Anything that makes it simple for them
- How to join with video (encourage)
- Any IT support they may need from their own organisation
- How to access materials. My website? Giraffepad?
- Any special needs?
- *Q1 - How to get learner to engage before the course starts:*
 - Pre-notes
 - Training video
 - Set goal in advance
- *Q2 - How to increase the human element in a virtual setting*
 - Exercises - stretches
 - Have a drink
 - B/O sessions
 - Make sure your camera works
- *Q3 -How to encourage learners to support each other post-training*
 - Buddying
 - Peer to peer
 - LI or FB group?
 - GP?

- Give them specific tasks to complete
- Certificate on completion?
- WhatsApp groups

Facilitation style

- Lively and interactive
 - How to deliver content (high level)
 - Give the minimum of theory possible in order for people to have a conversation.
 - Then can drip feed information in the B/O rooms rather than deliver everything to the main group.
 - Keep it high energy
- **Exercise** - what are the key considerations re the following five elements? Do this in groups. Two mins for this.
- **Room layout** -keep hands liberated, virtual background, glass of water, reduce background noise, space, lighting, nothing distracting, have pen/paper to hand.
 - **Posture, camera, position** - use more slides, KISS, exaggerate interaction, use prefacing, stand up, background, enough light, wireless headset, webcam or use from Mac, camera - just below eye level. Look at camera, not at screen. We need eye contact. Neil prefers not gallery view
 - **Tone of voice** - exaggerate tone and volume. Imagine talking to a real room. Slow down a little. Use pauses. Stand back a little. Use hands. Exaggerate facial expressions.
 - **Interaction** - B/O rooms, open Qs, Qs to named people, polls, some will dominate - facilitator needs to manage this (as in classroom), use pen/paper - ID who is taking part by making a mark. After each section, draw a line and do this again. Simple tip to see who is participating. Can then draw others in using Qs to named people. Use visual props if appropriate, use clicker, make use of B/O. Consider keeping the groups the same for ease or mix them up. Encourage speaking rather than just chat.
 - **Materials and design** - chunk down, very visual, more slides than the training room, send out digital materials. PDFs - editable, hyperlink sections, GP?, easy download instructions, light on text, follow up with something heavier after the course.

How to use Zoom as a Presenter

- Very chatty as people enter
- Warning being recorded (if you are recording)
- Remember to record!
- Consider virtual background. Can have this branded (zoom.us)
- Slide - Who is CM?
- LOs and purpose
- Slide - what we will be covering
- How to schedule a meeting - either live or in advance

- Give it a title
- Can set up a meeting password
- Avoids getting the wrong people in the meeting
- generate meeting link automatically - preferable.
- Can put logo into settings
- Can customise the title, logo and description
- Enable video etc
- Advanced options - allow people to join before host/not?
- Keep in waiting room - preferred for me and security
- Can set to auto record
- Enable polling in the settings (in web browser)
- Create in advance
- Need to toggle it
- Create a poll and give it a title
- Need to exit and go back in for it to be saved.
- Create a question
- Choose single or multiple
- add answers and save
- Can use this in any meeting
- Must exit and go back in
- Can see the results of any poll very quickly
- Host sees the results and can share
- Then close
- Fiddly to set up but works well
- Once I have polls enabled it will show up in the host toolbar
- Sharing whiteboard
- Share screen
- Click W/B
- Annotation bar
- Tell C/Ps to save the W/B - puts this into a Zoom folder. If you click quickly on the hyperlink it will show straight up on desktop.
- 7/8 minutes to play with the W/B
- One person to volunteer to own the W/B
- Needs to save
- Has more controls than the others
- Neil recommends the pen mouse
- In W/B settings -owner only
- On right hand - three dots - shows name of annotators
- Remind people how to annotate .
- B/O rooms are not recorded unless the host is in
- I will be popping in to see how you are getting on
- Can give one person the option to record in their B/O. Gets saved to their local PC
- For B/O can do random or select who

- Can set settings in B/O rooms
- Countdown time is useful
- Press open all rooms
- Host can see when people have joined
- Host can join a B/O just like in real life.
- Can keep same groups or recreate (will be new)
- Can require registration in account management
- One of the topics there is reports
- Also in settings, can see if someone is looking away from the screen
- Can annotate slide too
- People can put ticks onto the slide
- Can have co-host.
- Rapport - How are you feeling? Show me an emoji or give me one word in the chat
- Can use two screens - makes things easier, especially so you can keep an eye on the slides but mainly be back in the main room. The human element works best!
- Simple check re controls
- Use slightly slower speech and good eye contact.
- Be clear about how/where people should answer your questions e.g Hand up, jot down in the Chat.
- If use visual aids - lift them up so we can see them properly
- Mute everyone and get them red to unmuting themselves when they answer.
- Proof-read slides properly!
- Clear instructions - think driving test!
- Use Pixabay, Unsplash, Pexels for images plus iStock
- Some stand for the session - use a standing desk. May radiate more energy
- Could use clicker for slides if stood up

Kirsty Lewis - Designing virtual webinars and classrooms

- **REMOTE** acronym
 - **R**esponsibility
 - **E**mpathy
 - **M**eeting etiquette - call this out. E.g interaction, hands up, NVCs, not talking over, video and eye contact
 - **O**bjectives - need these just the same as F2F
 - **T**echnical tolerance - don't assume that all learners have the same capacity. Can show empathy here!!
 - **E**nd - properly!
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- Can do a **vote** using a slide and asking people to annotate - which is which?
 - Think of virtual being like in the real classroom
 - Try to have a max of 12.
 - Be clear whether this is a **webinar or virtual classroom**

- **Focus** on the knowledge that people need to be really in the moment.
- “We have a **whiteboard** activity coming up in a moment.”
- “What do you need to think about in relation to your audience?”
- e.g time zones, IT capacity, skill levels, special needs, attention span, attitudes, resistance, engagement.
- “Ok I am going to save that.” “I need to clear that before we move on.”
- **Five moments of learning needs** - new, more, apply, problem solving, change. Thinking through these helps with our LOs and what changes people expect to see.
- In a 30-min session - max number of LOs - 3.
- **Topics** - purpose and LOs - same designing F2F
- **Who** have we got?
- **What** do we want them to **change**?
- **Practicalities** - time, # session, platform capability, materials - what do I need? Which activities? How long? e.g case study, 60-120 mins, breaks? Constraints?
- Various **platforms** available. **Zoom** is most popular. Also Teams. Webex, GoToWebinar.
- **Design** - brainstorm or post-it notes. Make a flow.
- **Settling people in** - rapport and rituals. As facilitator, you create this interaction. Work the inner DJ e.g. Chris Evans!
- Invite people in e.g. Kirsty does a one-min silence. Allows people to become grounded.
- Ask them how are they feeling. Pop an emoji or a word in the Chat
- What can they see?
- What are you drinking?
- **Technical tolerance** - give time to explain the tech. Share the tools you will use in the session.
- Do some intros at the very beginning. Link with a sound check. Explain if I have muted everyone that they should feel free to unmute themselves when they want to speak.
- **Meeting etiquette** - call this online e.g one at a time. I am recording this session. What will happen to the recording . What will happen to the recording. How to ask Qs.
- Visual attention grabber to start.
- **Content** and exercises
- McCarthy’s format mode -
- **Why** are we here/doing the exercise?
- **What** is it that we are doing?
- **How** are we going to do it? The experience
- **What if?** debrief/making meaning.
- **End** - doing a learning review
- Always get people to be **reflective**
- What are you learning right now?
- What are you taking from this conversation
- Just put down in the chat box **one thing** you have learned so far.

- I have a **poll** for you - How often should there be interaction? Can be a poll, a question, reflective chat, W/B in a B/O
- Can even do this in webinars but easier in virtual classrooms.
- **Basic exercises** - ask for opinion rather than the correct answer (save embarrassment), share thoughts, chat, W/B, brainstorm, role play, paired discussions, chat box, stories and examples, interview someone, scavenger hunt - go find xxxx in your house, show a video, do a quiz, hands up, out of 5,
- Think of the W/B like a piece of flip chart.
- On Zoom can share a document in the Chat
- Interaction - need one at least every five minutes
- 8 hours to design and create a 45-min class.
- 15 hours for a 90 min class
- Detailed FAC guide
- Pre-thinking, documents, videos
- Power of the facilitator/producer.
- FAC guide in Word
- PPT deck in PPT
- Game-storming and Liberating Structures for ideas for exercises.
- Prezzi - like an online mindmap
- Need a clear end with a clear piece re learning review
- Pre-work - could be online quiz, reading, watch a video, listen to a podcast.
- How to engage ahead of course?
- How to make this as engaging as possible?
- Final poll of today - what pre-work task is your favourite? - video, podcast, read an article, email to read, phone call, something in the post.
- "Let me share the results of this poll" - favourites are watch a video and article to read. Lowest - snail mail/something in the post to open.
- Share purpose and LOs in advance

Principles of POSE

- Purpose
 - Ownership - how to put this on the learners
 - Safety
 - Engagement - how to create in the room. Through exercises, quizzes etc.
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- Check Pria Parker's Art of Gathering - why do we connect.
 - Put the learner in the spotlight.
 - It is about the group, not about the facilitator just talking.
 - Put in the interactions.
 - Make it more human.
 - How to connect with delegates in the room?
 - Don't want to ignore them/ be ignored, just as F2F.
 - For a large group it is worth having a producer.

- It is super important to help connect with the group.
- KL recommends 10 per class max without a producer for the purpose of max interaction.

Think about self

- Inner dialogue - how is it at the moment? Take deep breaths.
- Clothes - block colours are better.
- Make up
- Hydration - glass of water (no branding)
- Last-minute prep - pen/paper to hand. Phone on silent with WhatsApp at the ready in case need to communicate with the producer.
- Harvard power pose - Amy Cuddy

Roles

- Power of the **producer** (if using) - does the tech, moves slides, deals with chat, launches polls, manages W/B. Behind the scenes stuff.
- Ideally producer should be a facilitator in case they have to take over if there are serious tech problems.
- **Facilitator** - fully concentrates on the learners and the content. Shares messages, draws out the learning, creates space.

How we bring our best selves

- Reference to Mehrabian research. The interpretation of this is that NVCs have the most impact and influence.
- But virtual training will need more of the verbal too.
- If people don't hear properly they will quickly disengage.
- **Verbal** - Language directs attention.
- You should choose your words like you select a rail ticket - i.e. focusing on the destination.
- Be conscious of all the paralinguistics e.g er, um, no, like, so, you know, self-deprecating phrases.
- **Voice** - confers emotion.
- Tone of this sentence - "I didn't say this was bad."
- Can change speed, pace, inflection, timbre, can insert pauses.

How we use questions

- These are the root to involvement
- Open/closed? Open to gain information. Closed to confirm.
- Group/ individual?
- Can tee up to the group that you are going to ask a Q.
- Funnelling Qs - long warm up.
- "In a moment ..."
- "Unmute yourself and speak to the group...."

- Remind learners to use speaker view.

What about technology?

- Need a decent laptop
- Possibly buy an external microphone
- Lighting - that attaches to the side of the laptop
- External camera - e.g Logitech?
- Standing? Sitting?
- Use books to raise the laptop? Ironing board for standing?
- Camera in line with forehead?
- Think about the angle of the camera - avoid pea head.
- Avoid moving too much and in/out.
- Need a stable position
- Sit tall
- Use hands with meaning
- Normal eyes
- Can stand up if you wish.

What if it goes wrong?

- Have to become an improvisation ninja!
- See everything as an offer.
- Security of the platform
- Avoid Zoom-bombing
- Producer to step in?
- Plan B - flip-chart?
- As a last resort agree to postpone.
- After party - after the formal session, end cleanly, stop recording and then let people know you are happy to stay on for xxx minutes if anyone has Qs.

Zoom zone

- What is going on behind you?
- Lighting? Bought? Natural?
- Sit opposite a window.
- What can people see?
- Need to tidy?
- Virtual background?

End cleanly

- What have you learned today?
- One thing you will take from today and implement going forward?

SoF - Advanced Zoom delivery - April 22nd

- Some functionality isn't uniform for all users. Check they know the controls.

- Get them to try speaker and gallery view. Mention pin video and unpin - if you want to keep one person on the screen (such as me!).
- Check I have everyone's real name
- Go to photo and rename yourself
- What can you see from the window?
- Check they can use the chatbox
- Let them know re reactions eg thumbs up/ clap
- Commentary - I am going to share my screen
- Check group can see slide
- View options - side by side
- Tell them to use annotate and use the stamp to put a heart or tick
- As host I can save this and send to people later
- I have to clear the drawings before moving to the next screen
- Record!!
- CPs can clear all their own drawings
- If they just want to clear the most recent, use undo.
- Roadmap - verbal, NVCs
- If using a W/B can direct them to use parts of the W/B
- Also use chat. Chat moves very quickly
- Really helpful to have a producer to monitor the chat etc.
- Tim Andrews book - Where is your spotlight?
- Interaction includes typing, hands up, annotation
- As host I can move the text boxes around if people type over each other
- Save and clear
- Keep calm and apply strengths slide
- Consider a wired connection (ethernet)
- MacCarty's 4-mat system slide (more relevant re design)
- Words - direct attention (positive language), for instruction, for interaction.
- Don't say "What we are not going to cover" or "we don't have enough time for that"
- Show emotions through language.
- E.g "I am excited to show you."
- Clear instructions and lead in ..." I am going to ask Fiona and then I will come to Mervyn."
- Be as clear as possible -0 simple, clear, direct instructions.
- E.g "Unmute yourself Fiona and then ask your question."
- Heads up re activity. "Shortly we shall be going into a B/O room."
- Virtual questions
- Name, question, name vs pose, pause, pounce
- "We are going to do an exercise now and we are going into B/O rooms.
- As host, can create these auto or manually
- Now it is your turn slide
- Can only allocate people into B/O rooms once they are in the meeting. Cannot pre-determine

- W/B - go into the share screen and save.
- As back up ask someone else to make notes
- Allocate people to a task
- Visit the B/O rooms and check they know what to do
- Be explicit what is happening when they get message to go into a B/O
- Give clear instructions who is to do each task
- You always have a option to leave the B/O if no-one else is there
- Click to join B/O
- Be clear re time and final 60 seconds warning
- If you had the W/B and saved it goes into the desktop or documents on PC (Zoom folder)
- When you hit save allow to show (brief message)
- Use inclusive language “Let’s do....”
- “We’re learning together”
- Step by step instructions from Sarah re sharing the W/B
- Be very specific re time following a break
- Be prompt.
- Easier to name a person rather than “who wants to share”
- If recording, turn off during B/O as it doesn’t record the B/O only me twiddling my thumbs!
- Voice - pace and pause. Don’t cover face. Emphasis. Intonation. Move head more when speaking.
- Body language - still counts even if only top half
- Camera on and get CPs to also
- Stand or sit
- How much of me in camera
- eye contact - look at camera
- Gestures
- Audience gestures - harder to read.
- Virtual mouse is useful
- Clothing - block colours work better.
- Background - buy pull-up from Amazon or magic flip chart
- Window behind camera for light
- Share agenda
- If use a flip chart needs to be very close.
- Have a back up. Poss 3M desktop flip
- Words vs images
- Attendees view. help people to adjust to virtual environment as much as possible
- Logitech headset
- Yahoo images forlearning etc

Making learning stick - post course

- Hermann Ebbinghaus research on how we remember. Not much one week later!

- Likely to recall less than F2F.
- Reinforcement sessions
- 1:1 coaching
- Tasks/projects to complete

Benefits of virtual learning for stakeholders

- people/clients should buy virtual live training because: better ways of working, behaviour changes, new skills.
- Help customers to make those choices.
- Sell the benefits
- Focus on the results and logistics
- Breaking into smaller chunks - one topic at a time then apply
- As a trainer, link the topics
- Results can be better
- Logistics are easier and cheaper
- Don't need the whole day out of learners' calendars.
- Cost benefits come from time and travel.