3 BIG IDEAS FOR PRODUCING ENGAGING VIRTUAL TRAINING

with Kassy LaBorie

FREE Webinar on Monday, April 26, 2021, 2:00pm - 3:00pm EDT

Producing Virtual Training, Meetings, and Webinars
Master the Technology to Engage Participants
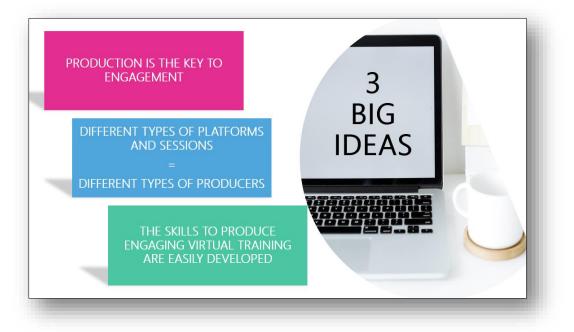
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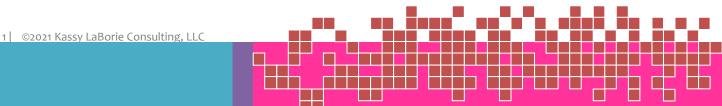
3 Big Ideas for Producing Engaging Virtual Training

VIRTUAL CLASSROOM PRODUCTION: What is it?

- **TRAINER / PRESENTER / MEETING LEADER → CONTENT AND MEANING**
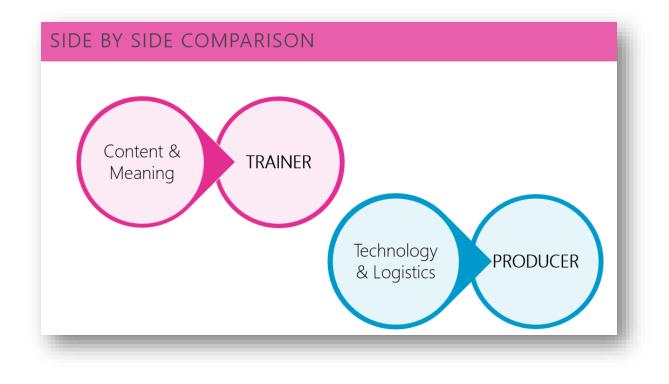- **PRODUCER / HOST / MEETING MODERATOR → TECHNOLOGY AND LOGISTICS**

Virtual classrooms, meetings, webinars, and webcasts all require technical setup and focus that is not necessarily within the knowledge or skill set of the trainers, presenters, and facilitators leading them. Virtual production is the planning, setup, *in-session management, and follow-up of all the logistical and technical details required of a successful and engaging virtual event.

The Producer is an individual who performs these tasks. Other titles for those who perform production tasks include but are not limited to: Host, Moderator, Virtual Classroom Assistant, and Event Specialist.
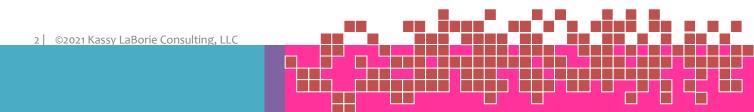
In-session management

Producers demonstrate and teach effective use of the tools of the online platform, guiding participants to connect and manage audio, use chat to communicate, annotate whiteboards, and participate in breakout activities to name a few. They support the facilitator and participants during the preparation, launching, and debriefing of activities during a live event. They assist with engagement of exercises and activities by role playing, commenting in chat, participating during discussions, and assisting with progress checks as needed.

SIDE BY SIDE COMPARISON

Content & Meaning → TRAINER

Technology & Logistics → PRODUCER

Notes:

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TYPES OF SESSIONS

Webinar versus Virtual Classroom Training

Webinar

30-45 minutes

- "Knowledge based" learning objectives
- Larger number of attendees
- Interactive

Virtual Classroom Training

1-3 hours, breaks needed

- "Skills based" learning objectives
- Smaller number of participants
- Interactive AND collaborative

TYPES OF PRODUCERS

Technical

Technical producers provide guidance and technical support on the use and management of the technology. They know the platform features and functions and are there to provide technical support throughout.
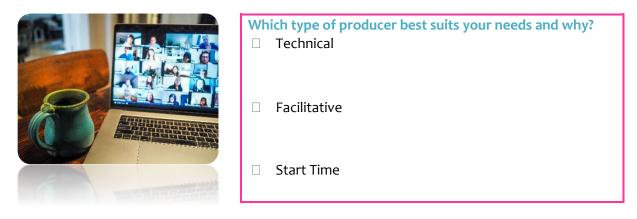
Facilitative

Facilitative producers do all of this too, but they bring an additional set of skills to the session: they are also able to facilitate learning, present content, and guide participants through an engaging live online event if requested and in a secondary or back up teaching role. They have also prepared themselves on the relevant content and have trainer and presenter skills for the live virtual environment.

Start Time

People who assist online meetings, webinars, and virtual training sessions only in the beginning to help everyone connect and get the session off to a good start. They do not stay for the entire session but do often remain available to be called back in if assistance is needed.
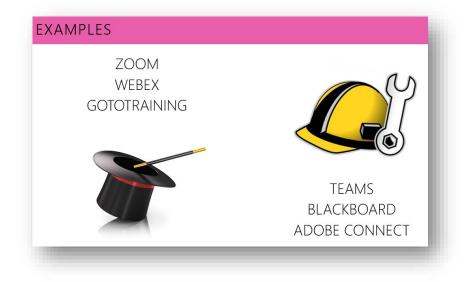
Which type of producer best suits your needs and why?
- ☐ Technical

- ☐ Facilitative

- ☐ Start Time

Notes:

TWO PLATFORM ARCHETYPES

Revealers and Builders

Having run thousands of webinars, online meetings, and virtual classroom training sessions over the past twenty years, my approach to learning a new platform begins by first identifying the *type* of platform I am dealing with. The first question upon receiving a login to a new platform is, "Do I share my materials in the moment, or can I upload them into the environment ahead of time?" The answer determines the planning, preparation, design, delivery, and support of all interactions and activities for the sessions.

I've categorized the platforms into two archetypes based on their primary presentation characteristics: Revealers and Builders. Revealers require sharing the screen or the presentation materials and activities after the start button has been pressed. In other words, the session must be opened before most actions can begin or be revealed. Builders enable pre-loading of presentations and other materials or activities before pressing the start button. In other words, content can be uploaded or built in advance and will remain there each time the session is accessed.

PRODUCER SKILLS

VIRTUAL PRODUCTION CAPABILITIES: A CHECKLIST

Connecting to online events, supporting everyone throughout, and repairing issues if they occur comes up in a variety of ways in webinars, online meetings, and virtual classroom sessions. A person producing live online events should develop their skills in the following areas:

Technology

- Learn
  - ☐ Knows all the features of the platform, including the administrative side that includes logins and site settings, to confirm the proper functioning of events.
  - ☐ Comprehends the purpose and function of each feature and role, to provide accurate support before, during, and after an online event.
  - ☐ Stays up to date with feature updates and product changes, paying attention to details that might affect the function and experience.
- Use
  - ☐ Uses a variety of features and tools to effectively support a live event.
  - ☐ Assists session leaders and participants to use the features of the platform as needed.
  - ☐ Provides timely and accurate technical assistance before, during, and after sessions.
- Fix
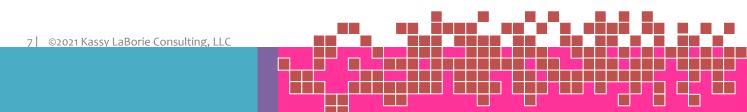 - ☐ Responds to technical issues quickly, accurately, and patiently.

☐ Creates alternative solutions during sessions when features to do not function as planned. (EXAMPLE: partnering people in chat if the breakout sessions will not launch).

☐ Recognizes when technical issues may be caused by the administrative side of the platform such as logins, site settings, role privileges, etc.

Support

- Connect
    - ☐ Assists everyone to download, setup, and join sessions effectively and following all platform and audio requirements.
    - ☐ Stays alert throughout the session, confirming all systems are working as planned.
    - ☐ Recognizes problems and creates solutions to reconnect participants and equipment if necessary.
- Partner
    - ☐ Rehearses with event leaders to plan for readiness, including deciding who does what, when, and how.
    - ☐ Prepares polls, breakouts, chats, and any other features needed to run a smooth event.
    - ☐ Advises appropriate presentation guidelines, software demonstrations, and other activities using feature knowledge and experience.
- Analyze
    - ☐ Preempts possible issues to avoid missteps, using knowledge of platform functions, event processes, and audience engagement techniques.
    - ☐ Responds to problems quickly, without dwelling on them, following up as necessary to report.
    - ☐ Creates alternative solutions when things are not working as planned, clearly communicating any changes to everyone affected.

Communicate

- Listen
    - ☐ Listens carefully to cues for action from the facilitator as planned and rehearsed, and demonstrates flexibility as needed.
    - ☐ Listens proactively for extended gaps in the facilitator's audio to jump in should they be disconnected for a few minutes.
    - ☐ Listens empathetically via audio and text to the technology issues each participant is facing to help alleviate their stress and find a quick solution.
- Present

- □ Conveys technical directions clearly, patiently, and concisely, via both audio and chat, as needed.
- □ Responds to questions quickly so that participants are not waiting for resolution to issues.
- □ Provides clear feedback to the facilitator after each session about technical issues that arose, how they were solved, and how to avoid them in the future.
- Appear
  - □ Maintains a professional appearance and work environment, regardless of whether webcam use was planned.
  - □ Uses appropriate audio and video equipment so that sound and images are crisp and clear.
  - □ Displays confidence and positivity, towards the technology, facilitator, and participants, even when issues arise. (NOTE: think "e-body language")

3 TASKS TO IMPLEMENT TODAY!

1. **USE A START TIME PRODUCER TO GET THE 15-MINUTE BEFORE HELP**

Most technical issues occur in the beginning of sessions, when participants are joining and trying to connect to the audio. If I do not have a person who can be in the role of producer for my entire session, I will make sure I have help for the 15-minutes before a session.

2. **DOCUMENT FOR A QUICK COPY/PASTE**

I compose the following information on a document ahead of time so that it is ready for a quick copy / paste into the chat: greeting messages, audio information, directions for contacting technical support, partner names, team names, extra activity instructions, break messages, etc.

3. **BREAK FOR BREAKOUTS**

Managing breakouts takes time and requires focus. I prepare them at break times in my sessions. I also use the platform options to *group automatically* or *evenly distribute* the group members when it does not matter who is working together in the teams.

ACTION PLAN
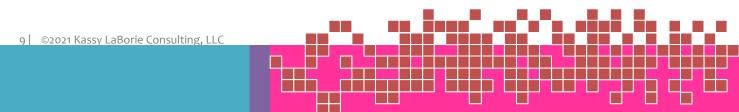
My Personal ACTION PLAN

Take time now to reflect on what you have learned, and importantly, what you want to DO with it. Be sure to share your action plan with your immediate supervisor or manager, friends, family, or… anyone who will listen!

KEY TAKEAWAYS:

ACTIONS I will take to continue building my VIRTUAL CLASSROOM PRODUCTION skills:

Download additional virtual training resources, examples, and checklists from https://kassyconsulting.com/resources/

RESOURCES

LaBorie, Kassy. (2021). Producing Virtual Training, Meetings, and Webinars. Master the Technology to Engage Participants. Alexandria, VA; ATD Press

LaBorie, Kassy, and Tom Stone. (2015). Interact and Engage! 50+ Activities for Virtual Training, Meetings, and Webinars. Alexandria, VA; ATD Press

And more from friends who also specialize in virtual training and meetings…

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Clay, Cynthia (2012) Great Webinars: How to Create Interactive Learning That Is Captivating, Informative and Fun. San Francisco, CA: Pfeiffer.
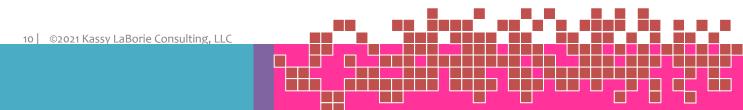
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Murdoch, Matthew and Treion Muller. (2013). The Webinar Manifesto: Never Design, Deliver, or Sell Lousy Webinars Again. New York: RosettaBooks.

Pluth, Becky Pike (2010) Webinars with WOW Factor: Tips, Tricks and Interactive Activities for Virtual Training. Minneapolis, MN: Pluth Consulting.

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ABOUT THE SPEAKER

KASSY LABORIE is the principal consultant at Kassy LaBorie Consulting, LLC. She is a speaker, instructional designer, classroom facilitator, and author who specializes in virtual learning, teams, and live online technology. Kassy is passionate about helping organizations, learning teams, and training professionals successfully move to the virtual environment.

In her previous role at Dale Carnegie Training, she was the director of virtual training services, a consultancy that partners with organizations to help them develop successful online training strategies. Kassy also served as the product design architect responsible for developing the company's live online training product and experience. Prior to this, she was an independent master virtual trainer, a Microsoft software trainer, and a senior trainer at WebEx, where she helped build and deliver training at the WebEx University.

Kassy is the co-author of Interact and Engage! 50+ Activities for Virtual Training, Meetings, and Webinars and author of Producing Virtual Training, Meetings, and Webinars, both with ATD Press. A frequent speaker at industry conferences since 2006, she has presented at Training Magazine events including their yearly conference and Online Learning Conferences, Chief Learning Officer symposiums, The Virtual Learning Show, ATD's TechKnowledge and International Conference & Exposition, as well as many local ATD Chapter events.

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