

The background of the slide features a glowing blue world map with a grid of latitude and longitude lines. In the foreground, the silhouettes of seven business professionals are visible. On the far left, a man in a suit stands with his hands clasped. Next to him is another man. In the center, a woman is shaking hands with a man. To their right, a woman and a man stand together. On the far right, another man in a suit stands with his hands in his pockets. A dark blue horizontal bar is positioned at the top of the slide, partially overlapping the map.

# CONDUCTING EFFECTIVE VIRTUAL TRAINING

DEPARTMENT OF ENERGY

**EFCOG**

# SESSION OVERVIEW

## 6 Steps to Conducting Effective Virtual Training

1. Personalize an Impersonal Environment

2. Create a WIFM for the participants

3. Focus on meaningful content, not the technology

4. One-way broadcasts are DEATH...Interaction!

5. Pulse activities and exercises

6. Schedules and Tech Support

## Anything Else?

- Consider your existing Live Web knowledge and background
- What would you like to learn in this session?
- Please note your response in the chat area

## STEP 1: PERSONALIZE AN IMPERSONAL ENVIRONMENT: STEP 2: IDENTIFY THE “WIFM”

- **Introduce yourself via public chat:**  
Preferred name if not how you logged in (I like Rich), live web Experience, expectations for today (what can I do for you?)
- **Foster interaction from the first moment:**
  - Use Overhead and Direct questions
  - Pulse “nonverbals” with Chat Check (1, 2, 3)
  - Leverage individual and group experience
  - Play to the WIFM



**Rich Arnold**

- 24 years USCG and USN. 20+ years project work:
- Africa, FSU, Asia, SW Asia, South America, Pacific Islands for DTRA, Dept of State, Military, UN, NGOs
- Maritime focus + Technology based training

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# I. PERSONALIZE AN IMPERSONAL ENVIRONMENT

**Break down the anonymous look and feel of a virtual session**



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## Personalization

- Use names as much as possible
- Recognize respondents
- Be positive, even when correcting
- Thank respondents
- Mix direct (by name) verbal and chat questions

# I. PERSONALIZE AN IMPERSONAL ENVIRONMENT



**Don't treat your live web programs  
as if they were traditional classes**



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## Different Approach

- Detailed up-front logistics
- Less “personality” power
- Replace nonverbals
- Decompose the schedule
- Courses + Informal sessions / workshops
- Interact and engage

# I. PERSONAL AND PROFESSIONAL: CAMERA TIPS

- **LOOK AT THE LENS!**
- “The Ugly Shot”: Camera below eye level
- Check lights (front of face), camera focus, position, and appearance
- Look professional (at least on-camera part)
- Check background for anything inappropriate
- Audio Prep:
  - Microphone: Digital Headset / Test Audio
  - Avoid Background Noise



**What's wrong with this setup?**



**Anything better about this one?**

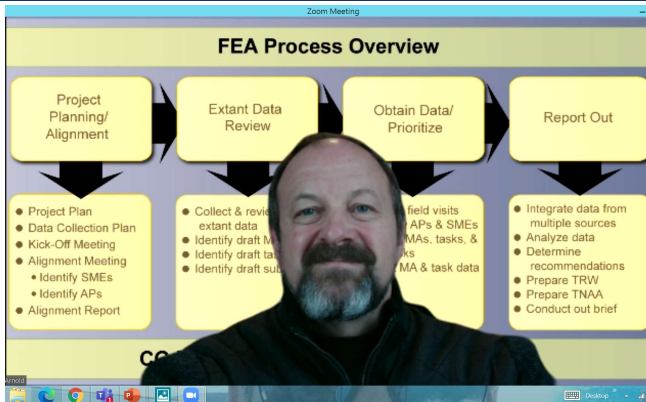


**Lens at eye level with a stand or a separate camera to avoid...  
*The Ugly Shot***



# I. PERSONAL AND PROFESSIONAL: CAMERA TIPS

- Use “Blur” or background function if available. Try a thematic background
- “Pause” video if you need to look away
- Contacts if you have them / check for glasses reflection
- No distracting jewelry
- Use of hands and idiom
- Be careful with split monitors!



**Camera: Eye Level + Lighting: Front of Face + Blur: No Issues**



# I. PERSONALIZE: CAMERA TIPS

- Alternate to laptop camera:
  - Use a web cam
  - Use a Go Pro as a webcam
  - Adapt cell phone as a webcam IVCam:  
<https://www.e2esoft.com/ivcam/>
- Build/Buy a professional stand for equipment and technical demonstrations



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# I. PERSONALIZE: VIRTUAL COLLABORATION TOOLS



## Practice with the Tools

- Installed Apps usually more functional & more effective than web version
- Don't make virtual training a phone call...use tools to make it collaborative
  - Chat + Verbal for dialogue
  - Annotation, collaborative drafting, screen grabs
  - Video – Not Video?
- Use technology agnostic methods
  - Build personalized job aides and notes
  - Test system channels and tools before diving into content with trainees / participants

## 2. WIFM: WHAT'S IN IT FOR ME? BUILD EVENTS THAT PEOPLE WANT TO PARTICIPATE IN

You have about 2 minutes to interest the audience:

- Develop, advertise, and use solid performance objectives
- Use a detailed agenda, instructions, and job aids coupled with a Block Zero
- Pre-session pulse to align objectives / expectations
- Confirm needs at start via chat, poll, question tools
- Establish post-session communication channels
- Circle back to clear parking lot and WIFM items

### Interact / Engage

- Actionable objectives
- Careful alignment of needs to delivery
- Appeal to Adult Learners: **Leverage experience, meaningful material, applicable to work**
- Flexibility for schedules
- Short intense engagement

### 3. CONTENT FOCUSED: ITS NOT THE TECHNOLOGY!

Initial focus on interaction and engagement

- Training and engagement are not driven by travel logistics or related face-to-face admin issues
- Build in more iterations to develop mastery and retention...not just train to comprehension
- Instructors can leverage white boards, notes, polling, and question tools
- Use substantive “outside” of class time to work examples and problems
- Be flexible in delivery, evaluating, and updating content and approach...tech demo with job aids

#### Content Focus

- Use technology to help the session flow
- Avoid overuse of “bells and whistles”
- Use what is *needed* to meet the objective
- Develop instructor tech skills over time
- Be creative

## 4. INTERACTION: AVOID ONE-WAY BROADCASTS

Frequent, meaningful and participant focused interaction

- Interaction replaces physical presence
- Recreate face-to-face (F2F) behaviors
  - F2F Whiteboard → Virtual whiteboard
  - Collecting input “around the room” → Virtual polling and public / private chat
  - Don’t always call on the same people → Chat, focused question, polling to get everyone’s input
  - Replace nonverbals like head nods → Thank respondents / participants, use chat / pacing tools
  - Equipment captures (think YouTube repair)

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### Interact / Engage

- Chat: Quick & Deep
- Focus on meaning, not process
- **Dynamic vocals!**
- Mix different types of questions (Overhead & Direct / Open & Closed)

## 4. INTERACTION: REPLACE NONVERBALS AND ENGAGE

- Nonverbals tend to fade out...
- Student Cameras...especially in groups...are poor at conveying nonverbal information + “Zoom Fatigue”
- Use system tools to boost interactivity and gauge interest
  - Chat 1, 2, 3 = Head Nod
  - Open and Closed questions
  - Questions/interactions: Relentless!

### Sample Chat String

**Rich Arnold (to Everyone):** What is your biggest concern about using or delivering a webinar?

**VanHorn, Christine:** 1:32 PM: Recording a session.

**Bek Caruso:** 1:33 PM: Connecting with the audience

**Michael Sheets:** 1:33 PM: Often no feedback 😞

**Jessica Osuna:** 1:33 PM: Motivating participation

**VanHorn, Christine:** 1:33 PM: Technology

**Jeff Hoffman:** 1:33 PM: Mastering the technology--including how to trouble-shoot on the fly.

**Prioleau, Wagnus:** 1:33 PM: Keeping up with chat messages and questions.

## 4. INTERACTION: “RELENTLESS” QUESTIONS ARE KEY

### Questions boost dialogue and attention

- Open: multiple potential answers
- Closed: defined answer
- Overhead: posed to entire group
- Direct: addressed to specific person/group
- Combined: overhead → direct
- Rhetorical: stimulates thought/connects concepts
- Relay: participant question → overhead/direct

**Use your system tools to boost public and private interaction**

### Questions

- Pull instead of Push content
- Start, guide and redirect dialogue
- Focus in on agenda and objective goals
- Not just for training!

## 5. ACTIVITIES AND EXERCISES

Activities promote better learning than lecture

- Discovery: Find information or solve a challenge by locating/using links, workbooks, references
- Compare and contrast examples and materials
- Case Studies that build across the module
- Solve more in-depth questions via with whiteboard + private chat
- Equipment inspection, start/stop, calibrate, use
- “Homework” in between modules
- Problem-solving examples

### Activities

- Short in class events
- Involve all participants
- Tied to objectives
- Build confidence
- Can be solo or in small groups
- Tool Time!!!

## 5. ACTIVITIES AND EXERCISES

Use virtual exercises (hospital and field survey examples)

- Cognitive – Process Exercises
  - Break out rooms with multiple instructors
  - Defined/focused events with detailed directions
  - Complete and return to main room
- Physical Skills – Equipment Operations
  - Detailed job aids
  - Video examples with crisp step-by-step instructions
  - Instructor demonstrates using task-step numbers, walk through with them, they practice
  - Scanned video + live link

### Exercises

- More substantial sequences
- Best with individuals or small groups
- Schedule mini-sessions
- Equipment availability
- Detection material



## 6. SCHEDULES AND TECHNICAL SUPPORT

Create and use flexible schedules:

- Decompose 1-5 day courses into two hour blocks
- Make topics available over a lengthier time period
- Develop and build on foundational relationships
- Short meaningful and task-oriented engagements
- Build capability and competency with formal courses plus workshops, seminars, and “on call” (sort of) aid
- Add Communities of Practice

### Schedules

- No “Big Block” events:
- Break into flexible easily adjusted chunks
- Learn → Practice  
(GAP)  
Learn More → Practice
- Stratify groups/agendas

## 6. SCHEDULES AND TECHNICAL SUPPORT: PARADIGMS

### Face-to-Face Paradigm

- I wait in a room for the doctor / my time is less valuable than the medical professionals
- I need to “fake” paying attention, even if I am bored
- I can privately side-bar with friends, colleagues, and the presenter/leader before & after the meeting
- I can easily work on group projects and cooperate with others
- Schedules are designed around logistical considerations and efficiencies
- Limited availability to leverage experts, mentors, and accomplished professionals within the construct of face-to-face scheduled events

### Virtual Paradigm

- My time is just as valuable. Telepresence means nobody really must wait.
- I can multi-task to my heart’s content...*should you?*
- It is harder to hold sidebar conversations or extemporaneous meetings
- Cooperation and collective work require some planning, tool knowledge, and joint focus
- Schedules can be designed to promote Learn –Do-Learn More with a high degree of flexibility
- Much easier to provide access to expert information and mentors, via on call, just-in-time events and communities of practice

## 6. SCHEDULES AND TECHNICAL SUPPORT

Provide Presenter and Participant support:

- Block Zero identifies bandwidth, system, and other issues well in advance of content sessions
- Producer assists instructors and recipients prepare for sessions and programs
- Provide job aids with download and system set up information
- Assign a back up instructor or Producer to help monitor chat, support sidebars, group work and other issues
- Back up becomes primary if connection drops

### Tech Support

- Don't make instructors fix tech issues
- Use Block Zero to ID issues
- Use a Producer
- Job aids and common SOPs

## WHAT IS THE PAY-OFF FOR *CORRECTLY DELIVERED* WEB ILT?

Virtual and Hybrid: “hard” dollar savings and opportunities to foster deeper client connections

- Opportunity for exceptionally cost-effective engagements linked to your in-person events
- Freedom from the “Tyranny of Logistics”
  - Training becomes more like how we really work:  
**Learn Something → Practice! → Learn More → Continue to Sustainment**
  - Minor events and refresher training spaced between major events/field visits
  - Table-tops, conferences and dialogues are more sustainable between major visits
  - Interaction with clients not limited by travel logistics and personnel security concerns
- Communities of Practice (COPS) foster participant-to-participant and participant-to-DOE connections
  - “Office Hours” approach to interaction
  - Lessons learned and mini-training events
  - Focused and intensive dialogue that results in capability sustainment

## SUMMARY

1. Make your training, conferences and outreach programs two-way...not “typical” one-way passive webinars
2. Focus on realistic and measurable goals and objectives
3. Make the environment personal and engaging by focusing on people and their needs, not bells and whistles
4. Don't let unconscious choices about scheduling, logistics, types of engagements drive your virtual program
5. Provide solid tech and back up support
6. This is not a choice of face-to-face **OR** virtual engagement...make it **AND...**



# CONTACT INFORMATION

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