BEHIND THE SCENES
ENSURING FLAWLESS VIRTUAL EXPERIENCES
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTRODUCTION</td>
<td>3</td>
</tr>
<tr>
<td><strong>01 PREPARING CONTENT FOR THE VIRTUAL CLASSROOM</strong></td>
<td>4</td>
</tr>
<tr>
<td>Step 1: Identify instructional goals and performance objectives</td>
<td></td>
</tr>
<tr>
<td>Step 2: Determine potential assessment needs and techniques</td>
<td></td>
</tr>
<tr>
<td>Step 3: Determine if collaboration would improve the learning outcomes</td>
<td></td>
</tr>
<tr>
<td>Step 4: Determine authentic training techniques</td>
<td></td>
</tr>
<tr>
<td><strong>02 PREPARING VIRTUAL LEARNERS FOR SUCCESS</strong></td>
<td>7</td>
</tr>
<tr>
<td>Pre-Session Learner Engagement</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Learner Preparedness - Bottom-Up</td>
<td></td>
</tr>
<tr>
<td>Learner Preparedness - Top-Down</td>
<td></td>
</tr>
<tr>
<td><strong>03 YOUR VIRTUAL FACILITATORS MUST BE READY, WILLING AND ENABLED</strong></td>
<td>13</td>
</tr>
<tr>
<td>Ready</td>
<td></td>
</tr>
<tr>
<td>Willing</td>
<td></td>
</tr>
<tr>
<td>Enabled</td>
<td></td>
</tr>
<tr>
<td><strong>04 HOW TO ANTICIPATE AND ALLEVIATE RISK IN THE VIRTUAL CLASSROOM</strong></td>
<td>16</td>
</tr>
<tr>
<td>Technology Risk</td>
<td></td>
</tr>
<tr>
<td>Behavioral Risk</td>
<td></td>
</tr>
<tr>
<td><strong>05 WHEN GOOD LEARNING TECHNOLOGIES GO BAD</strong></td>
<td>21</td>
</tr>
<tr>
<td>4 Step Disaster Recovery Process</td>
<td></td>
</tr>
<tr>
<td><strong>06 THE ROLE OF THE PRODUCER</strong></td>
<td>24</td>
</tr>
<tr>
<td><strong>07 USING A FACILITATOR GUIDE TO MANAGE THE VIRTUAL TRAINING SESSION</strong></td>
<td>26</td>
</tr>
<tr>
<td>CONCLUSION</td>
<td>28</td>
</tr>
<tr>
<td>ABOUT THE AUTHOR – JENNIFER HOFMANN</td>
<td>29</td>
</tr>
</tbody>
</table>
Behind the Scenes: Ensuring Flawless Virtual Experiences

INTRODUCTION

Flawless virtual events don’t just happen – they take careful planning, preparation and practice. And because the modern classroom has evolved, we as practitioners no longer design, facilitate, and manage stand-alone events. Everything we do has become part of a learning experience. In this whitepaper, we will explore what goes into making virtual learning experiences flawless and well-received by our audiences time after time.

Virtual learning experiences are NOT simply plug and play! When you decide to take your training online, it’s not going to be accomplished simply by taking your traditional face-to-face content and “plugging it” into the virtual classroom. A smooth transition requires a lot of work – a worthwhile investment to ensure a positive training experience for our learners.

Of course, modern technologies make it easy to create and schedule virtual classroom learning sessions, but learning can’t go online until we consider the human elements.

For instance:

- Is your delivery team skilled enough?
- Have you thought through the flow and design of the entire experience?
- Does your audience understand the learning environment?
- Do you have the proper support in place for the event?

We’ll walk through how to prepare your content, your virtual learners, AND your virtual facilitators for success. We will review common risks inherent to the virtual classroom and share a proven process for how to anticipate and mitigate them. We will also examine the role of the producer and how they can really help make your virtual sessions effortless and memorable. Finally, we detail how to provide your instructional team with a script, (we call it a facilitator guide), that enables them to handle even the most complicated virtual experience with ease.
As you begin to incorporate virtual training sessions into your blended learning experiences, you will naturally want to move existing instructional designs into this new environment. But, as we pointed out, taking a plug-and-play approach sets your learning initiative up for failure.

While the *blended learning instructional design process* is detailed in its own whitepaper, understanding the fundamentals of effective virtual learning design helps you create a successful program right from the start.

Ready to get started? We advocate for a comprehensive four-step process:

1. Identify instructional goals and performance objectives
2. Determine potential assessment needs and techniques
3. Determine if collaboration would improve the learning outcomes
4. Determine authentic training techniques
STEP 1: IDENTIFY INSTRUCTIONAL GOALS AND PERFORMANCE OBJECTIVES

Whether you plan on designing brand new content or re-imagining an existing offering, double check that the assumptions you make about the program are valid.

Ask yourself, “What will this learning experience accomplish?” The answer clarifies the instructional goal of your entire program, and will enable you to begin designing content for a purposeful learning experience. Drill down into the individual performance objectives required to achieve that goal. List those objectives individually and keep them handy! You’ll need them again during this process.

STEP 2: DETERMINE POTENTIAL ASSESSMENT NEEDS AND TECHNIQUES

Once you identify the performance objectives, you should next determine how you will know whether or not a learner has mastered each objective. In determining the assessment techniques you will need for your learning experience, consider each objective as stand-alone. As a result, your blended learning experience will include multiple assessment techniques.

This step allows you to determine how appropriate the virtual learning environment will be for your blend. My assessment rule is: if you can test it online, you can teach it online. This mantra will become useful at the end of this four-step process, as well.

STEP 3: DETERMINE IF COLLABORATION WOULD IMPROVE THE LEARNING OUTCOMES

Many stakeholders and learners incorrectly believe that the virtual classroom does not support interaction and collaboration. With the right design, popular platform tools and features empower facilitators to create an engaging environment. The real question we should ask, though, is “Would collaboration improve the learning outcomes?”

If peer-to-peer interaction would encourage a more authentic and effective online learning experience, design your instructional activities to include collaboration. But if collaboration does not improve the content’s message or application, don’t bring learners together online. Instead, that objective may work more effectively as a self-paced exercise or self-guided resource.
STEP 4: DETERMINE AUTHENTIC TRAINING TECHNIQUES

Remember that list of learning objectives? Now is the time to refer back to it. When possible, train the objective in the manner in which learners will apply it on the job. The best part of a blend is the flexibility. You can match each learning objective to the most appropriate design option.

Authentic design treatments orient the instruction to real work. Are you teaching sales representatives how to complete a transaction over the phone? Provide virtual classroom training at their desks where they can learn using the phone and computer they work with day-to-day. If you’re looking to improve networking soft skills, bring learners together in a physical classroom for a practice session. Always go back to the learning objective level to determine if your design is right for the virtual classroom.

By completing or understanding the instructional design process for virtual classroom content ensures the material suits the virtual classroom. If, at any point, the virtual classroom does not provide an authentic treatment for your material, move in a different direction.

Ultimately, you can only guarantee a flawless experience if the virtual classroom is the best learning environment option for your training goals and objectives.
Using today’s virtual classroom technology, it is easy to set up the online session and communicate the event details to your group of learners. But then they get reminder after reminder and often end up getting confused. Or they arrive at the session and discover they don’t understand the tools, or know how to learn in the virtual classroom.

A single frustrating webinar experience contributes to a sweeping negative reputation of virtual learning. You have to combat this with a purposeful approach that combines preemptive engagement, communication, and two-prong preparedness.

**PRE-SESSION LEARNER ENGAGEMENT**

Before your virtual learning event even starts, you need to convince learners that attendance and active participation are worth their time.
The InSync team leverages a five-step approach that includes a thoroughly modern combination of microlearning, as well as:

1. **Introduce training content with a video.** What’s the best part of a movie? The previews! Providing learners with a peek into the program helps them identify ways the content will support their personal professional development. Pro-tip: provide one actionable next step or idea that they can use right away to really drive interest.

2. **Create a tool that is immediately useful.** Learners want new skills now. How can you provide that kind of informal learning ahead of a formal, well-planned event? Share an infographic or checklist related to the training content ahead of time. Not only will the tool help them back on-the-job, but they may share it with their networks and increase attention for the program.

3. **Write a blog article.** No content stands alone in the blend. Review the facilitator guide for your virtual learning components. Can you transform any of that material into a helpful recap blog? It does not take long to flip existing instructional material into a quick summary read, but it provides valuable, easy-to-access information after the live event ends.

4. **Deliver an interactive lesson.** This step harkens back to the design process. Collaboration and interaction increases learner engagement. Make sure when you bring your audience together in a live online lesson, that they leave feeling like they learned something useful and they have confidence applying the material. Teach formal sessions using the tools you created to support informal learning moments for an even greater result.

5. **Expand everyone’s Personal Learning Network (PLN).** Each of your learners has a PLN, or Personal Learning Network. Connect your virtual learners with one another using additional resources and collaboration activities. Make discussion boards or moderated cohort groups part of the post-virtual learning session experience.

Learner engagement begins long before your learners log in to the virtual classroom for the first time. Generate interest and investment before the first session and carry that engagement through their perpetual learning experience.

**COMMUNICATION**

How do you currently communicate with your learners? Email has become ubiquitous for many training-related updates. But when you add the virtual classroom into a larger blended program, your communications become even more important. The best communication avoids confusion, provides clear access instructions, and clarifies the time commitment involved in the program.
Behind the Scenes: Ensuring Flawless Virtual Experiences

You need to set the right expectations for your learners from the start and come up with a communication plan that will make learners sit up and take notice.

We believe the most effective communication plans address four mission-critical topics:

- **Frequency** – How often do you need to reach out to learners with session or program materials?
- **Method** – How will you contact them – via email, LMS notification, other?
- **Amount of detail** – How much information do learners need in each communication they receive?
- **Content** – What will the messages themselves say?

For stand-alone virtual sessions, one communication with the subject line, “Name of Class – Details” often works just fine. We include links to the session, reminders of required self-paced work that needs to be completed before the session, and anything else they need to be successful.

But when the virtual learning session is one of many or is part of a larger blend, we have found that a picture is worth a thousand emails. We believe campaign maps most succinctly and efficiently communicate complicated blended learning programs:
A campaign map visually displays an entire learning journey in sequential order, with guiding questions, resources, and live events highlighted. Learners can more easily understand a complex program and select the resources they’ll need on their personal learning journeys.

Combining your campaign map with appropriate email communications and your LMS ensures you have communicated all key details to your learners in a timely and succinct manner.

LEARNER PREPAREDNESS - BOTTOM-UP

There are two very distinct ways for you to tackle learner preparedness - bottom-up and top-down.

Bottom-up learner preparedness looks at the need to educate your learners before they even enter the virtual classroom. By providing effective communication and internal marketing of the programs offered online, you give your learners the information they need to arrive at your live sessions as a willing audience.

For example, virtual classroom sessions run according to strict online schedules, which the learners expect you to adhere to. If their schedule says the “presentation skills course” runs from 2:30 to 4:00, they will log in at 2:30 (some even earlier) and plan to log off at 4:00, whether you’ve managed to deliver all of the content or not.

It’s important, therefore, to make sure that you give yourself enough time to deliver 100 percent of the training content, AND allow for 10-15 minutes at the start of the session to ensure learners have access to the presentation and audio.

You also need to let your learners know that any listed self-paced activities are mandatory, not optional. This way, everyone begins the live session with the same basic knowledge level. Shift away from terms like “pre-work” and “homework.” Instead, use the language of modern blended learning to define the components of your virtual experiences:

- **Session:** “A stand-alone presentation / webinar / interactive eLearning module, etc., that has no associated assessments or required actions. The intent of a session is to share information and to provide opportunities for basic interactions and to ensure understanding.”

- **Lesson:** “The term used when the audience is actively learning something new, and there is an expectation that there will be some kind of assessment (either formal test or self-assessment) to ensure that knowledge has been transferred or skills obtained.”

- **Activity:** “The opportunity to practice or use some content obtained via a lesson. The activity can be collaborative or self-led.”
By changing the way you talk about your virtual events, you can manage learner expectations and remove the stigma often associated with mandatory assignments. More importantly, perhaps, this shift communicates the equal importance of different learning components within the experience.

In addition, be sure to set out guidelines as to what they will be expected to do in the live lesson - engagement and participation should not be optional either!

It’s important to also recognize that newcomers to the virtual environment must actually learn how to be effective virtual classroom learners.

We host a 60-minute experience for new learners called, “Learn How to Learn Online” as a prerequisite for all of our training programs. This lesson helps learners to understand the environment, the interaction tools, and the appropriate etiquette for the virtual classroom. Introducing the learning environment prior to the training program allows learners to adapt to and navigate the experience more comfortably.

When preparing your learners for virtual learning, highlight:

- **Environment**: Learners often attend live lessons while sitting at their work desks, leaving themselves open to interruptions from colleagues, background noises and other office distractions.

- **Tools**: In live events, you can invite your learners to use chat, annotation and hand-raise tools to engage both themselves and others. Remember, you need to teach them how the tools work and also when to use them.

- **Etiquette**: Set expectations with your learners for how they will be involved in the lesson and how their questions will be handled (i.e., instead of just shouting out their question, they should use the hand raise tool or something similar).

If you don’t prepare your learners adequately, then you lend yourself to the wrath of the virtual classroom gods. Alienating participants does not encourage a flawless virtual experience.
LEARNER PREPAREDNESS - TOP-DOWN

Top-down learner preparedness refers to working with the learners’ managers. Managers must “buy-in” to the whole idea of giving the learner sufficient time and space to attend the training event.

Often we find that it is the learner’s manager that interrupts them and takes them away from the virtual training experience. This is not a behavior we would expect from the manager in a face-to-face classroom (unless truly necessary), so why does it happen so often in the virtual classroom?

Perhaps it’s the fact that most learners will “attend” the training event at their working desk, leading to the visual assumption that they can be interrupted.

We need to enable our learners by providing the right environment in which they can learn effectively. Some items to consider:

- Wired internet access is better than Wi-Fi.
- Provide a quiet office space or room, separate from their usual working space.
- Managers must minimize interruptions.
- The learners need sufficient time to complete all elements of the training experience, including live lessons, self-paced activities, and resource review.

Effective communication, learner preparedness, and stakeholder buy-in are crucial to allowing your learners to succeed in the virtual classroom. It is also important that all virtual event participants are given the space, time, and tools to participate fully and meaningfully. Keep all of these best practices in mind when planning your next virtual training experience.

Perhaps surprisingly, our role as modern learning practitioners does not focus on ensuring their attendance. Rather, we should strive to support their personal learning journey. Individual learners may not need the skill building provided during our carefully planned virtual event. That’s okay! Flawless virtual experiences address the needs of our learners, respect their autonomy, and ensure they’re adequately prepared.
When moving a training program from the face-to-face classroom to the virtual classroom, be careful. Your regular facilitator may be great in the traditional classroom, but they may not have experience in the online environment. No matter how long they have been facilitating, the virtual classroom is an entirely different setting, requiring a different set of skills.

You must make sure that your facilitators are ready, willing and enabled!

**READY**

Your facilitators need to know how to teach in the virtual classroom. They should have the skillset to answer questions like:

- How does the technology work?
- What does the entire learning experience look like?
- How can we engage learners to maximize the virtual learning lessons?

Facilitators must also be given sufficient time to teach AND prepare to teach. Often, organizations schedule multiple two-hour learning sessions in a day. Theoretically, this sounds very productive.
In reality, teaching online drains facilitators, more so than leading face-to-face classroom training. You have lost body language and visual cues. Your senses are heightened in this environment and you need to concentrate more. You have to deal with the technology, the learners and the content - all at the same time!

Combine this with the time needed to prepare to teach (assessing self-paced activities, practicing delivering the next event, communicating with learners, etc.). You can see that just because the session is two hours long doesn’t mean that’s all the time that is necessary to teach that two hours of content!

Also consider that as you move towards modern blended programs, facilitators have an expanded role. In addition to facilitating live learning in the virtual classroom, they must also manage the blend as a whole. The virtual classroom components, and the associated preparation, become just one part of a holistic learning experience. Make sure they understand the responsibility of making the move to the virtual classroom.

WILLING

Your facilitators must believe that delivering training in the virtual classroom is as effective as in a face-to-face classroom. Their mindset should include belief in:

- The effectiveness of virtual learning
- The effectiveness of virtual sessions as part of a blended experience
- The adaptability and flexibility of facilitation skills

If they don’t believe in virtual training experiences, they will pass on that uneasy feeling to your learners in the live lessons. Live online learning events are not second-best to face-to-face training sessions - expect to offer training at an equal or greater level to learners.

Learners need to believe in the process, and if their managers or the corporate learning culture don’t support this learning modality or recognize it as valid, our learners will disengage.
ENABLED

Your facilitators must receive proper support from your organization. At the bare minimum, think through whether or not:

- The team has access to the right technology to bring everything together.
- Facilitators have had time to learn the technology and have practiced teaching content in the virtual classroom.
- Instructors feel fully prepared to facilitate online.
- The team has the time and abilities required to support the blend.

There are many different technical platforms that can provide easy-to-use online training sessions, simplifying the learning process for both facilitators and learners. Intuitive user interfaces, built-in audio conferencing, and streamlined procedures can ease the transition from teaching face-to-face to facilitating in the virtual classroom.
The virtual classroom, simply by virtue of having a layer of technology, does bring with it several risks. As a modern learning practitioner, you need to be able to both anticipate and alleviate these inherent challenges.

If you know ahead of time what some of these risks are likely to be, you can plan how to approach them in the live lessons and have contingencies ready to put into action when the need arises.

**TECHNOLOGY RISK**

Clearly, the first risk lies in the technology itself. Facilitators and designers often ask themselves:

- Will the learner be able to access the training room?
- Does their computer have the correct operating software and the right plug-ins?
- Is someone trying to use a mobile device?

These questions provide a helpful starting point and lead to two best practices for handling technology risk.
Alleviating Technology Risk Method 1: Prepare Ahead of Time

Flawless virtual experiences include program managers and facilitators who take care of as much of the setup work PRIOR to the actual live event as possible.

Thankfully, most virtual classrooms download the necessary software after you access the session link. As a result, learners do not have to manually install anything themselves. Even so, we always recommend our learners download the software and test it with their system well before the session starts. Encourage learners to join all virtual sessions on the same machine to ensure the technology program is easily accessible. By encouraging them to test their technology before training kicks off, the instructional team can manage technical issues ahead of time.

In addition to the virtual classroom platform itself, additional technology risk stems from:

- **Web browser conflicts.** Most internet browsers work whether on PC or Mac, but there are potential conflicts with some web conferencing platforms. The best way to check to make sure that connectivity won’t be an issue is to have a test session with the learners before the live lessons.

- **Internet connection issues.** Wired internet connections are preferred, but Wi-Fi is perfectly acceptable, although it can be prone to fluctuations in signal strength. This could cause the web conference to drop learners from a lesson, resulting in missed content, repeated rejoin attempts and frustrations with the virtual classroom process. The only thing you can do to alleviate this risk is to recommend using a wired internet connection for your learners and make sure they understand the issues that can arise with use of Wi-Fi.

- **Session access from unapproved devices.** If participants are expecting to connect via mobile devices (Bring Your Own Device (BYOD)), you need to provide specific instructions and clarify how the virtual classroom works differently on each individual device. You also need to design for the BYOD environment. (To learn more about how to maximize the virtual classroom for mobile users, click here.)

- **Inconsistent or hard-to-hear audio.** If you are using Voice over Internet Protocol (VoIP) for the audio portion of your virtual classroom, clarify what equipment learners will need by sending out a list of requirements before your event. The addition of headsets to the classroom means you may have to troubleshoot for learners who can hear but not speak. Again, the test session helps with equipment setup for success in the live event.

Document these challenges so that you have the ability to quickly offer support during future live sessions.
Alleviating Technology Risk Method 2: Live Technical Support

Technology malfunctions will happen during a live online session at some point. Providing learners with access to a designated troubleshooter eliminates much of the stress around the possibility. If you are working with a producer, they can manage the relationship between learners and technical support.

The best way to do this is to have technical support telephone numbers available for the virtual classroom vendor that you are using. If there is something going wrong that you can’t troubleshoot prior to class starting, you can refer the learner to the technical support number to connect with someone who can hopefully help them get everything working before class starts.

Alternatively, while you don’t necessarily need to train your IT personnel in the web conferencing solution, the more support options you have, the easier it will be for you and your learners.

Once the live session has started, you need to not only help learners with technical problems but also concentrate on delivering the learning content. You may need to ask learners to reach out to technical support themselves while you focus on the job at hand.

Alleviating Technology Risk Method 3: Make Sure Facilitators “Tool-Up”

The third way you can anticipate and alleviate technology risk is to be totally prepared yourself! As a facilitator, you need to “tool up” for your live sessions.

Your ideal toolkit includes a number of resources, including:

- **A headset for use in virtual classrooms** — There is nothing worse than holding a telephone handset for two hours and getting a crick in your neck while you’re trying to concentrate on delivering a great training program. It’s essential that you have both hands free to work the various notes and materials so that you can deliver 100 percent of the training session.

- **Access to a second computer or second screen** — An additional log-in allows you to have one screen showing the presenter view and the other showing the participant view. This helps you see how your slides are building for the audience, which will help you to pace your delivery accordingly. It also lends itself as a backup should a computer act up or the laptop batteries drain. (Always have the charger plugged in — it may be silly to remind you, but people forget!)
BEHAVIORAL RISK

During your sessions, you will likely encounter behavioral risk, as well. These are the risks associated with your learners and their behavior during the session. We always hope everyone will arrive on time prepared and ready to learn but, just in case, you need to have some strategies in place to handle disruptive behavior in the virtual classroom.

Two of the most common disruptive learners are the “Blamer” and the “Disconnector.”

The Blamer is the learner who claims they never received the joining instructions, self-paced activity directions, or the participant guide — even though all the other learners in the session did.

**Problem:** It may be the case that this one learner did not get the emails if they were added to the program late, so mitigate the risk of this happening by ensuring you have a mechanism for emailing the missing resources immediately. Having the roster at hand with email addresses helps.

**Solution:** If you are working with a producer, they can handle the task of getting the Blamer up-to-speed while you continue with the session. Addressing the Blamer’s complaints quickly and efficiently helps to avoid derailing the session.
The Disconnector is not the person who actually signs off, but the one who mentally checks out from the session. They are signed in but unresponsive to questions, whether verbally or in chat. The Disconnector brings absenteeism to the virtual classroom, which can spark other learners to start behaving in the same way.

**Problem:** Your learners’ managers may be partially responsible for this behavior. The manager is very often the one interrupting your Disconnector, taking him or her away from the session to attend to some other task or activity. (For some tips on getting management on board see my blog posting, *101 Tips to Motivate the Virtual Learner: Management Mandate*.)

**Solution:** To combat the Disconnector, keep engagement and interaction high by setting expectations about attendance and self-guided activities, and by calling upon learners for their input so they know you are giving them attention. If you have a producer, you can also ask the producer to check to make sure someone hasn’t disappeared by engaging the learner in a private chat. Try to connect with every single member of your audience by taking the roster and placing a tick next to the learner’s name when you engage them. This helps you see who has not contributed and you can call on them specifically for answers or suggestions to make sure they are not “checking out.”

With preparation, you can easily alleviate technology and behavioral risks. Planning ahead and communicating with learners about specific technology concerns improves success. Additionally, working with your producer during the live sessions can minimize the possibility that these risks will derail the learning experience.
The virtual classroom has the capacity to work flawlessly, but sometimes you hear:

- “The slides aren’t advancing!”
- “I can’t hear the facilitator. Did they lose audio?”
- “Why is there a delay in the screenshare?”

Maybe your learners keep getting kicked out of the platform. Or you have one learner who can’t log in. The list of things that can go wrong with learning technologies often seems endless, but they’re easy to overcome when you’re prepared.

4-STEP DISASTER RECOVERY PROCESS

As part of our Master Virtual Producer certificate program at InSync Training, we discuss and share the 4-Step Disaster Recovery Process. This tried-and-true method addresses how to diagnose problems and minimize anxieties to keep the session going.

With the exception of power outages, built-in web conferencing platform errors and internet failures, there are no disasters that you cannot tackle using this 4-step process.
Step 1 – Minimize anxiety

If learners experience problems, your first step is to minimize their anxiety. With your in-depth knowledge of the web conferencing platform, you should be able to understand what the learner is experiencing and what they are seeing. Put them at ease by explaining that these things can and do happen and that you have a resolution.

Try these tricks:

- Stay calm and keep your voice authoritative and controlled.
- Don’t panic and don’t blame the technology.
- If you have a producer, allow them to handle the technical difficulties.

Minimizing anxiety starts before you kick off the virtual learning lesson. Let learners know early in the session who to connect with in the event of technical difficulty, and how to communicate the issue. For example, at the beginning of InSync Training sessions, we ask learners to reach out to the producer through the chat feature if they have any issues. If something goes wrong with the technology, the producer can chat with them, get their mobile number, and call them to troubleshoot while the facilitator continues on with the session.

Step 2 – Identify that there is a problem

This is where you need your detective skills. Learners must explain as best as they can what is happening and what they are seeing (or not seeing). By answering two easy questions, you can root out the cause of the issue:

1. Is the problem instructional or technical?
   a. A problem is ‘instructional’ if there isn’t a real technical problem; someone simply doesn’t know the points and clicks needed to complete a task. If it’s instructional, provide clarification for the whole group, as more than one of the learners may be confused, but only one has spoken out.
   b. A technical problem is one that can’t be solved with simple clarification. For example, a corporate firewall doesn’t allow certain content to be displayed. If it’s technical, you need to drill down further to find a solution.

2. Is this problem affecting more than one learner? Technical problems require more complex solutions, especially if they impact more than one learner. Ask your other learners to use the hand raise tool to indicate if they are also experiencing problems.

Once you have identified whether the problem exists and whom it is affecting, you can move on to resolving it.
Behind the Scenes: Ensuring Flawless Virtual Experiences

Step 3 – Get participants up and running

If you have determined that the problem is technical in nature, you need to do your best to get the learners back up and running as quickly as possible.

If you have producer support, ask them to troubleshoot with the affected learner(s). The producer should phone the learners and walk them through the problem.

If you’re by yourself, ask learners who have the problem to log out and then log back in. Next, ask them to close their browser and click the meeting URL again. Finally, ask them to reboot their computers and rejoin.

If the problem persists, ask them to contact technical support (either their internal IT contact or the web conference provider’s support). Because there are so many permutations of system configurations, virus checkers, and firewalls that could be causing the problem, you need cut your losses at this point to keep the learning going.

Remember: don’t sacrifice the majority for the minority. If there is one person who is having all kinds of issues, they need to try again another day. You don’t want to disrupt the entire class and make them sit through all of the gory details of getting just one person functional.

Step 4 – Determine the next steps

If the fix works, acknowledge that the learner has re-joined the session and continue.

But if the fix does not work, then you will have to politely dismiss the learner from the session and follow up later with other options such as:

- Contacting technical support.
- Taking another lesson.
- Accessing a recording.
- Meeting one-on-one with a facilitator.

Afterwards, document what went wrong and create a list of common problems, which you can even convert into FAQs to be used within the participant guide.

When learners experience technical difficulties, the technology takes over and learning can stop. Using this 4-Step Disaster Recovery process will help you to deal with almost any technology issue that might come up, creating a flawless virtual experience.
THE ROLE OF THE PRODUCER

As the support person on the delivery team, the producer is an invaluable resource before, during, and after a virtual training event. They are there to support the facilitator, the learners, and the technology.

The producer makes the session run smoothly by troubleshooting technical issues, loading polls, and even co-facilitating content (which helps change the dynamics with the new voice). Producers allow facilitators to do what they do best: deliver the learning objectives and guide learners through content.

Producers have so many tasks that they can take on including:

- Providing technical support for learners.
- Launching polls.
- Keeping time checks with the facilitator.
- Serving as a backup facilitator.

The last one is vital. If the facilitator’s audio disconnects or their internet connection drops, then the producer can load slides, take control of the presentation and carry on (or hold the learners while the facilitator reconnects).
Often, however, we find companies dismiss the idea of using a facilitator/producer team, viewing it as an additional resource cost.

But, once companies have had their first session collapse because the facilitator did not know what to do when the audio failed or when screens froze, they soon realize that having a producer is a lot like having an insurance policy and then some.

It’s only when you crash that you are grateful you paid for the insurance, as the policy kicks in, and takes the headache away - but with a producer in the virtual classroom, you are looking to avoid the crash in the first place!

The producer also acts as a learner advocate, someone who can restate or rephrase questions, both from the facilitator and the audience, that were possibly a little unclear.

Often, the producer can be the first to volunteer for an activity. They can act as “the plant” who asks the right questions, which can spark the learners into asking questions of their own. The producer can also be used to alert the facilitator to raised hands or questions in the chat.

A great way to secure a producer is to utilize a member of the team who will be teaching the session in the future, thereby familiarizing that person with the flow of the lesson, the type of questions asked, and the live online audience activities.

Try using a producer in your next virtual class. Although you may discover that some courses don’t require two people to manage, many will be improved by the second set of hands and a different voice. At the very least, a second person will become familiar with the course content. And, in the best case scenario, having a producer can help you or your facilitator feel as comfortable in the virtual classroom as in a traditional one.
What really happens behind the scenes when you go live in a virtual classroom?

How do the facilitator and the producer manage the session without speaking over one another?

A critical part of any virtual training or blended learning experience is the facilitator guide. You may call it running notes or a master. The facilitator guide is a master reference document designed to help the facilitator and the producer to prepare for and deliver the program.

Compare it to a stage play where the producer handles the scenery and the technical aspects while the director (the facilitator) leads the actors. The facilitator guide is the script that they perform.

You can embed these in the notes section of your slide deck if you want, but it’s vital that you choreograph the session in some way.

We’ve seen so many different types of facilitator guides that have worked well that we have concluded there is no right or wrong way to design your facilitator guide. As long as the directions are complete, clear and easy to follow, format really doesn’t matter.

InSync Training facilitators use a three-column format:

- the first column shows the current slide
- the second column shows what the facilitator needs to cover and when
- the third column shows what the producer does and when.
Where possible, the facilitator and producer instructions line up within the columns to indicate WHEN instructions should be carried out.

We include all of the facilitation materials for each of the sessions in the program, including:

- Checklists of necessary materials and resources (slides, web page addresses, etc.)
- Presentation scripts and key points
- Instructions for managing time and discussions
- Producer guidelines for supporting the facilitator

It is important to note that the facilitator guide assumes that both the facilitator and the producer are technically proficient with the virtual classroom delivery platform. The guide excludes technical instructions for executing activities in the delivery platform.

It’s also important to note that the suggestions in the producer’s column are intended to serve as a guideline. The producer should feel free to adjust the suggestions (such as use of a particular tool) to maintain attention or emphasize the facilitator’s points.
CONCLUSION

As we’ve discussed, preparation and rehearsal help ensure flawless virtual experiences. Following the tips and best practices in this whitepaper will ensure that you deliver well-run, problem-free virtual events as stand-alone sessions or components of comprehensive blends. When learners enjoy and engage in the process, their new skills and behaviors will enable them to make a difference in the workplace – a hallmark of truly successful training.

From an organizational perspective, you will be in a better position to leverage the virtual classroom and its technologies for budgetary savings by reducing travel and hotel expenses. In addition, you will save time for your audience by removing the need for them to step away from their jobs to attend an in-person event.

And, as you become more agile at designing and creating these virtual experiences, you will be able to reach previously unreachable audiences.

It is your responsibility to ensure that your virtual events run as smoothly as possible and following the tips in this whitepaper can help you to achieve your virtual training goals.
Jennifer Hofmann, mastermind behind virtual classroom best practices and blended learning pioneer, is Founder and President of InSync Training. Her entirely virtual consulting firm specializes in the design and delivery of engaging, innovative, and effective modern blended learning. Under Jennifer’s expert leadership, Inc. 500|5000 named InSync Training the 10th Fastest Growing Education Company in the U.S. in 2013, the 20th Fastest Growing Education Company in 2014, and to their Inc. 5000 list for four consecutive years. Dell Women’s Entrepreneur Network, Forbes Most Powerful Women Issue, The NativeAdVantage, and Goldman Sachs 10000 Small Businesses have all recognized her entrepreneurial drive.

Jennifer has written, and contributed to, a number of well-received and highly-regarded books including: The Synchronous Trainer’s Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!: Tips, Techniques, and Ready to Use Activities for the Virtual Classroom, and Tailored Learning: Designing the Blend That Fits with Dr. Nanette Miner. In 2018, The Association for Talent Development (ATD) released her newest blended learning title Blended Learning: What Works.

Jennifer frequently presents in-person and online for leading learning organizations including Training Magazine, The Association for Talent Development (ATD), eLearning Guild, Training Industry, and Training Mag Network. Subscribe to Jennifer’s blog Getting InSync and connect with her on LinkedIn for new content and timely insight.