Virtual trainer/facilitator communication planning checklist

guidedinsights
breakthrough conversations
for bottom-line results

Session name:
Session leader:
Date(s) and times(s):
Login information - web meeting
Dial-up information (if different):
Technical assistance:

Timing	Communication	Format/Method	Status
	Announcement • Date, time of session(s) • Method of delivery • Purpose, outcomes and takeaways • Who will benefit and how • Expectations for participation • Expectations for prework • Expectations for post-training assessment • Registration instructions • Mandatory or optional • Limited opportunity or ongoing? • Contact information for questions		
	Prework • Create prework and post in online conference area (or send) • Send prework invitation email with instructions, including completion date required • Include test link for online tool • Monitor online conference area for participation as needed • Review and note online responses prior to training		

guidedinsights

114 Flagg Hill Road / Boxborough, MA 01719-2108 | VOICE (978) 263-2545 |
nancy@guidedinsights.com/www.guidedinsights.com

Virtual trainer/facilitator communication planning checklist

Calendar appointment
- Create meeting request (or use LMS system) to send out dates, times and login information (web meeting and audio, if different) for your sessions
- State preference for audio participation, if any
- Update if passcodes or other information changes
- Include information for tech support help in the calendar request

Session reminders
- Send as needed, especially to those who registered after initial invitation
- Set expectations for level of participation required
- Request for confirmation (of those who haven't done prework)
- Contact information for questions

Post-training – assessment and reinforcement
- Create feedback form and post
- Create learning assessment and post in online conference area and/or within LMS system
- Develop and post job aids to reinforce and apply lessons learned
- Set up chat forum (or similar) online for participants to check in, share, ask questions, offer ideas, etc.
- Convene follow-on meeting where participants can "unpack" what they have learned and applied