

Engaging your virtual workshop participants, by design

Variables that affect virtual training design

- **Learning goals and intended outcomes:** What do participants need to learn, exactly? What degree of proficiency is needed, by whom? For example, do some people need a mastery over a given topic, or just a passing knowledge? What do people need to take away from the learning?
- **Type of interaction needed:** To achieve these learning goals, do people need to exchange ideas, ask questions, share stories, or reflect out loud? Is active listening with occasional online participation (such as a quick poll, hand up, or written notes) enough? To what degree is conversation needed or possible? Are some topics more suited to conversation than others?
- **Expected number and location of participants:** How many people will participate, and where are they located? If they cross multiple time zones, consider which training times will be most convenient. You may need to run duplicate training sessions due to time zone differences, or if the group is so large that real-time interaction will be difficult or impossible.
- **Time constraints:** How much time are people willing to spend, whether participating asynchronously on their own time or during the real-time training? Must each training session be limited to 60 minutes?
- **Relationships among participants:** Do people know each other well? If so, they may be more willing to share stories and ask questions during the training. Do people have the same role, or are they in the same geographic area? Being aware of the extent to which people know each other, or share common attributes, can affect your design – especially the level of participation.
- **Cultural differences:** Consider cultural differences when you design your virtual learning program. For example, if you expect that everyone in the virtual room will respond to certain questions, validate this assumption when you're working with cultures that value hierarchy and formality. Thinking about including a role-play? Think again if you're working with cultures where saving face is especially critical.
- **Language differences:** If people have different levels of proficiency in the shared language (usually English, for global business teams), think about how much extra time you need to build into your agenda for translation in and out of local language, creating space for pausing and reflection, and making time to paraphrase to test understanding. Also consider how you might use both verbal and visual content to impart knowledge, and to enable better participation from all. Key components – virtual training design

- **Participant preparation:** What, exactly, do participants need to know or do to prepare for the training session? Is prep and prework required or is it optional? Such pre-work may include responding to a survey, reading a case study or article, reviewing a slide set, or submitting questions in advance.
- **Blending of asynchronous and synchronous communications:** For example, the prework and initial discussions might be done online, prior to the training session. The real-time learning session might focus on particular content areas best learned through interactive conversations. The application of tips and techniques may take place later on, through feedback and exercises with colleagues, managers, or clients, whether internal or external.



- **Reference material:** You rarely, if ever, want to use real-time training sessions to wade through complex and detailed content. Instead, think about other ways you can serve up important content that people can access quickly and easily when and where it's most needed. For example, you might post a "just in time" reference guide ahead of your real-time training session (or afterwards), so people can review relevant content when it has the most meaning for them. (Consider using a Word document vs PowerPoint slides, so you can create a table of contents or index to make finding needed content easier.)
- **Duration, number of training sessions:** It's not always possible to achieve your learning goals in one 60-minute training session, especially if the content is complicated and detailed, or if discussions are needed to help participants absorb and apply new information. You have many choices, including:
 - You can usually expand the time to 75 or 90 minutes.
 - You can create a modular training series. (If so, determine whether participants must take all modules in a certain order.)
 - You can refine your objectives to make them less ambitious, as long as there's another way to cover the additional content

- You can have more of the participation take place asynchronously, through online conversations or small-group conversations
- **Job aids:** Can you create tip sheets, guides or templates to help jumpstart the application of training content to real-life work situations? In addition to providing a more detailed reference guide, it can be helpful to give participants some sort of tool or job aid makes a clear connection between their jobs and what they have just learned.

Tailoring the interactive experience to the size of your group

A virtual training session gives you the opportunity to increase the number of participants well beyond what's possible in a physical classroom setting. Your learning objectives will determine the optimal group size. In turn, the group size will affect your training design.

In general, the smaller the group, the greater the opportunity for personal interaction and sharing among the participants, while the larger the group, the less personal the experience.

Creative use of technology and training techniques, however, can maximize the opportunities for interactivity even in larger groups.

- **Mini virtual training sessions: 5-10 people** – These training sessions may have a conversational tone and the feeling of sitting around a table with everyone having airtime. People have an opportunity to get to know each other and build social capital that can lead to sharing of personal stories and experiences in a trustworthy environment.
- **Small virtual training sessions: 10-25 people** – These are characterized by limited airtime for all participants. Web collaboration tools allow everyone to get ideas down quickly on a shared online area to stimulate and focus the discussion. Use voting tools or show of virtual hands allows for interaction, keeping people engaged.
- **Medium-size virtual training sessions: 25-50 people** – Here, the connection with and between participants is more distant and less personal. Web collaboration tools are critical for a high level of interaction and to keep people engaged. Subject matter experts or guest speakers help focus discussion and create interesting debriefs on group input. Virtual training sessions of this size require tightly facilitated Q&A; online chat or brainstorming tools can capture questions for a moderator to paraphrase.
- **Large virtual training sessions: 50-150 people** - Panel discussions can keep conversations lively while collecting comments back and forth between participants on a shared online space. Deliberative polling (pre- and post-) focuses participant attention on the key issues and can test to find out what knowledge has been absorbed. Build in several pauses where you can pose questions for people to answer online in a place where all can see. Capture group comments online for a documented takeaway.

Creating a compelling and experiential training session design

Keeping participants engaged requires compelling content and a training design that focuses on experiential learning and active participation when possible. That means less sit-back-and-listen and more sit-up-and-participate. In a virtual training session, visual aids and video feeds can help, but what's more important is that you think about how best to keep participants busy responding, contributing and engaging directly with the material under discussion.

Two quick design rules challenge us to create a virtual training session designed for engagement:

✓ **Rule #1: 45-60-90**

Most virtual training sessions are scheduled for about 60 minutes. Assume 45 minutes of content – the other 15 minutes will leave time to get started, clarify objectives, set the stage, and wrap up, which sometimes includes quizzes. So for 60 minutes, plan for 45 minutes of content at most. For 90 minutes, plan for an hour and 15 minutes.

✓ **Rule #2: 80% Active Participation**

Create an agenda that keeps participants actively engaged – that is, actively doing something other than sitting and listening – for 80% of the time. This means 48 minutes out of a 60-minute session. This rule drives us to design ways to have participants multi-tasking on task rather than on something else that has nothing to do with the training topic. It also reminds us to think about how we can maximize the use of offline participation (such as pre-work) and keep the real-time training session for a more interactive discussion.

Ideas for encouraging everyone to participate

- Call on individuals at the beginning, middle or end of the training
- Ask people to post questions or notes in the chat area of whatever tool you may be using for your virtual training session; ask a colleague to help keep up with the comments and pose questions to the trainer or subject matter expert at frequent intervals
- Reach out to key participants and silent types before the session; understand their needs and questions and agree how they want their perspectives shared with the group
- Gather a first round of questions, ideas and opinions online ahead of the session, using anonymous input if it will help ensure greater participation and openness, both in contributing and listening