

# Beyond the Basics: The Art of Virtual Facilitation

---

Reference Guide

---

# Three Types of Online Events

## Meetings

- Collaboration & Action Items
- Use a platform like GoToMeeting, Skype, WebEx Meeting Center, or Adobe Connect for Meetings

## Webcasts

- Speaker presenting information to large audience (like an evening newscast)
- Use a platform like GoToWebinar, WebEx Event Center, or Zoom for Webinars, or Adobe Connect for Webinars

## Training

- Learner centered experience, focused on learning objectives, usually small audience
- Use a platform like GoToTraining, WebEx Training Center, Zoom Pro, or Adobe Connect for Learning

# The Participant Experience

Most participants in virtual classes feel *isolated* and are often *uncertain*. They are distracted by their environment. It's the facilitator's responsibility to help them feel *connected*, *confident*, and *engaged*, and to have an easy *experience*.

Move from ...	To
<b>Isolated</b>	<b>Connected</b> <i>For example, allow for participant introductions at the start of each online event.</i>
<b>Uncertain</b>	<b>Confident</b> <i>For example, provide specific instructions for every online activity.</i>
<b>Distracted</b>	<b>Engaged</b> <i>For example, start the session with interaction to help focus their attention.</i>
<b>Overwhelmed</b>	<b>Simplified</b> <i>For example, include user-friendly prompts when using the platform tools.</i>

# Set the Stage for Learner Engagement

## Techniques to Engage Participants from the Start

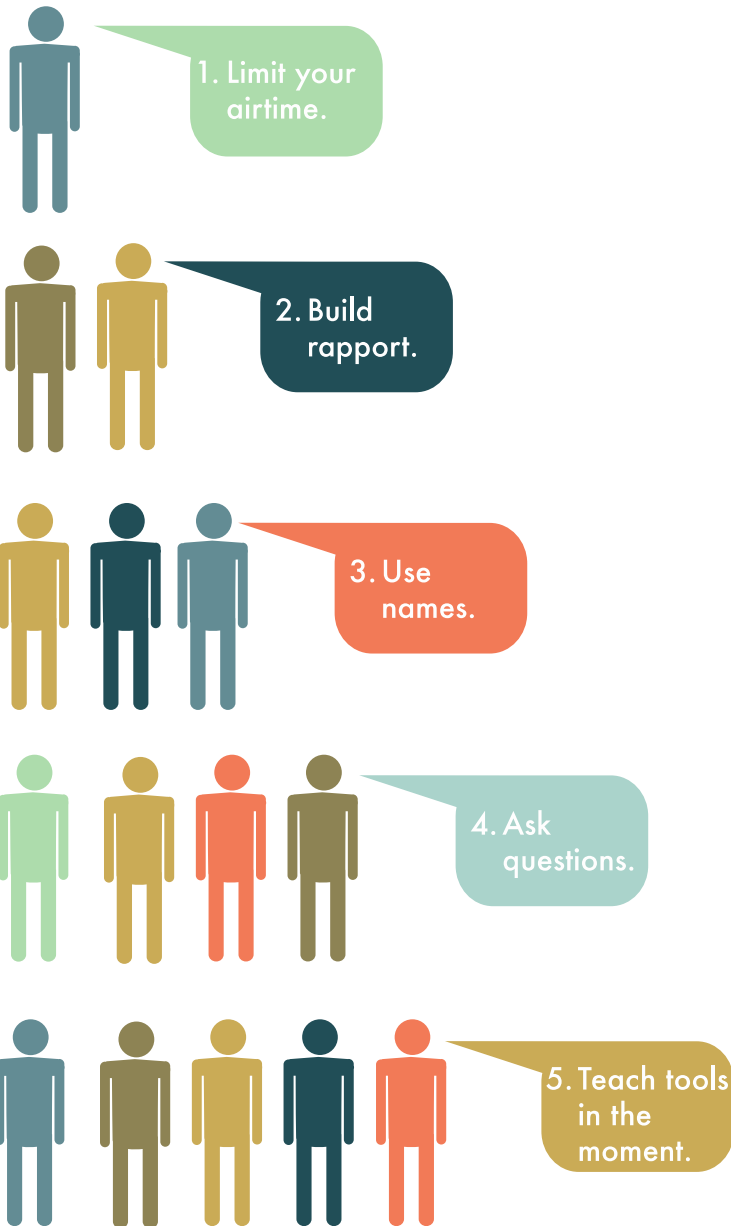
<b>Set Expectations</b>	Communicate with learners ahead of time, and at every opportunity, to let them know it will be an interactive event.
<b>Start Early</b>	Have on-screen activities ready for learners upon login.
<b>Social Experience</b>	Choose activities that let learners frequently interact with each other for dialogue and discussion.
<b>Seek &amp; Sustain Engagement</b>	Maintain an appropriate yet quick pace in the online classroom, Keep learners involved and engaged in activities that lead toward the learning outcomes.

Participants should interact with the platform, with the facilitator, or with each other at least every \_\_\_\_ minutes during a live virtual event.

- Participants are easily distracted by their surroundings.
- Participants think they can multi-task, yet learning requires focus.
- Participants learn best when they are engaged in their own learning!

# Facilitator Engagement Techniques

There are five key techniques for engaging participants as a virtual facilitator:



# Using Names

## 5 Guidelines for Using Names in a Virtual Event

<b>Let them know you'll be using names.</b>	Mention it during the warm-up activity and again at the start of a session.
<b>Use names in your examples.</b>	Say learner names as often as possible, and incorporate them into stories and illustrations. For example, you might say "Let's use Adam's project as an example. As Adam said earlier..."
<b>Say their name before asking a directed question, and repeat it again after.</b>	Directed questions are targeted to one individual. When using this type of question, say the person's name, then ask the question. It may also be helpful to say the person's name again before inviting them to respond.
<b>Ask directed questions that do not have an incorrect answer.</b>	Avoid putting people on the spot or embarrassing them. Instead, ask opinion-style questions that do not have one right answer. In other words, if you ask a directed question, make sure anything could be a correct response. For example, ask " <i>Jack, what do you think about this topic?</i> " or " <i>Maria, what's your experience with the process?</i> "
<b>Give options for responding.</b>	Allow participants the opportunity to "pass" and not respond, or to have shared responsibility for answers. For example, say "Let's hear from both Jane and Maria. Would one of you be willing to go first?" Or, "Those of you dialing in from Nashville, what's your take on this scenario? Joe? Michele? Avery? Would one of you weigh in?"

# Questioning Techniques

Asking questions in the virtual classroom requires different techniques than asking them in the traditional classroom. There are two keys:

## Be Precise

- Ask specific questions
- Use one question at a time
- Choose simple, straightforward words
- Plan questions in advance
- Ask follow-on questions to encourage dialogue
- Consider the following technique:  
*Lead with a yes/no question, then ask follow on questions to expand and elaborate*

## Be Prescriptive

- Consider the many ways to respond in the virtual classroom
- Let participants know how to respond – which tool to use
- Provide instructions for responding
- Set expectations for responses (quantity & time)
- Offer variety or choice in response method (when appropriate)

---

---

---

---

---

---

---

---

---

---

# Skill: Multitasking

Multitasking is a combination of preparation and speed. Here are some tips to help you be a better multitasker:

- Be prepared
- Know your software
- Use a producer
- Be a proficient typist
- Practice, practice, practice
- Resist temptation to do too much

Use this checklist to rate yourself on 10 steps for multitasking success.

Multitasking Checklist					
	Never	Rarely	Sometimes	Usually	Always
I set myself up for success before the virtual training event.	1	2	3	4	5
I am completely prepared to deliver my training content.	1	2	3	4	5
I fully know the virtual classroom software that I will be using.	1	2	3	4	5
I have a producer or co-facilitator who will assist me during the event.	1	2	3	4	5
I can type quickly and accurately.	1	2	3	4	5
I have predefined trainer "pauses" identified.	1	2	3	4	5
I practice multitasking.	1	2	3	4	5
I am comfortable with my virtual training delivery skills.	1	2	3	4	5
I have eliminated all distractions from my workspace in order to focus on the virtual training experience.	1	2	3	4	5
I am comfortable with letting unimportant things "slide" without comment in the virtual classroom.	1	2	3	4	5



# Skill: Voice and Visuals

## Tips for Creating Your Best Voice

<b>Extend the headset microphone above your mouth</b>	Check your audio connection to ensure the right volume – not too loud and not too soft – and avoid heavy breathing into the microphone.
<b>Exercise your best posture by sitting or standing tall</b>	Use your posture to help create a rich sounding vocal quality.
<b>Exude enthusiasm and energy</b>	Pour energy and enthusiasm into your voice. Sound like you are completely enjoying the online experience!
<b>Exaggerate your voice</b>	Avoid sounding monotone. Add vocal variety to emphasize key words and phrases.
<b>End sentences strong</b>	Keep your voice from trailing off at the end of sentences. Also be aware if your voice rises at the end of a sentence, to avoid sounding unsure of yourself.

## Tips for Presenting Yourself on Webcam

<b>Place camera at eye level</b>	Move your webcam to a spot that centers your face on screen instead of looking down to it.
<b>Put lighting in front</b>	Have a light source in front of you instead of to the side or behind you.
<b>Place appropriate items in the background</b>	Be aware of what's in view of the camera. Have appropriate items of interest that do not distract.
<b>Position yourself the correct distance</b>	Use the “palm above head” guide as a reference point for centering your shoulders on screen.

# Managing Technology

## Tips for handling tech challenges with grace

- **Expect technology challenges, it's part of virtual delivery.**
- **Stay calm, take a deep breath.**
- **Partner with the producer, allow them space to handle it.**
- **Spend a moment or two troubleshooting.**
- **Carry on with your backup plans, or move to the next activity.**

---

---

---

---

---

---

---

---

# Day of Event Checklist for Facilitators & Producers

*Use this checklist to ensure that you are prepared for your next virtual event.*

## **Participants have been sent:**

- preparation instructions
- test link and/or installation instructions for virtual platform
- logistics such as links, passwords, and audio information
- participant materials to print
- contact information for questions or technical support

## **Facilitator and Producer have materials ready:**

- slides, polls, whiteboards, notes and other visuals
- facilitator / producer notes
- instructions for all activities and exercises
- contingency plans

## **Equipment is ready:**

- Computers and equipment have been checked and tested.
- Applications and necessary files are open, available, and ready. All non-essential applications are closed.
- Audio, such as telephones or microphones, have been tested.

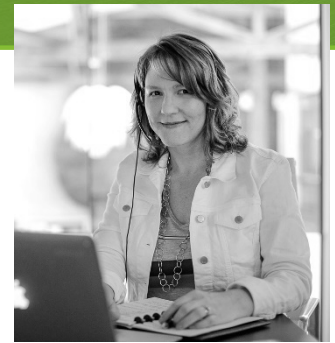
## **Facilitator and Producer are physically ready:**

- Delivery area is ready (free of distractions, glass of water available, and so on).

## **Platform is ready:**

- Room is opened at least 30 minutes in advance for preparation.
- Participant privileges have been granted as needed.
- All documents and resources are uploaded.
- Opening activity available on screen.

## About the Presenter: Cindy Huggett, CPLP



Cindy is a pioneer in the field of virtual training. She's been providing virtual training solutions since the early 2000s and is a recognized industry expert in teaching training professionals how to design and deliver interactive virtual classes.

Cindy is the author of four books on virtual training: *Virtual Training Tools and Templates: An Action Guide to Live Online Learning* (2017), *The Virtual Training Guidebook: How to Design, Deliver, and Implement Live Online Learning* (2014), *Virtual Training Basics* (1<sup>st</sup> edition 2010 and 2<sup>nd</sup> edition 2018). She's coauthored two ASTD Press Infolines, "Simple, Effective Online Learning" and "Designing for the Virtual Classroom", has contributed to many compilations, including the *ASTD Handbook: The Definitive Reference for Training & Development* and *101 Ways to Make Learning Active Beyond the Classroom*, and written several articles for T+D magazine.

Cindy partners with her clients to help them transition from the face-to-face to the virtual classroom, and works with them to design online and blended learning solutions. Her clients include global organizations of all sizes, including several in the Fortune 100 list. With over twenty-six years of overall professional experience, Cindy has worked in various industries including technology, construction, higher education, retail and the public sector. Her management and global experience includes serving as the regional Director of Training and Operations for an international software training company, and the Learning and Development manager for a global mechanical contractor.

Cindy holds a Master's degree in Public and International Affairs from the University of Pittsburgh, and a Bachelor's degree from James Madison University. Cindy was also one of the first to earn the prestigious Certified Professional in Learning and Performance (CPLP) designation.

A recognized leader, Cindy served on the national ATD (formerly ASTD) Board of Directors, and selected by the *Triangle Business Journal* as a "40-Under-40" Award recipient. She also co-founded a non-profit organization to promote volunteering and community service in her local area. She's passionate about helping others succeed and brings that dedication and commitment to every project she undertakes.

Cindy regularly tweets about workplace learning issues (@cindyhugg), and she provides many training resources on her website: [www.cindyhuggett.com](http://www.cindyhuggett.com).