

The eLearning Guild's Handbook on

Synchronous e-Learning



How to
design, produce,
lead, and promote
successful learning
events, live and
online

By Karen Hyder,
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and Matthew Murray

Edited by Bill Brandon



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Who should use this book?

The eLearning Guild's Handbook on Synchronous e-Learning is intended for anyone and everyone who wants to produce, lead, or promote live, interactive learning events on the Web.

Novices will find information on what other people are doing in this medium, which kinds of training and education are best suited to it, how to convert existing classroom content for delivery online, how to lead effective and compelling live learning events on the Web, and how to promote these events to obtain maximum participation.

More experienced practitioners, including experts, will find a wealth of ideas that they can use to improve or enhance their current processes.

All readers will find job aids, references, examples, and information to significantly reduce the amount of time required to produce online learning events.

The eLearning Guild's Handbook on Synchronous e-Learning

By Bill Brandon, Editor

Synchronous e-Learning goes by a variety of names: virtual classrooms, Web conferences, Webinars, and online presentations, to list just a few of them. Some of these names are more common in the education community, some are more about delivery than about collaboration, and some are more often seen in marketing copy than in practice. We couldn't improve on the current selection, so we chose to stay generic rather than add another designation. "Synchronous e-Learning" will have to do for now.

What all of the descriptions have in common is the use of Web conferencing software to support live, interactive (more or less) learning events delivered on the World Wide Web. The importance of this notion is borne out by the fact that there are dozens of Web conferencing applications, all fighting for market share.

Another indication of the importance of synchronous e-Learning is seen in The eLearning Guild's live, real-time Guild Research database, online at <http://www.elearningguild.com>. With thousands of members reporting which products they use, their satisfaction with each, and the modalities in which they support learning, we are getting a much better picture of the adoption patterns. We can slice and dice the data by organization size, industry, number of learners, or in various combinations of factors. We now see (although the numbers change a bit week-to-week with the addition of more data) that overall two-thirds of the respondents online are using synchronous e-Learning "often" or "sometimes" to deliver learning. Compare this to 90% for classroom delivery, and 85% for asynchronous (self-paced) e-Learning, and you can see that live, online learning is an important third leg of most organizations' instructional strategies. It will be interesting to watch the trends develop between these three legs over time.

With these facts in mind, The eLearning Guild decided in the fall of 2006 to put together a handbook to support development and production of synchronous e-Learning. No such comprehensive advice for practitioners existed at the time, perhaps because of the speed with which the technology is evolving. Although synchronous e-Learning has been around for almost fifty years in more primitive forms, it is only in the last five years that organizations and individuals have had the technology, the infrastructure, and the bandwidth to make it practical for widespread adoption.

We have enlisted the aid of four experts who are themselves leaders in the field to create this little handbook. Together with the information available in The Guild's periodic Research Reports on synchronous e-Learning, and the up-to-date information on products and on actual projects in our Live Research online, we believe the contents of our Guide will serve readers well.

About the Authors



Karen Hyder

Karen Hyder has been using technology to teach about technology since 1991 when she began offering applications software courses for Logical Operations and for Ziff-Davis Education at the crest of the Windows and Microsoft Office explosion. In 1995 she was promoted to Director of Trainer Development, teaching classes to help trainers improve skills and earn certification. In 1999 Karen began a consulting firm to offer train-the-trainer courses including using synchronous online software tools. Her clients include AMS, Cigna, Compuware, Microsoft and Morgan Stanley. Karen is part of the team developing CompTIA's eTrainer Certification (CTT+e). She has served on CompTIA's Certified Technical Trainer (CTT+) Advisory Committee since its inception in 2001.

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— Sandy Kennedy Zachman, Corporate Training Manager,
New Century Mortgage Corporation

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Maximize productivity. Bring in trainers from different locations to train collaboratively.

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Engage learners and improve interactions by sharing video from a web or video camera.

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Choose toll or toll-free global teleconference with call-in or call-back options, or VoIP.

Microsoft® Outlook™ Integration

Streamline scheduling using existing enterprise processes.

APIs and Standards Support

Extend your learning technology investments and ensure interoperability.

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Assess comprehension, track individual performances, and share correct answers within a session. Leverage web-based test libraries for pre- and post-session training.

Polls and Surveys

Measure session effectiveness and gather feedback for future sessions.

Registration and Reporting

Simplify session registration and easily track attendance.

Cross-Platform Support

Give trainers and learners the ability to participate from different environments. WebEx supports Windows, Mac, Linux, and Solaris operating systems.

Record and Playback

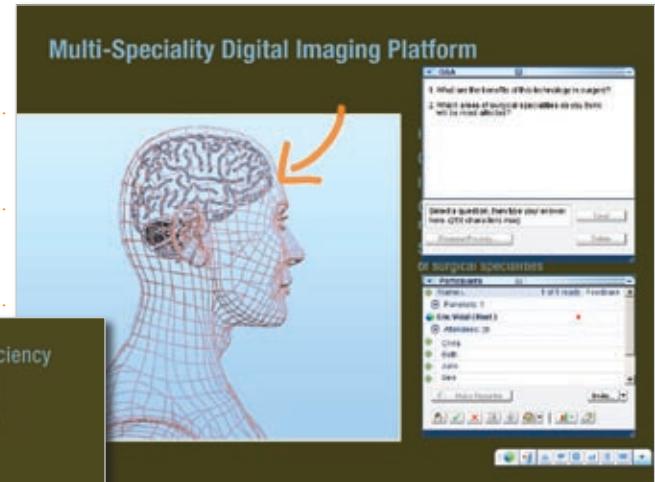
Record training sessions for reuse and review. Stream recordings within live sessions or post for learners to play back at their convenience.

On-Demand Module

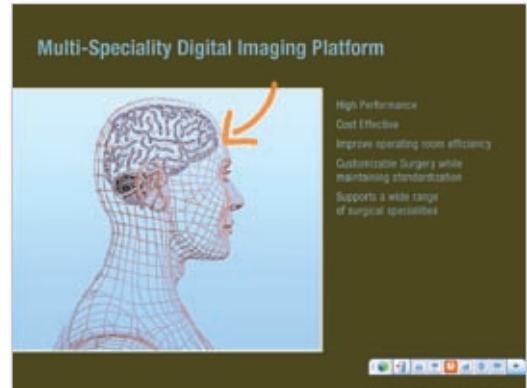
Get everything you need to create, manage, deliver and access on-demand training. View sessions from the viewer-friendly player, with intelligent search capabilities, detailed tracking, file transfer capabilities, and integrated testing.

Automated e-Commerce

Create revenue-generating programs with self-service registration and payments.



Floating PowerPanels allow the trainer to view attendee list, Q&A, and other online classroom activity — but are invisible to learners.



Learners get an engaging full-screen view with a discreet toolbar for navigation.

Minimum Windows system requirements:

Windows 98, NT, 2000, 2003 server or XP; Intel x86 (Pentium 400MHZ+) or compatible processor with 128MB RAM; Microsoft Internet Explorer 6, Netscape 7, Mozilla 1.4 or higher; Firefox 1.0; JavaScript and cookies enabled in the browser; 56K or faster Internet connection.

Other platforms supported:

Mac OSX 10.2 or higher with Safari 1.x or 2.x, Linux (RHEL3, SuSE 9, Turbo Linux, JDE) or Solaris 8 or 9 with Mozilla 1.4 or higher or Firefox 1.0.

For the latest platform requirements, visit our web page.

Languages supported:

English, Spanish, French, German, Japanese, Chinese (Simplified and Traditional), and Korean.

e-Learning Standards support:

SCORM 1.2

Find more information about WebEx Training Center and other web meeting applications at www.webex.com/applications.

Introduction to Synchronous e-Learning

By Matthew Murray

Although you might never have consciously considered it, you've already logged many thousands of hours in a synchronous learning environment. It's the traditional foundation of the school and college experience, the familiar standard against which all other learning models are compared and measured.

What is synchronous e-Learning?

Synchronous learning is live, real-time (and usually scheduled), facilitated instruction *and learning-oriented interaction*. I've emphasized "learning-oriented interaction" in order to differentiate synchronous learning from lecture, product demonstrations, and other "knowledge dispersal" activities. In my opinion (backed by plenty of research findings), the interaction is essential to learning.

Synchronous e-Learning is synchronous learning that takes place through electronic means. Synchronous learning is distinguished from self-paced asynchronous learning, which students access intermittently on demand. Table 1-1 on page 2 compares synchronous e-Learning to asynchronous e-Learning.

These terms don't always apply cleanly to specific examples. Creating and attending a synchronous e-Learning session can involve asynchronous experiences (pre-registering or conducting a diagnostic technical check), but the learning experience is live and real-time.

The term "blended learning" can refer to a combination of synchronous and asynchronous experiences. For clarification, blended learning is also applied to mixed online and face-to-face training, and more generally to approaches to course design and delivery that combine different modalities (e.g., self-paced Web-based training, followed by classroom instruction, accompanied by printed job aids, and supplemented by virtual classroom follow-up sessions). This might take place at a course level: for example, mixing asynchronous e-Learning modules and synchronous sessions. Or it could occur at the session level: for instance, integrating self-paced exercises within a live virtual classroom session.

Synchronous e-Learning has grown rapidly to become a significant component in most organizations and training environments. A September 2005 eLearning Guild research report indicated that about 90% of respondents had participated in a synchronous e-Learning event. (See *The Synchronous e-Learning Research Report 2005*, available through The eLearning Guild Research Archives at <http://www.elearningguild.com>. As of November 2006,

Contents

In Chapter 1 you will find information about:

- **What is synchronous e-Learning?**
- **Synchronous e-Learning technology categories**
- **The roots of synchronous e-Learning**
- **The learning needs for synchronous e-Learning**
- **The business case for synchronous e-Learning**
- **Integration points and challenges**

almost two-thirds (63%) of e-Learning Guild survey respondents reported using synchronous e-Learning “Often” or “Sometimes.” (See the “Live & Interactive” section of “Guild Research,” at <http://www.elearningguild.com>.) Its use was particularly marked in high tech sectors like computer manufacturing and telecommunications. Respondents from large organizations were the most likely to use synchronous e-Learning, although employees at mid- and small-size companies were also using the tools in large numbers.

Despite the growing presence of synchronous e-Learning, there is still uncertainty about how best to plan, design, and deliver for this medium. The field has developed so rapidly that best practices are only now starting to emerge. A lack of clarity and consistency exists over exactly what synchronous e-Learning is and how it is delivered. This chapter provides an overview of synchronous e-Learning and identifies its key uses and benefits. It outlines the technologies employed, lists the typical learning needs that synchronous e-Learning fulfills, and summarizes the most important factors to consider when developing a business case for its deployment.

You may know synchronous e-Learning by another name, or by one of the myriad modes that it can take: virtual classroom, Webcasting, Web conferencing, videoconferencing, Webinars, live e-Learning, eConferencing, . . . You might just know it by reference to a particular vendor, tool or software program that enables the creation and delivery of synchronous e-Learning. We’ll sort through the terminology and types of tools available, but let’s first reiterate our definition: Synchronous e-Learning is live, real-time, interactive, electronically-enabled learning. Synchronous e-Learning sessions can usually be recorded and played back, but that’s not their primary strength or purpose. Our focus is on the live and the collaborative.

Table 1-1

Synchronous vs. asynchronous e-Learning		
	Distinctive features	Examples
Synchronous e-Learning	<ul style="list-style-type: none"> • Real-time • Live • Usually scheduled and time-specific (but can be impromptu) • Collective and often collaborative • Simultaneous virtual presence (with other learners and facilitators or instructors) • Concurrent learning with others 	<ul style="list-style-type: none"> • Instant messaging • Online chat • Live Webcasting • Audioconferencing • Videoconferencing • Web conferencing
Asynchronous e-Learning	<ul style="list-style-type: none"> • Intermittent access or interaction • Self-paced • Individual, or intermittently collaborative • Independent learning • Usually available any time • Recorded or pre-produced 	<ul style="list-style-type: none"> • E-mail • Threaded discussion • Boards • Web-based training • Podcasting • DVD • Computer-based training

Synchronous e-Learning technology categories

The spectrum of synchronous e-Learning technologies and options can appear overwhelming at first. New tools appear with regularity, and existing tools are frequently upgraded or expanded to improve performance and incorporate new features. And while the tools are morphing, converging, and re-configuring, the terms and labels associated with them become more loosely applied and flexible — further adding to the complexity associated with comprehending and discussing the field. You may wish to refer to the Executive Summaries of some of the more popular tools in Appendix A.

Although synchronous e-Learning is about utilizing tools to achieve effective training and education, identifying the main categories of synchronous e-Learning technologies is a good place to begin. Even though the rest of this book deals with what I will refer to as the “Web conferencing” category, it is important to differentiate these terms:

- Teleconferencing and its major sub-categories, audioconferencing and videoconferencing;
- Webcasting;
- Gaming and simulations; and
- Web conferencing.

Teleconferencing

What is it? This term is context specific, and is used differently by different people. Some associate “tele” (a prefix to signify “at a distance”) with the telephone and use it synonymously with audioconferencing; others associate it with television and use it to mean videoconferencing. It’s also employed as a blanket term to reference all technology-enabled conferencing. To avoid confusion, I recommend adopting the terms audioconferencing or videoconferencing instead.

Audioconferencing

What is it? Also known as conference calling, this is audio-only interaction via telephone.

Why use it? While the tool is primarily used for meetings and project updates, training that utilizes audioconferencing can achieve impressive results. Since it is relatively inexpensive and readily available, most organizations can easily implement synchronous training this way. The approach has been largely superseded by more recent technological advances. But although it is often overlooked as a limited, low-tech option, the form has undergone something of a renaissance recently — driven by easy access for mobile workers (through cell phones), improved audio quality and call management options, and the lure of quickly repurposing recorded conference calls as downloadable Podcasts.

Best practices? Audioconferences are often used in association with other delivery means (such as sending out slides and materials through e-mail, or simultaneous integration with Webcasts and virtual classroom sessions). Audioconferences can draw from radio design and delivery techniques to engage learners, and provide abundant opportunities to integrate feedback and knowledge sharing (in the mode of an educationally-oriented “call-in talk show” or “ask-the-expert” format).

Videoconferencing

What is it? Full screen video and audio, either point-to-point or bridged multipoint. Most systems also permit screen sharing and document camera source inputs. Data signals are transmitted over high speed dedicated telephone lines (ISDN model), or over the Internet (IP model).

Why use it? Often employed as an executive meeting tool, videoconferencing holds great potential for synchronous learning. Its full screen video and high audio quality make it the form that most closely emulates the face-to-face experience and human co-presence. Once the preserve of expensive, high-end conference and boardroom suites, videoconferencing has become more portable and less hardware dependent. The move from ISDN- to IP-supported videoconferencing has reduced line charges and permitted easier integration with desktop systems. Videoconferencing currently appears to be diverging into two directions: high definition “telepresence” (particularly well suited to training fields, such as medicine, where visual clarity is crucial), and standard definition integrated desktop and suite systems that provide full screen, Webcam-driven audiovisual communication. Both threads are progressing towards fuller conferencing feature integration, such as desktop sharing, supplementary text Chat, etc. While a specialized market for high definition, hardware-dependent systems will always remain, it’s reasonable to assume that the distinction between standard definition videoconferencing and Web conferencing will continue to blur and eventually disappear.

Best Practices? Videoconferencing is well suited to group training split between two or more locations. Its historically high initial capital investment had limited its use to large organizations with dispersed learners (for instance, bridging together classes in Toronto, Portland, and Phoenix with learners and instructors in Atlanta), or guest speakers and class exchanges between educational institutions. Videoconferencing works most effectively when the classroom environment can be reproduced remotely, through “smart classrooms” with daisy-chained microphones that pick up all partic-

ipants' comments, split screen, and multistream video feeds. Its unparalleled full screen video capabilities also provide integration opportunities for videoconferencing with other technologies: routing in high quality audio/video of remote presenters for live Webcast feeds, for example.

Webcasting

What is it? Again, this term is applied variously (sometimes incorrectly) by different users. It is sometimes employed as a generic reference to all Internet communication technologies that transmit audio and/or video. This is inaccurate, and a distinction should be retained between Webcasting and Web conferencing (described below), although it is true that the features and vendor offerings in both spaces are converging. Webcasting as a term was derived from the concept of broadcasting over the Web. As this etymology implies, the expression originally referenced audio and video sent from a single source to multiple passive receivers, either live or on demand. Webcasting utilizes streaming media to transmit audio/video efficiently over the Internet. These media streams are encoded and decoded using a common system format (e.g. Windows Media, RealMedia, Flash Video, QuickTime, or DivX).

Webcasting can refer simply to one-way audio/video streams. However, numerous services and tools have emerged, providing more sophisticated communication options that are synchronized with the audio-video stream — most commonly presentation slides, real-time text captioning, text Chat, polling, and file downloads. In other words, fuller features and opportunities for interactivity have been introduced into some Webcasting services, challenging its differentiation from Web conferencing. Nevertheless, it is still appropriate and valuable to use Webcasting to refer to unidirectional (one-way) point-to-multipoint synchronous communication, with limited or restricted interactivity features, that is based around high quality streaming audio and video.

Why use it? Webcasting is principally utilized for presentation-style, knowledge-dispersal types of learning. Webcasts are typically most practical for reaching large volumes of learners simultaneously, so the opportunities for complex interaction with learners are intentionally restricted. This also reduces demands on computer processor performance and network activity, making Webcasts an appealing option for reaching diverse groups of learners at varying bandwidths. Webcasts can be designed and delivered very quickly and at relatively low cost. Although the video window of a Webcast is typically quite small, the image quality can be very good — well suited to talking heads and pre-recorded video scenario roll-ins. Recorded Webcasts replay well in playback mode, since only a limited amount of learner interactivity is lost. This can extend the shelf life of a synchronous learning Webcast as a repurposed job aid or knowledge object.

Best practices? Training Webcasts have been derided in some circles for taking on a lecture format that offers little in the way of learning appeal: static video of a presenter expert who pontificates endlessly on minutiae, accompanied by text-heavy slides, delivered to isolated, passive learners who fall asleep, multitask, or lose interest. While it's obviously important to avoid the trappings of a boring Webcast, the tool can be used extremely effectively with the prerequisite instructional design. Webcasts can draw upon established media techniques to engage learners and improve the delivery of materials through panel formats (multiple perspectives), engaging audio (background music and transition bridges), high quality motion graphics, and animations. Learners in many industries and workplace roles benefit from the didactic, information delivery approach which is the hallmark of live Webcasting. For instance, the form is very popular among specialized communities and disciplines that thrive upon rapid dissemination of current and dense visual information (e.g. practitioners in medicine and the health sciences; legal professionals; government agencies reaching field units, etc.).

Gaming and simulations

What is it? Online virtual environments or challenges that respond and dynamically adjust to learner input.

Why use it? While this field is still in its infancy, it is advancing rapidly and has strong support from those who advocate the myriad benefits of verisimilitude, immersive learning environments and “realistic” problem-based scenarios. Simulations permit participants to learn through practice, and to measure the consequences of actions in a safe context (rather than on the job). Games and simulations also promise to facilitate the online learning of psychomotor skills, long regarded as a field of instruction requiring face-to-face demonstration and practice.

Best practices? Most games and simulations are currently single player and self-paced, or multi-player and asynchronous. But the advent of MMLOGS (Massive MultiLearner Online Games) is close at hand, presenting the possibility of truly immersive virtual campuses with synchronous training events and advanced, risk-free practice and simulation opportunities. Sophisticated games and simulations are particularly appealing to high risk industries and occupations (such as aviation, financial services, military, law enforcement, and medicine), where the potential fiscal and health dangers associated with an unskilled workforce are especially high.

Web conferencing

What is it? Highly interactive, Internet-based applications with a rich collaboration feature set (e.g. audio/video from presenters and learners, application sharing, whiteboarding and markup tools, breakout rooms, polling, quizzing, hand raising and emoticon responses, slides and media, Web site tours, public/private text Chat). It is capable of scaling from small groups to hundreds or thousands of simultaneous users.

When people discuss “synchronous e-Learning,” they are typically referring to Web conferencing. Web conferencing technologies offer tremendous potential for robust interactivity and collaboration through their versatility and rich feature options. Again, the terminology in this area is a little fuzzy. The distinction between “virtual classroom” and “Web conferencing” is largely subjective (although some people, typically in academic environments, use virtual classroom to refer to asynchronous online course technologies, and others consider Web conferencing to represent the business end of synchronous usage, or only synchronous e-Learning delivered to larger participant groups). Other terms that are used synonymously with Web conferencing include “live e-Learning,” “synchronous e-Learning,” “Internet collaboration” and a slew of vendor-inspired monikers. Note that the commonly trumpeted “Webinar” can refer to a Webcast or Web conference: usually one promising an expert presentation on a specific knowledge topic.

Why use it? Web conferencing allows for highly collaborative online learning among geographically dispersed employees. Its interactive architecture is especially well suited to smaller class sizes and a facilitative, rather than didactic, teaching methodology. Web conferencing permits learners to easily share ideas and experiences, ask follow-up questions, and participate in practice exercises and case study discussions. It also carries numerous secondary benefits, such as community building and networking.

Best practices? Of all online e-Learning formats, Web conferencing excels in the development of “higher order” learning skills (such as synthesis, analysis, socialization, acculturation). The tool lends itself nicely to attitudinal subjects that require interpretation and mutual understanding (such as ethics issues, legal elucidation, policy readings). It permits instructors to illustrate the diversity of knowledge among participants, or build consensus among groups. Its “flat” multipoint-to-multi-

point structure encourages knowledge sharing among participants and collaborative learning projects. The virtual classroom also permits the successful delivery of risk-free role playing exercises, hypothetical scenarios, community of practice development, and dialogic exchange. Application sharing features make this tool especially attractive to software trainers and proponents of real-time team exercises. Overall, the greatest advantage of Web conferencing is the ability for instructors to present content in a number of different ways, solicit feedback and provide clarification, and then facilitate learner practice and collaborative problem solving.

As previously noted, the synchronous technologies identified above are currently undergoing significant convergence and redefinition. Telephony and audioconferencing services at many organizations are moving to Voice over Internet Protocol (VoIP) handsets, at the same time that many Web conference services are offering gateway integration between VoIP and regular PBX/PSTN telephony. Mobile devices are rapidly adding features that exploit their visual interfaces, larger memories and higher bandwidth cellular networks, indicating that videoconferencing and Web conferencing integration is close at hand for the mobile learner, facilitator, and presenter.

Knowing that the field is a constantly moving target, it's easy to get caught up in the technology itself and lose sight of the learning objectives you are trying to realize. As e-Learning professionals, we need to be able to move with the times and anticipate new directions, but speculation about future trends doesn't add much value in and of itself. It's best to consider which approaches to real-time voice, video, and data-based learning best suit your organization's learning needs and most appropriately fit your technology environment. Do your

research, but avoid "analysis paralysis." Move forward with enthusiasm, perspective, and confidence.

The roots of synchronous e-Learning

Like most successful technology areas, synchronous e-Learning emerged to fill a need and then expanded to provide options previously unavailable to early adopters. The roots of synchronous e-Learning derive from three main influences: the classroom, the media, and the conference. (See Figure 1-1.)

As the name "virtual classroom" indicates, highly interactive forms of synchronous e-Learning were developed to emulate the classroom experience. This is evident also in the nomenclature of some of the functionality: hand raising, whiteboarding, stepping out. Instructors have been quick to draw upon training room techniques to create engaging synchronous e-Learning. The metaphor of the classroom also helps to structure the learning experience and provide a familiar context within which participants and presenters can interact.

Trainers are increasingly recognizing the value of mass media techniques for presenting effective and stimulating e-Learning. This area is still maturing, but for large audiences and limited interactivity events, synchronous e-Learning Producers are beginning to draw on mass media formats (talk shows, expert panels, mockumentary scenarios, etc.) and mass media devices (layered audio, attention grabbing introductions, narrative threads, and serialized episodes with recurring characters and examples). The declining cost and increasing ease-of-use of media hardware and software has encouraged more organizations to incorporate more sophisticated audio-visual design within their training delivery.

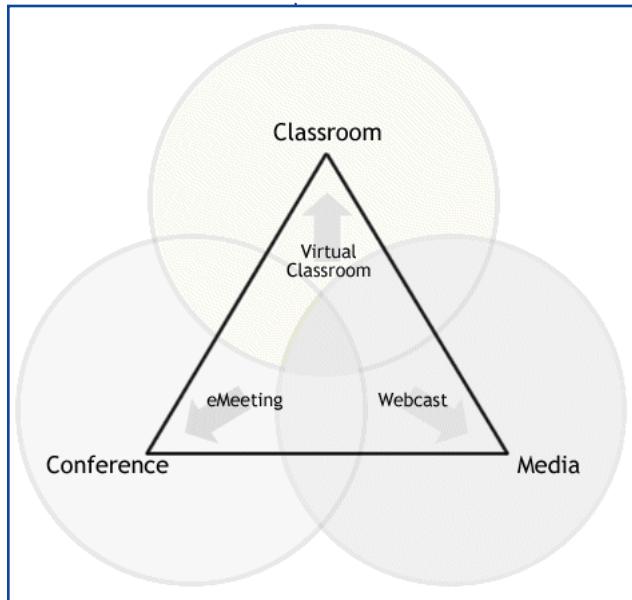
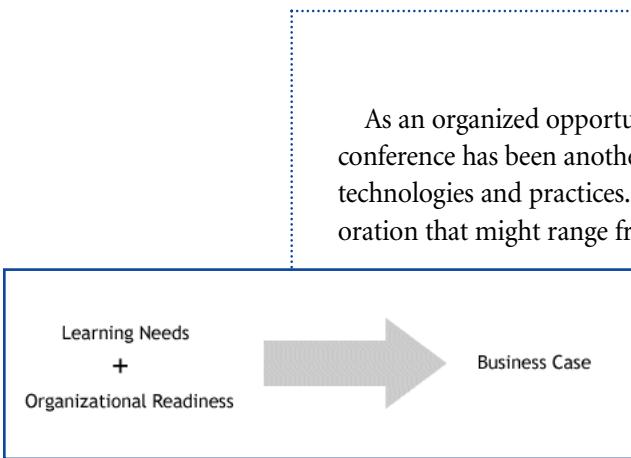


Figure 1-1
Synchronous e-Learning has roots in the classroom, online conferencing, and mass media formats.



As an organized opportunity to network, share ideas, and collectively develop best practices, the conference has been another formative influence on the development of synchronous e-Learning technologies and practices. I use “conference” here to imply an opportunity for exchange and collaboration that might range from small and closed (internal, conference room) to large and open (pub-

lic conferences and industry expositions. For most organizations, the internal conference refers to something more formal than a meeting or discussion, designed to generate ideas or disseminate information among a group or division. Hence, the early adoption of audioconferencing and videoconferencing as a means to reproduce that face-to-face interaction.

Figure 1-2

The business case for your selection of delivery mode arises from the combination of organizational needs and organizational readiness.

But while it is indebted to the classroom, the media, and the conference as forms of influence, synchronous e-Learning is its own form of communication, collaboration, and education. Anyone who attempts to simply reproduce instruction from the classroom, imitate styles and genres from the media, or recreate the conference environment will fail to excel. Synchronous e-Learning is most fundamentally about connecting people through technology to enhance competencies and promote understanding. Used appropriately, synchronous e-Learning tools permit instructional designers and facilitators to create truly engaging learning experiences. Designed effectively, synchronous e-Learning energizes and enables participants to enhance competencies and develop their skills, attitudes and behaviors.

The learning needs for synchronous e-Learning

Before you consider building a business case for synchronous e-Learning in your organization, you should determine whether a “learning need” exists and whether your organization is ready to implement this approach. Your needs assessment and learning objectives should drive the selection of an appropriate delivery approach and align more generally with your business case. (See Figure 1-2.) Implementing synchronous e-Learning approaches might generate some short term economic savings, but long term targets won’t be achieved if they are used inappropriately: learning effectiveness will decrease, training objectives won’t be realized, and you’ll be forced to re-evaluate your delivery systems. Chapter 3 addresses the issues of delivery approach selection and design, including conversion of existing classroom materials for use in synchronous e-Learning.

With this caveat, there are plenty of great reasons to adopt synchronous e-Learning approaches. Determining whether a learning need for synchronous e-Learning exists is rooted in its core definers. Synchronous e-Learning is live, real-time, interactive, collaborative and participatory, versatile, multi-modal (combining text, audio, video, graphics, etc.), and, most importantly, fun and effective. Some of the key advantages to using synchronous e-Learning include:

Connecting dispersed learners: Synchronous methods are especially well suited to organizations with geographically distributed learning populations. For instance, you may have a nationwide audience of regional sales representatives who need updating on product features and enhancements. Or you might have global franchisees requiring orientation around standard customer service skills. Firms with telecommuters and remote learners will also realize tremendous advantages by reaching these employees at their own locations.

Real-time interaction and collaboration: Synchronous tools allow us to engage with other people in real time, a very natural process that permits a spontaneous and flowing learning session. Answers to questions are immediate and clarification can be provided directly. Synchronous tools also lend themselves well to structured collaborative assignments. The social dimension of synchronous tools creates a learning synergy.

Sense of immediacy and co-presence: Synchronous tools are ideal for conveying late-breaking and time sensitive information. Since the human presence is so “front and center” when using these tools, the warm learner experience that is generated allays anxieties about the mechanical or depersonalized nature of technology-enabled learning.

Fostering a learning community: Learners benefit from sharing ideas and experiences with their colleagues. A major advantage to synchronous e-Learning tools is the development of a sense of connectedness and community among learners. Long term impacts can include better teamwork and collaboration skills, improved employee retention, stronger morale, and the formation of a collective identity. Adult learners, in particular, respond positively to peer support and opportunities to bond with their colleagues. Polling tools and other synchronous features can be utilized to build a sense of consensus, or to identify a respect for the diversity of ideas among a workforce.

Balancing learning dynamics: Synchronous e-Learning can reduce imbalances and create a more egalitarian learning experience. It can avoid the power dynamics of the face-to-face learning environment, where extroverts can dominate and where gender and other personal identifiers can impact group activities. Used effectively, synchronous e-Learning tools can overcome some of those barriers and level the field (although technical literacy can create imbalances among learners if not accounted for correctly). The use of anonymous feedback tools (such as polls and surveys) can increase the comfort level of online participants by reducing the fears that adult learners often have around answering incorrectly in front of their peers. On the other hand, the use of tools that do identify the originator (such as text Chat) can permit participants to shine in front of their colleagues and create a healthy competition. More generally, the variety of tools and communication choices available in synchronous e-Learning (text Chat, audio, polling, etc.) provides numerous options for connecting with diverse learners with different learning styles.

Unique functionality: Many synchronous e-Learning tools include features and functionality that offer unparalleled opportunities for fast and effective learning. Whiteboarding and markup tools can permit class exercises that can be easily saved and recalled. Application sharing allows for rapid and easy group work. Web tours can guide learners to specific points of interest.

Extending application demonstrations and Web safaris: Organizations that provide software and desktop training can benefit tremendously from the real-time application demonstration features of synchronous tools. Many tools also provide integrated virtual lab components, permitting supervised simultaneous practice sessions and “online sandbox” learning.

Synthesizing materials and concepts: Process-oriented tasks and information-heavy materials are best taught through asynchronous, on-demand training or reference materials. But the collaborative nature of synchronous tools makes them well suited to permitting learners to synthesize complex ideas and address “grey” areas. Synchronous e-Learning provides an online means for group learning techniques through discussions and dialogue, problem-solving exercises, and thoughtful reflection.

Access to valuable Subject Matter Expert resources: Many training organizations face the challenge of accessing subject matter expertise from highly experienced (and incredibly busy) senior members of the firm. Synchronous tools permit firms to tap into the deep knowledge and sharp minds of SMEs without significantly disrupting their schedule. These SMEs are usually the ones who are most aware of recent and emerging developments in their market area, and synchronous training provides the opportunity to rapidly convey that information. Large scale events ensure that a consistent message is delivered by senior management to all levels of the organization.

Train the Trainer: Synchronous e-Learning is especially well suited to training dispersed instructors (who might oversee regional training centers) and ensuring standardized training for all trainers. It provides numerous opportunities for reciprocal training, mini-challenges, fishbowl exercises, etc.

Informal learning: Once adopted by an organization, synchronous collaboration tools create points of exchange in everyday workflow behaviors that generate moments of informal learning.

Avoiding conventional pitfalls: The versatility of synchronous e-Learning allows trainers to avoid the pitfalls often associated with conventional face-to-face training. Often the cost of travelling results in marathon residential training programs where knowledge retention suffers. By focusing on facilitated learning and short, timely sessions, synchronous e-Learning is typically more learner-centric than many conventional training programs.

The business case for synchronous e-Learning

Having established the learning need, let's consider some of the economic and productivity advantages to using synchronous e-Learning:

Cost effective: Synchronous e-Learning is usually far more cost effective than face-to-face instruction. This is especially true for larger organizations that require participants and/or instructors to travel to central training locations. But it's increasingly true for medium and SOHO (Small Office and Home Office) businesses as well, since numerous lower-cost options targeting non-enterprise clients have entered the market in the last few years. Remember that ROI should be measured by learning effectiveness, not driven by short term cost savings. Most organizations are moving towards a blended learning approach, optimizing face-to-face, asynchronous and synchronous online delivery methods.

Productivity and workflow benefits: Synchronous e-Learning improves employee productivity by reducing travel strain, eliminating unnecessary time away from home, and connecting with learners at their point of work (rather than in unfamiliar classroom environments).

Recordable and replayable: Most synchronous training sessions can be easily recorded and played back. Many offer increasingly sophisticated opportunities for editing and repurposing (into portable and/or offline formats). Make no mistake; the true value of synchronous e-Learning is its live, real-time delivery. But the availability of playbacks (for those who missed the live session, or as an on-demand refresher) expands its reach and long term ROI potential.

Scalability: Many synchronous tools thrive upon smaller learning groups with a high level of interactivity. But some methods (Webcasts, for example) are typically less interactive and can scale up to large volumes of simultaneous learners and realize significant cost-per-user savings.

Extending the reach: Synchronous tools are especially effective for expanding into new markets and generating new learning communities. Organizations can reach new prospects and build an extended client base through Webinars (collecting contact information on attendees that feeds into a Customer Relationship Management database). Internally, synchronous tools can also contribute to improved knowledge sharing across departments and functional units.

Competitive business advantages: Synchronous tools permit rapid training development and delivery, providing competitive business advantages for organizations concerned with shorter production cycles and faster time-to-market rollouts. Organizations experiencing frequent employee turnover and workforce changes (through mergers and acquisitions, etc.) will recognize advantages in bringing new workers up to speed quickly. Synchronous e-Learning can improve Quality of Service benchmarks by ensuring a consistent standard of content and instruction. Benchmark your competition and see where you stand in relation to their use of these approaches.

Timely delivery and reusability: Synchronous sessions can provide relevant and succinct just-in-time training for employees when coordinated with the business calendar (e.g. seasonal training initiatives, end-of-year HR updates, or compliance deadlines). Most synchronous e-Learning tools permit reusing the same content in a series of sessions aimed at multiple learner groups, thus reducing

redundant design and development time and encouraging easy customization. Some tools provide opportunities for seamless integration with Content Management Systems and learning content authoring processes.

Automated learner recording and reporting: Many synchronous e-Learning services track learner attendance and participation. This automated reporting reduces administrative inefficiencies and can typically be integrated with other internal record keeping systems (such as Learning Management Systems, Performance and Talent Management systems, certification assessment programs, etc.).

Extending training budgets: Organizations invested in face-to-face learning typically spend about 70% of total training costs on travel, lodging, and catering. Synchronous e-Learning also eliminates meeting space requirements and numerous fixed and variable costs (which can range from property overheads to catering to projector rentals).

Integration points and challenges

When developing a business case for synchronous e-Learning, there are clearly a multitude of factors to take into account. Your cause will be made significantly easier if you can persuade senior management to champion the transition. Change management is crucial, and a clear projection of mutual benefits will help to build support from the various constituencies that will be affected by a synchronous e-Learning roll-out plan: curriculum designers, course designers, instructors, HR, IT, and other stakeholders.

Common sense and practical reality usually mandate that a phased transition is more effective and less disruptive than a major overhaul of your delivery methods. Identify advocates and pilot projects that will adapt well to the new approach. Develop a program around a series of synchronous events — it takes a few sessions before instructors and participants really start to feel comfortable with the new tool. Adult learners have a low tolerance for technical problems and time-wasting during training, and you'll want to eliminate any kinks during a trial period. Solicit feedback and support along the way. Ensure that your strategic objectives are achievable and can illustrate real and measurable advantages that reinforce the projections in your business case.

It's crucial not to consider synchronous e-Learning methods in isolation from the rest of your organization's needs and operations. Significant economies of scale can be realized if you can leverage the demand for these tools outside the training department. It'll also save you enormous headaches in the long run if you achieve consensus among all stakeholders with an interest in supporting and utilizing these technologies: typically the IT department, the Communications and Marketing departments, Sales, Human Resources, and quite possibly a number of other interested parties depending on the size and structure of your organization.

Our focus in this handbook is on e-Learning, but these tools provide significant opportunities and benefits for improved teamwork, improved productivity, virtual meetings, mobile workforce connectivity, and a host of other business functions. For example, videoconferencing is frequently mobilized for board meetings, interviewing, coaching/mentoring, remote management presentations, project kick-off sessions, and a myriad other uses. Most Web conferencing vendors provide a suite of products that range from supporting instant workflow collaboration meetings, through classroom sessions, to larger-scale scheduled events.

A number of options exist around selecting and implementing synchronous e-Learning technologies. The first decision is whether to use an existing service or product or build one yourself. Some organizations with specialist needs have created their own custom solutions. Given the complexity of these systems, this is not a decision that should be undertaken lightly. But the growing availability of freeware, shareware, and open source software in this area does make it a viable option for organiza-

tions with the necessary in-house resources. An additional decision with Webcasting is whether to choose a self-service or full-service model. Self-service requires your trainers and staff to prepare and upload materials and run an event; a full-service provider will, at a price, provide specialist staff to deliver those functions. Most Web conferencing systems assume an integrated self-service model, but there is usually an accompanying learning curve associated with understanding how to successfully prepare and run a session. Additional discussion of these points in Chapter 2 may be useful to you.

Webcasting and Web conferencing services can be internally hosted within your organization's IT infrastructure, or externally hosted by a vendor (commonly referred to as an Application Service Provider, or ASP model). Some vendors offer both models, whereas others offer only one or the other. The typical advantages to internal hosting are integration with your other internal systems, server control, firewall protection and security considerations, and long term cost savings with high volume usage. ASP solutions are fast to activate, require low initial investment, reduce the burden on your existing IT resources and infrastructure, sometimes offer better performance through integration with specialist global content distribution networks, offer helpdesk support, and eliminate the need for upgrading and patching the software. Whether to host internally or externally is a complex issue, but many smaller organizations find the ASP model more realistic, while larger enterprises tend to prefer the internal hosting option.

Pricing models for synchronous technologies vary widely, and are affected by whether you host internally or use an ASP structure, the number of users, and whether you select a full-service or self-service model. Prices for synchronous e-Learning services have generally declined over the past few years, making it even more appealing to smaller organizations and training operations. A few of the most common pricing structures are:

- Monthly subscription: a monthly fee for a certain number of simultaneous seats on an external ASP system
- Annual fee: a yearly license charge for internal hosting and unlimited volume
- Per minute, per user, pay as you go: a popular ASP structure for low volume users or new users testing the water.

Integrating with your other internal systems may be crucial. You'll typically want as seamless an end-user process as possible for learners and system administrators. Part of your implementation checklist should evaluate how well a synchronous e-Learning solution integrates with your LMS, evaluation and assessment system, LDAP directories, presence/IM/collaboration tool, CRM, Learning Content Management System, and other potential points of data exchange, authentication, and reporting.

Working with your IT unit, you should conduct a feasibility analysis of potential vendors. Many e-Learning vendors provide integrated service and product suites that cover a broad range of learning technology needs and might provide cost savings, simplified vendor relationships, and fewer customizations to out-of-the-box solutions.

While there are numerous advantages to adopting synchronous e-Learning, there are also challenges and limitations to consider. These range from the logistical to the pedagogical to the technological.

- Logistical: Time zone differences are significant for live training, especially for global events. If you have a largely mobile workforce, determine whether synchronous attendance is the most appropriate method for reaching them. Typically you won't replace another training strategy completely; you may need to have resources capable of also providing face-to-face and asynchronous online methods.
- Pedagogical: Synchronous e-Learning requires the resources and know-how for effective design.

Existing face-to-face course designs will need to be repurposed for the more interactive requirements of the virtual classroom. “Death by PowerPoint” will reduce learning effectiveness and create negative connotations among learners. Expect to invest in a program for training trainers on designing and developing use of these tools. Respect global cultural differences; identify and embrace how trainees respond variously to virtual synchronous approaches.

- Technological: Bandwidth is crucial. Although some online synchronous tools can scale down for modem users, most require stable connections and high bandwidth. Consider also the firmwide impact on your network of multiple simultaneous users. Identify your audience. Will you need a cross-platform, cross-browser solution? Coordinate any reconfiguration or restrictions on port, protocol, firewall, and file type policies with your IT representatives.

You’ll find additional discussion of these points and many others affecting production in Chapters 4, 5, and 6.

Summary

The September 2005 e-Learning Guild research report I referenced earlier indicated that about 90% of respondents had participated in a synchronous e-Learning event. The biggest benefits for learners were listed as, “immediate interaction and feedback from live instructors and SMEs,” “collaboration and social learning with other learners,” “reduced travel costs,” and “reduced time away from work or home.” The biggest disadvantages were listed as “technical problems with hardware, software, set-up, or connections,” “too little learner engagement or interactivity,” “facilitators are not usually skilled in synchronous remote delivery techniques,” and “bandwidth limitations.”

The subject areas reported most commonly covered were technical training, product knowledge, business skills, desktop applications, and company policies and procedures — although it is pertinent to note a focus on soft skills development and HR-related issues as well.

As this chapter has described, synchronous e-Learning tools are extremely flexible and adaptable to many different learning opportunities. Their personalized nature and collaborative potential will continue to advance the increasingly mixed formal and informal learning patterns and progressively more network-oriented workplace environments of the future. The widespread and rapid adoption of synchronous e-Learning approaches indicates the significant advantages that they offer. The challenge they represent for us as learning specialists remains threefold. How can I best integrate these systems technologically? How can I best implement and operate these systems within my organization? And how can I best create and deliver engaging and effective learning? We will address these questions in the chapters that follow.



“Because WebEx allows us to train large numbers of dealers effectively, we've accelerated our time-to-market at a rate that our competitors can't match.

—Mitch Bardwell, Director and Assistant General Manager,
Sales Training Division, Imaging Systems Group



LINE OF BUSINESS

Imaging equipment and information systems

WEBEX SERVICE IN USE

Training Center, Event Center, Support Center and Meeting Center

SUMMARY

Canon U.S.A., Inc. needed to find an effective method to provide easily accessible training of its new software solutions to its 8,000 sales professionals at Canon business technology and office product dealer companies. WebEx Training Center makes it possible for Canon to deliver hands-on training to thousands of dealer sales professionals throughout the Americas while optimizing critical company resources. Canon now brings sales of new software applications to market faster than ever, resulting in increased revenue streams and a greater competitive edge

ABOUT CANON U.S.A., INC.

Headquarters

Lake Success, NY

Number of employees

11,000

TARGET MARKET

Businesses, consumers, and dealers

WebEx Customer Since 2004

Canon U.S.A., Inc. accelerates time-to-market with WebEx.

A subsidiary of Japan-based Canon, Inc., Canon U.S.A. is an industry leader in professional business and consumer imaging equipment and information systems. With seven regional centers located throughout the Americas, the Imaging Systems Group supports a sales force of 8,000 people in a dealer network. Ranked as one of the top 100 US brands, Canon also maintains a deep commitment to social and environmental responsibility.

Canon has adopted the entire suite of WebEx solutions for a number of applications across its enterprise. The applications include using WebEx Event Center for product launches, Meeting Center for customer meetings, and Support Center for remote support and product demonstrations. The following story focuses on Canon's initial implementation of WebEx Training Center and how its integration dramatically transformed the company's business processes.

The Challenge

In early 2000, Canon began reformulating its Imaging Systems Group objectives to address a mature copier market. This involved developing document management and workflow solutions that would provide an additional revenue stream while also driving copier sales. Marketing the new products through its existing dealer network, however, was challenging. "Our dealers had been very successful selling our copiers and digital MFP's, but they are hardware-oriented and didn't have strong software competencies," recalls Mitch Bardwell, Director and Assistant General Manager of the Sales Training Division at Canon's Imaging Systems Group. "Since

our dealers were not experienced in selling software, they were reluctant to outfit their showrooms with software to conduct training at each Canon dealer location. The only other choice was to send sales reps to a Canon regional training center, a solution that was too inefficient, expensive, and impractical to implement across its dealer network."

The Solution

The training challenge led Bardwell to investigate online training solutions. While comparing several products, he discovered that WebEx Training Center had a unique feature called Hands On Lab. "When I realized that Hands On Lab would make it possible for Canon dealers to access computers with Canon software remotely, I knew it was the answer to our training problem," says Bardwell. At the time, Canon had computers installed in dedicated training rooms at three corporate regional training centers. "I immediately requested that all computers be shipped to Canon headquarters so I could set up our own remote training lab," he says.

Using the Training Center Hands On Lab feature, Bardwell was able to simultaneously connect dealers across the country to the lab computers located at Canon headquarters and conduct interactive trainings on both software and hardware solutions. Bardwell says, "The WebEx Training Center Hands On Lab feature gives us the ability to load the appropriate software on our lab computers, then easily train by enabling the dealer sales people to connect to the machines remotely. The sales people can then use the software as if it were on their own desktops."

Canon also uses Training Center to conduct virtual product demonstrations that are key to the sales process with its end customers. When a prospective sale involves sophisticated applications, the dealer calls a Canon field analyst for assistance. "In the past, field analysts had to travel to assist with each sale. With WebEx, field analysts now conduct detailed online demonstrations that answer dealers' and end customers' specific questions. Our analysts perform the virtual demonstrations online from wherever they are, saving Canon a tremendous amount of time and money," states Bardwell.

Today, 20 Canon field instructors have been trained on WebEx. They deliver one-or two-hour trainings to approximately eight dealer sales people at a time. Bardwell reports, "Using WebEx, we now train approximately 40 sales professionals at Canon dealers each month, which means we're training many more dealers in a lot less time at a lot less cost."

The Benefits

WebEx has transformed Canon's training model, increasing the speed with which the company trains dealer salespeople while saving tens of thousands of dollars a year in travel and lost opportunity costs. "Many of our dealers were resistant to taking on Canon's document management products," Bardwell remarks. "Knowing we had a solid training solution like WebEx in place to train an unlimited amount of representatives with no travel costs eased our dealers' apprehension about selling the software products," he says. "Because WebEx allows us to train large numbers of dealers effectively, we've accelerated our time-to-market at a rate that our competitors can't match."

"We cut our instructor-led application workshop from three days to one by creating a hybrid event that's much more effective than the original multi-day in-person event."

—Mitch Bardwell, Director and Assistant General Manager,
Sales Training Division, Imaging Systems Group

Canon has taken advantage of WebEx to adopt a new, blended training approach that leverages different learning methods according to content type. This approach has accelerated training rollouts, made learning more manageable for trainees, and improved the overall quality of training Canon delivers. "We cut our instructor-led application workshop from three days to one by creating a hybrid event that's much more effective than the original multi-day in-person event," says Bardwell. Two self-paced online courses with quizzes prepare trainees for the face-to-face instructor-led event. The next part of the course, which takes place after the instructor-led workshop, is designed to give all attendees the opportunity to delve further into specific topics of the application workshop via WebEx. "WebEx lets us do things faster, which is the most important competitive advantage for any company," he says.

Conducting virtual demonstrations with WebEx helps Canon improve the knowledge of its instructors while optimizing its field experts' time. Bardwell recalls, "In the past, it was very difficult for field instructors to go on sales calls and demos, so their exposure to real customer applications was limited." He adds, "Now when a virtual demo is set up and conducted by the field analyst we always have an instructor on the call. By observing the demo, the instructor gains tremendous insight to customer needs and Canon

solutions. The instructor can then bring that customer experience right into the classroom. There's less need for travel and we've improved instructor knowledge of customer applications." WebEx avoids lost opportunity costs that constant traveling can create. "Now our field experts spend their time doing more important things than traveling," he says.

The Future

As a result of Bardwell's successful WebEx training strategy and the resulting increased adoption of document management solutions, demand for training is quickly growing. One of Canon's dealer channels recently included the document management solutions products in its President's Club incentive program to ensure salespeople focus on the new product line. "We have been called upon to train 1,200 sales people in 30 days so Canon software products can be included in this quarter's sales. The only way we can do it is with the WebEx Hands On Lab solution," says Bardwell. To accommodate the increase in training demand, Bardwell plans to expand the number of WebEx Training Center Hands On Lab computers. "We also intend to start nationwide dealer launch training on new software solutions as they're introduced," he says.

Canon U.S.A. has been continually impressed by the WebEx commitment to customer service, innovative technology,

HIGHLIGHTS

- To provide new software training, it was not feasible or cost-effective for dealers to send all of their sales people to Canon U.S.A. regional training centers.
- Canon used WebEx Training Center to implement a new blended training approach that has accelerated and improved training.
- Virtual demonstrations saved Canon significant travel costs, elevated the level of knowledge of its dealers and instructors, and optimized its field experts' time.

Getting Started

By Karen Hyder

I've been teaching a group of analysts from a financial services firm how to use their new contact management software to track customer contact. Based on their practice exercises and test scores, I'd say they've learned quite a bit in a short time. I use a variety of instructional methods; I display the PowerPoint file that came with the courseware, ask and answer questions, and demonstrate the software features on screen. It's going well.

What makes this class different from any other? After three sessions online, I still haven't met any of my students. I'm here in upstate New York, and my students are in offices around the world. I'm teaching a synchronous online course.

How I learned to love synchronous e-Learning

I worked as a training road warrior for Ziff Davis Education in the mid '90s and taught technical and soft-skills courses in thirty-two states and twelve countries. Since then, distance learning has appealed to me, but I didn't think it was possible for this new technology to re-create the kind of learning environments I could build in a classroom. I feared that the interface would seem sterile and cold, and that my students couldn't or wouldn't participate.

Indeed, I found that synchronous collaboration software products did not automatically create good training, in much the same way that using Microsoft Word doesn't automatically create good documents. I did find, however, that the software does provide good instructional resources. It's up to me to create a new style of learning environment and effective learning relationships.

It took some time for me to feel competent in using the functions of the synchronous online software tools. I experimented, practiced a lot, and was soon ready to go. I invited students to a real session. I prepared and loaded my materials and tested everything in advance. Now, with a few clicks of my mouse, I can teach anything from right here in my office in my house, in the middle of a cornfield. Students in California or Hong Kong can see the files, demonstrations, examples, and messages on screen, and none of us have to leave our desks.

This chapter is an extensive overview of synchronous e-Learning and how to get started with it. I'll begin with some philosophy, help you evaluate the different Web conferencing features popular for e-Learning use, share my ideas about your role in this new world, and review common objections to synchronous e-Learning and how to answer them. I've also included executive summaries of a few of the Web conferencing tools, which you will find in Appendix A.

Contents

In Chapter 2 you will find information about:

- **Some philosophy about synchronous e-Learning**
- **Synchronous e-Learning application features**
- **A new role: The Producer**
- **Objections to online training**
- **Executive Summaries from: Centra, Elluminate 7, WebEx, Adobe Acrobat Connect Professional**

Some philosophy about synchronous e-Learning

Not everyone "bought into" synchronous e-Learning right away. Let's look at some of the reasons.

An uneven beginning

Ask 20 people in your organization what they expect from training and you'll get 20 answers. Managers are eager for employees to improve skills,

while employees want to understand new concepts and to be able to apply them confidently. CFOs want to reduce the costs of sending everyone to a classroom for eight hours at a time and they want to improve productivity. People often saddle training with expectations that make it the magic pill for all the organization's problems — just like the magic pills in infomercials. The trouble is that decision makers know that, while things look great in the ad, magic pills rarely live up to the claims.

Synchronous online training software, virtual classroom tools, and Web conferencing applications are three different names for essentially the same thing. They make it possible for many students to meet online at the same time with an instructor, and they make it possible for online distance learning to emulate a classroom learning experience. The notion of doing this has long been a fantasy of trainers, educators, learners, and managers. Few of us believed that we could ever recreate the “feel” of the face-to-face experience. We thought it was obvious that we’d never be able to walk around to a student’s equipment to observe problems and offer solutions. We’d miss the subtle cues of body language, and we’d never be able to tell whether the learners were actually learning.

Early adopters of synchronous online tools had mixed success. Many trainers and educators didn’t like the virtual classroom, because they felt they couldn’t connect with learners. Many training managers dismissed the online tools as unusable or impractical due to the high costs of licensing, the learning curve for trainers and users, and bandwidth problems — especially in the “last mile” between the network and the users’ connections. Users and trainers would need dedicated technical support, too. The managers decided the tools weren’t worth the cost and the effort required.

Other trainers logged on and lectured using the minimum of what was available. They lectured and advanced slides, or shared applications, for hours at a time. They created live sessions, but the learners found the sessions horribly boring and slow. The instruction was lower quality than old-fashioned CBT (Computer-Based Training) tutorials and required more setup. Endless PowerPoint slides and hectic schedules ensured that learners would “log in, check out, and drop off.”

At the same time, employees who touch customers most frequently — technical support staff and sales engineers — quickly adopted online tools to answer questions and solve problems. Sales and help desk technicians don’t consider what they do to be training. Help desk calls became less frustrating when technicians could instruct callers to share their own application and could obtain a direct view of error messages and anomalies. Technicians could correct problems remotely.

Sales engineers found that online tools made their work easier because they could control what the user was seeing. They could present slides and demonstrate features of their products in real time. They prompted attendees to mute their phones and type any questions in Chat, so the presenter could respond to them at the end. Engineers found that they could do more demos per day, and connect to buyers quickly and directly.

Eventually eager trainers looked at the strategies used in both successful and unsuccessful online sessions and adopted some best practices from what they saw there. Unfortunately, even among the eager adopters, there were many who ignored the features of the tools and never looked at their content from an instructional design point of view. They just lectured.

Those who were most successful worked with the online tools in order to support what they wanted to do. They created an entirely new, comfortable, and fully functional place to deliver their message clearly and effectively. They reframed their job, from being a content provider to becoming a context creator.

Instructors are context creators

We’ve been taking desks for granted. Desks, chairs, and books have been fundamental elements of our learning environments; they are part of the context of how we learn. It’s natural for us to imag-

ine ourselves sitting in classrooms where learners and teachers come together in one room to observe, discuss, and practice. In traditional instructor-led classroom training, there are certain established ground rules for how learners behave and interact in that environment. We understand these conventions, and we sit in seats and face the front. The trainer speaks and, for the most part, everyone else listens. When the door closes, everyone is isolated (if we're lucky) from the world for eight hours of immersion in the topic of the day.

In online training sessions, not only do we not have desks in a classroom, books are rare. We can't even see the trainer or each other while we learn. There are new ground rules, and in many cases, new vocabularies that are unique to new modalities for learning. In online sessions, the trainer cannot physically establish his leadership role. Only a click away from e-mail, Amazon, and eBay, learners are easily distracted from the online session by an unimaginable number of things that never affected the in-person classroom.

Trainers need to think beyond the outmoded physical aspects of a classroom, and instead create learning relationships with session participants using the resources that are available to them in synchronous online software or virtual classroom tools. Learning relationships, like relationships with a remote teammate or distant family member, require special effort and different tools and resources than the ones we use when in the same room. Distance does not prevent communication, although we might sometimes feel it hinders it. Because we cannot rely on body language to indicate subtleties in meaning, we must be more direct. We cannot keep learners locked in a classroom or compel them to participate. We must trust that they will focus on the lesson.

Like every training modality that has come before — classroom, CBT, and correspondence courses — there's no guarantee the online training session will automatically translate into learning. Many training organizations evaluate learners and trainers using "smile sheets" so that a "fun" class in which time flies often equates to a successful learning session. But a high "smile" rating is no guarantee that students will be able to apply what they have learned back on the job.

The only key to effective synchronous e-Learning is held by two groups of individuals: instructional designers and instructors.

Instructional designers identify learning objectives, develop materials, and plan activities to engage learners and confirm learning. Instructional designers create the structure and the goals and provide tools that support the trainers as they deliver and evaluate learning.

Training builds on solid instructional design, but if you've ever seen a great classroom trainer, you know that what they do is way beyond what's written in the book. A trainer can bring real-life experience, humor, and adaptability to a session, and can create a comfortable and engaging learning context. Quick-thinking trainers rework instructional design on the fly when technical problems limit participant activities. Hiring managers admit that subject matter expertise and a good personality are key factors in the selection of trainers.

In online sessions, it can be challenging to capture the level of "connectedness" that comes naturally in the classroom. We must measure results on a new scale. To create an appropriate context for an online session, learn to use the online tools and resources that are available to you and to your learners.

Synchronous e-Learning application features

Here's a quick introduction to the range of features and resources available in synchronous online learning tools. Every product is different, so be sure to carefully compare feature availability and importance to you, and test drive the software with your materials to ensure functionality before you sign a licensing agreement. Many of the products allow 14-day free trials as well as live demonstra-

tions on demand. (See Sidebar 2-1 for links to free trials and demonstrations.)

The different Web conferencing software products package these features in different ways. You may find that certain features have different names across the range of products, compared to the names I use here. Nevertheless, most products tend to address the various functions. As you read this book, you will see these functions again and again. However, each time you see them, they will be in a different context — how to design an event with the features in mind, how to prepare for using the features, and how to manage the features during the event.

Licensing

Vendors offer flexible licensing plans and a broad range of pricing to suit small and uber-large groups. Large corporations might license and install the online software so that it runs from inside the company, supporting it with internal IT staff members. Smaller groups might choose a hosted model where they just use the software, but don't maintain it.

Forecast how regularly you'll use the online software, how many sessions might be running at the same time, and the number of participants you'll have every session, every month, or every year. Your vendor can offer pricing from a few cents per minute per attendee, to monthly limited, or unlimited use. If you're not sure what volume you'll run at, ask for ramp-up pricing so the licensing grows as user adoption grows.

Third party entrepreneurs such as Encounter Collaborative (www.encounter.net) and communiqueconferencing (www.communiqueconferencing.com/webinar.asp) are an option where you can sometimes find less expensive rates than licensing directly from the software publisher. These third parties also offer conference call services you can roll into your agreement. If you need help getting set up, they may also offer event services, a team of Producers to help you ensure a great session. This is perfect if you only present an online session once in a while.

Learning Management System considerations

While shopping for software, look at Learning Management Systems, too. LMSs provide ways to communicate with learners before, in between, and after synchronous online sessions. Event Producers can post supportive materials and independent exercises as well as generate reports on registrations, attendance, and test scores. Discuss with your team what you need, and what's it worth to get it.

Tip: Synchronous software providers often have a preferred LMS partner. To streamline your processes, consider products that are designed to work together, such as Centra Live and Saba.

Learn more about linking to an LMS in Chapter 7 of this book.

Sidebar 2-1

Links to free online trials

WebEx Free trial

<http://www.webex.com/go/choosetrial>

Centra Live Free Trial

<http://www.saba.com/products/centra/trial/index.asp>

Microsoft Live Meeting <http://www.microsoft.com/uc/livemeeting/default.mspx>

Elluminate Live!

http://www.elluminate.com/free_trial.jsp

Adobe Acrobat Connect

<https://onlineservices.adobe.com/account/?prod=Adobe-com>

Making the connection

Unlike basic audio conference calls, interfaces like Centra, Live Meeting, InterWise, Elluminate, LearnLinc, and WebEx offer standard conferencing tools that support effective instructional methods to appeal to a wide variety of learning styles. Some examples of the functions available and a few of their virtual classroom uses are:

- A slide or file display that allows the instructor to show students PowerPoint slides or other files;
- A whiteboard to brainstorm a list of ideas;
- Application sharing, so the instructor can do a software demonstration from one computer that can be seen by every attendee;

- Tool access, so the instructor can share the ability to use tools and functions of the online interface with students or other trainers;
- Peer-to-peer Chat, to get students to connect with other students;
- Student and trainer Chat, to allow sidebar Q & A;
- Instant feedback, to confirm the appropriateness of the pace and the content;
- Polling, to gain consensus or perform quick learning assessments;
- Annotation, to focus students' attention on a specific area of the screen.

Here's a closer look at these functions and features, and several others, to give you an idea about what each is like. I've also made some suggestions ("Hold this thought") that might get you thinking now about things you can do in order to use them most effectively. Ann Kwinn will talk about some of them in a design context in Chapter 3. Then I'll expand on these ideas in Chapters 4, 5, and 6.

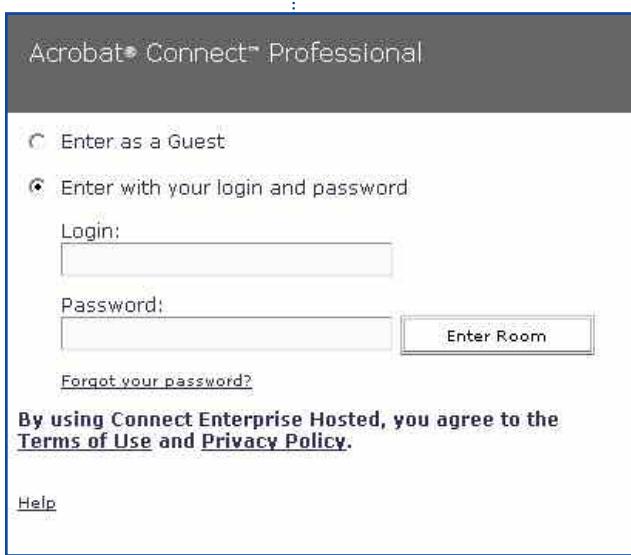


Figure 2-1

Login to a virtual classroom is very simple. (Your login interface may be different.)

Familiar log-in

Using only a browser, students and presenters can attend your virtual classroom on the Web in the same way they would go to any other URL. (See Figure 2-1.)

What it's like: Shopping online and logging into an account. Everyone has done these things by now.

Hold this thought: When you prepare information packages that will go out to learners before the class, remember to be very clear about the instructions and log in information. Anticipate that 5%-10% will still need assistance on the phone or in Chat. I will have more to say about this in Chapters 5 and 6.

Here's another thought: More software vendors are now offering an "always on" or "persistent" meeting room option that an individual or team can use and reuse for every meeting. This is similar to having a conference call number and pass code that never changes. There are

several advantages to using persistent meeting rooms including:

- Files and activities can be loaded days or weeks in advance;
- The same files and poll questions can be reused from one session to the next;
- Participants use the same Login link, user ID and Password for each session;
- Participant privileges and custom settings will remain set continuously;
- The process of setting up a new session need only be done once.

Slide or file display

You can use slides to help organize your content for presentation and to manage the flow of ideas. Bulleted lists, graphs, photographs, and screen captures help participants follow along. Often, by using this feature the instructor can also show sample documents created in Word, Flash, or HTML format. (You may need to convert files to a format that can be used by the software.)

What it's like: PowerPoint slides. In fact, most products let you use the slides you already have, and they may support custom animations in PowerPoint. Another use of slides is similar to the advertising and trivia shown at movie theaters before the lights are turned down and the preview clips begin. Often referred to as informational cycle slides or "tweens," this is a PowerPoint slide set created to run automatically and provide instructions and information to learners joining a synchronous or asynchronous session. Cycle slides make use of that awkward pre-start time by welcoming early attendees and helping them get set up, without requiring the instructor's immediate attention.

Perfect for those frantic five minutes when the instructor is handling a tech support call or stepping out to use the loo. We've put the tween set we use for Guild Online Events on the Web at http://www.elearningguild.net/tweens/OLF36Tweens_nl.swf.

Hold this thought: You can say a lot in 10 slides. Post the agenda, give instructions for using basic features of the software, show reminders, offer links to bandwidth tests, prompt for last-minute questions. You can also lighten the tone by adding music or comics. More about this in Chapters 5 and 6.

Whiteboard

With a whiteboard, instructors can encourage students to share ideas and comments through brainstorming, ask questions, and type their responses on the whiteboard. This promotes interaction, validates student input, and provides clarification for others who may not have heard the answers. The instructor can also use the whiteboard to sketch or annotate your visual examples. See Figure 2-2 for the annotation toolbar.



Figure 2-2
Whiteboard annotation tools allow users to type onto the board, to draw lines and geometric figures, sketch, and erase.

What it's like: It's like writing on the whiteboard in a physical classroom, except the instructor has to draw with a mouse pointer, which is quite different from drawing with an actual pencil or pen.

Hold this thought: It's not as easy as you may think it is. In Chapter 6, I'll show the instructors who are reading this how to post an image to annotate instead of sketching. You can save the data to review or reuse later.

Tool access and sharing

The leader or leaders of the session control the images and tools that all online participants see. They can display files, annotate important points, and create quizzes or polling slides. Students can contribute verbally, but cannot control the tools. You, or the training coordinator who sets up the session, can select the access level for each of the invitees so that two or more trainers can take turns delivering. There are also options that give all participants (almost) equal control.

What it's like: Team teaching. When instructors are sharing the stage, they have to make agreements about who will cover which portions and when they'll switch roles.

Hold this thought: Tap into your resources and invite an expert to share their insight with the class. Logging into an online session is a much smaller commitment than attending a class in person.

Here's another thought: To ensure smooth transitions, you will want to be sure the co-presenter roles, like time limits, are defined and agreed upon in advance.

Peer-to-peer Chat

Chat gives participants direct access to each other via text messaging, thus providing a forum for sidebar conversations and comments. In some tools, you can also create "break out" sessions where students work through a scenario and report their results to the group.

What it's like: It reminds me of passing notes in third grade, but is ideally used for course-relevant side conversations, similar to coffee break comments. It's also like nudging your coworker in the ribs saying, "Hey, we could've used this to solve that problem that came up last week."

Hold this thought: Some products allow you to turn off the Chat feature to avoid inappropriate use.

Student-to-trainer Chat

Students are able to direct questions and ask for clarification without interrupting the flow of the class. Simply type your response back to the student.

What it's like: Parking of questions — that is, setting questions aside with the intent of answering them later. Instructors can manage the content and sequence efficiently by not addressing every question immediately.



Figure 2-3
By using “Status” icons, participants can give presenters instant feedback without interrupting the presentation. (Status feature from Adobe Acrobat Connect.)

Hold this thought: It’s a good idea to give a basic intro to how Chat works and encourage students to ask questions of the instructor or of the moderator. Chat allows them to do this without having to un-mute the phone, or to share comments such as how they might apply the new skill or use the feature at work. To keep the session moving along quickly, you can invite a fellow trainer or subject matter expert to moderate the Chat questions on your behalf.

Instant feedback

The comment I hear most from trainers about teaching online is that they miss being able to connect with students by observing behavior and asking “How’s it going?” Using instant feedback features, students can change an option on their screens to alert the trainer to slow down, speed up, or clarify. (See Figure 2-3.)

What it's like: Observing body language that indicates a student needs help. It also reminds me of a flight attendant call button. The instructor can say, “I see a red indicator telling me someone needs clarification on that last section. Are there specific ques-

tions I can answer?” or send a Chat message offering assistance.

Hold this thought: This is sometimes called an “on-the-fly Poll.”

Polling

An easy way to create interaction is to display a poll that students can respond to. A poll usually consists of a question and two or more possible answers. Some tools limit the number of answers to six or seven. The Multiple Choice option will limit the number of possible answers to one. When the question is set to Multiple Answers, respondents can choose every option.

You can create a poll prior to the session, or just when you need it. (See Figure 2-4.) Once it’s displayed, students can respond by clicking on the option of their choice. The interface will display the percentages of the responses and, in some cases, how each participant responded.

What it's like: Quizzing, gathering opinions, quick needs analysis.

Hold this thought: You can plan and create polls in advance to build meaningful lesson introductions and evaluations. It’s a good idea to use a polling slide about every ten minutes to build interaction.



Figure 2-4
In Live Meeting, this dialog allows the instructor to create a poll slide.

Annotation

Create impact with annotation tools by drawing arrows to a particular object on the screen, circling or underlining words, or adding text on the fly. Participants can also use annotation tools in interactive exercises. See Figure 2-5 on page 22.

What it's like: The coach showing the offensive and defensive plays.

Hold this thought: This is essentially the same as using the whiteboard. If your mouse drawing skills are limited, you can create a slide with the graphic partially completed. Click on the slide when you’re ready to use it, and simply make annotations or allow the participants to do so.

Multimedia content

Vary your instructional methods and engage student interest by showing AVI, Flash, or other action clips. Check your software product information for a list of supported file types.

What it's like: Filmstrips, VHS tapes, or demos.

Hold this thought: You can use clips from Help files, marketing materials, portions of asynchronous training tools, or your own examples. Keep the clips short and highly relevant. Participants tend to surf away to something else if they lose interest.

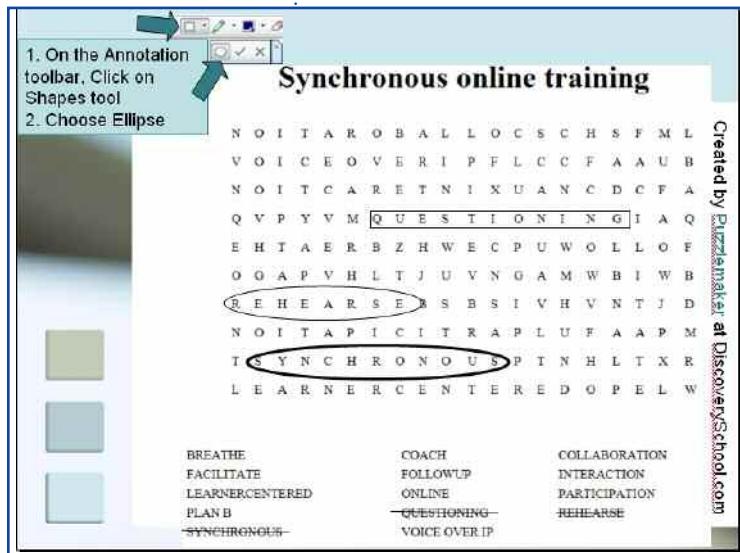


Figure 2-5

A PowerPoint slide with a customized Word Search game. WebEx participants were invited to use annotation tools to review vocabulary words.

Live demonstrations

This feature is useful in software training. Participants see how software functions as the trainer performs the actual clicks.

What it's like: Using a projector or big TV screen to walk through the steps before students try on their own.

Hold this thought: When you design a live demonstration that may be lengthy, such as touring complex dialog boxes, include questions you can ask that will prompt students' verbal participation. "Why would you want to keep track of this contact's ID>Status?" This promotes learning, and it also increases engagement.

Group Web surfing

Like demonstrations, group surfing lets you move around on your machine, displaying to your students what you see on your screen. When you navigate to a Web site, each student can interact directly with the site. For example, if you want students to complete an online form, you can take them to the URL and drop them off. They will directly link to the form.

What it's like: Being a tour guide in a brewery and providing samples to visitors.

Hold this thought: In some tools, it's possible to snap wandering students back from the Web and into your session with a single mouse click.

Over-the-shoulder application sharing

If you've ever worked on a Help desk, you know that there are times when it would be particularly useful to be able to see what the caller is trying to explain. Programs with sharing features let you see a student's screen to coach his performance or reach right through the interface and make adjustments on his PC once he's given you permission. Teams can view and make changes to shared files.

What it's like: Providing technical support to someone when deciphering the "whooziewhatst" and "thingamajigger" breakdowns from a hundred miles away.

Hold this thought: Assure participants they can take back control and end the share access at any time.

Integrated telephony and VoIP

You can handle the audio portion of the course — that is, the voices of the presenter and the participants — with a simultaneous conference call. Also, some software applications support Voice over IP (VoIP) technology where voice is transferred over the Internet making use of the microphone and speakers on each user's PC. VoIP users may experience a choppy audio sound most frequently attributed to their Internet connection speed.

Using either method (or both) participants see and hear the same thing at the same time and can participate as they would on a phone-based conference call.

What it's like: A conference call.

Hold this thought: Provide call etiquette information as part of the invitation you send to each participant. At the beginning of the actual session, ask each participant to state his or her name before asking questions or making comments. Provide a slide that explains how to use VoIP controls (see Figure 2-6). Plan questions to ask that will create mild interaction. For example, “What data points would you want to collect that *Act!* does not already have a field for?” When you ask a question, wait twelve seconds for response. The reason for this is that it takes students three seconds to realize a question was asked, three seconds to think of an answer, three seconds to get the courage to answer, and three seconds to “unMute” their audio and answer the question. You’ll be amazed by the difference waiting longer after questions can make.

Control your audio using the Hands Free lock



Figure 2-6

Use a tip slide to help participants use VoIP Audio controls in Adobe Connect.

Record and play back the video and/or audio portion of the session

Many Web conferencing tools allow you to digitally capture a visual and audio record of the session for review or reuse.

What it's like: Videotaping your class with the camera focused on the slides and demos.

Hold this thought: This recording can be added to a Web site and used asynchronously.

Registration, testing and grading (Learning Management Systems, or LMSs)

Built-in and proprietary tools are available to track test scores, automate registration, and find out who's attending online sessions. Talk to your software vendor about how to best support your learners and trainers. Formalize your evaluation process by generating, administering, and scoring quizzes and practice exams and by tracking student assignments. In addition to registration and tracking, LMSs can also provide places and formats to support additional materials including assignments, tutorials, clips, and Chat rooms (an interface where individuals type messages to those who are logged in and those who will log in later. Also called threaded discussions.)

What it's like: A teacher's grade book and school transcripts. You can find out which courses this student has taken, their test scores, and their completed assignments.

Hold this thought: It's a good practice to make a note of every question your students ask in this course. Start with that list when writing test questions. To better prepare students for an online session, attach a pre-course assessment tool directly to the automated confirmation email, along with your customized agenda and online etiquette guide. Remember that, after the session, many learners

need help applying what they have learned in class back at work. With support from an LMS, it is simple to follow up with previous students to offer additional support and training opportunities tailored to their specific needs.

A new role: the Producer

So you think you're ready to tackle the challenge of delivering training and presentations online? Are you itching to try a synchronous software tool like WebEx, Adobe Acrobat Connect, Microsoft Live Meeting, Elluminate, Centra, or any of the many other products now available? Welcome to a new world!

In the training or education world you have been used to, there were designers, there were instructors, and there were (if you were lucky) media specialists to help you prepare all the support materials. In synchronous e-Learning you will find that a new role or position is called for: the online session Producer.

As you read the next part of this chapter, I'd like to ask you to put yourself in this new online session Producer role. I'm going to shorten that to just "the Producer" and I'm going to capitalize the title because it is a key role. The Producer's job is to be sure that the software, the content, the presenters, panelists, and speakers, as well as the participants, can get up and running and have a relevant, successful session. Also, the Producer is always ready with Plan B in case of emergency. When I refer to the Producer, I'm referring to the role responsible for the functional and administrative aspects of the overall event. This is in contrast to delivery of training. Realistically, the designer/presenter/trainer/speaker will often play the role of Producer, too.

What does a Producer do?

The Producer has a long list of responsibilities, "to-do's," and general housekeeping duties. I'm going to list the bigger ones here, in more-or-less chronological order.

Set the date for the pilot

To begin with, the Producer sets a reasonable target date for a pilot session. The objective of the pilot is to have a "dry run" session with a select group of colleagues or volunteer students. The pressure of a target date will develop a certain momentum for the real event, but the pilot performance will not impact "real" learners, and you'll have time to strengthen any weak spots in the design, the content, or the instructor preparation before the debut.

Adapt methods to the virtual classroom

The Producer knows that very few of the traditional classroom processes and methods will work the same way in the virtual classroom. The Producer will rework his or her thinking, and adapt traditional classroom methods to the new environment.

Map the process

My recommendation is that the Producer should immediately begin to create a list or mind map of all the steps, tools, and obstacles to overcome. (Note: a mind map is an organically grown and organized group of ideas used to facilitate and support brainstorming. A mind map shows visual relationships between entries.) Creating a mind map will help you organize a very detailed, non-linear production process. Thinking things through, making a plan, and assigning roles and tasks will improve your likelihood of getting it right the first time.

Use software such as Mindjet (<http://www.mindjet.com/us/>), or use a physical whiteboard to lay

out your mind map. Think of every person, connection, or training material that needs to be attended to in the preparation in order to create an environment where learners can be successful. Examine what attention each area will require. The list, or mind map, must be as detailed as the Producer can manage, and the Producer will fill it in as his or her perspective broadens. The level of detail can extend to decisions about how to present information, about the need to create invitations, and whether participants will register through a Learning Management System (LMS).

I've provided a basic version of the mind map for my role as Producer of The eLearning Guild online events, as a guide for your own map. You will find it in Appendix B of this book. This mind map, or list, will vary for different Producers, software, and situations and will likely include the same general areas as the example.

Support the event

The Producer supports the synchronous software interface before and during the event, ensuring that everything works: sessions are created, users are added, files are converted and uploaded, polls are set up, and connectivity and audio are optimized.

The Producer supports the session content by ensuring that the software tools support all learning activities. If the instructional design calls for a small group discussion, for example, the Producer decides how to manage it in the actual session. Producers will need to create the polls the design calls for. The Producer will also follow a script or storyboard that indicates when to perform certain steps during the session, such as, "Move to Slide 5 and start application sharing. Prompt learners to click the Full Screen button." Whether your training materials need to be created new or just need tweaking, see Chapter 3 for more about developing and adapting materials for synchronous online sessions.

The Producer supports the presenter, aka trainer, aka speaker. The Producer ensures that the presenter can do what he has planned, that all files are available, and that the presenter is sufficiently competent in using the interface tools. The Producer and presenter rehearse, not necessarily the content, but the delivery.

Even experienced trainers often need an extra pair of hands when presenting online. During the session, the Producer manages the technology to allow the presenter(s) to focus on the content and the learners.

The Producer supports the participants, aka learners, attendees, students, users, or clients, by ensuring that they are prepared to learn in this new environment. The Producer sends invitations with critical installation and log in information. The Producer confirms that all participants can log in to the session, and see and hear to at least a 90% quality level. I recommend accepting 90%, and being realistic about the factors you cannot affect.

The Producer is responsible for Plan B, that is: what happens next when something fails. Everyone will be looking to the Producer. As the Producer, you must have a well-thought-out plan ready in the wings or you will have dead air. Start developing Plan B wherever you see an opportunity for something to go wrong. For example: What if a participant can't view the PowerPoint slides on screen? Plan B might involve having e-mailed the file to all participants ahead of time. Or it could involve asking the participant to follow along on the audio portion of the call (teleconference) until his machine reboots.

Deal with the Learning Management System

If also implementing a Learning Management System, the Producer should treat that as a separate area of consideration or a separate project. Get the LMS installed and thoroughly tested before scheduling synchronous sessions or adding users and content. Review the three "LMS Tips" eBooks

from The eLearning Guild for ideas and best practices. (See Sidebar 2-2 for two example tips.)

Objections to online training

I've introduced hundreds of subject matter experts and trainers to virtual classroom tools such as WebEx, Breeze (now Adobe Acrobat Connect), Live Meeting, and Elluminate. Invariably, they cite the following objections to this new model for training and learning. I can't argue with them — all these concerns are warranted. But there is hope if you try the strategies that work.

Objection #1 “I’m not able to observe participants’ body language or eye contact to ensure that they are ‘with me’ and learning.”

My response: You're right, you cannot observe those things. However, relying on body language and eye contact are very low-level feedback methods. They reveal basic information such as: the learner is awake, or the learner appears to agree with something.

In online sessions, in order to get any feedback at all, I need to ask questions that elicit a specific feedback response. This means asking more challenging, probing questions and asking for specific responses. I can prompt learners to type responses in Chat, to select responses in a poll, or to respond verbally using audio. I can even ask for low-level but specific feedback to impromptu questions such as, "Are you able to hear me? Please show Thumbs Up or Thumbs Down," using emoticons or status indicators.

Consider these additional benefits: participant responses using Chat and Polling come in all at the same time. A trainer doesn't need to wait for each person to take a turn responding. Also, the whole group benefits when no one participant can hijack the session by talking too much.

Try this: "Seed" five new, relevant questions. That is, write out polls or open-ended Chat response questions to ask at predetermined points during your session. I like to ask questions such as, "How will you use this?" or "How is this like something else you've used?" You'll be amazed at how much relevant information you can find out from your learners, and you'll have better evidence that they are "with you" and whether they are learning or not.

Objection #2 “I can’t connect with learners and build rapport like I could in the classroom.”

My response: Nope. You're right. It's not the same. Consider the relationships you have with out-of-town family and friends that

you talk to on the phone, or remote team members you've never met. It's not impossible to build rapport; however, it does require different activities.

Back in the days before my learners had e-mail, I wished I could send out pre-course surveys and ask them why they wanted to attend the session and what they hoped to learn. I wanted to know how they planned to use the tools I would teach them.

Try this: Try not to set the expectation that it will be the same as the classroom. Look at the resources you have available to communicate better with your learners. Send a survey by e-mail or ask participants to complete an online form declaring their learning needs for the course. Use a threaded discussion database and invite participants to post specific topics of interest or their own experience with the subject.

Sidebar 2-2

LMS Implementation Tips

"Make sure that the people who are implementing an LMS are not just technical people, but have a solid foundation in human performance technology and instructional design; otherwise the LMS becomes a database instead of a strategic tool. We must figure out the 'pain points' around worker performance and see how an LMS can meet those needs."

Katica Jacob, Learning & Development Rep, Kaiser-Permanente

"Information architectures should be planned for; if they grow up organically, it's a mess."

Kathy Napierala, Senior Systems Programmer/eLearning Strategist, GEICO

Objection #3: “Learners don’t have the attention span to stay online and stay interested.”

My response: This reminds me of a favorite quote from Kevin Kelley of *Wired Magazine*: “The only factor becoming scarce in a world of abundance is human attention.” Learners have a tremendous capacity to stay interested in things that they find relevant or fun. Learners don’t want to stay logged in and listening to someone talk for eight hours. They lose momentum when they feel their time is wasted or when they are not involved in what’s going on.

The design of synchronous online software tools supports human-to-human interactions. Effective trainers use Chat, polling, and audio features to compel participants to share ideas by typing, verbally responding, and answering polls throughout the session. Learners can ask questions and find out more about how what they are learning applies to their work. The trainer can observe the learner’s discussion in the learning process, and clarify or correct when needed. Sessions can spread out over time allowing time in between to apply learning and to do independent assignments.

You ask: How do I cover the rest of the material? Practice activities, tutorials, and reading assignments can be reworked into asynchronous (aka homework) activities where learners don’t need the support of the trainer and other students. Move these activities to times before or after the online sessions. With fewer tasks to do together, trainers can schedule less “premium time,” or online sessions when learners and trainers are all logged in at once. During these sessions, the group can focus on the most discussion-oriented aspects of the course. An eight-hour classroom-training course might only need two two-hour blocks of premium time.

If just listening to a lecture might better serve your learners, simply record the presenter alone. Then, e-mail or post the recording for learners to view at their convenience. Learners can listen to this type of recording, often called a “Podcast” because learners download it and play it later using an Apple iPod™ or other MP3 audio playback device, at their own convenience.

Try this: Evaluate your session materials to determine which segments NEED to be delivered online with the trainer and which can be done independently. Focus your online sessions on engaging learners directly. For more information on how to develop session content for online sessions, see Chapter 3 on instructional systems design.

Objection 4: “My students don’t want to share their ideas or do homework.”

My response: Learners are typically willing to do whatever the trainer invites them to do as long as they are properly prepared and treated respectfully. Learners prefer clear learning objectives; they like easy access to resources, and they can become frustrated if the process is slow or confusing. They don’t like to be humiliated.

Try this: Outline the ground rules up front. Remember, some learners have never learned this way before. They only know classroom-style and cannot imagine how this will work. How will they know what to do or not do unless you tell them? Teach them how assignments are given, how the online sessions will run, how to access materials, how to use the tools — create a tutorial for how to learn in your class. Invite them to contribute their own ideas and experiences to the conversation. Establish dates and times for online sessions and assignments. Allow flexibility for students who have other commitments to manage by offering session recordings as an alternative to attending in real time. Ask learners to suggest appropriate adjustments and agree to the ground rules. They will.

Objection 5: “Technology can fail in the middle of the session.”

My response: Yes, it can and it does. I recommend you prepare a Plan B and a Plan C for each aspect of your session so, no matter what the issue, you’re ready to move to the solution and keep working.

Try this: Worried about the Internet connection? Test participant connections in advance. Having trouble with application sharing? Create screenshots in a separate file. Show the file only if needed. Are some learners on a low bandwidth connection? Send assignments and presentation files ahead of time so they can still follow along with audio if the connection drops.

Objection 6: “It’s hard to keep track of everything that’s happening during a session. I have to manage the software tools, stay on time, and try to engage the learners.”

My response: Yes, sharing polls and applications, reading participants’ Chat messages and reacting to technical problems can feel like a full time job, not to mention focusing on the content. It takes at least as much practice as it did to learn to drive a car or dial a cell phone. It’s possible to master it. In the meantime, here’s another suggestion.

Try this: Employ an online session Producer to help set up and manage the session and let you focus on what you need to say and do to teach the content.

Objection 7: “I don’t do training, I do sales demos.”

My response: Many of the most effective training strategies we use online serve similar evaluative and rapport-building uses when selling. We recognize that when we let the “client” or learner contribute to the conversation, we find out more about how to serve them. We derive more information from what they say.

Try this: At the end of each section of your demo, ask, “How would you use this?” Ask them to verbally respond or type answers in Chat. Then wait and listen quietly. Each message that comes in will confirm that people are able to understand concepts conveyed in this online format, and you’ll have feedback that says people are really out there and listening. Beyond that, you’ll also find you can very quickly get new insights into what typical users’ tasks look like. You’ll see opportunities to customize for individual areas of interest.

Objection 8: “It’s easy for you. I can’t do it.”

My response: Who said it was easy? The only difference between what you’re doing and what I’m doing is that I’m applying several good strategies in every stage of my planning, preparation, and delivery. I apply them consistently, and I practice them a lot.

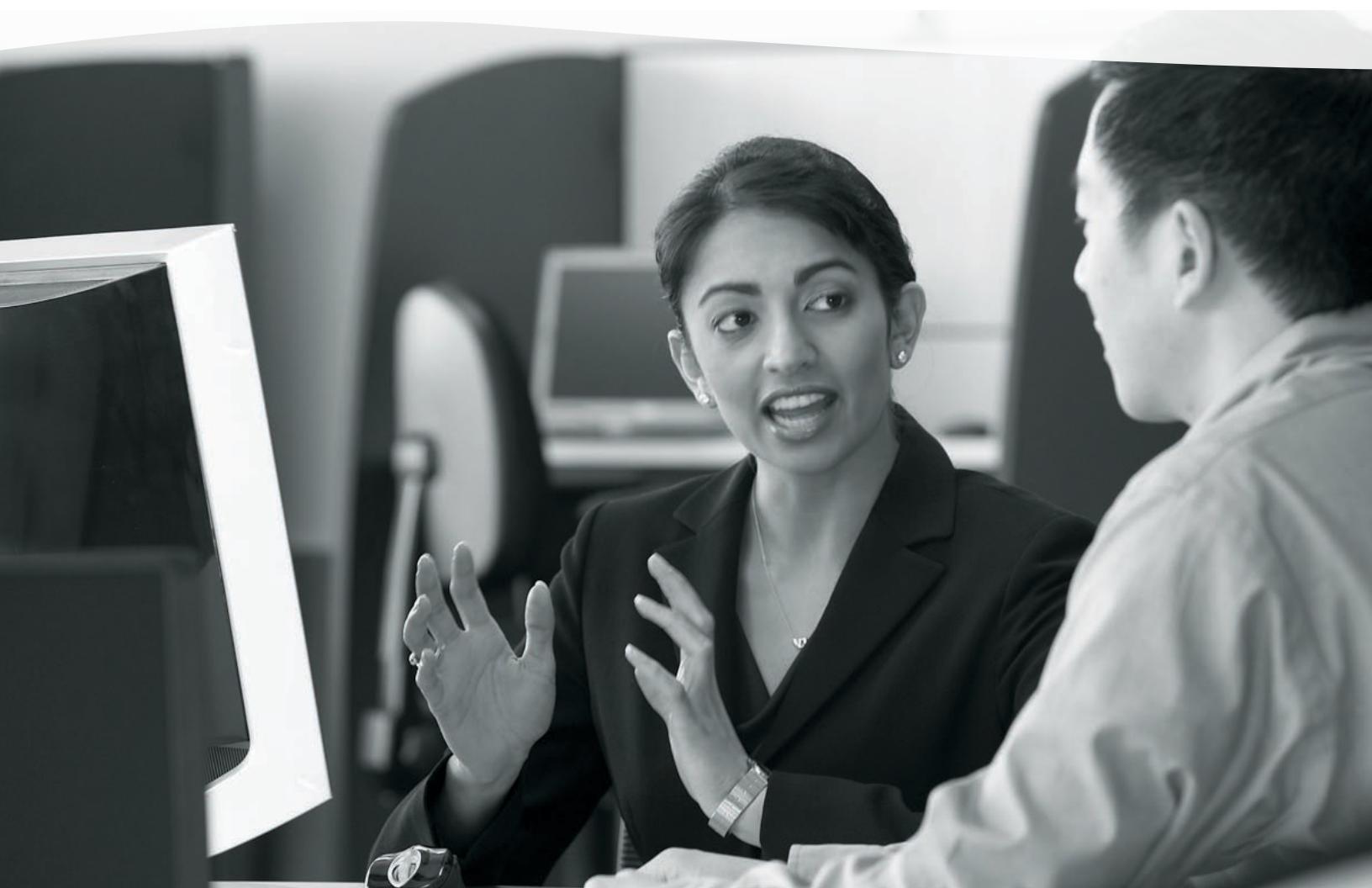
Try this: Read and apply each of the “Try this” items above. You CAN do it, and you can improve what you’re already doing. Know that it gets easier when you turn objections into preparation, apply proven strategies to use the great resources you have, and relax.

WebEx Consulting Services



Optimize your eLearning program —and improve business results.

Extend your training reach — and maximize results from your existing resources. Create the ideal training blend, including a web-touch training program, to accelerate knowledge transfer and drive business growth. WebEx makes it easy. Engage our professional consulting team to evaluate your unique situation, develop a plan, and manage deployment to ensure optimal performance. Count on our proven eLearning expertise to reduce your risks, and ensure your success.



Does your Company have a competitive eLearning plan?

The Challenge

You're familiar with the directive: Maximize reach, speed, retention and interactivity while minimizing resource utilization. This is the challenge faced by every corporate training department as companies come to recognize that knowledge means competitive advantage.

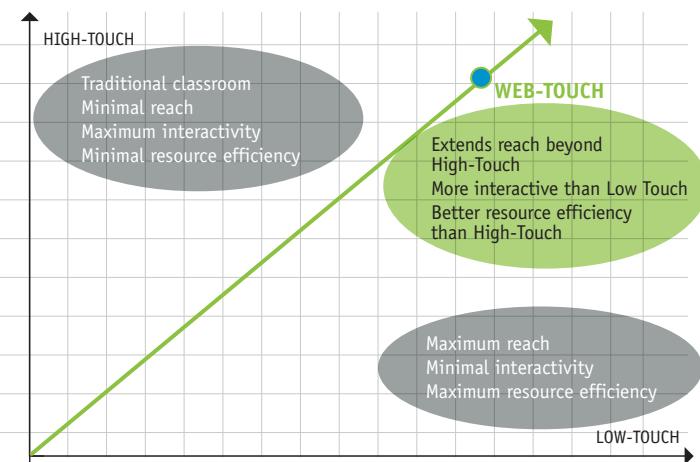
Whether you're responsible for training employees, partners, customers—or all three—you need to transfer knowledge to as many learners as possible while using your resources most efficiently. In order to accomplish this objective your organization must continually strive to extend its reach while enhancing the richness of the learning experience. Technology has provided a vast array of tools to help you and your team meet this objective. However, having the infrastructure is one thing; knowing how to use it, and do so effectively, is another.

Simply implementing an LMS or purchasing asynchronous training from a third party is only part of the answer. To achieve breakthrough business results and gain a competitive edge through training requires careful alignment of your business objectives with your training programs. Selecting the appropriate technologies, monitoring the results, preparing your staff, repurposing your content and initiating continual improvement strategies are the ingredients to ensure your success. Enter the era of web-touch eLearning.

The Opportunity

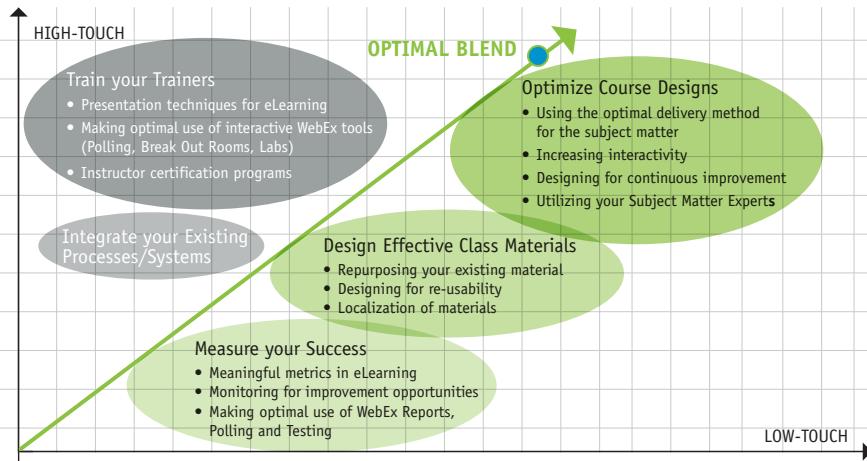
Whether you want to completely transform your learning environment or simply solve a specific learning challenge, the results can be dramatic. Savings in time and travel cost, while substantial, are only a fraction of the value you can realize. In this knowledge economy, what value do you place on ensuring that your staff has the right information, at the right time, regardless of where they are located? Many of our clients are finding that their knowledge is so valuable to their business partners and customers that they are able to produce new revenue streams with their training departments.

Through web-enabling your training effectively, the reach of your high value Instructors and Subject Matter Experts is extended across geographical boundaries and through limitations of time. If you are not reaching all of your audience, you are leaving money on the table. By providing engaging, interactive web-enabled training that fully utilizes the technology to obtain real time feedback, and providing a hands-on experience for the learner, you can ensure a rich learning experience. Your competitive success is ensured when you combine maximum reach and an optimally rich training experience that is perfectly aligned with your business objectives. The opportunity is having the right eLearning environment. The opportunity is Web-touch enabled eLearning.



Objective: Transfer knowledge to as many learners as possible while efficiently utilizing your resources.

WebEx Consulting Services represent the culmination of decades of collective experience and wisdom in delivering knowledge over the web effectively. Combining the experiences gained through implementing eLearning for thousands of customers, WebEx has created a methodology of best practices, models, processes and metrics to ensure your implementation of web-touch eLearning delivers rapid and dramatic business results. WebEx Consulting Services has the answers.



Utilize WebEx domain expertise to move toward the optimum on a proven, predictable and expedient path.

The Approach

The WebEx Web-Touch eLearning Consulting service helps you design the optimal approach for your needs, taking into account your existing process and the specific requirements of your business.

For each stage of the process we consider:

- Organization Preparedness:** How well are the company's business goals aligned to your current processes and learning product offerings? Are the metrics you are currently using enabling you to monitor your performance against your ROI goals?
- Instructor Preparedness:** We will take a look at their tools and skill levels with the various tools, examine their use of best practices in eLearning, and study their interactions with Course/Content Developers and Subject Matter Experts.
- Course/Content Development:** We will examine your Course development process from the Needs Analysis to the Metrics gathering. We will look at the tools you use, the staff that are engaged and the reusability of the content. WebEx will also examine the learning aids that are developed. Are they effective, engaging and appropriate for the delivery method?
- Audience Analysis:** Understanding your audience is imperative to your success. We will look at the different audiences you are instructing and their comfort level with eLearning. We will be capturing their concerns and documenting your successes. The eLearning audience is maturing and thus a moving target. Checking the effectiveness of your feedback loop is an important part of this process.

Engagement

WebEx employs a proven engagement model to ensure alignment and coordination between your organization and the WebEx project team throughout the life of the project. Initial and recurring management reviews generate alignment — everyone involved understands the highest level objectives of the project in terms of specific expected business results. Desired outcomes are clearly defined at the project outset, and resources are coordinated to achieve those outcomes through professional program management methods.

Engagements follow a proven approach:

- Assessment:** The current situation is examined in terms of dissatisfactions and opportunities. Specific business result domains are identified.
- Recommendations, Statement of Work and Project Plan:** The optimal path to success is determined along with specific roles, responsibilities and timelines.
- Implementation:** We provide the roadmap, and the proven ability to get you to your destination. The project activities are executed, managed and delivered in alignment with the project plan.
- Change Management:** Behavioral change and process change is managed to ensure success.
- Metrics and Optimization:** Ongoing measurement and improvement programs are established.

WebEx Consulting will deliver the business results you need.

Implementing a web-touch training model is a proven method for driving business growth. Contact your WebEx Account Manager for more information.



WebEx eLearning Consulting Service Offerings

Choose from three program levels, based on the support you need and the results you desire.

CONSULTING PROGRAM	DELIVERABLES
Quick-Start <i>Have us TELL YOU how to develop your roadmap.</i>	<p>Discovery session & interviews Conduct a minimum of 15-20 individual interviews with your C-level executives, customers, stakeholders, and attendees.</p> <p>WebEx analysis of findings Use interview and discovery findings to analyze your organization, instructors, course and content development, and audience.</p> <p>Stakeholder presentation [via WebEx] Approximately 3-weeks after interviews, findings and recommendations are presented in a WebEx Meeting.</p> <p>» Delivery of customer opportunity document Strategic Account Plan recommends steps to develop your eLearning Roadmap.</p>
Pro-Start <i>Let us SHOW YOU how to implement your roadmap.</i>	<p>All Quick-Start deliverables, but your stakeholder presentation will be delivered live:</p> <p>2-Day stakeholder onsite workshop Approximately 3-weeks following interviews the customer sponsor & stakeholders are presented with findings and recommendations and your Action Plan is developed collaboratively.</p> <p>Your Action Plan includes necessary tasks and actions to accomplish business objectives, work effort estimates, and determination of roles and responsibilities.</p> <p>» Delivery of customer opportunity document Strategic Account Plan documents specific executables for implementing an eLearning Roadmap and an Action plan customized to your unique environment.</p>
Custom Consulting <i>Let WebEx develop and execute your roadmap FOR YOU.</i>	<p>Successful Custom Consulting engagements have included the following deliverables:</p> <p>» Training your trainers — Presentation techniques for eLearning — Optimization of WebEx tools</p> <p>» Optimizing your course designs — Methods to increase interaction and optimize delivery</p> <p>» Designing effective class materials — Design/repurpose materials</p> <p>» Integrating your existing processes/systems</p> <p>» Measuring your success — Constant evaluation of efforts and improvement opportunities</p>



Contact your WebEx Account Manager for more information,
or email psconsulting@webex.com.

How to Design for the Virtual Classroom

By Ann Kwynn

The virtual classroom — also called synchronous e-Learning — is a same-time any-place event led by an instructor in a Web-conferencing tool such as WebEx, Centra, or Microsoft's Live Meeting, with participants logged in from their own office computers. I use the two terms interchangeably, but one thing I also like to tell people moving into design for this new medium is: Consider the “model” you bring with you.

How you see it may depend on where you've been

Early e-Learning designers who started in the time of laserdiscs know that e-Learning can support video. They might say: e-Learning is like television. Later entrants who never experienced interactive media before the Internet was ubiquitous might say: e-Learning is like Web pages — you know, with lots of text. After all, we call them “pages.”

Now we have this “virtual classroom,” perhaps a contradiction in terms since the physical classroom space is exactly what we have eliminated. In fact, there is a nasty rumor circulating that a lot of folks are porting lectures and demonstrations over to the virtual classroom. This means that we are delivering something that was not very interactive to begin with (the lecture) without even the fun of checking out what the teacher is wearing. And simply highlighting text doesn’t count as interaction, or as rethinking the content for this new medium.

The danger is that designers and instructors (often the same person) may stick too closely to the old classroom instructional model and fail to recognize that this new high-tech situation calls for a rethinking of the teaching process itself. It is unlikely, in this case, that these designers and instructors will take advantage of the full potential of the virtual classroom experience. That’s fundamentally why The eLearning Guild decided to create this book.

Some people speak of the transition from being a standup instructor to being a virtual instructor. I belong to the camp of people who have done more of what is now referred to as asynchronous e-Learning, or what I call “old school” posted courses (and there are and will continue to be plenty

of these courses around). We develop these asynchronous courses in tools such as Authorware or Flash, and make them available for individual study through a company intranet, the Internet, an LMS, or on CD-ROM. I’ve also led many hours of classroom instruction conducted in the same physical space as my living, breathing, visible, audible students.

As a consultant, I am in a position to peek into many organizations and

Contents

In Chapter 3 you will find information about:

- **Media selection — to VC or not to VC**
- **Interactions — alone but engaged**
- **Visuals — the journey of a thousand pixels**

see what they are doing. Sure, everyone is trying to “do more with less,” which is often a driver of technology. But at the same time, the virtual classroom offers some exciting opportunities for collaboration, connection, access to information, cool graphics, and getting people quickly up to speed and productive.

The new paradigm circumvents some of the problems of the prior media, but presents its own challenges. Although there is certainly still a place for asynchronous e-Learning, the virtual classroom can provide some very interesting options if approached judiciously.

This chapter will cover when to use the virtual classroom, and, once you choose it, how to design new content or convert existing classroom content to make best use of its features. Some of the content comes from Ruth Clark’s and my book, *The New Virtual Classroom: Evidence-Based Guidelines for Synchronous e-Learning*, to be published in 2007.

We’re not in the classroom anymore, Toto. Let go of your old baggage ... you can’t assume that you can do the same things you used to do in either the physical classroom or traditional e-Learning.

Media selection — to VC or not to VC?

One common mistake novice instructors make in the synchronous e-Learning environment is that they feel like they have to be “instructing” all the time — and that means verbalizing. Have you ever tried to write when someone was talking to you? Did they just not take the hint when you weren’t paying attention? Now suppose this person was an instructor and you were their student, trying to process information, take notes, or complete an exercise. How do you think you’d feel about the quality of the educational experience? Many activities require contemplation and therefore a quiet environment. An instructor can provide this in a synchronous environment by resisting the temptation to keep talking. An asynchronous e-Learning program that runs without need of an instructor can also provide the necessary quiet. “Media selection” is the name for thinking through the instructional content and desired teaching methods and making a fundamental design decision, determining whether a synchronous or an asynchronous delivery medium is the better match.

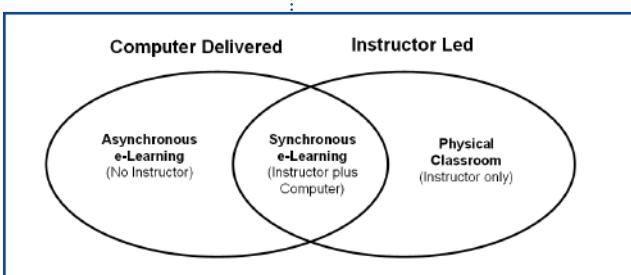
There are some possible pitfalls in selecting a synchronous approach. Handled carelessly, the virtual classroom can combine the worst of both the traditional classroom and asynchronous media. In this case, you have the instructor-driven pace of the physical classroom that will leave some students behind and will bore others, plus the sense of alone-ness learners may get from staring at the illuminated rectangle where they already spend so much time.

The synchronous, virtual classroom requires a different set of resources, compared to old school e-Learning. You need to have the instructor scheduled and on the payroll and all students available at the same time. Compared to traditional classes, the virtual classroom demands technological and psychological resources from both instructor and student.

Although this new medium can save on travel money, the separation of instructor and student also represents a kind of cost. With no instructor present, the student is on the honor system in terms of their attentiveness. With their desktop open, is the siren song of eBay, YouTube and IMDb just too loud during these sessions for any effective training to take place? The answer is that old standby of consultants, “It all depends.” It depends, in part, on the designer making the proper choice of media and techniques, which, in a nutshell, is the topic of this chapter.

So the question is: How do I know if my teaching situation is an appropriate one for a synchronous, virtual classroom solution? To answer this fundamental point, we first need to understand the characteristics of synchronous e-Learning as they relate to the other models.

Call me a geek, but I love Venn diagrams. Let’s draw some big ovoids and see where they intersect. (See Figure 3-1 on page 35.)

**Figure 3-1**

Where do computer-delivered and instructor-led learning intersect?

In my humble opinion, synchronous learning shares more with the traditional classroom than it does with the older instructor-less asynchronous e-Learning. Since synchronous e-Learning is instructor-led you need an instructor, and all of the students must be concurrently logged in. But thanks to the computer delivery, there's no travel involved. There are technical opportunities and hurdles involved in both synchronous and asynchronous e-Learning, but the consistent interface of synchronous e-Learning is a brilliant money saving invention

that asynchronous e-Learning never quite got to.

Two categories of factors drive the decision of what medium to use — logistical and educational.

Logistical media decision factors

Even though for dispersed audiences the *delivery* of electronic media is cheaper and faster than it is for traditional training, electronic media are typically more expensive to produce. Therefore, small numbers of students in the same location do not justify e-Learning unless they don't work at the same time or can't be simultaneously off the job. This situation might recommend quick and dirty asynchronous e-Learning, depending on the topic being taught.

Synchronous e-Learning might be faster to deploy than traditional classroom training if you have the technical infrastructure in place to support it. Less travel also means less lost opportunity for those employees engaged in training rather than their more financially productive jobs. But, although you can fit a lot of cyber behinds into a synchronous training session, probably no more

than 25 participants should be included in a true interactive learning experience. For an information dump, on the other hand — come on down! Note: When I was to present a Webinar recently, the system crashed when 800 people tried to log on.

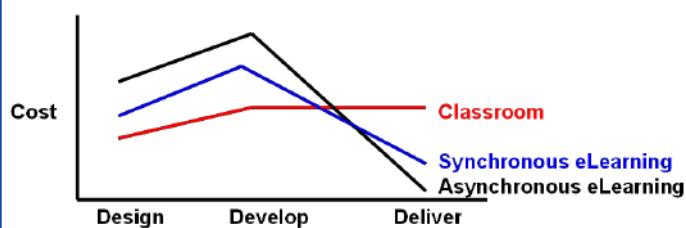
Figure 3-2 is a diagram of some very simplistic relative plots of the cost of design, development, and delivery of the various training media.

The classroom is cheaper to design and develop for, but expensive to deliver to a large, dispersed audience because of the travel and the need for facilities and an instructor. And consider

the quality of life issue: frequent flyer miles are poor compensation for the fatigue and time away from home. The small army it takes to develop good asynchronous e-Learning must be paid and fed, but once the program is running, and tested, and tested again, it's basically free to deploy it. Synchronous e-Learning falls between the two in terms of cost.

Let's look at an example of taking advantage of any-place training. Joe Pulichino, in The eLearning Guild's survey of synchronous learning users, lists the typically dispersed sales and marketing departments as the leading users of synchronous e-Learning. Their virtual classroom sessions provide short classes on special software features, sales demonstrations, and troubleshooting sessions. The need to quickly update a distributed sales force on new products and new product features makes the virtual classroom an ideal delivery vehicle.

Another pragmatic benefit to any instructor-led medium is course completion. Getting done is a beautiful thing — whether it's doing your Christmas shopping or finishing assigned training. When the teacher is watching, you had better do your schoolwork. Some asynchronous e-Learning clients have reported higher dropout rates than those for scheduled instructor-led learning events. Some organizations have tried to ameliorate this problem by reporting student completion to supervisors, for example.

**Figure 3-2**

The relative cost of the three delivery methods changes depending on the stage of creation and production.

No one wants to make something that no one will look at, or finish looking at. And companies surely don't want to spend money on courses that students don't complete. Figure 3-3 is a take that my sister and I gave on one cause of non-completion: environmental distractions.

Can your students self-regulate, manage their own time, and process information on their own? If not, you may have better luck putting under-motivated or over-worked students in a virtual classroom — as long as the course is interactive and engaging, and the students feel like someone on the other side of the network cares whether they are alive or dead.



Figure 3-3

What does it take to complete e-Learning?

Art from *The New Virtual Classroom*, by Ruth Clark and Ann Kwinn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

result of the training. Let's focus on the educational justification of the various delivery media and take a different look at the Venn diagram. (See Figure 3-4.) This one shows the attributes of Computer-Delivered and Instructor-Led Environments. All of these attributes are present in Synchronous e-Learning.

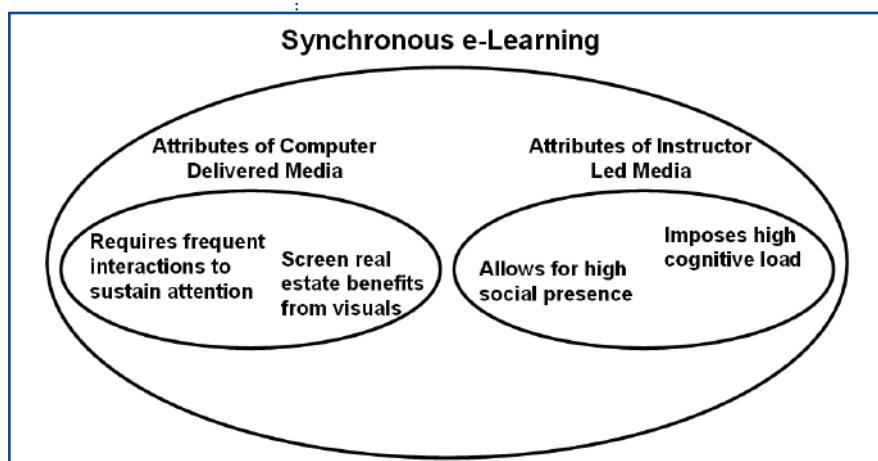


Figure 3-4

Synchronous learning has various attributes, depending on the delivery system.

Social presence

Let me start the review of this diagram by explaining the terms under "Instructor-Led." *Social presence* is the warm fuzzy feeling you get when actual people are around, especially when you can shake hands, talk, and stare at those awful shoes. When others are around only virtually, you can feel socially present, provided that the facilitator helps. An electronically delivered lecture, for example, would engender little sense of presence, while an in-person one would at least allow you to actually sit next to other people, even if there is little social interaction.

Cognitive load

Cognitive load is the amount of mental work imposed on working (short-term) memory. Working memory is your conscious information-processing center. It can only handle a limited amount of data at a time. For example, if your boss gives you a 20-minute brain dump of your assignments, and you don't get a chance to write them down, you will probably forget some of them. If an instructor plays a dense one-hour movie and sneaks off to get a sandwich, again — the students will remember little of the content presented in the movie. Each of us can only remember a finite amount of information without practice or memory aids such as documentation. "Instructor-led" means the presenter is running the show and controlling the pace of instruction, as opposed to the *learner-driven* pace of reading or taking an asynchronous e-Learning course where the student can pause, replay, continue, etc. In instructor-driven media, there is a risk of high cognitive load (or cognitive overload). All of the students are in the same boat, traveling at the same pace. You can't stop for very long at one

port or another. If a student doesn't get it, he can ask a question, but if he really doesn't have the background to complete the course, no one is going to wait for him to get up to speed. Such a student will have to fumble through.

Asynchronous e-Learning allows for individual study. You can go at your own pace, repeat sections and maybe go back and run the course again later. Depending on course design, you may get access to help such as remediation, a glossary of terms, etc. Asynchronous e-Learning can be a good choice for audiences who are heterogeneous, or at different levels, in the skill that must be learned. It can also provide individual drill and practice of skills that must be learned to high degrees of accuracy or speed, or content that can benefit from the use of video animation or simulations. I remember in the earlier days of e-Learning, many clients were appropriately skittish about using technology to rally the troops in a change management initiative. They were quite pleased, however, with the results of many different types of software training, especially for simulation of rare or expensive systems.

What about the “Computer-Delivered” side of the diagram?

Visuals

The virtual classroom loves graphics. It needs graphics. If the best you can do is text only, consider providing documentation or a Website. You could follow this by a question-and-answer session in the virtual classroom. And even then, you are not allowing practice of job skills, which, depending on the skill, learners can usually do either in e-Learning or in a traditional classroom.

Interactions

I'll cover the types of interactions in a later section, but for now consider the worst, most boring college lecture in your life, and remove the cute guy (or girl) down the aisle, and there you have e-Learning without interactions. Your students will feel a pressing need to make a grocery list, play Solitaire, or see if their name has an entry yet in Wikipedia. Virtual classrooms only work when instructors employ frequent, relevant (job-based) interactions.

Some skills and content areas don't work well when taught remotely. For example, you can watch every episode of “Dancing with the Stars,” or every cricket match on the cable sports channel, but without hands-on practice of this or any other motor skill, your muscles will never get the skill. This makes either type of e-Learning a poor choice for practicing non-computer-related motor skills.

Use the virtual classroom when the things this medium does best can best realize your learning goals:

- Computer application demonstration and practice
- Visualization of content
- Real-time interactions between instructor and participants
- Collaboration among participants, and
- Moderate social presence.

Blended solutions

Collaborative exercises can help get over the problem of a heterogeneous audience by letting the experts within student teams shine. But in general, the virtual classroom has a hard time on its own handling a diverse audience and complex tasks that require contemplation. This is why you may at times want to turn to what is done to martinis, milkshakes, and fabrics — blending, or distributing your content across or through diverse media — choosing the best medium for each topic or learning objective.

Blending is the watchword for a growing number of organizations, each of which may interpret

the term in a unique way.

Brian Mulliner, e-Learning and Development Consultant at Wells Fargo reports:

Groups at Wells Fargo are using blended learning solutions quite regularly. Individuals may start out with a Web-based training course (typically Flash or Breeze launched and tracked via an LMS) for pre-work, attend a live classroom-training event, and then use the virtual classroom for wrap up/final or follow-up training. Blended learning solutions typically cut travel budgets and time out of the office, a real win-win for managers who need to cut their budgets and for participants required to maintain their sales goals.

In this example, Wells Fargo starts asynchronously with self-study and then gets everyone together synchronously. This can help to make sure everyone is at the pre-requisite level of knowledge. The pre-work is the ticket in, and will help to get rid of the folks who bog down the class with basic questions.

Ask yourself: What is better to do alone? Helping participants attain knowledge and skills through reading “articles, books, or Web sites” and through asynchronous project work can combine well with virtual classroom sessions. During the virtual sessions, the instructor can provide discussions and interactions to expand the pre-work or review and refine project work completed outside of the session.

For Clark Training’s “Leveraging the Virtual Classroom” course, participants review two short virtual classroom recordings and note their differences before attending the first live session where they will meet in breakout rooms to discuss their findings. After each live session, participants apply the skills learned by completing their own individual project which they post on the course Website where the instructor and other students can review it.

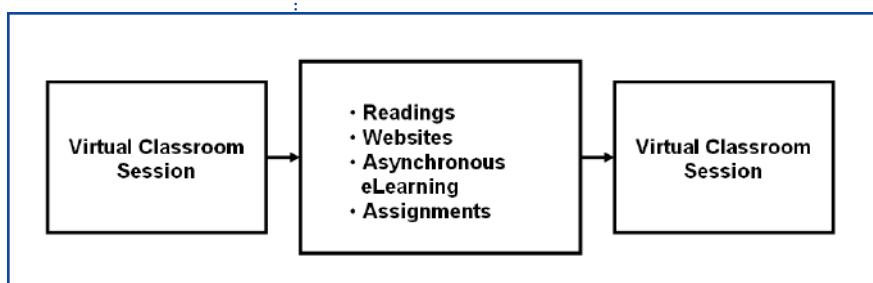


Figure 3-5
A blended design that combines synchronous e-Learning and offline private study.

Art adapted from *The New Virtual Classroom*, by Ruth Clark and Ann Kwinn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

Figure 3-5 shows an example in which the instructor prefers to meet the students first in a virtual session before sending them off to do solo work and then getting together again online. The self-study is sandwiched in between two slices of virtual classroom.

Only your imagination and resources limit the number of ways to blend media.

Interactions — alone but engaged.

Interactions are essential to the virtual classroom. But let's start with a definition. With apologies to extroverts, interaction in training does not refer to interacting with people, but rather with the content (just as we introverts would have it). You don't need other people to learn, but you do need practice. Call it rehearsal, activities, exercises, etc. — it is essential for learning. I like to say, if there's no practice, it ain't training. In the virtual classroom, an instructor will drive this interaction, but it does not have to feel like a classroom, meeting, or cocktail party. Your students are there to learn the content. Some gabbing is fine, but with the limited time that you typically have, make sure people focus on and understand the content.

Frequency of interactions

Including interactions is one of the most important things you can do for learning and engagement. Frequent participation will keep students from turning into zombies. I also like to use people's names when I can — Bueller? Bueller? This is easy given the list of participants in the participant window. They need to know you are “keeping an eye” on them. If you get to know something about

your participants, either during the introduction or through some pre-work, you can periodically relate your content to the types of projects, etc. that various individuals are working on.

Mark Bucceri, Principal Education Specialist for Saba Software says:

I've added increased activities to (a) keep participants' attention, as they tend to multi-task, and (b) to assess whether they are "getting it" or not — as I don't have the benefit of seeing their faces (and seeing the light bulbs or confusion). When appropriate (and when budget allows), I add multimedia to provide more pizzazz and to provide opportunities for interaction with the content.

(I never knew I was *supposed* to be looking for subtle signs of confusion. I can't flirt either.)

Response facilities in the virtual classroom

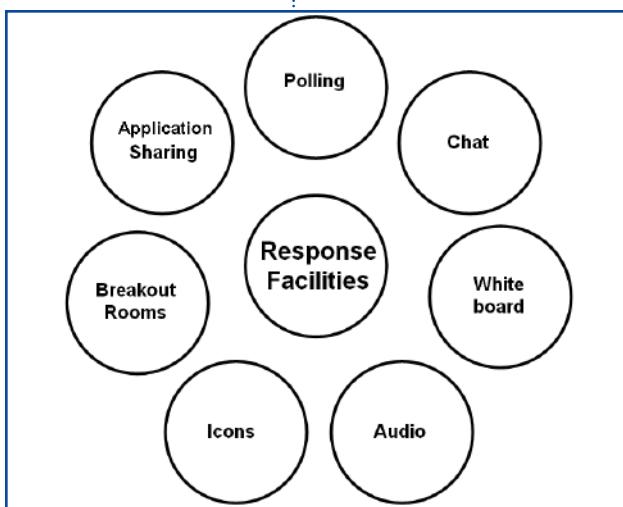


Figure 3-6
Synchronous e-Learning provides a number of interactive response features.

Art adapted from *The New Virtual Classroom*, by Ruth Clark and Ann Kunn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

The virtual classroom offers many opportunities for interaction. In fact, exercises are easier to execute and be done with in the virtual classroom since they require no rearranging of tables or looking for easels and smelly markers. Figure 3-6 shows the tool features you can use for interactions in many, if not most, software applications for synchronous e-Learning. And if the analogy "Here are the tools in your tool box" doesn't work for the women in the audience, how about: "These are the things you can carry in your purse."

In this section, I will describe the various response facilities so that you can decide which to use as you design or convert courseware for synchronous e-Learning. I will describe them from the designer's point of view. You have already seen these (and others) listed in Chapter 2, which Karen Hyder wrote for managers and others who are considering their options. Information about using these response facilities

effectively during an event appears in Chapters 4 to 6, where Karen will provide you with guidelines and examples from the instructor's point of view.

Individual interactions

The term "interactions" might refer to interactions between individual participants and the instructor or the content, it might refer to participation in discussions, or it might refer to collaboration between participants. I'll address each of these nuances, beginning with the individual interactions with the instructor and the content.

Polling

Although the word "polling" tends to connote presidential approval ratings or favorite dog food, polling in the virtual classroom just means multiple choice or true/false questions — something we can all relate to. After you set up a poll, each student can click on their choice — from A to E. You don't have to be asking for opinions; you can use this feature for exercises and tests. The multiple choice options can also be visual, such as: Is what's in the picture a gadget or a thingamajig? Some VC tools display the students' responses anonymously and some attach them to the students' names. In either case, you can offer more explanation if people don't seem to be getting it. Polling can also be a way to get to know people at the start of a session, i.e., "How many of you still believe in Santa?"

If you have your "designer" hat on (whether permanently or interchangeably) and you are preparing a kit of materials (traditional instructor guide, PowerPoint deck, job aids for the learners, etc.), you will want to provide the instructor with the appropriate cues and content for the polls that are

critical to your design. If you are working with one or more instructors who will actually deliver the synchronous e-Learning, prepare them to use your kit by having them practice setting up and executing the polls. In addition, be sure to provide the instructor with an “out” or “Plan B” in the event that a technology failure prevents execution of the poll as planned.

Chat

Chatting has been with us for a while in other forms. You should use it sparingly but it can be a good way for students to respond to *open-ended* questions. Try to construct your questions so that students can answer briefly. Such as: “Why would anyone buy our product?” Responses in Chat are not anonymous. Each student’s name precedes their statements. If you don’t want people to “cheat” by just entering the same thing as the last person, have the instructor ask students to type in their answers but not to press “Send” until the instructor says: “Send.”

Chat capabilities vary from one tool to another. If the tool allows, students can also use Chat to ask the instructor questions. It’s best to discourage off-topic conversations between students, however. Your instructor guide and instructor preparation session should address this.

With a lot of participants, Chat is murder because the comments scroll up quickly in the window.

In this case, the instructor can group people by asking all the Scorpios to take the next question, etc. Again, cover some options for grouping in the instructor guide and the preparation.

Whiteboard

The whiteboard is the area of the screen where the instructor displays PowerPoint slides. Everyone likes to write on the whiteboard. It’s so naughty. You got in trouble if you wrote on the chalkboard in school without permission, and then you had to do a lot of writing on the chalkboard: i.e.: “I will not misbehave in school.” “I will not misbehave in school” . . . Most people do behave themselves as adults, but be sure to provide your instructors with



Figure 3-7
In this whiteboard exercise, participants typed in the “thoughts” in the bubbles.

Art from *The New Virtual Classroom*, by Ruth Clark and Ann Kunn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

a set of clear directions they can give to the learners, and some suggested cues to let learners know when to start. Reference the tool the learners should use, such as “the little ‘A’ icon,” for the typing tool.

The nice thing about the virtual classroom is that people can annotate at the same time if that’s the direction the instructor gives them. They can type, draw lines, circle items, etc. In whiteboard activities, students can identify where they are located on a map, label parts of a diagram, plot data on a graph, and type in answers to questions, etc. All of these responses are anonymous. Figure 3-7 is an example of a whiteboard activity presented after a short video of the characters is shown. The learners typed in the “thoughts” in the bubbles’ heads.

Audio

The instructor can ask students to raise their hands (by selecting an icon, which I will explain in the next section) to ask or answer questions via audio. Some systems allow multiple speakers; some do not. The best practice is for the instructor to limit the response to one person at a time. Audio questions allow new voices to be heard, and are a good way to get longer answers to open-ended questions, but, as opposed to polling and the whiteboard, they only allow one person to respond at a time. Effective use of this capability depends on the instructor, more so than the designer. For now, just remember that too much back and forth can bog down a session: i.e.: Jason raises his hand.

Jason: "I didn't understand the question." Pause. Instructor: "What about the question did you not understand?" Pause. Jason: "The last part." Pause. Instructor: "OK. Let me re-phrase it." (etc.)

Icons

Asking students to answer questions can help to keep them engaged, but they can also respond in other ways — such as with icons. Is it a smiley face or a happy face? I don't know, but it's cute and yellow and I use it a lot. For example: "Click on the smiley face after you have read the passage." "Click on the smiley face if you are ready to do the exercise." "Click on the smiley face if you're happy and you know it."

Most virtual classroom software includes icons such as the smiley face, confused face, clapping hands, raised hand, etc., which allow students to give quick feedback or interrupt the action when they need to. This can help instructors working in the sometimes-silent vacuum that is the virtual classroom, where they can feel like Bruce Willis in *The Sixth Sense* — they think they're alive but no one reacts to them. Use of icons is another type of interaction that you should spell out in the instructor guide, and that instructors should practice during their preparation.

Application sharing

For you relay running fans, application-sharing lets the instructor run an application, such as Excel, and pass the baton, so to speak, to the students so they can operate the application. They can actually type, click, drag — everything. The great thing is — only the instructor needs to actually have the application on their machine. The crummy thing is that only one student can work at a time, which leaves a bunch of people wishing you had called on them ... maybe. Heavy software application practice is probably best to do individually, outside the virtual classroom — which is great for demonstration. You can also use application sharing to show asynchronous e-Learning programs — or anything that can be run on the instructor's computer.

Application sharing, depending on the Web conferencing program you are using, can be fraught with problems. Be sure that your instructor guide contains a Plan B for the inevitable times that the technology will fail the instructor, and be sure to lead instructors through practice sessions with both the application sharing and the Plan B.

How to maximize participation

As you can see, some interaction features allow simultaneous users and some do not. Your design should allow as many people as possible to work with the content in an efficient way. Avoid the bane of classroom discussions and group projects — the slacker and the control freak. No one likes them. Don't create a design that will allow them to flourish in your virtual classes. Consider activities that involve as many students as possible. For example — asking one person to use the microphone doesn't require everyone to have an answer. If you do this a lot, people will wise up to it and start stream-

ing Jon Stewart instead of paying attention.

Instructors may overly rely on open-ended questions: i.e. “How about those Lakers?” This can start a conversation going in the traditional classroom, but it takes a long time, and time tends to be in short supply in the virtual classroom. Also, open-ended audio questions only allow only one student to answer at a time. Rather, you could ask a polling question such as: “Who was your favorite

player?: a) Kobe, b) Shaq c) Magic, d) The Laker Girls.” It takes more effort, and the questions go by fast, but that’s what you want. You don’t get credit for killing time and no one will like you for it. The pace needs to be fast. Attend to your students or they start dropping off. (As in Figure 3-8.) Give the instructors specific questions (and alternatives) in the instructor guide.

You can certainly use a mix of open- and close-ended questions. For example, start with

polling and then have the instructor ask students for the rationale behind their answers.

However you structure your interactions, consider the do-it-yourself impulse behind YouTube, Wikipedia, and My Space. People like to contribute. The classroom is a democracy. Let your students speak! (Or at least respond.) Avoid the tyranny of the lecture.

Collaboration

You can take classroom democracy a step further and incorporate collaborative exercises. At Clark Training, we find that people really throw themselves into group exercises and often rate these activities as the most beneficial in a course. Research has shown that with correctly structured learning activities, students may learn more in collaborative groups than they do alone. Group activities can be a little tricky in the virtual classroom, but it’s possible to create even more of a sense of a community than you would have in a traditional lecture class. And while the learners are working in their groups, you can **<Alt> <Tab>** over to see how your stocks are doing.

Breakout rooms

Depending on the topic and the objectives, you can use virtual breakout rooms for most of the small group activities you would do in the physical classroom. Students can discuss case studies (using their own whiteboard to take notes), role play, complete short written assignments, and so on. And with a smaller group, say two to five participants, you can use audio more freely. If you want, a spokesperson from each group can report to the larger group once everyone has moved back into the main room.

Paired Chat

If you want students to work in pairs, you don’t necessarily need to establish a number of breakout rooms. Rather, you can assign pairings, i.e.: “Wallace, you work with Grommet.” You can have fun playing matchmaker — another good reason to know something about your participants. Depending on what your Web conferencing application allows, you can pair people working on similar projects or working in similar industries, group novices with experts, etc. Then ask students to direct their Chat messages to their partner only as they work through whatever problem you have given them. To you, the moderator, it will look like chaos since you can see all Chat messages, but the students can only see messages directed at *them*. In paired Chat and breakout rooms, the moderator



Figure 3-8

Keep the pace up.

Art from *The New Virtual Classroom*,
by Ruth Clark and Ann Kinn, used
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can only monitor pieces of the conversations and ask students to raise their hand if they have a question — which is no different from a physical classroom.

Feedback and assessment

Using the above interaction tools and techniques will make a session effective and engaging, but forgetting to provide feedback is a lost learning opportunity. Interactions without feedback may let the instructor assess the students but misses a chance for students to know if they got it right. A dance teacher once told me: “Practice doesn’t make perfect. Perfect practice makes perfect.” If there is a written component to exercises, consider giving model answers as feedback. If you have students complete a list of items on a printed worksheet, the instructor can then give them feedback with a slide containing the answers. Peers in breakout rooms can also give each other feedback.

If you want to assess the students individually, you must use interaction tools that are not anonymous. Polling and the whiteboard are typically anonymous. Chat is rather infeasible for assessments since students can see each other’s answers. Probably the best way to do an assessment is with an external survey tool or by asking students to e-mail or post answers to an assignment or quiz. Some universities have students grade each other based on their contributions. If someone wasn’t contributing, it’s payback time.

Visuals — the journey of a thousand pixels

In the virtual classroom, with the dominance of the whiteboard, a picture’s worth a thousand pixels. Text-heavy presentations spell nap time for participants. Working in this medium requires that you develop your visual literacy or visual chops. I like to say: While you’re designing, close your eyes and imagine what the student is seeing. You could also think of designing visuals for the virtual environment as turning your course into a comic book, in that there is some artwork for each piece of content. It doesn’t have to be Manga-quality to be effective.

Visualization facilities in the virtual classroom

Figure 3-9 shows the virtual classroom features available for visualization. Not all synchronous e-Learning systems support all of these features. Some features, such as the whiteboard and application sharing, do double duty as interaction tools and visualization tools.

The whiteboard

You can draw on the whiteboard directly, but following Siegfried and Roy’s principle of “Be prepared and keep it moving,” it’s best to have PowerPoint slides created ahead of time for the instructor to load into the system.

The space devoted to the whiteboard is typically only a portion of the screen. Make sure your artwork, diagrams, tables, etc. will be large enough to “read” within this space. Simple is good. Some very detailed images may need to be either broken into multiple images, reduced in fidelity, or have elements removed. Figure 3-10 on page 44 is an example of a size violation. There is too much tiny text on the whiteboard. Makes you want to get glasses, doesn’t it?

Web cams

Use of the Web cam brings into question the model brought to the virtual classroom enterprise. If

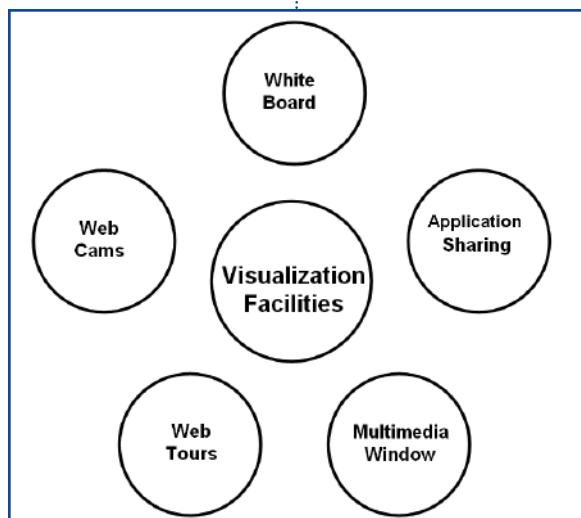
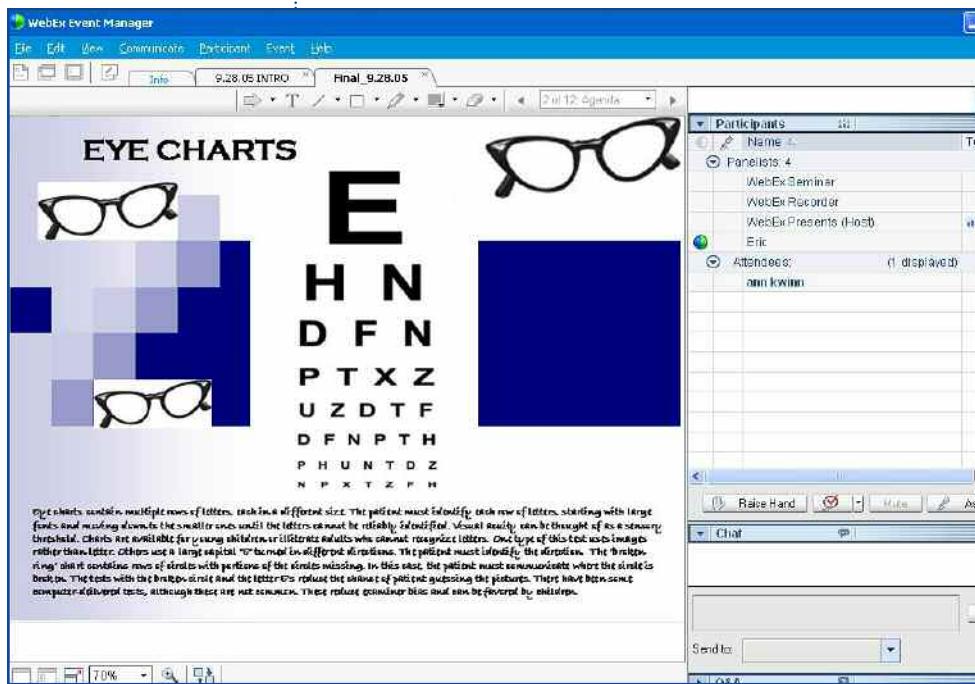


Figure 3-9

These are the tools you may have available for presenting visuals.

Art adapted from *The New Virtual Classroom*, by Ruth Clark and Ann Kwinn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

**Figure 3-10**

Remember that learners must actually read what is on the whiteboard!

Art from *The New Virtual Classroom*, by Ruth Clark and Ann Kinnin, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

you think of synchronous e-Learning as a classroom, needing the trappings of a classroom, you will want to see the instructor. But the only reason that we ever saw instructors in the physical classroom was because they were the repository of the information. They are also a cheap visual, but they don't help learning in and of themselves. A better use of the camera would be to use it as a document camera — showing documents or demonstrations, but even then, it's better to shoot ahead of time so the instructor can just roll 'em at show time. Those who tempt fate by not preparing will be rewarded with technical glitches, poor performance, and so on, so be sure that you address this in your instructor preparation.

Application sharing, multimedia, Web tours

Ever since the introduction of the graphical user interface, applications are visual, and therefore application sharing is a form of visualization. In fact, what better way to teach an application than to show it? This is the first item in the category of, “Steal from others — you don't have to make it yourself.” Second are videos and animations an instructor can play in the multimedia window. Just be mercifully brief. If you have a long piece, break it up with interactions. Worksheets, distributed ahead of time, could drive these interactions. The last great option for people who want to steal from others is the Web tour. As with application sharing, only the instructor needs to actually access the Web pages while the participants watch. This is particularly apt in cases where you are teaching students to navigate to a Web page, or when someone else has put together something very close to what you wanted to show in the first place.

Types of visuals

The various visualization facilities allow you to show many different types of visuals or graphics. Ruth Clark's and Chopeta Lyon's *Graphics for Learning* book describes at least three “communication functions” of graphics, or how graphics can convey information. The authors reported that a large proportion of visuals in instructional materials serve no useful learning function; they are merely *decorative*, used in the hope of beautifying the materials or to add interest or humor. But a pig in a suit is still a pig. Don't dress up the pig. Your course doesn't have to look like a video game to be effective.

Rather than decorating your screen, include artwork that is germane to the teaching topic. Sometimes less is more. Omit extraneous visual noise from your graphics. Oftentimes a line drawing is easier to see and understand and can help to focus the student's attention better than a photograph, for example. Assess the kind of visuals that will best communicate your message. Here are some suggestions.

Representational visuals look like the object in question. Both the glasses and the eye chart in

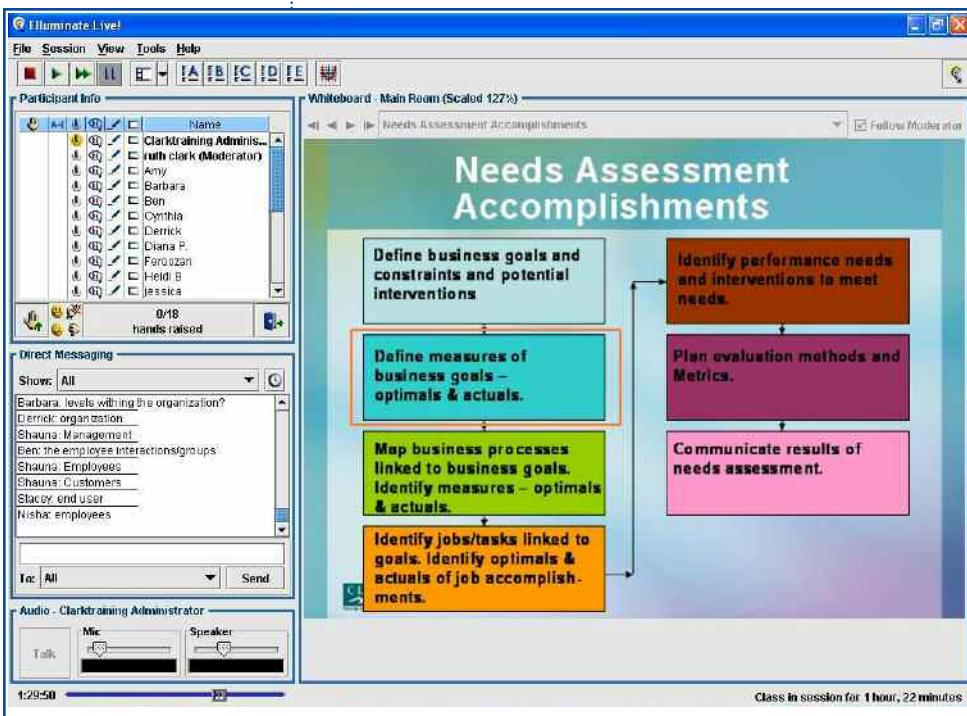


Figure 3-11
Simple flow charts work well online.

Art from *The New Virtual Classroom*, by Ruth Clark and Ann Kunn, used with Permission by the Publisher, Pfeiffer/Wiley, © 2007

Figure 3-10 are examples. Proper uses of this type of art include software screen captures, and photographs or illustrations of relevant equipment or products. Some of the “how to assemble” directions from the IKEA furniture store have only drawings with arrows, and do a pretty good job of teaching you how to assemble a bookshelf, for example.

Explanatory visuals are drawings of things you cannot see in real life — unless your CEO really sits just above the VP in the office as he or she does in the organization chart. This type of artwork can show qualitative relationships, like my Venn diagrams or quantitative ones, like the graph to show the cost to develop various media. Crack open Excel to see what it can do: line graphs, bar

charts, pie charts, etc. Consider too the type of picture shown in Figure 3-11, taken from a class teaching the needs-assessment process. This flow chart is simple but effective and efficient. Explanatory art is especially powerful for learning because it helps learners form relationships among lesson topics.

Now let me amend how I led off this section on visuals — a *good* picture is worth a thousand pixels.

Summary

In summary, visuals and interactions provide opportunity and potential pitfalls in the virtual classroom. Use them well and often, and your classes will be successful. Take the opportunity to create social presence through learner participation, and especially group activities, and don’t overload the student with too much information at one time. Good luck and have fun.

Preliminary Planning for Your Event

By Karen Hyder

I came across some old Windows 3.1 Orientation, Excel spreadsheets, and Word for Windows 2.0 Levels 1, 2, and 3 courseware manuals in the back of my closet. They're artifacts from the early 1990s, when I taught thousands of corporate students how to use computer programs.

What's different about a synchronous online event, compared to classroom delivery?

I saw my Trainer Checklist written on the inside of one cover showing the items I would need for that course. The list includes: spare floppy disks to format, broken floppy disk, PowerPoint overheads, printed sample documents and spreadsheets, markers, index cards, and ChapStick®. The pages were filled with notes to remind myself what to say, which file to open, and in which dialog box to remind students "DO NOT CLICK OK." There is a little yellow sticky note that says, "Agenda, Schedule." This was to remind myself what to write on the whiteboard before students arrived.

When I think of my current Checklist, the ChapStick is the only thing that hasn't changed. I have electronic substitutes for everything else. I still post an Agenda and a Schedule, but I send it in an e-mail and post it on a Web site. I still use visual aids to teach, but they are video clips, not clip art. I can still annotate an image, but I do it with a mouse pointer, not a marker. I provide sample documents for learners, but I make them available for download rather than distributing physical copies. Nothing has changed. Everything has changed.

In this chapter, I'll discuss the pre-planning and information-gathering that you must do in order to properly prepare yourself and your content. Let's begin with the learners themselves.

Contents

In Chapter 4 you will find information about:

- Who is your audience, and where are they?
- Are you going to have co-presenters? Where are they?
- What equipment and facilities will you need?
- Plan to support the instructional design
- How will you handle handouts and supplemental materials?
- Are you going to have a Producer?

Who is your audience, and where are they?

Back in the day, I rarely knew who would be in my class or why they were there. I'd have a roster of names and companies, but no specifics on learning objectives or needs. My first goal of the day was to meet as many students as I could while they were enjoying coffee and bagels. I was fishing for anecdotes so I could adapt my examples or storylines to better suit them.

Learners came in and sat down. The big concerns were parking or inclement weather. Students chose seats to be close to the door, or the board, or a coworker. I'd ask each to introduce himself at the beginning of the session and declare what he was most interested in learning today.

It was useful to gather that information, but I wished there was a way to know these details before the class started. It would have been easier to create an appropriate example if I had more time.

My online students' issues aren't parking, weather, or coffee and bagels, but logging in and using passwords. Sessions might take place at a time of day that is not business hours in every locale. Students are not in one room, but in cubicles or in their home offices, in other time zones. Trainers in this situation may feel a zero sense of control because, while it's possible that students are sitting at desks and looking at the demonstration, images, and text, there's no guarantee. Participants might actually be reading e-mail, shopping online, or folding the laundry.

Needs assessment and analysis

I'm so grateful for innovations like e-mail and Web forms. These days, I can find out relevant information about learners in advance, whether we're meeting in a classroom or online. I can ask

each of them, and their managers, what they already know and what they want to learn in our training sessions. I can find out more about how students will apply what they learn back at work.

I once gathered this information from my client, the training coordinator. This anecdotal information helped me get a sense of the situation, but didn't provide hard examples. Now, I send a pre-course survey file attached to an e-mail. The survey asks each participant questions about his skills and intentions for the session. (See Table 4-1.) I request information about job tasks and knowledge of other, similar tools.

Even more critical are technical needs. Learners who cannot connect to the session or cannot hear the audio cannot participate. Surveys can include questions about their individual hardware and software set-ups, network firewalls, and technical considerations that

Table 4-1

Collect relevant information about learners ahead of time

Questions	Responses from coordinator	Sample response: Student "A"	Sample response: Student "B"
Who is the audience?	They are primarily brokers, but also support, marketing, managers, etc.	I work on the help desk.	Financial services.
What do they know already?	They've been introduced to the product and have it installed. Some use it a lot, some not at all.	I've been using contact management software for six years. I've had this for three weeks.	Outlook. Two years.
What do they intend to learn from this training session?	Some are self-taught; they want to fill in the gaps. Others want a structured look at how to use the product and a chance to try it and ask questions.	I'm just using it the way I used the old software. I'd also like to understand more of the e-mail functions.	More on e-mail and contact management.
How does the organization see this group using the product?	Day-to-day.	It is my lifeline to my clients and my leads. I spend five hours a day using it.	All contact information in one place.
Experience using a browser and accessing Web sites?	Yes	Yes	Five years.
Synchronous online learning experience?	Yes/No/Some	Yes. Live Meeting for three or four meetings.	Yes.
In which product?	WebEx	Live Meeting.	Centra, BlackBoard in school.
What do they most need to learn?	They think it will help clarify things they are struggling with.	I don't need to start at the beginning. I just need to know how to be more efficient with the mess I have right now.	How to keep track of the huge amount of client information I have.

learners should address well in advance of the session.

I also invite learners to express concerns and intentions they have about participating in this new environment.

For large training efforts, individual e-mail and attached files quickly become cumbersome. Web-based forms can tie to the registration process, perhaps through the Learning Management System (LMS), so that trainers and registrars can view learner information as needed.

Keep in mind, if your goal is to build rapport, a Web-based form will not likely make the connection you're looking for. For that, you need to look beyond the confines of a single online learning "event" and connect with learners before, during, and after online sessions. Encourage them to communicate, too. Use group e-mails or threaded discussions as seen in chat boards. Teams are using "blogs" (short for "Web logs"), wikis (Web sites that allow users to create, edit, and comment on entries), and collaborative management software of many kinds (from Lotus Notes and Groove to the latest Web mashup) so everyone in the group can contribute to the discussion. You can get more insight into learners' needs from these sources. Bring your own bagels.

Adapt content or make adjustments to materials based on learner needs and technical setup

When an instructional designer hands you a course that you can load and run, be sure to say thank you. As you've seen in Chapter 3, several new factors need to be considered when designing for online learning. Sequencing and flow have become less linear. Materials have multiple formats and can require special players to run. Sessions can be any length. Communication is a whole new game. Rooms, desks, and gravity are irrelevant. Your course doesn't fit between the covers of a book.

Teaching online means accepting these things and finding ways to do what you need to do to get the message through, while staying flexible to deal with last-minute issues around technology or learners' interests.

When a client recently asked me to deliver two sessions, two hours each, on *Act! 6.0* for her financial services team, I ordered a courseware product designed for instructor-led classroom training. The course has six lessons and is a full day long, so I had to make some hard choices about what to cover and how. I didn't believe that going faster or simply asking the students to keystroke while I observed would cut it.

To keep students interested, I focused training on what they most needed. The surveys indicated that most students had already used contact management software, but not *Act! 6.0*. I scanned the course workbook for content on these subjects and planned 60 minutes of activities focused on contact management features, differences, and shortcuts including Contact Activity Lookup and Active Libraries. I planned 30 minutes on e-mail with Outlook integration and some practice time.

Part of delivering online is respecting the time available. It's not, "Cover everything you can," but, "Cover important content well in the amount of time you have."

To compel learners to pay attention and participate, create an "intentional design" for your online sessions. Plan what you'll say, what you'll show, and what the learners will do at every point in the program. Don't wing it! Make use of a variety of features to get the most from your online tools. If I can find out what they need to learn, what will keep them motivated, and what obstacles need to be removed, it's a start.

Are you going to have co-presenters? Where are they?

Imagine the practicality of inviting a guest speaker to your session, an industry expert whose forte is exactly what your learners want to know more about. You can have more than one expert. You can

have a panel. You can send the guest speakers a link to the session, test their connections, teach them how to use the audio functions and they're ready to go.

Surprisingly, I find it cleaner if co-presenters are in different places. If they are sitting next to each other, they might also need to share a headset and a keyboard. This requires constantly readjusting their hardware. If they are in the same room, and they both open their microphones, the audio of one speaker can often be heard in the background of the other, causing an echo.

Co-presenters can take turns speaking and using software controls. Leadership roles equate to privileges for controlling the audio, annotating the whiteboard, advancing slides, application sharing, and setting participant privileges. Some tools allow upgrading any user to have presenter privileges at any time. Other tools attach privileges to login type and only allow one presenter to have control at a time. Some tools have a variety of roles available, all with slightly different privileges. Hosts might choose to restrict the control that a guest speaker has so that an untrained user can't negatively affect the session by closing the file or changing the settings.

Co-presenters can support each other by fielding learner questions entered in Chat. Text can flow quickly in Chat, making it difficult for the primary presenter to read. An informed co-presenter might type responses to each question as appropriate, or alert the primary presenter to respond verbally.

The smoothest co-presented session is one where the presenters have practiced together in advance. They practice turning controls over to each other so that the process is seamless during the actual presentation. An important step in production planning is to determine who will take the lead, how to introduce activities, and who will cover each topic. If there is any confusion about which slide is whose, I recommend adding a visual cue to every slide; e.g., if the title text is blue, it's my slide; if the title text is black, it's yours.

If I'm supporting a presenter as an online session producer, I meet with him in advance to teach him the software and the interface, set up and test his system, and make sure audio and other issues are taken care of. I use a Speaker Tracking Form to document what we've done. You can download a Microsoft Excel template for the Speaker Tracking Form, in an archive with a Storyboard template, at <http://www.elearningguild.net/ebook/Worksheet.zip>. A printed version is in Appendix C.

What equipment and facilities will you need?

In order to present an online session, each presenter will need a minimum setup that includes the following items and services:

- A quiet, comfortable place to work
- A computer and, if possible, a backup
- A wired Internet connection for the primary computer, and if possible for the backup computer
- High quality audio
- Access to the session room and materials

A place to work

Each presenter needs a workspace, including a desk and a chair. I'd like to say I can do my job from anywhere, but sandy beaches and village bistros just aren't practical, yet. You need a place to be and to put your equipment — a place where you can sit comfortably for a long time. Find a comfortable chair and a desk or table that positions your keyboard and mouse at an ergonomically appropriate height. If your own audio line will be open, be sure to keep your background noise to a minimum. String a "Do not disturb" sign across your cubicle door, and turn down the ringer on the fax machine and pager. If you're at your home office, put the dog in the kitchen or in his crate.

Adjust the blinds to limit glare, and set the temperature. Bring in some light. Remember your bottle of water and ChapStick, too.

Two computers

At least one, if not two, PCs or Macs suitable for running the selected online software. (Some tools do not support Mac, so be sure to do your research.) You can use the second computer to display the participant's view, that is, what your participants are seeing on their screens. A second machine can also be an emergency backup in case your primary machine fails during the session. Remember, you'll need power. Don't count on your batteries alone if you are using a laptop.

Here are the average setup requirements for presenters (check the specifics for your particular software):

- PC: 256 Megs RAM (more if you need to open several applications)
- Pentium processor
- Audio card
- Windows 98 or better
- Internet Explorer, Netscape, or Mozilla
- Proprietary plug in to allow the second machine to connect to the synchronous session
- Minimum 56K connection speed for the second machine, but if the session will involve heavy media files or application sharing, you'll want more speed. (See the next heading, "A wired Internet connection.")

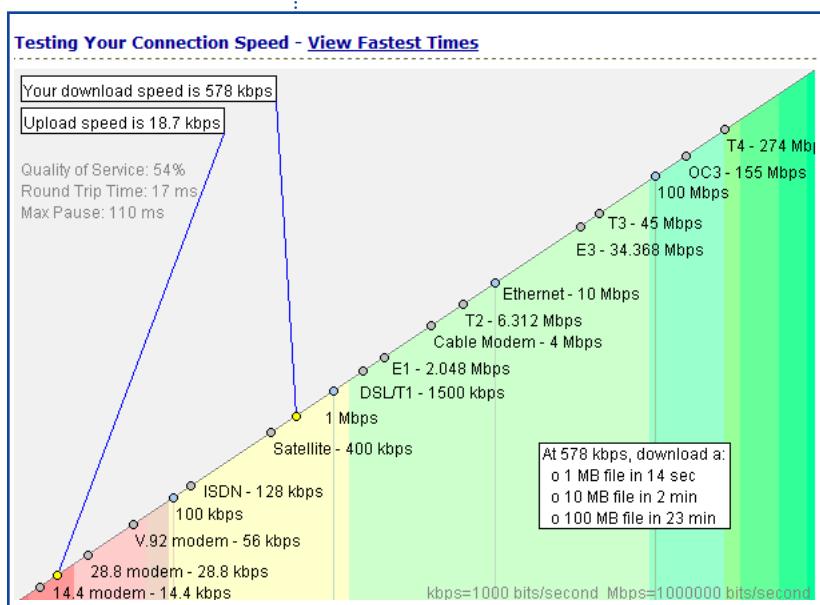


Figure 4-1
Internet Frog speed test results show your internet connection's actual performance. This may vary considerably from what you expected.

- Certain functions enabled or disabled (as required), such as JavaScript settings, or cookies and pop ups.
- Macintosh and Solaris users: check your vendor's system requirements. Some don't support Macintosh and Solaris systems, and some provide a less functional interface than what PC users see.

A wired Internet connection

The presenter(s) must have a wired Internet connection. Yes, I know that, technically speaking, wireless should work just as well, but if you're counting on application sharing and Voice over IP, make sure you have the best foundation possible. Participants, who are mostly receiving information, can get away with less upload speed as long as they can download quickly.

If you're presenting, your concern is with upload speed, not what your Internet provider tells you in their marketing collateral material, but your ACTUAL connection at that moment. Figure 4-1 shows the results of actual speed tests (<http://www.Internetfrog.com/>). Software vendors post preferred connection speeds for their products. The minimums are usually 28.8K and 56K, but most users will prefer to work on a wired cable or DSL connection. Your biggest consideration will be continual connection to maintain consistent flow of audio and data. Some software tools have an internal indicator to warn you when your connection speed is reduced.

Think of connection speeds this way: When you're driving on a four-lane highway late at night you have plenty of room because there's very little traffic. If there's an accident, though, it doesn't

matter how little traffic there is, you still need to slow down and sometimes stop. During rush hour, accidents, congestion, and regular traffic can affect your ability to get through or to send and receive continuously and consistently over a long period of time. Be realistic about your connection to the Internet. Establish the best connection possible.

Your software may have particular requirements that affect connections. For example, Elluminate runs on Java, which is installed on many (but not all) machines. You need to find out ahead of time what your presenters (and your participants) have. Elluminate also connects on one of two ports – 2187 or 80. Conflicts can occur when corporations don't allow students to use those ports for Elluminate, citing security, policy, and a support call waiting list. Last Minute Larry faces an obstacle when his IT staffer requires a trouble ticket and a three-day lead to open the port — not to mention the protocol meeting where IT decides if they are willing to subject their network to unknown traffic through the firewall. Larry will not be joining on time. Rest assured Elluminate is just doing what is needed to run the session; they're not stealing corporate secrets.

High-quality audio (whether VoIP or telephony)

Minimally, the presenter needs to have very high quality audio output, and the participants need to have high quality and consistently audible sound. When participants rely on being able to hear in order to get the information they need, it can be difficult to listen to a degraded-quality phone line. Participants have reported headache symptoms after a few minutes of listening to a line with a hum or buzz.

Take very seriously your decision about how participants will join the audio portion of the session. As with telephone conference calls, there are options that can restrict or facilitate opportunities for verbal interaction. You can allow all participants to speak openly, and mute and unmute their lines. This can take extra time if you intend that all participants will frequently speak and respond. You can let only presenters speak, but allow participants to comment at times when the operator opens the line. These options can affect session timing, content flow, and interaction types and should be considered in the instructional design process.

Will Voice over IP be good enough? VoIP requires that each person who will speak on the session must have a PC headset with a microphone. The small microphone and speakers in a laptop usually don't provide good quality.

Beyond input and output devices, bandwidth limits VoIP technology. When all participants enjoy an uncongested broadband connection to the Internet, VoIP audio can sound as good as a call on a hard-wired telephone — remember those? Many synchronous online software tools support full-duplexing, which allows multiple speakers to open their microphones and talk at the same time.

Speakers often report a slight delay in audio and have a tendency to speak over each other. In side-by-side tests with an open phone call, testers reported a two- to ten-second delay in receiving the VoIP audio.

When you're downloading e-mail or files from a network to your local drive, you might never notice that the flow stops and restarts. If listening to audio, it's very obvious when that happens. To the VoIP user, the audio might seem to cut out and drop words the way a cellular phone call does. More likely, the system will download and cache the audio stream, and then play it a few seconds late. Listeners hear all the words that were said, but with random gaps in between. Patient listeners will be able to follow along, but might not like it very much.

Access to the session room and materials

Presenters, like participants, typically need to log in to a session by following a link to a Web site and then entering a unique user ID and password assigned by the session Producer or training administrator. Once logged in, presenters can upload slides and share applications and other visuals. Some online software tools allow presenters to load materials in advance and leave them there until it's time to present them.

Plan to support the instructional design

Even though synchronous online software tools seem very similar, they all have their own way of doing things. These “ways” are not the same as the ways in which one does things face-to-face in the classroom, and converting existing materials for use in synchronous sessions requires forethought and planning. Because body language doesn’t exist online, you must plan ways to engage learners with the tools that are available online. The time to do this planning is well in advance of the actual session.

Build a storyboard

You can use an Excel spreadsheet to create a storyboard that helps instructional designers, trainers, and producers keep track of every aspect of the delivery. A storyboard captures what often feel like chaotic details in a more linear structure.

When adapting content, start with sections that are best delivered in a group setting (role plays, discussions, Q&A). Consider how the lesson will work. What instructions will the learners need? Will you give instructions verbally, visually, or both ways? Which feature(s) will you use to deliver the instructions? What missing classroom elements will affect the lesson? What can you use instead?

Once you’ve worked out the highly interactive sections, you’ll start to see how things work. Go back to the less interesting content and plan ways to keep it engaging. Create touchpoints that will confirm that learners are alive and with you. Plan to post polling or open-ended questions, encourage Chat, or initiate an activity. If online time is limited, develop independent tasks for learners to complete offline.

By incorporating these adaptations into a storyboard, you’ll remember to open files BEFORE you need to share them, and you’ll post the right poll at the right time.

Label your spreadsheet columns as listed below and then fill in every detail, every message to participants, and every filename or link that will be used. (See Figure 4-2 on page 55 for an example.) The beauty of using a spreadsheet is that you can write as much as you need to and not worry about margins. If you want to print the storyboard, you can always hide and unhide columns.

1. Learning content — The learning objective of this segment (more granular than lesson). Content might also include introductory instructions and ground rules.

2. Method — How will you deliver this learning content to learners? You can’t just have a blank screen and talk. What will you be showing or doing?

3. Graphic — If you’re displaying a file, list the filename here.

4. Tech check — Identify the technology that will have to be turned on, or in place, for this to work. Start application sharing. Convert and load PowerPoint files. The Tech check serves as a to-do list.

5. Talk track — Fill in who will speak and what they will say at this point. Be sure to include new phrases such as, “Click your Hand Raise button to request permission to use the Talk button.” For most presenters, this very specific, somewhat odd, language doesn’t flow easily. The script helps everyone get used to the new terminology.

6. Interaction — Interactions will include instructions for activities, polls, and open-ended questions. Schedule regular (every 5-15 minutes) relevant interactions, particularly questions, throughout the session.

7. Intended response — The intended response lists what the participants are likely to say or do when you initiate the interaction. List likely answers to an open-ended question, points of confusion on the activity, and reminders about using software tools. Think ahead to what the learner will be doing or will need at that point.

8. Response method — Head nods and audible sighs will not serve as communication methods. Plan how participants will do an activity and TELL THEM to respond that way. “Please click on your answer in the polling pod you see on your screen.” “Please unMute your line and speak up.”

9. PLAN B – The moment of dread will come. You will move to an activity and the file won’t be there. You’ll try to share an application and your machine will lock up. You’ll rest easier if you’re proactive. Set up a secondary solution to all key learning methods. You do not want to have to say, “I’m sorry, we are having technical difficulties and can’t give you the information you came here to see.” Even if the delivery option seems low-tech and lame, fill it in. I promise, it’ll be a relief the moment nothing else exists. Don’t be shy about fleshing out a Plan C or D option either, especially if it’s easy to do. Be prepared to say, “Log in to this site, download the file, and advance the screen shot slides along with me.” I needed to refer to Plan D once, and was able to keep the lesson afloat.

A good storyboard is a gift to a new online trainer. It helps them visualize the process and overcome the hurdle of managing many things at once. You can download a Microsoft Excel template for the Speaker Tracking Form, in a archive with a Storyboard template, at <http://www.elearningguild.net/ebook/Worksheet.zip>. A printed version is in Appendix C.. This template will help instructional designers and trainers create a support plan for everything that will happen in a session visually, audibly, and technically. By using this template, they can ensure that each item is set up and ready to go when needed. The template has some content filled in so you can see what types of information to track. Read the notes attached to the column headings for more details. Add your own learning objectives, and you can adapt this to support your own sessions. When you’re ready to set up the session (Chapter 5), use the Tech Check column to see what each activity requires.

Plan to share visuals

When classroom presenters would ask me what to do with their hands when standing in front of an audience, my answer was, “Use more interesting visual aids. If people are looking at your hands, they probably don’t have anything else to look at.” Provide a visual focal point for every part of your presentation. Like dead air, blank screens prompt learners to turn attention away from the session.

Online, the bulk of what we do is share visuals with participants. After all, unless you’re showing something, why not just use a conference call? The presenter’s body language and hand gestures can no longer serve as the default visual aid when there’s nothing else to look at. We cannot pass around a hard copy example of a document, and sketching on a whiteboard has a new complexity. However, we can show or share nearly any image, including photos, PowerPoint slides, graphics, video clips, Flash animations, text, charts, screen captures, and live demonstrations of software tools that are only installed on the presenter’s computer.

Include relevant graphics and diagrams that illustrate your point. These can bolster the visual appeal of any training session and, if done intentionally and effectively, can contribute to knowledge transfer and retention (see Chapter 3). The ways we share images can vary depending on the file type and how we use it.

It’s true that it is possible to share video feeds of the presenter, and participants, too, by using Web cameras. Unfortunately, the subtleties of body language are hard to observe on the little, grainy

Figure 4-2**Storyboard for Session Intro — A storyboard will help you create a support plan for your event.**

Learning Content	Method	Graphic	Tech Check	Talk Track	Interaction	Intended Response	Response Method	Plan B
Welcome participants to the session, remind them of the official start time.		Text with start times in 3 time zones – PT, ET, GMT	PowerPoint slides loaded	"Thanks for joining. We're just getting settled in. We'll officially begin at the top of the hour."				
	PowerPoint slide	Thumbs Up and other Emoticons	PowerPoint slides loaded	"If you're hearing me, please click Thumbs Up."	Click the Thumbs Up icon on the left side of your screen."	Mostly Thumbs Up; a few Thumbs Down	Emotions	Not hearing ok? Chat privately, take into a breakout room, or ring on the phone.
Check audio	PPT build or type in Chat	Type in Chat or Whiteboard or add to PPT in advance "if you cannot HEAR me speaking, type a private message to me."	PowerPoint slides loaded/Chat function on.		Messages in Chat		PPT and Chat	Type on Whiteboard
Introduction to each other	Audio and Chat			"Please say hello by typing in Chat and let us know where you're joining from."	Lots of messages in Chat	Cities, countries, companies, weather reports, view out the window intermingled with pleas for help from last-minute Larry who doesn't hear the audio.	Chat	
Introduction to synchronous software	Poll	What is your experience using this online software as a participant? Very familiar, somewhat familiar, not familiar	Poll created and ready to show	"Please use the poll to let us know what experience you have with this product. Click the one answer that best describes your experience."	Aggregated responses will be displayed to all	Suspected mostly "somewhat familiar"	Poll	Ask them to type experience level in Chat.
Introduction to synchronous software	PPT Tutorial slide	PPT with screenshots of Chat	PPT tutorial file loaded and accessible	"Please observe the screens I'm showing now. You can use Chat at any time to send a public message to everyone, or if you're having technical issues you can send a private message to me, Karen Hyder."			No public Chat, type on Whiteboard, respond verbally	No public Chat, type on Whiteboard, respond verbally
Introduction to synchronous software	PPT Tutorial slide	PPT with screenshots of the Emoticons	PPT tutorial file loaded and accessible	"You can use emoticons to let me and the presenter know that you agree, disagree, or need help, or to respond to an impromptu poll. So, let's practice. If you are hearing me now and my audio sounds clear, please click Thumbs Up now."			No public Chat, type on Whiteboard, respond verbally	No public Chat, type on Whiteboard, respond verbally
Firm up the agenda	PPT Agenda slide	Show the agenda		Talk through agenda points.				
Firm up the agenda	Poll	Which Agenda items are you most interested in? Multiple response.	Create poll -- multiple answer	"Please let me know which areas I should focus on most today. If you think everything is important, click each item."	Poll	The will list expectations that I can prepare for or park.	Poll and Chat	Ask for verbal or Chat responses.
Firm up the agenda	PPT Chat question	Slide: Additions, contributions, questions? Items you want to cover, but not listed?	Create slide with question	What other comments or questions do you have?		Clarify times, assignments	Chat or verbal responses	
Lesson 1 Introduction	PPT slides	Bullets and graphics	Ensure PPT file is loaded	Fill in content details	Ask participants about their current knowledge	Participant responses	Chat	

images. I don't find much learning value in being able to see the face of the presenter. Although I do like to see a photo of the presenter so I can assign a name to a face, I don't need to see them live. I also find that streaming video images from the Web camera requires a lot of bandwidth, and I'd prefer to reserve that resource for VoIP audio or desktop sharing.

It's important to determine early that the software tool you're using will display your learning materials appropriately. Think through, and plan out, what you'll show at every point in the session. Make sure it gets on the storyboard.

Plan for incompatibility issues

Know in advance how your online software tools handle your file types, and be prepared to make tweaks to activities or feedback options as determined by the software tool you use. If the instructional design calls for an activity that your software doesn't support, find a creative way to achieve the same result.

Plan around unsupported instructional design

If you are converting content from a classroom presentation, you can count on having parts of the old design that the online setting won't support. They may not be supported because the Web conferencing software just doesn't allow them, or they may not be supported because they aren't practical for online use. Here is my list of common problems in these areas.

Showing PowerPoint slide animations and “builds”

You want to show PowerPoint slides. Find out if the bulleted text will build one line at a time the way you programmed the custom animation. In some online tools, the slide images become static, and bullets and animations don't display individually.

Creative Solution: When using that tool, you must make a separate slide for each of the animated items. Admittedly, this is a tedious solution.

Tossing a question out to the group

You want each participant to type a response to the question "How would you use this?" so that all the participants can see what value the learning objective has to others. (In classroom design and instructor practice, this is often called an "overhead question.") In the software you're using, suppose participants cannot use Chat to type to the whole group; they can only send it to one person at a time. When they each type a response to you, 20 new text boxes open on your screen. No one else sees those 20 responses.

Creative Solution: Have them type responses on the whiteboard instead of Chat. You'll need to control where they type, so the messages don't layer on top of each other.

Showing a text document

A presenter wants to show a PowerPoint slide deck with 25 slides and a two-page Word document. Suppose your Web conferencing application will convert and upload the PowerPoint, but not the Word document.

Creative Solution: Application-share Word and the active document and all participants will see it. Low-bandwidth participants might find that images and VoIP audio cut out momentarily.

Alternate Creative Solution: Adobe's FlashPaper software tool can convert the Word document to an uploadable SWF (Flash) file. FlashPaper needs to be installed separately, and isn't free, but you can use a free trial.

Talk to each other

If you're the decision-maker for buying and implementing online training, be sure to check in with your instructional designers and trainers to confirm that each learning activity can be supported as designed. Remember, online tools come from a variety of development companies in a variety of "flavors" or levels of service, which affect available features and options. This might require the designers and trainers to resort to a creative solution. The cheaper product might be missing some key instructional tools, like polling, application sharing, or participant privilege options. Even these small limitations could compel a serious rework of the instructional design.

How will you handle handouts and supplemental materials?

Presenters can provide a world of learning resources before, during, and after online sessions. Supplemental files might include assessments or surveys, independent assignments, reading materials, and backup files. You can make nearly anything accessible.

For one or two small documents, e-mail is probably the best way to provide supplemental materials, especially if the group is small and the presenter or the Producer sends out course invitations, rather than having the Learning Management System send them automatically. If you have more than five files, post them on a Web site or a shared drive and ask participants to access them as they need them. Learning Management Systems also serve as easy-access storage.

Tips for supplemental files

Create a logical naming or numbering scheme so participants can use files easily. Categorize files in order of date, use, or topic. Attach comments to files to indicate the purpose or assignment cues, such as, "This two-minute clip answers Dave's questions about subnet masking." Or, "There will be a quiz on permissions, so read this article carefully."

If your files will require any extra software to open or play properly, CLEARLY post the installation link to the required software on the same page.

Are you going to have a Producer?

Our training center's policy stated that if there were more than eight students in a class, we would assign a facilitator to provide extra support to the primary trainer and to the learners. The facilitator rarely spoke louder than a whisper, but quietly moved around the classroom, assisting learners who fell behind in keystrokes, or who were lost in dialog boxes.

That person takes on a new role online as Producer (I introduced this role in Chapter 2) or moderator and technical support rolled into one. The Producer might introduce the session, with brief instructions on how to use the software and then turn it over to the main presenter. If participants find that their connection isn't functioning, and they need troubleshooting help during the session, rather than disrupt the session, they can call on the Producer, who can type solutions to the participant privately in Chat. If necessary, the Producer might call the person on the phone to identify the problem and solution more quickly. A Producer can take the pressure off one person having to do all the talking and manage the software, too.

However, those are pieces of the Producer's role. I'll have more to say about them in Chapter 6. During the planning phase, you will want to decide whether you are going to use a Producer, because planning is the time to bring this person into the picture. The Producer can do a number of functions in the planning phase that will help take the pressure off the presenter.

Most of these planning-phase Producer functions have to do with collecting information about:

- Hardware, particularly the hardware that the participants will be using
- Connectivity issues for the participants
- Software requirements for the participants: plug-ins, Java, and so on
- Co-presenters, panel members, and their hardware, connectivity, and software issues
- Any Learning Management System requirements for registration and tracking

The Producer may also become involved in helping the presenter(s) deal with any matters of instructional design not supported by the Web conferencing software in use.


SUBARU

“

We're the first car manufacturer to create a customer service recovery program to increase customer loyalty, and WebEx helped us do it.

—Darryl Draper, National Customer Relations and Loyalty Training Manager

”



LINE OF BUSINESS

Automotive manufacturer

WEBEX SERVICE IN USE

Training Center, Meeting Center

SUMMARY

Subaru's launch of its Owner Loyalty Program required efficiently delivering training to 600 dealerships across the US. Implementing WebEx Training Center enabled the program's sole trainer to reach 2,400 dealers within six months at a cost of \$0.75 per person. As a result, Subaru was able to roll out the industry's first customer service recovery program, while offering quality training that its dealers love. Subaru of America is in the process of implementing WebEx throughout its enterprise.

ABOUT SUBARU OF AMERICA, INC.

Headquarters
Cherry Hill, NJ

Number of employees
800

TARGET MARKET
Consumers and dealers

WebEx Customer Since 2003

Subaru achieves industry first with WebEx Training Center.

Subaru of America, Inc. is the exclusive United States marketer of Subaru products manufactured by Fuji Heavy Industries Ltd. (FHI) of Japan. First to introduce four-wheel drive passenger cars to the world, FHI's Subaru division currently sells more than 10 million vehicles a year worldwide. Working with 600 dealerships nationwide, Subaru of America works to maintain the value of the Subaru brand—long associated with quality and reliability—across the US.

The Challenge

Subaru's launch into the luxury car market prompted the car manufacturer to evaluate the level of customer service it provided. Subaru's Owner Loyalty Program (OLP) addresses the needs of a high-end market that expects premium customer service. The program, which uniquely focuses on predicting and fostering customer loyalty, requires the thorough training of Subaru's dealers. With just a single trainer dedicated to this program, providing training to 600 dealerships across the nation proved challenging. "When we launched the program, I spent seven months on the road. I would spend three to four days a week teaching a class, travel home and then do the same thing the following week," says Darryl Draper, Subaru's National Customer Relations and Loyalty Training Manager. Despite the intense seven-month schedule, Draper was only able to reach dealerships in the Western region of the US. "We needed a more effective way to deliver quality training to our 600 dealerships, while freeing my time to creatively develop new programs," she says.

The Solution

Draper searched the Internet for an online training solution. After comparing four solutions, she chose WebEx because of its ease of use. "It was very intuitive and had all the features I was looking for, including attendee tracking, live chats, polling, and testing," she explains.

With WebEx Training Center, Draper was able to implement a crucial and unique component of Subaru's OLP program: Customer Service Recovery. According to Draper, "If a customer submits a negative survey, we notify the dealership and offer the dealer the opportunity to go back to the customer and fix the problem." To ensure dealers are qualified to participate in the Customer Service Recovery Program, Subaru requires each dealership to send at least two employees to an in-depth training program developed by Draper. The program, which teaches the dealers how to reverse negative opinions, consists primarily of WebEx prerecorded and live online training sessions. It also includes a traditional classroom segment that Draper plans to replace with WebEx Training Center sessions in the near future.

Using the on demand module in WebEx Training Center, Draper developed seven OLP recovery presentations that dealers may access 24x7. The company hosts the presentations on a Subaru-branded WebEx portal that dealers frequent. "Each prerecorded presentation lasts 10-20 minutes, so a dealer can leave the sales floor and complete a session even during a short work break," says Draper. She continues, "Because accessing the presentations is

so convenient, some dealerships have as many as 20 employees—instead of the two we require—participating in the trainings.”

As part of the recovery training, Draper also requires the dealers to attend a live 45-minute WebEx session. The live online sessions optimize her time by making it possible for employees from multiple dealerships to attend the same session. “By enabling us to institute the Recovery Program, WebEx is helping us foster customer loyalty that will increase both car and service sales,” says Draper.

At Subaru, WebEx Enterprise Edition is now being integrated throughout the organization for a variety of purposes. For instance, the IT department uses WebEx for internal application training, while regional vice presidents and training managers use Meeting Center to conduct meetings with dealers and salespeople located throughout large geographic territories. Subaru Service Technical Trainers also use WebEx to deliver diagnosis and just-in-time trainings to dealership technicians.

The Benefits

WebEx enabled Subaru to execute quickly on a customer service program unique to the industry. “We’re the first car manufacturer to create a customer service recovery program to increase customer loyalty, and WebEx helped us do it,” states Draper. Since launching its online OLP recovery training program six months ago, Subaru has trained 98% of its dealers. “Using WebEx, we trained 350 dealers in the first month. Now it costs approximately \$0.75 per person to deliver training. No other program in Subaru’s history has achieved these types of results.”

Using WebEx, we trained 350 dealers in the first month. Now it costs approximately \$0.75 per person to deliver training.

—Darryl Draper, National Customer Relations and Loyalty Training Manager

As a result of using WebEx, Draper has reallocated the time and money once spent on in-person training to an effective, measurable solution that dealers love. “Now the dealers use Subaru’s training as the gold standard to compare other manufacturers’ programs,” explains Draper, adding, “WebEx has raised Subaru to a first tier level in the dealers’ minds.” With its better training, Subaru now gets more attention from the dealerships, a crucial factor in increasing sales.

WebEx has not only improved efficiency at Subaru but it has also helped the company strengthen its dealer relationships and the impact of its programs. Draper uses WebEx to start impromptu online sessions or conduct just-in-time trainings whenever necessary. She says, “I’ve established an ongoing relationship with our dealers through WebEx. I now have more one-on-one interactions and know more about them than ever before.”

Draper has also discovered that WebEx is an excellent tool for advanced learning. Using WebEx, she recently incorporated a higher learning course into her training offering and had surprising results. “The course required dealers to retrieve data from the OLP site and to create an action plan that would resolve problem areas in their dealerships,” says Draper. She continues, “Within a week, 75 dealers had

submitted action plans to me. Once again I knew I could rely on WebEx to drive important changes in my business.”

The Future

On the heels of her overwhelming success with the recovery training program, Draper already has plans for increasing the use of WebEx. She intends to transition half of her in-person classrooms to WebEx Training Center by the end of this year, converting to 100% online trainings by the end of 2007.

Draper is also investigating ways to use the WebEx Sales Center communications portal for training purposes. “I’d like to upload relevant documents to the portal so dealers can easily access them.”

Draper has identified herself as a WebEx evangelist who would like to help other departments at Subaru adopt the solution. She concludes, “With decreasing budgets and increasing demands for efficiency, WebEx presents a better solution to the way things were done before.”

HIGHLIGHTS

- The launch of Subaru’s Owner Loyalty Recovery required the program’s sole trainer to efficiently deliver training to 600 dealerships across the US.
- WebEx Training Center enabled Subaru to train 2400 dealers in six months at a cost of \$0.75 per person.
- Providing dealerships with better training and frequent interactions has strengthened dealer relationships and programs.
- Subaru’s WebEx training is now considered the gold standard by which dealers compare other training programs.

Setting Up for Production

By Karen Hyder

Prior to the session, the presenter or the Producer might upload session materials, set up polls, and customize session options. Many Producers also serve as a coach to the presenters by rehearsing with them and providing feedback on skills and strategies. Producers set up and test everything in advance to ensure that all is in readiness. Finally, the Producer or the presenter will send an invitation and instructions to the participants. In this chapter, I'll go over the three major preparation areas (technology, speaker, participants) and provide you with a checklist and other Producer tools for this most critical step in preparation.

Technical setup

There are a number of technology details to verify, and to make ready, well in advance of your session. These begin with setting up the Learning Management System or other arrangements for registration and tracking of learners, and conclude with conversion of content from PowerPoint, Word, or other formats, and uploading it to the session room.

Registration and tracking

If your participants are students in a course and you need to track their attendance, it will be important to have each register and log in to the session using a unique name. (See Figure 5-1 on page 62.) Trainers can go back later and view reports on who logged in, what time they logged in, and in some cases, their answers for polls and quizzes.

Some tools prompt participants to complete a self-registration form, others require that a software administrator add participants' names, user IDs, and passwords. In the latter case, some software requires adding names one at a time, which can be tedious. Other software, however, permits uploading all the names and information at one time in a comma-delimited data file.

Many organizations use a Learning Management System to create and track session content, users, and data. Talk to your Training or IT department about the tools that are available to you, and get up to speed on how to use them effectively.

When tracking is not an issue, and presenters don't know for sure who will attend, they can create a generic login link and send the link out to an e-mail group or post it on a Web site. When interested participants log in, the system prompts them to enter a name (or nickname) and admits them to the session as a Guest.

Connectivity

There are three ways to reduce connection issues during your event. You can take care of two of them during your setup, and you can advise parti-

Contents

In Chapter 5 you will find information about:

- Technical set up
- Speaker preparation
- Learner preparation and communication
- Moderator checklist

pants about the third in your communications with them before the event.

First, test everything! While you still have plenty of time to troubleshoot or make adjustments, test everything you want to do during the session. Be sure to open all the files and turn on all the features you'll be using in the event. If anything behaves strangely, or if audio fades or cuts out during the practice, take steps to improve your connection or your equipment, or install upgrades to players and add-ins.

Second, get wired. You can dramatically improve your connection to the internet by presenting from a corporate LAN rather than from a DSL connection in your home office (assuming you have a choice). In either case, be sure to use a wired connection to the session, not a wireless connection.

Finally, optimize resources during practice and during the actual event. Close unneeded applications.

They use bandwidth and system resources, including memory. Clear temporary files and cookies. In your invitation, or other pre-event communications, suggest that all participants do the same.

Figure 5-1
WebEx attendee registration form.

Attendee Registration: Require attendee registration [Customize form](#)
 Automatically accept all registration requests
 Set registration password: (Optional)
 Confirm registration password:
 Maximum registrations allowed: (leave blank for unlimited)
 Set registration close date:
 April 5 2006

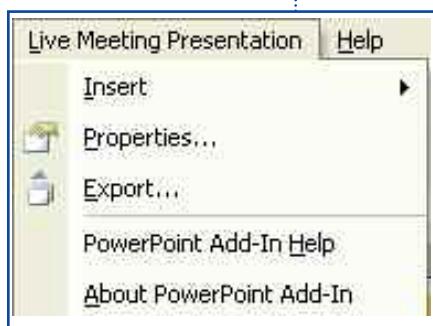


Figure 5-2
Live Meeting provides an add-in for PowerPoint that displays a new menu.

Think through the advantages and disadvantages of using Voice over IP (VoIP) audio instead of a conference call. This is not a trivial decision.

Several online software tools offer VoIP technology instead of a phone call for audio. For long sessions with large groups, the cost savings can be huge. Recording functions integrate the audio without an extra step.

VoIP does have its drawbacks. There is a small learning curve for using the interface talk button, and all speakers (participants as well as presenters) require a PC headset or they will be severely limited in their ability to communicate with other participants. We spend a lot of time asking "Can you hear me?" Low-bandwidth connections often experience dropped audio, typically followed by speeded up audio. Participants might feel that they are losing information, but you can reassure them that they are receiving everything, it's just delayed.

Software and services

A key part of your preparation as presenter is to make sure you have control of the software and services you will be depending on. Here are three essential items to check during your setup.

Plug-ins

Software tools often have additional plug-ins or add-ins. These are mini-applications that add menus or functions to tools, such as PowerPoint and Outlook. These plug-ins are free, and the functionality can help you prepare materials more quickly with tools you're already using. You and your co-presenters will need to verify during setup that you have installed all the mini-applications you will need. Figure 5-2 illustrates an add-in that Live Meeting provides for PowerPoint.

Prepare for application sharing

With a few exceptions, you cannot upload and show files to participants from applications other than PowerPoint. If a speaker needs to demonstrate how to use menus and screens from another software product (e.g., Excel, Lotus Notes, Act!) or show a file created by that product, the solution is

to “application share” the software. This shows the product or file to all participants. It reminds me of video cameras in a store window. When you wave, you can see yourself waving on the adjacent TV screen. Figure 5-3 shows Jeff Gordon application-sharing Lectora (an authoring application) during an eLearning Guild Online Event.

The main concern when using application sharing is that everything is real time. There is no opportunity to transfer content to participants’ machines in advance, so broadband connectivity becomes much more important. Also, speakers must consider what the streaming data looks like to participants. If it takes two milliseconds for the speaker’s screen to change, and 10 seconds for some participants to receive the change, then you must reduce the number of changes, and the speaker should allow some time for catch-up.

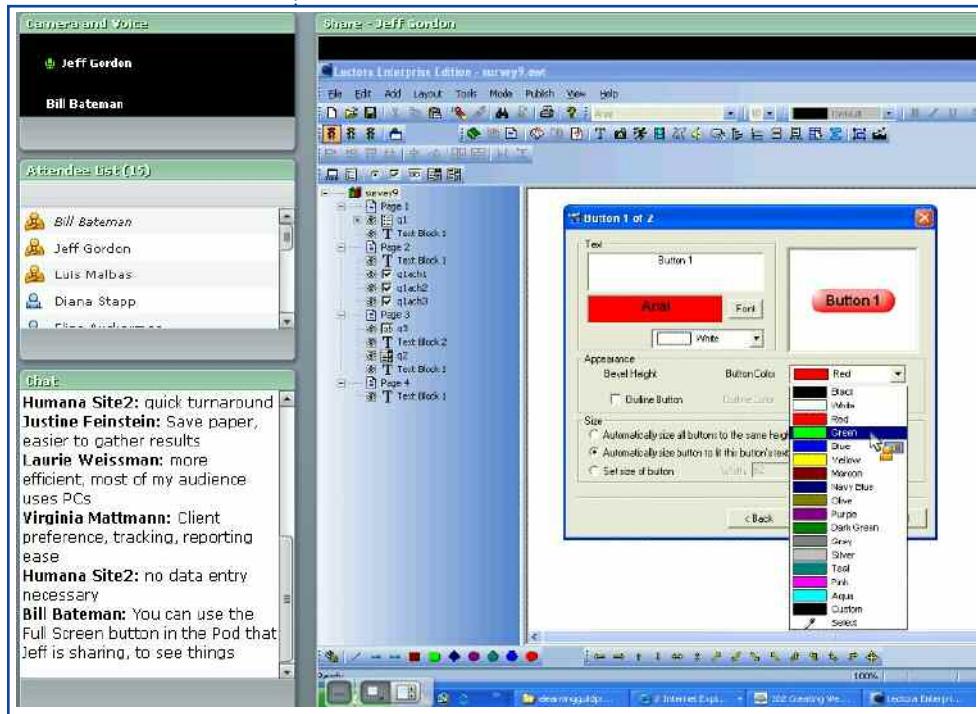


Figure 5-3
Jeff Gordon application-sharing Lectora during an online event.

Encourage all participants to use broadband when connecting for sessions, especially those that will rely heavily on VoIP and application sharing. Some participants on dial-up connections at 56K or lower are still able to participate happily and successfully if they are willing to tolerate slower refresh rates. For others, the slowness would be intolerable.

Prepare for recording the event

Many Web conferencing tools provide a recording function that will capture the presenters’ visual aids, including PowerPoint slides, shared applications, and polls, as well as the audio component of the event. If your session uses a separate conference call, you’ll need to enter the number of the call into the session setup form (see

“Setting up session rooms” below) so that the audio is connected to the recording of the visuals. VoIP audio recording is embedded automatically in the session recording.

Recordings are saved in formats that are unique to the software interface. When you tell participants about the recordings (so they know they can access the recording after the event), be sure to tell them that they must install the required applet. Many tools prompt users to install the software when they try to access the recorded file. Reassure learners that it’s OK for them to follow the download and installation instructions.

In some cases, you cannot edit recordings made by online software tools. If you need to be able to edit a session, use an external recording tool such as Adobe Captivate to record the entire session. This will allow you to clip out what you don’t need.

If you’re planning to record a session, ask yourself how you plan to use the recording. If you simply want to keep it for review in case someone missed the live session, recording is a very good option. Anyone can play the recording back at any time. If your purpose is to create a recording that will be used *instead of* a live session, consider the same instructional design guidelines that you follow for asynchronous delivery. Recorded lectures with hundreds of slides fail to keep participants

appropriately engaged. You might chunk the information in small segments with independent exercises balanced in between.

Setting up session rooms

The first time you set up a session room, be prepared. You'll need to fill in a form with several key details that affect the session audio options, how attendees will join, and what format the session room will use. (See Figure 5-4.)

Enter Meeting Information
Enter Meeting Information > Select Participants > Send Invitations

Meeting Information

Name: *

Custom URL: http://elearningguild.breezecentral.com/

(Leave this field blank for a system-generated URL, or include a unique URL path. For example: "productdemo" will result in http://elearningguild.breezecentral.com/productdemo/)

Summary: *(max length=750 characters)*

Start Time: 16 November 2005 09:00 AM

Duration: 01:00 hours:minutes

Select Template: Shared Templates\Default Event Template

Language: * English

Access: Only registered users and accepted guests may enter the room
 Anyone who has the URL for the meeting can enter the room

Figure 5-4
Adobe Acrobat Connect
Meeting Information
screen

system pulls invitation information directly from this form. You might choose to build in 15 to 30 minutes of lead time so that participants can log in early, test their connections, and ask questions well in advance of the start of the session content. This method reduces late starts due to last-minute trouble shooting by 80%.

In some online software tools (for example, WebEx), the setup forms are extensive, offering options for how participants will register and log in to the session, what the session password is, and if participants will have privileges to type in Chat or print session documents. (See Figure 5-5 on page 65.)

In most cases, privileges and settings can be set or changed both as the room is created, and once the presenter has joined the session room.

Converting and loading content

You will almost certainly be displaying content that you have created in PowerPoint, and possibly in other software applications as well. You will have to convert this content to a format that your Web conferencing software can send to session participants. Converting a file also reduces the file size so that the file transfers more quickly. Each Web conferencing application handles external files (your PowerPoint or Word content) a bit differently. Typically, PowerPoint files lose some function-

Your first decision might be to choose the type of session you'll need. Vendors provide tools within Web conferencing applications. These tools offer different levels of support or "flavors" for different audiences. They have the same basic functionality, but differ on features such as polling, testing, or audio capabilities. For example, WebEx's Meeting Center and Support Center do not have all of the options and tools found in the Training Center. Lower level and less expensive "flavors" also limit the number of participants in a session to five or ten. Be sure you know which flavor will support the communication type you want and the activities you have planned for your session.

Session start and duration times (items on the setup form) may not be relevant if your session is persistent and can be accessed any time. (See discussion of persistent sessions in Chapter 2, "Familiar log-in.") Start times and end times are critical if you choose to have the software generate e-mail invitations for each participant. The

ability (especially animations and transition effects) when they are converted to a usable format.

The conversion process can take some time, especially if you have a very large file with lots of graphics or screen captures. Several online tools provide an option to convert the file in advance to reduce the day-of-session preparation time. They also provide different choices for the display size of the slides for various screen resolutions.

As an example, you can convert PowerPoint files for use with Elluminate either from the Elluminate Web site or as part of the uploading process. The converter changes PowerPoint files to static whiteboard (WDB) files.

When the WDB file is uploaded to the session room, presenters and participants can view the slides. They can annotate or write on the slides using the whiteboard annotation tools. However, they

can no longer edit the slides as PowerPoint. The only way to edit a slide on the whiteboard is to go back to the original PowerPoint file, make the change or other edit, reconvert the file, and then upload the new whiteboard file into Elluminate. Be sure to allow a few minutes for this process. If your participants require real-time editing, use application sharing.

Adobe Acrobat Connect Professional (formerly Breeze) does not convert PowerPoint files to a static WDB file, but instead creates dynamic Shockwave (SWF) files. When SWFs are uploaded into Adobe Connect, the dynamic aspects of the files are still dynamic; that is, custom animations work. As was the case with Elluminate, you can only edit errors in the original files, using the original tools.

Other content for conversion might include graphics like GIF or JPEG, MPEG, AVI, or SWF files, and any other file types that are running on the presenter's machine. Check your licensing agreement and your software flavor (Training,

Session Options

Attendee Privileges

Select the attendee privileges that you want all attendees to have when a training session begins.

Documents:	View:	Other:
<input type="checkbox"/> Save	<input checked="" type="checkbox"/> Attendee list	<input checked="" type="checkbox"/> Chat
<input type="checkbox"/> Print	<input checked="" type="checkbox"/> Video	<input checked="" type="checkbox"/> File transfer
<input type="checkbox"/> Annotate	<input type="checkbox"/> Thumbnails	<input checked="" type="checkbox"/> Recording
	<input type="checkbox"/> Next or previous page	

Security

- Exclude password from emails sent to attendees
- Attendees must have an account on this service to attend session

Universal Communication Format (UCF)

UCF allows you to share rich media objects such as audio, video, Flash, etc.

- Allow attendees to share UCF objects (host can always share UCF objects)

Other Options

- Mute attendees on entry

Save **Cancel**

Figure 5-5
WebEx Session Options form

Meeting, or Seminar) to ensure it supports your material and file types.

You can convert Word documents to SWF format using an external tool called Adobe FlashPaper. A number of other software tools can create SWF files, including Adobe Flash and Flash Lite, Adobe Captivate, and Camtasia Producer.

In some cases, certain files, such as Word or Excel documents, cannot be converted and uploaded. This depends on the Web conferencing software you are using. In these cases, presenters might choose to simply use application share in order to show the content or make it available to participants.

File conversion can cause slight changes in your files so always double-check the results. The conversion process has been known to drop logos and other graphics files, and to break custom animations that build text one bulleted item at a time.

Speaker preparation

The second major area of production setup involves coordinating with another speaker, co-host,

or “guest speaker,” and with panel members. The objective is to set them up for success. This is an excellent place to make good use of a Producer.

As an online event Producer, I serve as technical setup and support, and as a presentation coach. I ensure that presenters can join a session, can use the basic interface features, and that they have a good sense of the options available for them to incorporate into the design of their session, without having to be an expert in every aspect of the software.

Presenter issues

Skilled classroom trainers may not like to admit that they feel like fish out of water when presenting online. The communication methods they’ve long relied on suddenly fail them. They can no longer observe body language, nor react instinctively to inquisitive looks. When online, voice communications tend to be either severely limited or overly congested. And sometimes participants accidentally log off and disappear.

“(In online training sessions,) it’s difficult to know if my message is being received,” says Curt Valmy of OM-Tech Learning in Fort Lauderdale. “I feel disconnected from the learners. It’s very different than relying on the feedback I usually get from students in a face-to-face setting.”

Despite these obstacles, training and meeting online can be very effective. But you must first admit that online is very different from classroom training, and accept that the only way to make online as effective is to prepare appropriately.

Online speakers tend to be like one of these four presenters:

Expert Erin believes that presenting online isn’t much different from what she does with an in-person audience. She’s technically savvy, and has seen a few Webinars. Erin knows her material inside and out, and feels confident that — with a few minutes of preparation — she can transition to synchronous e-Learning and deliver a successful presentation.

Realistic Rick realizes there’s a learning curve when moving to online delivery. Eager to learn a new tool, he installs the software on his PC, logs into the interface and starts experimenting. He speaks to an instructional designer about how he can adapt current lesson plans for online. Rick schedules time with another trainer to practice his session, and he obtains feedback that will improve his delivery.

Nervous Nancy is anxious about using synchronous e-Learning. Presenting is difficult enough; trying to manage the technology at the same time seems overwhelming. She agonizes over rewriting lesson materials until the last minute.

Vince Verbatim has little experience presenting in front of any audience. He’s relieved that, with synchronous e-Learning, he won’t need to make eye contact. Vince plans to show bulleted slides, elaborate, and answer questions as they come up. He practices online alone, reading from his notes.

Never mind what Erin and Vince think, or what Nancy fears; all trainers need some preparation and a little help to be successful online. Here, Rick is the man to watch. He knows a professional instructional designer can help him keep lessons focused and balanced. By practicing online with an experienced trainer, Rick will quickly get up to speed on the software, and begin to adapt his presentation style and language for an online classroom.

Here are some strategies all online presenters can apply immediately.

First, get to know your Web conferencing software intimately, and the specific tools within it that you will use for synchronous e-Learning. Use it every day. Get comfortable with the functions, the shortcuts, and the typical errors. Become familiar with solving basic issues. Connect with colleagues online simultaneously with conference calls. Request that your team hold regular meetings online. Invite staff members to join online rehearsals and provide typical participant feedback. You can also observe the professionals at work by attending the online tutorials offered by software providers.

Second, adapt your instructional methods. If you default to boring lectures and PowerPoint slides, you'll ensure that learners will multi-task during your session. How will you make use of your "premium time" with your learners and engage them directly? Remember, participants will be just a window away from their e-mail inbox or a favorite Web site, so you must keep them interested. PowerPoint slides can provide a good backbone, but go beyond bulleted text and create an interactive discussion. Good instructional execution will compel learners to process what they are learning, respond to others, ask questions, and stay engaged.

Third, learn to prompt participants for relevant feedback. Polling and open-ended questions provide opportunities for audience members to contribute their ideas. Prepare slides that pose questions and ask for responses from participants. By doing this, you will see and hear responses, connect with participants and find out where they're coming from, what they are learning, and what questions they have.

But by far the most important thing you can do is to practice.

Practice, practice, practice

Imagine driving in a country where they drive on the "wrong" side of the road. What you need to do in order to drive from Point A to Point B is, for the most part, the same as it would be at home. But the mechanics of driving are now different from what you instinctively know to do. Mastering those differences and similarities in how to drive takes time and practice. Lots of practice!

So yes, even the very experienced person needs to acclimate to an online software interface, try out the tools and audio, and learn to upload files. It's best to coordinate tasks with the event Producer who can troubleshoot issues and offer feedback. Dead air and online fumbling are awkward, and obvious to the participants. A few minutes of planning and preparation can eliminate many potential problems and give sessions, presenters, and materials a more polished look and feel.

If you are the event Producer, your job is to make everyone sound good and ensure that the technology properly supports every aspect of the session. That takes time, so don't let anyone off the hook.

Speaker coaching and preparation

When I coach eLearning Guild Online Forum speakers who are new to using synchronous online tools, I take steps that make the preparation process easy, and that help them to be successful their first time. All that the speakers need to provide is their content or learning materials. The Online Forums provide the structure of the session, and the online software interface license. It's a team effort that takes much of the pressure off of the speakers.

Start by making a Speaker Topic Support Outline

I begin with an e-mail to the speakers. This message offers several opportunities to prepare with me online. I suggest that we might meet, up to three or four times, depending on how much time they need to get ready. I send along guidelines for preparation, a link to previous session recordings, and a form that will help them plan how to use online session tools to support each agenda item or learning objective.

This form is a table presenters can use to organize all the topics, activities, and tools they will use during their session. By doing this, presenters can focus on how they'll need to deliver each item, rather than defaulting to classroom-based methods. Speakers will inventory and plan everything, from introductions, to file types, to application sharing. If they aren't sure how to handle a task, they can ask you to fill in the table. Note that this is similar to the storyboard I recommended in Chapter 4. Sidebar 5-1 on page 68 is an actual example from one of our online events.

Sidebar 5-1**Speaker Topic Support Outline****Online Forum Topic:** Designing and Developing Modular & Reusable e-Learning Content**Presenter Name:** Deborah A. Kenny

Vice President and General Manager
Learning Solutions
Information Mapping, Inc.
dkenny@infomap.com

Session Title: How to Write Cost-effective Modular Learning Content

Topic Outline	Interaction or Tool
What is Modular Learning Content?	Definitions via Chat
How many currently create modular content?	Poll Question: Y/N/Not Sure
How many currently reuse content across multiple courses or learning platforms?	Poll Question: Y/N/Not Sure
Before and After Example	Possibly Shared Document or Online Time Test?
What You See ... and What You Don't See	PowerPoint Slides
Attributes of Modular Content	Contribute ideas via Chat Follow with PowerPoint Summaries Ask for comments, anything I missed via Chat
The Value of Modular Learning Content	Chat Question: What are some of the benefits of creating modular content? Follow with PowerPoint summary slide.
Common Problems of e-Learning Content	Chat Question: What problems are you experiencing (or do you anticipate) when writing modular content? Follow with PowerPoint summary slide
What we need ... What can help ...	PowerPoint slides
How to Create Modular Learning Content: The Information Mapping Method	PowerPoint slides
Analyzing People, Information, and Technology	Use Chat and PowerPoint slides to discuss What do you need to know about the: purpose and scope, audience, content, technology.
Information Types	PowerPoint and Chat. Have participants contribute examples of information they create or write for each information type May be able to show some online Web or e-Learning examples or even an interactive exercise?
Research Based Principles	PowerPoint Memory Test to Demonstrate Chunking, Labeling, and Relevance principles
New Units of Information	Chat: Who can provide a definition of a paragraph? Presentation: Definition of Maps and Blocks
Developing the Content	PowerPoint
Demonstration – Reusing Modular Content	Application Sharing — Go to Content Mapper application to show modularity and reusability of content
What Writers Need to Know About Modular Content	Presentation – “top ten” list
Question and Discussion	Chat

The first coaching session

If a new speaker has experience with any online tool, I first focus just on how the software tool we use is different. Then I point out what added features, or what customized options, we have set up. We experiment with the options and settings, and handle any specific questions about Chat, Polls, Emoticons (status indicators), Layouts, or display options, and how to advance slides. Depending on the software interface, these simple tools can behave very differently. They also have settings that can restrict or allow options.

Next we talk or step through every feature they'll use during the session. If the speaker has provided me with an outline, such as Debbie Kenny's in Sidebar 5-1, I can proactively show him what tools to use to get the result he wants. If he plan to ask poll questions, we can set them up together and practice using them. If the speaker wants to show participants a software application running on their PCs, we discuss the differences between application sharing and desktop sharing and decide which one the speaker will use. We talk through basic functions as well as best practices and cautions.

If the speaker has a PowerPoint file, we can convert and upload it, advance the slides, and proofread text and images together. Often, we find errors or places where we need to make adjustments to poor images, bad fonts, or colors. We might even need to adjust the

participant prompts to say, “Please type your responses in Chat,” or, “Please label the screen by using your Text tool,” and show a picture of the Text tool.

Each of the Web conferencing applications that offers integrated VoIP audio has a slightly different way to turn the audio on and off. If the presenter has not used the audio function of the application for the upcoming event, the first few minutes of the actual session can be lost due to explaining to participants about clicking the Talk button on and off, and about adjusting headset or microphone volume. I have a slide set prepared ahead of time so that I can show screenshots of the Talk buttons and audio controls. (See Figure 2-6, on page 23, for an example from this set.) I include images that show speakers how to regulate their own volume without needing to ask, “Can you hear me?” Volume levels often display as colored bars in the interface. Knowing that green is good and red is too loud is useful. Simply moving the Microphone slider bar will increase or decrease the volume.

In Debbie Kenny’s outline in Sidebar 5-1, it’s clear what will happen at each stage. The Producer can prepare properly by creating polls in advance, coaching the presenter on application sharing, and confirming that the PowerPoint file is properly converted and loaded. During the actual event, both the presenter and the Producer will use the table outline (or its equivalent, the storyboard) to track along with the session, staying on time and on task.

The second coaching session

During the second session, I focus on two main areas: (1) opportunities I see for the speaker to encourage interaction among participants, and (2) what I, as moderator, need to do or say during the session to help the speaker. Ideally, speakers leave notes for me within the Notes section of the PowerPoint presentation. For example, “KAREN: Please open the next poll.” I can open the poll and make it available for the participants to click response options.

In this session, I also teach presenters how to display a layout option that allows them to control what shows on the screen.

The third coaching session

The third practice session is a dress rehearsal. At this time each speaker has the opportunity to test final changes to his presentation, update me on technical needs, and ask last-minute questions about presenting in this interface. Again, some speakers prefer to go slide-by-slide and practice the entire talk track, while other speakers just ask questions. We typically record this session for benchmarking, or for review and coaching purposes, if needed.

Not all speakers meet with me three times. I make the most of each session, and stay flexible to what they feel they need to practice.

I use the tracking form in Appendix C to document every detail of preparation and delivery of the session. You can download a Microsoft Excel template for the Speaker Tracking Form, in an archive with a Storyboard template, at <http://www.elearningguild.net/ebook/Worksheet.zip>.

Dealing with the reluctant speaker

Here’s some firm language I use in e-mails to prompt a response from preparation session-dodging speakers. Never scold. Restate your role as supporter, invite them to prepare properly.

“Dear Bill — I’m eager to connect with you in Adobe Acrobat Connect to set up your files and test your audio. Please respond to me today to schedule any day this week. I assure you that if we get in the online session room for just 30 minutes, we’ll see it as time well spent. I’m also sure that if we do not get online together in advance, we’ll wish we had. Let me know what questions you have. I’m here to help! Thanks! Karen :-)”

Call, too. Some people are able to respond more easily by phone. You might find out that they have not received your e-mails.

Learner preparation and communication

There are a few common, solvable problems that participants can run into when using any online interface. Such technical issues can delay a person getting into the session, or leave the Help desk to sort things out with the pressure on and the clock ticking. It's far better to connect with each participant well in advance than to wait until two minutes before start time. I've had my phone ring just as I clicked the Talk button to introduce a session. The caller had a standard technical problem and couldn't log in. I was not in a position to help him because 87 people were waiting for me to begin the session. I had to ask the caller to hold on until I finished my introduction.

Participant readiness

Sidebar 5-2

Sample Invitation and Agenda

Send participants an agenda similar to this, with time estimates, pre-course work, and online etiquette tips.)

Greetings!

In preparation for our online *Act! 6.0* session on Monday, November 4, please spend a few minutes reviewing this agenda, responding to this survey, and getting set up. I'll adapt the session to suit your needs and experiences.

Goal/Purpose

The goal of this online session is to help you make the best use of the new features available in *Act! 6.0*.

Preparation

Before our session begins on Monday, be prepared with a few necessities. Check your connection to the session by clicking this link: (add URL) If it prompts you to install a player, do it. If there are any questions, contact me before Monday!

- Hang a "Do not disturb" sign on your door
- Figure out the Mute option on your phone
- Use a headset if you have one.
- Please set cell phones and pagers to silent mode
- Open the attached file
- Get a notepad and a pen

If you need to "excuse yourself" during the session, just mute your phone and set it down. Please do not put our call on HOLD or we'll hear your Muzak.

Files

Please open the attached file (*ActExercises.doc*) and have it ready for our lessons. I'll tell you when to reference it.

Agenda/Topics

Monday, November 4

1:55 - 2:05 Log into Live Meeting and dial in for audio (as per your confirmation e-mail)

2:05 - 2:15 Introduction

2:15 - 2:30 Overview/Review of *Act! 6.0*

2:30 - 3:15 Contact Management features — compare to old system, use shortcuts

3:15 - 3:45 E-mail features

3:45 - 4:00 Practice activity and Wrap up

Please complete and return the pre-course survey by this Friday. If you have any questions prior to the session, call or e-mail me. For issues during the event, send me a Chat message or e-mail me.

Thanks again! I'm looking forward to meeting all of you online.

Karen :-)

Phone #

It's critical to have participants (and speakers) install and test the software they need well BEFORE the session is due to start. One or two problems are manageable. Ten problems are not manageable, no matter how much support staff you have.

Begin with your software vendor to see if they have a Web page where participants may download software. Also ask whether the vendor supports user installation and testing. If the vendor does, you can refer all participants to them as part of your confirmation notice. Give a due date for performing and testing the installation and login.

If your software vendor does not provide that service, either create a Web page that has all the instructions, and a link to the installation files, or send instructions and links in an e-mail. You may schedule "office hours," specific times you'll be logged on and helping anyone who calls or joins.

Registrants can log in during office hours to:

- Get a brief demo of the software interface.
- Experiment with the basic features, such as buttons that indicate status; thumb up or down, smiley face. Learn about the Chat tool that allows participants to use text to communicate with speakers or other participants.
- Confirm that software installation was successful. If registrants cannot join the session, ask them to contact technical support directly. A common stumbling block is that a participant is behind a firewall and needs to have a port opened. Organizational restrictions on opening of ports vary, so be

Sidebar 5-3

Moderator's checklist

Two days before event

- Send reminder e-mail to each Speaker. Include Usernames and Passwords, technical support number, my number, room access time, and session start time.
- Speakers' files converted to correct format and uploaded, Polls, files, and applications to Application Share.

Two hours before event start

Confirm that you have:

- Two PCs with proper player software, PowerPoint, and e-mail access loaded. Both connected via cable modem. Two login IDs and passwords.
- Two PC headsets. One to use, one backup that stays plugged into the 2nd PC to restrict audio output.
- Speaker prep notes, list of support tasks ("At slide 19, go to URL ..."), list of URLs, and crib notes text.
- Speakers' phone numbers (specifically for where they'll be that day).
- Software vendor or Internal Technical Support number.
- Speakers' usernames and passwords.
- Link to Resource Page where students can download handouts.
- Link to post-event survey to push at the end.
- Printed schedule for the day showing at least two time zones.
- Speakers' introduction information.
- List of event registrants with phone numbers and e-mail addresses.

50 minutes before event start

- Join session room.
- Run audio wizard.
- Set connection speed for session to DSL or Cable.
- Confirm all files are loaded and properly pointed.
- Set up breakout rooms, load instructions into each room.
- Greet early participants.

40 minutes before event start

- Use restroom.
- Fill water bottle.
- ChapStick®.
- Cough drops.
- Turn phone to silent mode.
- Hang "Do Not Disturb" sign on the door.

30 minutes before event start

- Start sound checks.
- Chat with early participants.

15 minutes before event start

- Start tweens tutorial.

Event start

- Start recording.
- Welcome participants.
- Review schedule and agenda for the day.
- Remind participants that they need to log out at the end of this session and log in to the next.
- Request feedback via online surveys — will send URL via Chat and will push link at the end of the day.
- Introduce speaker.
- Stand by to assist as needed

sure to check with your network sentry.

- Check audio speakers. Interfaces that use VoIP do not require a phone connection. Participants hear people talking through their own PC speakers or headset.
- Check their microphones. Some online session tools allow presenters and participants to communicate verbally using a shared microphone or Talk button control. Typically only one person can control the Talk button at a time. There's a tiny learning curve for people who need to remember to click Talk before they make their contribution to the discussion and release it when they have finished talking. For participants who don't have a headset, the internal microphone (the small hole in a laptop keyboard panel) is a less-than-optimal option because it can pick up machine noise and create an intolerable online hum. External or desktop microphones are not much better. Don't bother with headsets that cost more than \$30. Expensive ones break just the same as the inexpensive ones do. It's better to invest in two in case one fails during your session.

Invitations

When you create a meeting you can complete an online form and send an automatic invitation to all participants via e-mail. (See Sidebar 5-2 on page 70.) This designates a classroom and automatically generates a passcode. Some applications also generate the conference call number, ID, and passcode.

You can generate invitations and send them directly to participants. Along with the connection information, you may want to personalize the message and let students know how to prepare and what to expect from the sessions. Send an agenda with time estimates, pre-course work, and online etiquette. Here are some additional topics to include:

- Automatically generated e-mails, and those sent through calendaring programs like Microsoft Outlook, will convert to each

user's local time. If you are sending customized invitations, be sure to list the start, break, and end times. Be clear about the time zone used for the schedule, and provide a conversion tool so each person can look up their own start time. (I recommend <http://www.timezoneconverter.com/cgi-bin/tzc.tzc> or <http://www.timezonecheck.com/>.)

- Include the URL link to log on to the session and the phone number for dial-in. If participants are dialing in for audio, remind them to use Mute if they can hear the background on the call. Also remind them NOT to put the call on hold or the rest of the participants might hear music!
- Include detailed instructions to install online session software. Remind participants to install and test access to the session well in advance of the start.
- Provide contact details for whom to call for help other than the presenter.
- Send or post learning materials in advance. Allow time for participants to download and print handouts or other supportive files. You can also send surveys that will help you understand learners' needs, or you can assign prep work to complete before the start of the session.
- List agenda items that will be covered during the session.
- Offer ideas to improve their session experience. Suggest they use a headset and adjust the sound as necessary, and post a "Do Not Disturb" sign to keep coworkers and family members out. Remind them that the session will tether them to the desk, so gather all the items they'll need in advance; coffee, water, session materials, and a pen.

Conclusion

Building and delivering online events takes a lot of preparation and a few pairs of hands, but with practice, you can create excellent and effective learning experiences. Sidebar 5-3 on page 71 provides key preparation steps and timing in checklist form. Assimilate these strategies. I also encourage you to contact me concerning your additional questions and about overcoming specific obstacles.



- Cut the time, effort and resources required to manage training processes and programs.
- Quickly assess developmental needs for individuals and your organization.
- Improve each employee's performance with personalized training plans.
- Speed regulatory compliance and time to market by delivering training faster.
- Easily measure training impact in terms of results and ROI.

Maximize results with WebEx integration

Optimize your training initiatives with Learning Manager.

Give your growing organization a competitive edge by ensuring that every employee receives precisely the training they require to succeed. Develop, deliver, manage and track your staff, customer and partner training programs—effectively, flexibly and cost efficiently—with Learning Manager by GeoLearning. Centralize and automate all learning processes using this robust learning management solution. It's hosted, so you keep down IT costs and see a fast return on investment.

Gain the advantage of well trained staff.

Get the right training quickly to the right employees by designing comprehensive, personalized learning plans. Instantly spot gaps in staff knowledge and competency and deliver effective learning and assistance, including on-demand e-learning, live classroom training or virtual classroom instruction. Track employee progress by generating reports on performance and attendance.

Reduce the effort and expense of learning management.

Keep the focus on learning, not administration. End the paper chase and manage all of your organization's training activities with an efficient, centralized service. Allow learners

and instructors to access your course catalog and register for classes easily, right online. Provide your employees with access to a rich library of bundled business and technical courseware—free—saving you thousands of dollars. Instantly track student performance and course metrics, and measure training's impact on productivity and business results. Produce, modify, analyze and share reports in a fraction of the time.

Start quickly. Scale easily.

Learning Manager is software as a service, delivered via the internet for low cost of ownership. No need to purchase or maintain special hardware or software. Keep implementation and IT support costs down, paying only a predictable subscription fee based on the number of learners you support. Roll out Learning Manager quickly, giving administrators, instructors and learners full functionality via a simple internet connection. Take advantage of Learning Manager's out-of-the-box integration with WebEx™ Training Center Online Classroom to deliver engaging, interactive online classes. Expand your use of these solutions easily as your organization grows.

Extend the reach of your training programs with the tight integration of WebEx Training Center Online Classroom with Learning Manager. Schedule and manage Training Center classes directly from Learning Manager. Allow students to browse a catalog of Training Center classes, and register for, view and launch them all from Learning Manager. Access up-to-date transcripts of students' attendance, test results, completions and more from the Learning Manager console.

Effectively and efficiently manage training using powerful features.



Automated Class and Event Management

Manage class planning and scheduling online. Coordinate instructor and student schedules and the availability of resources such as physical classrooms.

Individual Development Plans

Define competency goals, create learning tasks, assign due dates and set up automatic email reminders for students. Devise multifaceted plans that include live classes, e-learning, tests, assignments, surveys and physical media.

Searchable Course Catalog

Give learners the ability to browse or search your course catalog to select the classes they need.

Student Transcripts

Provide a comprehensive view of learning activities with personal student transcripts.

Test and Survey Development Engine

Identify training requirements and effectiveness by using this tool to conduct tests, needs assessments and job skills analyses. Also determine how courses could be improved, through course evaluations, opinion polls and attitude surveys.

Robust Reporting Capabilities

Create, modify, analyze and share reports quickly and easily, using dynamic reporting tools. Generate standard detailed reports on course statistics, student proficiency metrics, and test and survey data, or create ad-hoc reports on the fly. Export reports into .PDF, .CSV, Word or Excel formats.

eLearning Standards Compliance

Ensure learning standards interoperability and enable integration with other systems. Identify with AICC, SCORM and ADA Section 508 compliance.

Communication Tools

Engage students, instructors and administrators via an integrated chat system and a bulletin board. Publish upcoming events and classes on the online learning calendar.

State-of-the-Art Security

Provide secure access to your learning content and processes with robust user authentication and security.

Free—Bundled Courseware Library

Give up to 1000 learners access to a rich library of courseware—free. Provide your learners with the opportunity to learn valuable business and technical skills in areas such as sales training, team management, safety regulations, compliance and software applications.

Fast Implementation, Easy Maintenance

Deploy and expand quickly and easily by leveraging the Learning Manager software-as-a-service, web-based model. You save on software, hardware and support costs, and recoup a rapid return on your investment.

GeoLearning is on the WebEx Connect Grid

WebEx Connect brings together leading business process applications with WebEx collaborative applications, making truly innovative solutions available to you, on-demand.

Take advantage of the combined expertise and support of WebEx and GeoLearning to streamline your business activities and accelerate your growth.

Learn more at www.webexconnect.com.

The screenshot shows the Learning Manager by GeoLearning interface. It includes sections for 'Registered Training' (listing courses like 'Excellence in Service: Communicating with Customers Virtually' and 'Selling Skills - Evaluation and Test'), 'Learning Plan' (showing a custom learning plan for 'Robert L.'), and 'Learning Activities' (listing tasks like 'Project Management' and 'Sample Test'). Each item in the lists has columns for Type, Status, Score, CEU Credits, CEU Hours, Due Date, and Type.

Students can get a comprehensive view of their assigned learning activities and launch classes directly from Learning Manager.

Minimum system requirements:

Operating System Windows XP/NT4/98, Mac OS 9 and above.

Internet Explorer 5.0 (or higher); Netscape Navigator 4.7 and above.

Cookies, Java and JavaScript enabled (must support Java version 1.02 and JavaScript 1.0).

133 MHz or higher processor.

16MB RAM (32MB recommended).

800 x 600 resolution at 32-bit color depth

WebEx Training Center v4.7L (for integration of Learning Manager with WebEx Training Center)

Some courses and features require special multimedia plug-ins and players, or require specific operating systems, browsers and Java.

Languages supported:

English

Showtime!

By Karen Hyder

You've done your planning, contacted your presenter or your panel (or maybe you are the presenter), and prepared your slides and other content. You've contacted your participants and they know how to connect to the session and log in. Now it's The Day.

The day of the event

Just as with a classroom-based course, there are many things that the Producer and the presenters can do to make a synchronous e-Learning event a success. In this chapter, I've organized my "lessons learned" after conducting many events, and I will present them here around the major activities of your online day.

You'll find several checklists here to help you make sure you cover your bases. There are tips for handling introductions, for managing all the details, for dealing with the times that technology lets you down, and some pointers about the things you definitely want to avoid doing. Let's begin with the checklists.

Essential checklists for the day of your event

I love roller coasters. I'm willing to weave in and out of the labyrinth of a line for hours in order to get to that moment at the top of the hill when I know I'm about to experience a real thrill. Whether the thrill is terrifying or delightful depends on the feeling of safety and security — or my naïveté.

What motivates me to do all the careful preparation and planning, all the rehearsals and testing for online sessions, is the moment that I get to open the microphone and, without hesitation, say "Hi, I'm your host for today and I'd like to welcome you to this session." If I can feel confident and secure at that moment, I know I'm prepared and the learning event can begin.

When I'm the Producer or supporting another presenter, I need to make sure they feel equally confident. I remind them that my role is to make everything go smoothly for them. In sidebars 6-1, 6-2, and 6-3, on pages 76 and 77, you'll find some checklists that I use in order to *make sure* things go smoothly for them — and for me.

Contents

In Chapter 6 you will find information about:

- Essential checklists for the day of your event
- Managing the online sessions with the help of an event Producer
- Learner participation and interaction
- Introducing participants
- Running the event
- Conducting tests
- Disaster control: backup and Plan B
- Online interaction "Do's"
- Online interaction "Don'ts"

Managing the online session with the help of an event Producer

Presenters used to ask me what to do with their hands when speaking to a room full of students. In online sessions, the problem becomes not what to do with our hands, but what to do first. Presenters might need to share a file with participants, click the Talk button, and type a Chat response to a participant who has a technical problem, all at the same time. Features can require several menu choices, mouse strokes, and keystrokes. Listen to the audio of a trainer who is fumbling with a menu or typing a Chat response; they sound distracted.

Trainers often find themselves literally needing an extra pair of hands. The

Sidebar 6-1

Host/Presenter Technical Checklist

You may not need all of these items for a particular event. Customize this checklist for your own use.

- The Primary PC with plug-ins and PowerPoint installed, connected to a wired (not wireless) connection, logged in as HOST, headset connected.
- A Secondary PC with plug-ins and PowerPoint installed, connected to a wired (not wireless) connection, and logged in as PARTICIPANT, headset connected. Unless a presenter has two PCs logged in and can see what the learners see, or the presenter is using Elluminate's Preview Window, she is working blind. She won't know what their shared image looks like on the participants' end.
- Have all files properly loaded into the Agenda Builder, the session rooms set up with presenter slides and supplemental files, and your introduction, closing, and interface tutorial slides. Your Poll files are loaded, proofread, and set to open.
- Have backup copies of all files being used installed both locally and on a portable drive (thumb drive).
- A Speaker Tracking Form. List all activities and details of each speaker and each session.
- A crib notes text file. This document is the storehouse for all text you might need to type into Chat during the session. Include all URLs, as well as typical instructions such as, "Please expand the Poll Panel by clicking on the 'down' arrow . . ." You can subtly give instructions to participants and presenters as needed using public or private Chat. (See Sidebar 6-4 on page 82 for some sample "crib notes.")
- Emergency instructional slides. Keep a PowerPoint slide file available that includes screen captures of common errors and solutions. If the presenter is struggling to use a feature (application sharing, desktop sharing, opening a new file), you can talk him through the process, and show a visual of the step he needs to perform. You might also include a "Please Stand By" slide to inform the participants that you'll be back on track momentarily.
- PC headset for VoIP audio sessions, and a spare headset.
- Phone, phone headset, spare headset, and charger. Call waiting turned OFF.
- Phone numbers of all speakers and participants during that session (might be different than office phone number).
- Turn off all noisemakers including ringers and fax machines. Muzzle the dog.
- Print hard copies of any text you'll have to read. You'll find it easier than reading from the screen.
- Pen and notepad — jot down reminders, observations, errors to research, participants to follow up with after the session.
- (Optional) Backup connection to the Internet. If there's any chance that your connection could cut out on the primary PC, you'd be wise to access the Internet a different way on the secondary PC.

temptation is to do less, ignore more, and expect silence. I disagree. When you use the resources built into the synchronous interface, and invent new ways to engage learners and to get feedback, you'll find that you can create better exchanges with your learners than you could in the classroom. If this seems like a lot to manage, instead of doing less, ask for help.

Presenters who want an engaging session and need help managing online tools can recruit an online event Producer. This is a person who coaches the presenter (as I've suggested in Chapter 5) and provides technical support before and during the session. The result is that the presenter can focus on delivering the content and engaging the participants. The Producer can step participants through technical problems or audio adjustments by using the audio channel or by surreptitiously typing messages in Chat. If the presenter cannot remember the sequence to begin sharing an application or uploading a file, the Producer can cue the presenter or just do the task for him.

Producers often kick off sessions with a quick tutorial on how to use the software. Then they introduce the presenter and stand by to assist for the duration the session. They stay on until the end to close the session and collect evaluation feedback.

As an example of a way this concept has been applied, Compuware's training team in Bijmeler, Netherlands has developed synchronous training programs that use radio talk show techniques. The Producer and presenters have defined roles. While the presenter instructs, lectures, shares screens, and poses questions, the Producer introduces polls and activities, calls breaktimes, and supports the session technically. The Producer also researches questions behind the scenes, often asks the questions that a curious student might ask, and sometimes provides comic relief. Their manager, Hervé Brittman, got the idea from Marc Gamble's session *Using Radio Broadcast Techniques to Improve Synchronous e-Learning* at the 2006 eLearning Guild Annual Gathering.

Novice presenters might decide they no longer need a Producer after they've done several sessions and feel confident with the software tools. When things are working well, managing everything is possible. However, no matter how experienced a presenter may be, I recommend using a Producer for any group of more than 20 people, because the impact of technical problems increases with group size.

Sidebar 6-2

Personal Comfort Checklist

You'll be tethered to the desk for a while. These are some items you will want to have on hand, and some details you will want to take care of before the session starts.

- A quiet location, or ask coworkers keep voices low
- A comfortable chair
- Dress in layers
- Water, or non-fizzy drink
- Lip balm
- Lozenges (please remove from mouth before you start talking)
- Photos of learners taped to your monitor.

Sidebar 6-3

Intro and Closing Slides

This is the minimum set of slides you will want to have prepared beforehand.

For the opening:

- Introduction to the session
- Notification that sessions are being recorded
- Schedule of session times and breaks
- Introduction to host, and the host roles
- Name of presenter(s) include photo, biography, agenda items, or learning objectives
- Introduction to the interface, how to use the tools, how to respond verbally, how to mute the mike, how to respond publicly or privately using the Chat feature
- “Keep this screen open” reminder (See Figure 6-1). Remind participants to leave the “tunnel” window open (this is the screen that reads “Leave this window open”). This window maintains a link to the session even if the user closes the session window. If a participant gets bumped out, he can get right back in without having to find the email with the link, reenter his login ID and password, and lose five minutes.
- Tips to ensure good-quality connection to the session, adjustments to user settings
- Where and how to access supplemental materials and handouts
- Who to contact for technical support during the session

For the closing:

- Thank you to speaker(s) and participants
- Follow-up session, next steps, assignments, and tasks to complete
- Where to go for recording or materials, i.e. a Web site, LMS, or other repository
- Evaluation procedure. Ask participants for honest feedback, offer incentive to complete forms



Learner participation and interaction

An assumption that I make here is that you see online session time as “premium time.” That is, time for you and your participants to get together and exchange ideas and interact. I assume you want to do more than “chalk and talk.” Tedious lectures are even more tedious online.

If your intentions are that your participants will join a session and sit quietly until the end when they are asked, “Any questions?”, this next section will not apply to you. In such a case, I encourage you not to use group sessions and instead simply create Podcasts or asynchronous tutorials that participants can listen to or watch silently at their leisure.

However, if your goal is to engage your participants in a meaningful way throughout your session, here are some strategies to employ. These add to, and expand on, the interaction strategies that Ann Kwynn explained in Chapter 3.

Introduction to the interface

When you take the time to teach participants how to learn in this new model, using synchronous online sessions, you'll find that they are more prepared and willing to participate. If you intend to provide support materials and activities they can use independently, teach them how and when to use those, too.

Ideally, we ensure in advance that everyone can properly connect to the session. (See Chapter 5 for more

Figure 6-1 This is the “tunnel window” that allows participants a quick return if they are bumped out of the session or otherwise lose their connection. Leave this window open! (Screen shot is from Live Meeting, other tools will look different.)

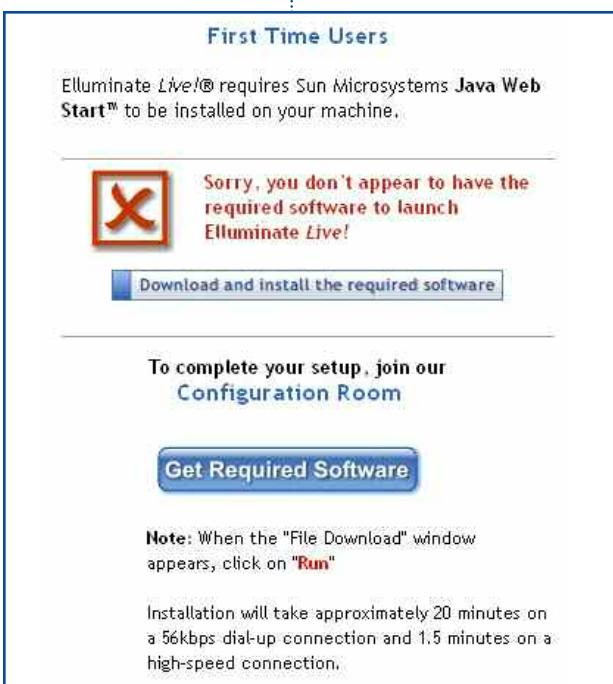
Figure 6-2

The schedule of events leading up to the start of your session should offer participants several opportunities to confirm their ability to connect to the session and to learn about using the software tools and options available to them.

on this.) We should also ensure that participants get used to the software interface before the focus of the session turns to content. Try to schedule early log in and orientation to ensure an on-time start. (See Figure 6-2 for an example of an agenda posted on the Web from one of The eLearning Guild's online events.)

Offer your learners multiple resources and opportunities to help them learn their way around.

The Schedule and Agenda	
Monday, November 6	
Log-in Information sent via email	
Tuesday, November 7	
8:30a- 2:00p Live Practice Session in Breeze	
Wednesday, November 8	
8:30a- 2:00p Live Practice Session in Breeze	
Thursday, November 9	
8:00a- 8:15a Participant Log-in	
8:15a- 8:30a Orientation	
8:30a- 9:45a Opening General Session	
101 Setting an Effective Strategy for Repurposing and Reusing Content - Gottfredson	Handouts Recording
9:45a- 10:15a Break	
10:15a- 11:30a Concurrent Sessions	Handouts Recording
201 Optimizing Reusability of e-Learning Interactions - Mock	

**Figure 6-3**

If a user tries to log in without the correct plug-in or software available, the system will prompt for a download and installation.

on this.) We should also ensure that participants get used to the software interface before the focus of the session turns to content. Try to schedule early log in and orientation to ensure an on-time start. (See Figure 6-2 for an example of an agenda posted on the Web from one of The eLearning Guild's online events.)

Offer your learners multiple resources and opportunities to help them learn their way around.

Provide a Quick Reference Guide: Create a one-page file for participants to print and keep in front of them during the session. Check the Web site for your software vendor and see if there is an existing resource posted that you can offer. For example, Elluminate provides a Quick Reference Guide online at http://www.elluminate.com/support/docs/7.0/Elluminate_Live_7.0_Participant_Quick_Reference_Guide.pdf

Send a PowerPoint file: This contains labeled or annotated screenshots for participants that will step them through the interface. Send this information several days in advance. Ask participants to go through this mini-tutorial, and to contact you or the Help desk to solve any issues in plenty of time.

Create a self-paced tutorial: This short lesson demonstrates the use of the tool. Post it on a Web site or mail them the file. An example of such a tutorial for the new Acrobat Connect is online at <http://www.adobe.com/resources/acrobatconnect/>

Schedule short orientation sessions: Invite new participants to come to a live orientation session to test their connection and audio, and to get a quick introduction to the tools they will be using during the actual session. The presenter can troubleshoot any technical problems during this orientation to ensure instant access on the day of the session.

Build a short tutorial into the beginning of each session: When scheduling an event, include buffer time for participants to log in early and ask questions. Allow time for solving log-in problems or connection issues, to show a short tutorial, and to have participants practice using the tools in the interface before you turn to session content. Understand that during this buffer period, total learner attention is not expected. It's okay that everyone is in a different state of preparedness, including some who are listening but finishing up e-mails or printing handouts. It's better for that to happen during the buffer time rather than at the very moment the speaker begins the lesson.

Remember “tool time”: Many tools require that “plug-ins” or software applications be installed on each users’ PC. (Java WebStart, Live

Meeting Console, Flash Player, etc.). The system will prompt individuals who have not already done so to install the necessary software when they try to access the session. Downloading and installation can take several minutes. Figure 6-3 shows how Elluminate handles this — other synchronous systems have similar screens.

Dealing with connectivity issues

Let's go back to a metaphor I used earlier, but with a slight change. Imagine driving on a busy highway at the height of rush hour traffic. Depending on a variety of factors, you can get through. But occasionally, the traffic flow might slow down or stop completely. Now imagine the same highway and you're towing a boat or camper or trying to follow your friend in the car ahead of you. You might find that you can't go as fast as you want to, or can't squeeze past another vehicle. When you get on the road, you might have some idea of what you'll face, but won't know for certain until you're there.

Think of this traffic scenario if you ever find yourself in an online session when suddenly everything seems sluggish, or the audio cuts out, or portions of the screen go blank. While not unusual, these "towing a boat in rush hour traffic" moments can be terrifying, and can last from one second to several minutes depending on your connection.

Online session software providers will tell you that participants can join a session with a connection as slow as or slower than a 56K dialup — this is true. However, know that participants will likely experience occasional delays in the flow of shared visuals or VoIP audio. Sometimes delays are undetectable to the participant, some show up as breaks in the audio or a change in the way software features respond. See Figure 6-4.

Remember that delays, as in highway traffic, are caused by a variety of factors including an increase in traffic, or a more burdensome load. Sending Chat messages and clicking emoticon buttons don't require the same amount of resources



Figure 6-4
The Adobe Acrobat Connect connection test verifies that the user is ready to participate in a synchronous session.

as uploading files or using VoIP audio or application sharing. Help your participants optimize resources. Remind them to close unneeded applications that use bandwidth or system resources, including memory, and to clear temporary files and cookies.

Preparing users to learn

When preparing participants for learning, I have a number of recommendations.

First, make no assumptions. Give enough information about the tools and the session so that participants can understand how the session will run, what their role is, and how and when to use available tools.

Teach participants how to use the software tools. Include slides in your introduction that show the features of the software interface and that give clear instructions on how to use tools. Inform participants that the presenter will ask them to use these tools. Include instructions about how to mute and unmute the audio!

Welcome and thank participants. These are your clients. Treat them respectfully, and let them know your role is to support their learning.

Set ground rules. Set the ground rules for behavior and contribution online, just as you would in a physical classroom. Request that participants give the session their full attention.

Treat sessions as "premium time." These sessions are live and in real-time, so make the most of this rare opportunity by exchanging ideas and customizing examples and answers for the unique mem-

bers of this group. Learners in these sessions want an engaging experience; otherwise they'd use a self-paced tutorial or watch a recording.

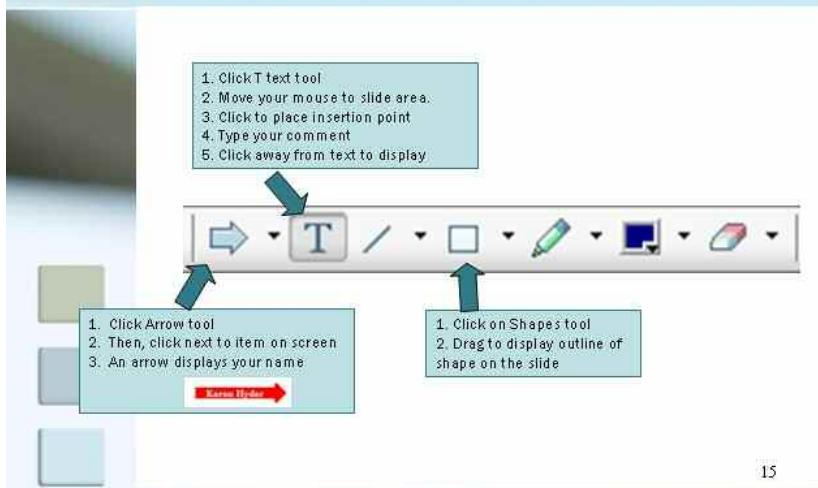
Invite participants to ... er ... participate. Participants might feel apprehensive about using the tools, concerned that they might do the wrong thing or annoy the presenter. They may think, "It's easier and safer to stay invisible." Invite them to contribute to the conversation during your "Introduction to the Session" session. The session design should offer multiple points throughout the session for participants to give examples, responses, opinions, applications, or opportunities. Be sure to take advantage of these "participation points."

Your participants have questions about online session etiquette, although they might not know the etiquette for asking. When you ask non-rhetorical questions (where it's supposed to be obvious

that you want a response), participants often aren't totally sure how to respond. Participants don't know if you are the type of presenter who likes to hold all questions until the end, or if you prefer that they "raise their hand" virtually any time there is something they want to ask about.

If you want participants to type comments or questions in Chat as you present, tell them so. Or, if you prefer, ask them to hold all questions until the end. It's a good practice at the beginning of the session to ask participants to keep their Chat comments focused on the session content. Otherwise, during the session, Chat can turn into a free-for-all. If this happens, remind participants of the earlier agreement and again request that messages be limited to questions to the presenter or to responses to open-ended questions. As a Producer, I've sent private messages thanking "talkative" participants for their eagerness, and asking them to hold back com-

Use annotation tools



15

Figure 6-5

Teach participants how to use any tools you want them to use during the session. (PowerPoint slide explaining WebEx annotation tools)

ments or off-topic questions until the end of the session.

Be vigilant about time. Make every effort to ensure sessions can start and end on time. Remind presenters and participants of how many minutes remain. Display a countdown clock to inform learners when to return from a practice session or break.

Spell things out. The best way to get learners to participate is to invite them to do something; respond to a poll, type a response to a question, or click through a tutorial. Spell out exactly how to use the software tools to do it — I include an extra slide with instructions and screenshots just in case they didn't hear my directions. Then, allow ample time to perform the action. For instance, if you ask a question such as, "Can you give me an example like this from your own work?", you also have to say, "Please unmute your phone link and speak up," or, "Please click your Talk button and speak into your microphone."

When participants are asked to type responses in Chat, be patient and quiet as they craft and edit an answer. Participants might be shy or lazy or might think that your question is rhetorical. You need to make it clear that you WANT them to respond.

Tip: Once you have asked a question and given instructions on how to answer, release or mute your own microphone. These moments are the only times you are able to rest, sip water, rustle papers, clear your throat, and breathe. Also, by staying quiet, you further prompt the participants to pay attention to what's happening on screen.

Introducing participants

In just the same way that cold calls can feel unfriendly, unwanted and, well ... cold, online training sessions can feel strange, too. Create interactions early, by encouraging participants to introduce themselves.

If you have an audio line where everyone can take turns speaking, each person can easily introduce himself. In some sessions, multi-way audio isn't practical. In others, introductions would take too long. You can still do introductions by using the other resources available in your online session software.

One option is to ask a question that each participant can respond to by typing in Chat. Ask, "Where are you from?", "How's the weather?", or "What do you most want to learn today?" Wait for responses to come in and provide verbal feedback to welcome participants and connect with them.

You can also create a slide with each participant's name listed. Move to the slide and ask each student to take his turn stating his name and where he is calling from, and to type his city name on the slide. Participants can associate a voice with each person and have a chance to feel connected. Check to see that proper privileges are set for learners to use the whiteboard. Also, remind participants how to use whiteboard tools. In WebEx, for example, it's important to say, "Once you've typed your city name, click away from the text to display it." You might want to create a PowerPoint slide to illustrate the process. (See Figure 6-5 on page 80.)

Depending on available tools or privileges, the presenters might need to type the city name for the participants. An alternative to typing on the whiteboard is asking each participant to type his city name into the Chat feature. This option, if available, is very tidy. Each participant's login name precedes his response, so other participants can easily identify the author of each comment.

For small groups, especially those who will work together for several sessions, include photos of each participant.

Profiles, found in Elluminate and Live Meeting, help participants learn about each other during the session. Participants can post personal information and images for others to see. They can control how much information they offer, and may use an actual photo or display a fictional image (avatar) to represent themselves. Participants can choose to view Profiles or not. (See Figure 6-6.)

Latecomers quickly get up to speed as they see who's already on the call. Once you're finished with the introductions, say a quick "Hello and welcome" to new people who have just joined. Ask them to send you a Chat message to confirm they have materials, can hear and see, and are ready to start.

Running the event

Transition on time from orientation introductions and thank you's to the primary presenter and session information. This is the official focusing of attention. By now everyone needs to be ready to start. Be prepared for latecomers, or for learner problems such as, "Can't see" or, "Can't hear" in Chat or audio. Redisplay the slide containing instructions on how to mute and unmute the line.

Be prepared to offer instructions to the presenter to increase volume, or to make an adjustment that might solve the issue. If learners can't hear, you must use a text-based method to inform them what to do.

In the Host/Presenter Technical Checklist (Sidebar 6-1 on page 76), you may have noticed that I referred to a "crib notes text file." Sidebar 6-4 shows some of the entries in this crib file. I made this a



Figure 6-6
Profiles offer a way for participants to "introduce" themselves to the group (Screen shot is from Elluminate.)

Sidebar 6-4

Word document, and I keep it open to provide a quick source for the common messages and cues that I might need to type at any point in the session. As I need them, I copy from Word and paste into Chat or onto the whiteboard. This saves time and improves message accuracy. Some audio conferencing vendors also have an audio control panel add-in so presenters and Producers can control all of the audio lines.

Once you get up and running, the bulk of the session is the presenter speaking and showing files and demonstrations to learners. Ideally, the presenter is prepared and the software, audio, and internet connections will behave consistently well throughout the session. The Producer can observe the presenter and track along with the session plan.

Karen's Event Crib Notes

These are messages I frequently copy and paste into the Chat area of a synchronous online session. I can send messages to the whole group, to individuals, and to presenters. Be sure to update text and links prior to each session!

Chat Messages for Participants

- Greetings!
- You can use Chat to say hello or ask questions.
- Where are you joining from?
- Event intro begins at 8:15 PT/11:15 ET
- We will begin at the top of the hour
- Here's the link to the schedule, the handouts and the Login links.
- Links, handouts, and later recordings will be posted (enter URL). Be sure to bookmark it.
- We will post handouts shortly.
- We will post the recording shortly.

Conference call details

- The dial in number is
- Passcode
- Use *6 to Mute and #6 to unmute

When presenter is App sharing

Turn on Enable Participants to use Full Screen (at the bottom of the Share pod). Then, type in Chat:

- You can click the Full Screen button to increase your display size

Set up/support

- Set your connection speed to DSL/Cable
- Meeting menu, My connection speed
- MY STATUS above our names
- It is a drop down list
- Please stand by
- Please mute your audio.
- Please keep Chat messages on topic. Thank you!
- Please use e-mail or another forum to continue this conversation.
- Please log out and back in.
- Check your settings in Windows, Control Panel.

Chat messages you might need to send to Presenters

- Are you ready to start?
- Please increase volume
- Please move microphone away from lips
- 30 minutes remaining

- 2 minutes remaining
- Please WRAP IT UP

Turn on Camera and Voice pod.

- Please Click the button in the lower left corner of the Camera and Voice pod (top left).
- It will prompt you to Allow.
- Your microphone is now open.
- The Talk button and the lock next to it (Hands free) are dark grey.
- You should see a green indicator as you speak.
- Click the LOCK button to release the microphone.
- Yes, I hear you.
- Good, loud and strong.
- Keep talking so I can assess the consistency.
- Not hearing you.

To use Talk button

- Click the lock icon to the right of the Talk button to turn on your microphone and keep it on.
- CLICK THE LOCK button.
- Be sure to release the LOCK button when NOT talking.

To reduce audio fluctuation

- Please run the Audio Wizard.
- Go to your Meeting menu (top), Audio Setup Wizard ...
- Follow the prompts, adjust your volumes and microphone.
- Be sure to Test Silence and be quiet.
- On the 5th page of the wizard, Click Advanced ... turn off Auto Gain Control.

Microphone use issues

- We can hear you typing — just speak your response.
- I can hear you breathing.
- Move your mic away from your mouth or release the lock button.
- During the next poll, turn off your mic, clear your throat, and take a sip of water. Wait a full minute before you come back.
- Please mute your audio.

Audio issues

- Too HOT — can you turn your microphone down?
- Too QUIET — can you turn your microphone up?

- To turn your microphone up in Connect, RIGHT mouse click on the slides and click Settings ...
- The third tool on the bottom is a Microphone icon, click it. Now you can drag your audio level down to the left and see the indicator on the left.
- Your audio is fluctuating a bit.
- Could you check your connection speed and make it DSL.
- Under the Meeting menu, My connection speed ...
- Is your e-mail open, or virus scanner, or anything that would be using system resources?

When presenters are moving Poll pods to the viewable area

- Your Poll is open. You can drag it to the center when ready.
- When you have addressed this Poll, just MINIMIZE or hide the pod.

Using Layouts

- Click the App Share Layout button, along the bottom left.
- GO BACK TO SLIDES LAYOUT.

Dire technical issues

- Please call this number.
- OK, let's try a clean slate. Please close the application and reboot your machine.
- Clear your temp files and cookies.
- I'm going to call you on your cell.
- Ring ...

Contact

- Contact info for speaker
- Contact info for Producer
- Contact info for Support

Links to PUSH

(Plan B — Plan A is to load into session room or PowerPoints in advance.)

- This event
- Upcoming event
- Evaluation form
- Presenter content 1
- Presenter content 1

Synchronous software tools display content in unique panels or pods. These are small- to medium-size on-screen windows that float on top of everything else on the presenter's display. They expand and collapse as they are used. You can organize and display a configuration or layout of panels to emphasize the tools you need to use at a specific time. (See Figure 6-7)

If you prefer not to use a Question and Answer panel, you can turn it off. If you want to give more emphasis to shared applications, you can increase the size of the share display area.

When I'm able to control the layout, I display text Chat, audio controls, and a list of attendees in addition to the PowerPoint slide or application sharing display. I turn off all other tools until they are needed and keep the screen tidy.

Stay alert, Producers! Be prepared to offer assistance to the presenter. He might need help clearing the whiteboard or advancing slides.

Using questions and annotations

Certified Technical Trainers CTT+ will tell you, no matter what topic you're teaching online, hearing and seeing relevant feedback from learners is key. Without feedback, you have no idea if what you did or said had any impact on your learners.

One sure-fire, easy way to get feedback and responses from your learners is to ask for it, and provide a format for them to use. Ask lots of questions. Prompt participants for relevant feedback. Open-ended questions provide opportunities for participants to contribute their ideas. By doing this, you can see and hear responses, connect with participants, and find out what their needs are as well as what they are learning.

Online session software provides several ways to "ask" and several ways for participants to "respond." It's up to you and the instructional designer to determine how best

to craft multiple choice, multiple answer, yes/no, and open-ended questions, and how to best instruct participants to use these tools. (See Chapters 3 and 5 for details.)

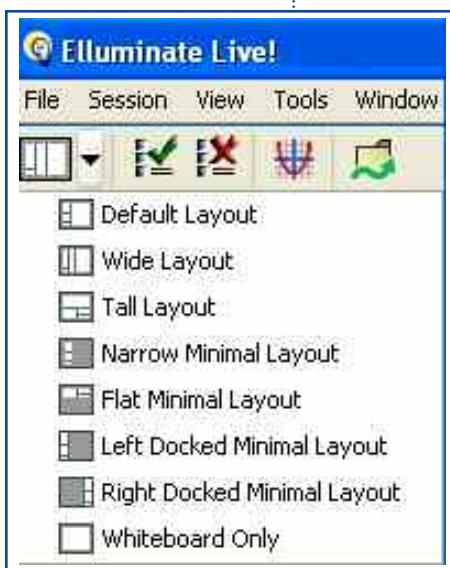
Here's an example:

A PowerPoint slide presentation comes with the instructor's version of the *Act! 6.0* courseware. It includes every bulleted item you can imagine, but it has a slow start. One slide boldly lists 10 reasons to use a contact management tool. When I think of what my participants will be doing when they see this, I imagine them yawning and clicking over to their inboxes.

I want to hook them in and get them actively participating. Knowing that they are already familiar with the concepts of contact management, I created a new slide with just one question on it, "How do contact management tools save time?" Then I thought about what their answers might be.

- Forward leads with all relevant contact information
- Track interaction between our administration, marketing, and sales staffs
- Help marketing see demographics and trends
- Build client relationships

Figure 6-7
Elluminate layout options.



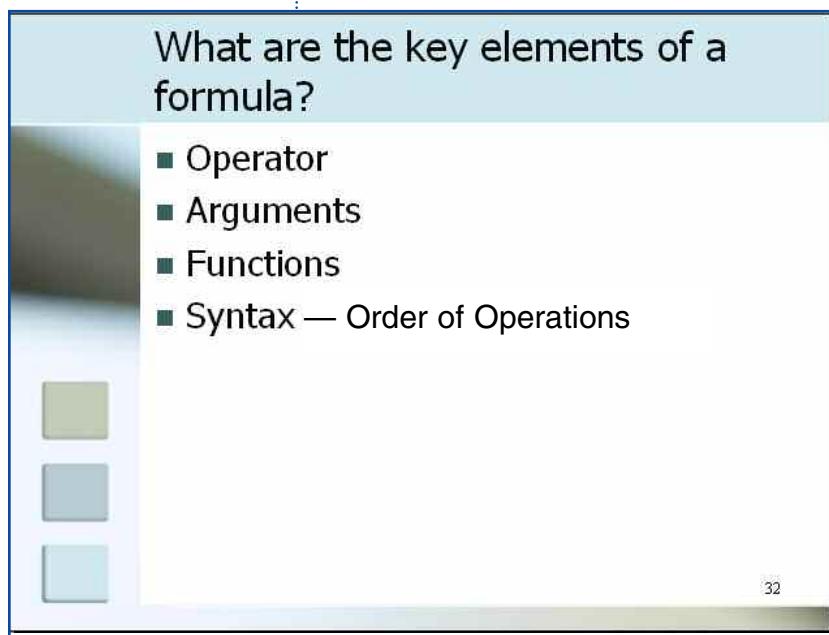
What are the key elements of a formula?

Please type your responses in Chat

A screenshot of a presentation slide. The slide title is "What are the key elements of a formula?". Below the title, there is a text box containing the instruction "Please type your responses in Chat". On the left side of the slide, there is a vertical stack of three colored squares (green, blue, and red) and a small icon of a speech bubble with a question mark.

Figure 6-8
Seed your presentation slides with open-ended questions to keep participants engaged.

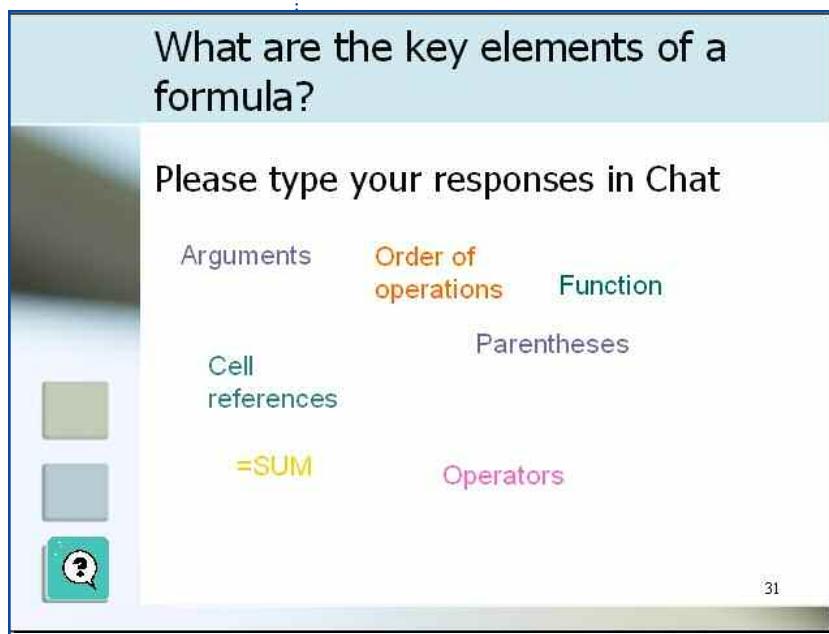
Figure 6-9
Slides with bullets like this one put everyone to sleep.



What are the key elements of a formula?

- Operator
- Arguments
- Functions
- Syntax — Order of Operations

32



What are the key elements of a formula?

Please type your responses in Chat

Arguments	Order of operations	Function
Cell references	Parentheses	
=SUM	Operators	

31

Figure 6-10
Participants can type responses to a question using annotation (whiteboard tools). Their answers appear on your prompt slide.

OK, that works. If they can answer the question, and are willing to respond, we're on the right track.

I seed my presentation slides with these open question slides, putting them in context. Some are leading questions, review questions, opinions, wild guesses, and any question that begs response from participants. When I come to an open question slide in my presentation, I ask the question posed there, and then prompt participants to type their answers using annotation (whiteboard) tools or Chat. (See Figure 6-8 on page 83 for a typical slide from an Excel course.) If those communication options are not available to participants, I can capture students' verbal input by typing their responses on the whiteboard myself. Depending on the software, one of these options will suit your needs better, as long as you have done the planning and the thinking ahead of time.

When using a canned slide set with bulleted points there's not much room for interaction. (See Figure 6-9.) Participants will simply read along as the presenter describes each bullet. But here's a handy trick. If there's a chance that some or all of your participants have a conceptual understanding of the topic (as they should, in our example), you'll likely find that individuals can guess or anticipate what the bullets are without seeing them.

So rather than showing a bulleted list slide like Figure 6-9, instead show them a prompt slide first, like Figure 6-8 on page 83. Then, as the entries from the audience appear in Chat or on the slide, you can discuss those entries that correspond to your content. (See Figure 6-10.) When their entries slow down, you can THEN display a slide with all the answers (Figure 6-9) and discuss any remaining ideas. Sidebar 6-5, on page 85, summarizes the process.

This is not only a test to see who's awake and listening, but it is also an opportunity to validate participants' knowledge without radically changing your lesson plan. And you may also get lucky and find that participants offer a perspective you hadn't considered. You can also prompt learners to use the whiteboard tools to annotate, with lines, circles, or boxes as well as with text, *any* slide during a discussion or Q & A.

The extra bonus to using this strategy is the ongoing assessment of learners' knowledge. If 100% of the participants are able to fill in the blanks you've left for them, you'll have a good indicator that this audience is not as novice as you anticipated. Additional questioning and evaluation will help confirm that fact.

There is another way to use questions: the polling feature.

Sidebar 6-5

A Quick and Easy Way to Prompt Participation

Before the event:

1. Select an original bulleted slide and duplicate it.
2. Remove data on the first copy, leaving only the title or question.
3. Be sure the question is worded clearly to generate the responses you need. It's worth testing the question on some friends to see what responses they are likely to generate. There's little worse than relying on the audience to reveal the responses you need, and having them offer every answer but the one you need!

During the event:

1. Pose the question to your participants and ask for their responses.
2. Thank them and validate their answers.
3. Reveal original slide and data AFTER participants contribute.
4. Address any points not offered by the group.

Using the polling feature

The polling feature displays a question and several possible answers that participants can “vote for” by clicking on their choice. You can tally responses and display percentages. It is possible to create polls during the session, but I don’t recommend it. It requires accurate typing while participants stand by and wait. You need to prepare your polls ahead of time as part of your design and preparation work (see Chapters 3, 4, and 5).

Carefully planned polls can get a snapshot of learner perspectives and can also reconnect the learners and presenters with key concepts very quickly and visibly. Ask a variety of questions that challenge the participants and help you to learn more about your group. Even in a 1:1 demo or sales session, polls can be an informative way to connect with your guests.

Why not ask a question? Create a slide with this question and possible short answers.

Work with an instructional designer to create the most relevant Poll questions for your session.

I always know when it’s time to display a poll. I leave a placeholder “cue” slide in the PowerPoint file displaying only the poll number and the question. When I come to the slide, I can ask the question to start the participants thinking about their responses while I

show the poll. If there’s any delay in action, they will spend the time thinking about the question.

I encourage presenters using Adobe Acrobat Connect to include a placeholder for Poll pods. During the session I pre-open a Poll pod in the presenter-only area right before it’s needed. When the presenter is ready, she can drag it from the private area into the public area.

Tip: Always prompt participants verbally to respond to the poll. If they have clicked to another window, and are only listening to the session, you’ll get their attention back for a few minutes.

Polling in different tools

Each online software product handles polling differently.

For example, Acrobat Connect Professional creates and saves Polling pods (small windows) inside the session. (See Figure 6-11.) Poll question and answer text can be typed or pasted from a text or PowerPoint document into a pod. The pod can be displayed as needed, can be sized, and placed anywhere on the screen (even out of the view of the participants).

In WebEx, you can create polls in advance or inside the session room. By downloading a separately-installed software application (WebEx Poll Questionnaire Editor) presenters can create the polls

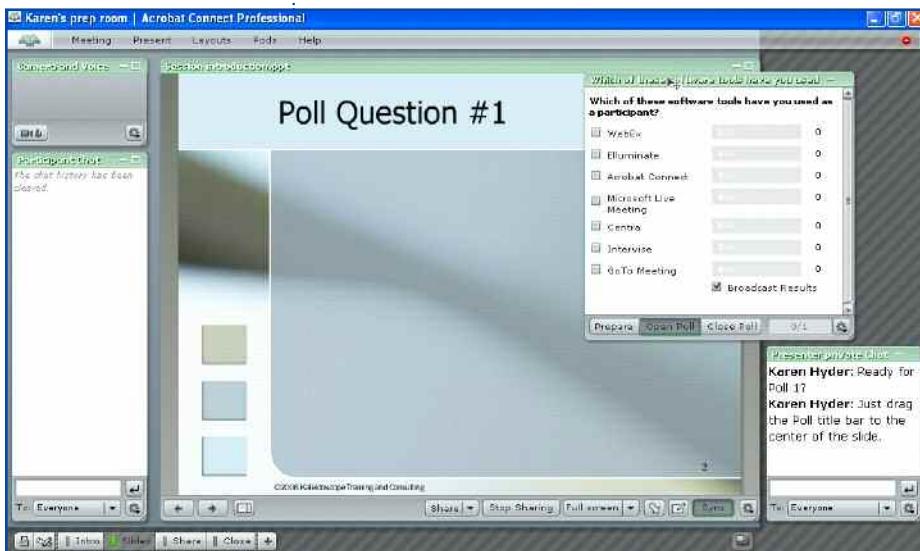


Figure 6-11

Displaying a Poll in Adobe Connect by dragging a poll pod from the hidden Presenter Only area.

Figure 6-12

With the WebEx Poll Questionnaire Editor, you can prepare and save polls ahead of time without logging into a session room.



without actually logging into the session room. (See Figure 6-12.) This is great if you are sharing a room with other presenters, or if your service charges by the minute for access to the room.

Many online synchronous tools have downloadable add-ins, plug-ins, or additional software tools that aid in developing session materials. With the Live Meeting presenter add-in, you can create polling and other features inside PowerPoint using a proprietary menu on the PowerPoint menu bar. Content developers can add polls, Yes/No questions, and open-ended text responses.

You might also develop content in a more high-end tool such as Flash, Articulate, Camtasia, or Lectora, providing many more options and requiring more development expertise.

When using Elluminate, create polls in advance by creating a PPT slide with a question in the Title and a list of possible answers labeled with letters A through E. (See Figure 6-13.) Inside the session room, there is a menu option that allows the speaker or moderator to show the appropriate buttons on the toolbar. Participants can then click on the button that corresponds to their choice. Their selection displays next to their name in the Participant Info window.

Impromptu polling

Most online tools have buttons that allow participants to respond affirmatively or negatively. Use that tool set for quick audience analysis and impromptu polling. Start using these early by asking easy questions, such as, "If my microphone volume is at a good level, and you can hear me clearly, please click on the Smiley Face. If not, please click the Thumbs Down button so we can see if adjustments are needed." Ask learners to click specific emoticons to indicate whether (or not) they are now able to see the onscreen demonstration.

Be sure to use the correct emoticon names for your software. Hover your mouse pointer over the emoticon or button and the proper name will appear.

Are you unsure of skill levels? Post a polling slide or quiz to quickly assess them. Are participants hesitant to interrupt you to ask questions? Encourage them to type questions in the Chat area. (See "Managing Chat")

You can introduce new topics by, for example, asking the audience to "Click the Smiley face if you've ever created an e-Learning module or course using Flash."

Broaden the response opportunity by

adding "If you've created an e-Learning course using a different software tool, go ahead and type the name into Chat" (in Elluminate, call the tool "Direct Messaging"). You'll better understand who's in your audience, who's awake, and who has experience. You can further engage the audience by vali-

**Figure 6-13**

Elluminate's polling question responses display in the participant window.

dating their responses. “I see MaryH has used Dreamweaver and SteveS has used HTML. And we have several experienced Flash users. Great! I’m eager to hear your perspectives and ideas during the session today. Feel free to type in your comments or raise your hand to request the use of the microphone.” Voila! NOW you have interaction and an invitation to participate at will.

Managing Chat

Encourage participants to offer comments and questions throughout the session by typing in Chat and reading each others’ messages. The Producer can read Chat messages as they come in and respond to technical issues in a private message. You can listen to Debbie Kenny prompting participants to respond to her open questions in Chat, at http://www.elearningguild.net/ebook/Kenny-401_clip.swf. This is an entire session from an eLearning Guild Online Event. The open question exchange begins in the first ten minutes of the recording.

The presenter should respond verbally to content-related questions, but might prefer to wait for a pause in the material to stop and read Chat. It can be very difficult to read, speak, and perform tasks simultaneously, and listeners can hear hesitation in the speaker’s voice when he or she is reading.

If you need to cue the presenter while she is speaking, paste text from your Crib file into a private message so the speaker sees it as a different color. It’ll be much easier to pick out your message. In Adobe Acrobat Connect, presenter Chat pods are separate from public Chat pods and are on a different part of the screen, hidden from others. The presenter knows that messages there are only for him.

I type Chat reminders to the presenter stating how many minutes remain in the session. I suggest that participants might want to click Full Screen view to increase the size of the shared application. Polls and testing can require an extra pair of hands: one person to open the file and the other to verbally ask the question or give instructions to participants. When I’m using VoIP and the learners don’t have audio, I turn on my microphone to update the presenter about what I see on my screen.

If random conversations pepper the Chat messaging, send a private message to each of the “chatters” to kindly stay on topic.

In addition to Chat messaging, question-and-answer features allow the presenter to filter incoming messages and respond to the sender or to the group. Some learners can feel overwhelmed by a lot of banter in Chat, and this feature reduces the amount of it.

Doing demonstrations

The steps to launch application sharing differ slightly between online software tools. There are a few actions that are relevant in most cases.

First, open the application before you need to use it. Have it open, logged in, and ready in another window.

When you start sharing, you’ll have an option for Application sharing and Desktop sharing. Application sharing is the best option if you don’t know what you need. Just choose the name of the application you want to share from a list and participants will quickly see your shared screen.

Use Desktop sharing when you want to share several different applications during your demonstration. This option will display absolutely anything you have running, including your e-mail inbox and your minimized shopping.com windows. Be careful what you share. Also, desktop sharing tends to require more bandwidth because it needs to send so much information. If you choose application sharing instead, you will be limited to showing ONLY the application you select from the list of things running on your computer.

The presenter’s screen resolution determines the size of the image displayed to the participants. If

adjustments are possible, be prepared to tell presenters or participants how to make them. For instance, you might need to say “Click the Full Screen button to display the shared image in a larger size.”

Producers, stand by to coach a presenter through sharing his application if he gets stuck or is showing the wrong view. When using Adobe Acrobat Connect, some presenters don’t see the Stop Sharing button that sits in the system tray. Some tools pop up text messages as they come in, but it’s easy to miss if you’re fumbling with a menu or Browse window. WebEx’s Application sharing function is one of the most straightforward, and even it necessitates help.

Slide viewing

Slides typically display the way they were formatted to display. When you load and convert the file you’ll see the fonts, graphics, and animations as you created them. Sometimes they don’t convert correctly, and things look wrong. Try PowerPoint’s Replace Fonts function and switch to a more standard font.

Figure 6-14 shows the Acrobat Connect Professional sidebar. The sidebar displays a list of slide titles so presenters can quickly jump to a selected slide, rather than advancing one slide at a time. The sidebar is not seen by participants. This sidebar can also follow cues the designer has created as Speaker Notes added to the PowerPoint file. You can advance one slide at a time, or jump ahead or back to a specific slide. If you have more than one presenter, agree in advance which presenter(s) will advance slides.

Outline	Notes	Search
Slide Title	Duration	
Welcome to: The eLe...	00:05	
Get Wired!	00:05	
Click here to access t...	00:05	
Listen up!	00:05	
Set your Connection ...	00:05	
Use Chat to ask or re...	00:05	
Use My Status to prov...	00:05	
Slide 8	00:05	
Thank you!	00:05	
Thank you for joining!	00:05	
Click here to access t...	00:05	
The Event Resource Pa...	00:05	
The Event Resource Pa...	00:05	
2007 2-day Online Fe...	00:05	

Figure 6-14
The Adobe Acrobat Connect Professional sidebar allows the presenter to jump to a selected slide. Participants cannot see the sidebar.

Avoid embedding media files into PowerPoint to play inside your session. It’s better to load the file into the interface and cut out the middleman.

Not all tools accept all file types. Check your features information, plug-ins, and complementary development tools.

If you’ve done a test run of your audio and video clips with a typical user’s computer and you see that it works, all should go well. You play the file, participants see it. It’s easy.

Be aware there is very likely to be some choppiness in the image and audio at some point, especially for the slowest connections and weakest computers.

Breakout rooms

In Centra and Elluminate, you can send participants to breakout rooms where they use a separate whiteboard and audio button. Text messaging is seen by all participants, even when in breakout

Status indicators

For quick responses about audio level, Yes/No questions, or pulse checks (to find out if you need to speed up, slow down, take a break, or answer some questions), ask participants to change their status indicators or emoticons. This is very useful when participants cannot verbally respond. Participants can voice their needs instantly and silently.

Audio and video clips, multimedia files

rooms, so global messages can be sent. Breakout rooms are a good place for 1:1 troubleshooting with an event Producer or presenter.

Elluminate recently updated their breakout controls to make it easier for the Producer to control who gets sent to which breakout rooms.

Independent practice activities

If you ask participants to do practice activities, give very clear instructions, and make sure they can get to files or applications they'll need. Also, give a time limit or due date. Stay available for questions as they work. Work with your instructional designer to create appropriate practices and activities to support your learning objectives.

Conducting tests

In addition to Level 1 evaluation forms (a.k.a. "smile sheets") and interactive polling slides, presenters and trainers may also include more formal quizzes and tests. Your synchronous software product might include test development tools that support scoring and reporting. Or the testing functionality might be part of your version of a tool, or a Learning Management System. Third party tools like Questionmark Perception also provide robust test development and tracking.

Writing test questions is an art form, so if you need help, talk to an instructional designer or psychometrician for appropriate test question content, wording, weighting, scoring, and reporting.

A helpful reference is http://en.wikipedia.org/wiki/Psychometrics#Standards_of_quality.

As always, do thorough testing of your tests before you deploy.

Students tend to be sensitive about tests and their scores. Create tests and technology that ensure fairness, accuracy, and secure submissions.

Disaster Control

For every plan you have for how things are going to work, have another plan for what to do if they don't work. If you log into a session and the presenter's VoIP headset doesn't work, how will you continue the audio presentation? If some users are not able to view the shared application, how will they understand what the presenter is talking about? If you try to launch an activity and it doesn't launch, then what? Even the best-laid plans fall apart.

Common errors and fixes

Presenters and participants might not be able to join sessions or might notice changes in the behavior of the software due to common technical issues.

- Participant can't log in, seems to have the wrong link, gets an error message indicating "wrong user ID" or "wrong password." Check that the link hasn't word-wrapped. Verify that password is correct case. Try joining as "Guest."
- For some Web conferencing applications, an additional software application (a plug-in) needs to be installed on each user's machine. Ensure this is done days, not minutes, before the session.
- A firewall may be blocking access. Talk to IT well in advance of the session. If this does not lead to resolution, join the session from a home office outside the firewall
- Audio drops, or images load slowly. The problem may be low bandwidth. Try logging in again. Change connection speed to a lower setting. Shut down unneeded applications.
- Interface integrity breaks down or freezes. This could indicate the affected machine does not have enough memory. Shut down unneeded applications, log out, and log back in again. Try deleting temporary files, using Tools, Internet Options, Delete Files. The user might need to reboot.

- Presenter can't upload a file. Shorten the filename and try uploading again. Convert the file before loading. Reinstall the plug-in.
- Presenter audio cannot be heard. Shut down audio function and restart. Swap out the headset. Try a headset with a USB connection or, if USB is the type you have, try a two-jack audio and microphone headset. Check audio settings in Windows Control panel.

Backup/Plan B

It's better to have plans B, C and D than to have to reschedule a session due to a technical showstopper. In your role as Producer, know what options you have for responses and solve problems immediately as they come up. Be sure to test your Plan B and C options as thoroughly as you do Plan A.

Prepared presenters don't miss a beat as they implement the plan B solution and keep going. Here's a clip of Matthew Murray's online Forum session for The eLearning Guild. His plan A doesn't work, so he downshifts to another option. Notice the recording showing the participant activity. The presenter didn't himself go to the backup file. (<http://www.elearningguild.net/murray/components2/testrecording.swf>)

Freeconferencecall.com can provide a good plan B for audio. Participants each have to pay to call in, but the conferencing is free.

THAT-1 is a \$139.00 hardware device that can pipe the phone call into a PC soundcard and into the session. If a presenter's connection to the session is poor but the Producer's connection is strong, the presenter can call the Producer on the phone. The Producer can send the incoming call through THAT-1 and into the online session. Participants can still receive audio over Internet and do not need a separate phone connection.

Online interaction "do's"

Here are some final suggestions to consider.

1. Provide a visual focal point for every part of your presentation. Like dead air, blank screens prompt learners to turn attention away from the session. Include relevant graphics and diagrams that illustrate your point. Also include visuals that explain what's happening now: "The Session Will Begin at 10:15 After the Break" or "Up Next: Demo: Editing a User Profile." With these tools, even learners who have been distracted or have lost audio can stay in the loop.
2. Mind your language. Synchronous online sessions are reminiscent of talk radio broadcasts. A professional-sounding voice and careful choice of words improve the credibility and clarity of your message.
3. Edit yourself. Your online time is limited. By using concise and articulate language, especially if coupled with reinforcing visuals, you won't need to ramble on.
4. Master the language of the interface. If the text message function is called "Chat" or "Direct Messaging," be sure to use that terminology when directing participants. When referring to a button or tool on the screen, use its name and its location on the screen. "Please click the 'My Status' drop down list arrow just above our names in the Attendee list on the left side of your screen. Then click the 'thumbs up' or 'thumbs down' indicator." While it might feel strange to be so specific, your participants will perform the task much more quickly if your instruction is very clear. You can reduce the amount of detail after you've used the tool a few times
5. Avoid overuse of idioms that don't add to the meaning. They require excess words and can alienate non-native English speakers.
6. Stop saying "um." Without a face-to-face relationship, your voice represents you as a person and a trainer. Filler words like "um," "uh," "like," and "basically" are even more tedious and unprofessional online. If you need time to think, take time to think. Then speak.

7. Keep your pace and tone conversational. If you sound like a dictator or cheerleader, you might distract learners from your message or invite them to tune you out.

8. Plan time to breathe. It's not practical to try to talk non-stop through your session. Take advantage of points in the presentation where, while you wait for participants to respond to polls or type in Chat, you can go off microphone to breathe, take a sip of water, and think before you continue. Get in the habit of using Mute or simply releasing the microphone whenever you're not talking. While reading Chat or opening new files, it's better to turn off your microphone than to try to read and talk at the same time. Also, no one wants to hear you breathing, coughing, or burping (yes, even the very quietest are audible) into your microphone. Mute it!

9. Every niche has its lexicon. If you think the language around synchronous online tools is strange, you're right. As with any field, there is language that borrows terms from other fields, or invents new words to label the innovations as they come into use. Online trainers, speakers, Producers, hosts, moderators, facilitators, and event support professionals with other titles are responsible for teaching the new language of the tools in synchronous online training.

Online interaction "don'ts"

If you're used to having certain resources available, like body language or two-way verbal communication, you might feel quite limited when working inside an online tool. Here are a few strategies that WILL NOT help you create an effective learning environment.

Don't apologize for the interface. Online session software is a tool that offers functional resources to engage groups of people. You can't do everything the way you did it in the classroom, but that's OK. We can do other things.

Don't patronize your learners. We're all adults here, no matter what role we play. Participants need the basic information and some guidelines to get tasks done. They don't need nagging or criticism. Behave like you would in any other professional interaction.

Don't read silence as disinterest or unwillingness. Not all sessions support multi-speaker audio; participants might not have the functionality to verbally respond. If no one responds to your questions, ask the question again, tell them how to respond and then wait quietly and patiently. If after a full minute you haven't heard or seen a response, calmly fill in with Plan B and move on. Be as patient next time you ask a question — don't be discouraged.

Don't wait until the end to ask for participation. A presenter saying "Any questions?" at the end of a presentation DOES NOT count as interaction. If you haven't engaged them in the first two minutes, and re-engaged them regularly throughout the session, they will have completely checked out by the end.

Don't do "hit and run" training, dumping tons of information in one session and then disappearing. Your online session can become more productive when you've already taken care of some of the preliminaries and learner-specific issues. Make use of the opportunities you have to connect with participants via e-mail or an online discussion group before, during, and after online sessions. Find out more about your learners' application needs. Make sure everyone's technology is ready to go in advance so they can connect to the session room. Send preparation materials or links to materials well in advance. Reference and use the materials throughout the session.

Don't label a session unsuccessful if learners were quiet. If they were able to see learning materials, understand the speaker, respond appropriately to poll and Chat questions, and complete assignments successfully, something was working well. Initiate an e-mail conversation with each participant outside the synchronous session to open another avenue for feedback and questions.



We completed our first online lunch rollout in less than a week when normally it would have taken our culinary supervisors and divisional vice presidents a month of travel. We saved \$30,000 in travel costs in that one rollout alone.

—Lori Van Holmes, VP of Training and People Development



INDUSTRY

Restaurant Company

WEBEX APPLICATIONS

WebEx Training Center

SUMMARY

BUCA, Inc. needed an effective training method to ensure its new programs and services would be rolled out quickly and accurately by staff in 104 restaurants located throughout the U.S. Using WebEx Training Center accelerated BUCA's information delivery processes, saving \$30,000 and weeks of in-person training in its first online food rollout. BUCA now offers Family Members (employees) frequent interactive online trainings, improving productivity and quality of training across its restaurants.

ABOUT BUCA, INC.

Headquarters
Minneapolis, MN

Number of employees
6500

Line of business
Restaurant company

Target market
Individual consumers

WebEx customer since 2005

BUCA, Inc. uses WebEx Training Center to dramatically improve information delivery processes and standardize quality of service.

With 104 BUCA di Beppo and Vinny T of Boston restaurants located in 30 states, BUCA, Inc. is one of the premiere restaurant companies in the US. To maintain the integrity of its well-known brands, BUCA must consistently replicate its unique family-style dining experience — complete with distinct ambiance, exceptional Italian cuisine and warm, attentive service — throughout all of its locations.

The Challenge

For a dynamic restaurant company like BUCA, Inc., new menu rollouts and changes to restaurant services need to be frequent, fast and effective. With restaurants located throughout the United States, BUCA found that distributing this type of new information to the field was challenging. During each rollout, it became clear to BUCA's VP of Training and People Development, Lori Van Holmes, that the changes implemented by the corporate office were not being rolled out consistently by all 104 restaurants. "We would send out enormous information-packed rollout books to each restaurant. The restaurant managers were responsible for wading through the information and then passing along the essential bits to the kitchen staff and service personnel," recalls Van Holmes. In addition to the books, divisional vice presidents and culinary supervisors often traveled to each restaurant to train the staff in person. "The amount of information was overwhelming, and the delivery method just wasn't working," says Van Holmes.

The Solution

When Van Holmes attended a WebEx online meeting to further her own professional training, she immediately began thinking about how a web meeting application could help solve the rollout problems at BUCA. She introduced the idea to BUCA's CEO and soon began a trial of WebEx Training Center. "It was surprising how easy it was to use WebEx and integrate it into our organization. Not only is the system intuitive, but the trainings provided by WebEx were great, the instructors excellent, and the ancillary training material answered all of our questions," she says.

The first food-related WebEx training Van Holmes conducted was for a lunch rollout. Van Holmes simply sent out a meeting invitation through Outlook giving restaurant managers the option of choosing one of four meeting times. "During each WebEx training session, we launched our desktop publishing application and dynamically drew lines to show the managers exactly where the new items were on the menu. We were also able to show pictures demonstrating how to prepare the food. It was a significant success," explains Van Holmes.

BUCA's most recent program rollout with Training Center was a program acknowledging employees who have reached tenure throughout its restaurants. "I administered the meeting but the senior director of family resources was able to log in to WebEx and make his presentation



right from his office," says Van Holmes. To keep the audience interested and involved, Van Holmes used the WebEx polling feature. "I asked attendees questions throughout the presentation, inviting them to raise their hands to answer. Then I showed the percentages for each answer on the spot," she explains.

WebEx is now used for all rollouts at BUCA. For each rollout, up to 400 managers are trained by three hosts using WebEx Training Center. "The traditional rollout books are still sent out two weeks before, but now the WebEx meeting schedule is listed in the books so managers can attend at their convenience. The books are there as a reference, but the WebEx training is what we rely on to make sure our managers get the real essence of the material," says Van Holmes.

The Benefits

With approximately 20 BUCA rollouts a year, the business results of using WebEx have been significant. "We completed our first online lunch rollout in less than a week when normally it would have taken our culinary supervisors and divisional vice presidents a month of travel. We saved \$30,000 in travel costs in that one rollout alone," says Van Holmes.

WebEx has also enabled BUCA to deliver information quickly, and in smaller, concentrated amounts, improving knowledge retention, speeding employee productivity and ensuring that training

WebEx is helping us achieve our organizational goals: to grow sales, increase profitability and provide ongoing development of our people. We now provide more training than we ever did before. And everyone loves WebEx, from the restaurant managers to our COO and CEO.

—Lori Van Holmes, VP of Training and People Development

is aligned with corporate objectives. Van Holmes has also found that WebEx provides built-in accountability for BUCA employees and encourages communication. "By polling the audience during a presentation, I can check to make sure managers are focusing on the right information. There are no more excuses for not doing what's being asked of them," states Van Holmes. In fact, WebEx has enabled a new dialogue between the restaurants. During the online meetings, restaurant managers have begun sharing their experiences with each other. "Managers can now learn best practices from their peers, not only from the presenters," she says.

Finally, WebEx is helping Van Holmes meet the development needs of the BUCA staff by enabling more frequent training. According to Van Holmes, "WebEx is helping us achieve our organizational goals: to grow sales, increase profitability and provide ongoing development of our people. We now provide more training than we ever did before. And everyone loves WebEx, from the restaurant managers to our COO and CEO."

The Future

As a result of the significant impact WebEx Training Center has already made on the BUCA organization, Van Holmes is focused on finding new applications that will further streamline and improve BUCA training. Using WebEx, Van Holmes is planning on cutting out a full day of training at BUCA University, a six-day in-person training conference that takes place four to six times a year. Transitioning part of the training conference to ongoing online classes will deliver the information in smaller, more palatable amounts and enable users to advance at their own pace. "We plan to use WebEx hands-on labs and breakout sessions to make these trainings even more robust," says Van Holmes.

BUCA's dedication to improving processes and providing better services is what led Van Holmes to incorporate WebEx in the first place. Now she looks forward to having WebEx help her execute on her department's vision. "We haven't even scratched the surface of what we can do with WebEx. We're really excited about coming up with even more ideas to meet our goals," she says.

HIGHLIGHTS

- New program materials sent to restaurant managers required in-person training, and were not being incorporated effectively by BUCA staff.
- BUCA found that WebEx was easy to use and integrate into its existing processes.
- WebEx Training Center enabled BUCA to convert the large amounts of rollout information into short, online presentations managers could conveniently attend.
- Better and faster delivery of information, combined with more frequent training, ensures uniformity of service across all 104 restaurants.

Wrapping Up and Following Up

By Karen Hyder

The event wraps up when the presenters have completed their delivery, the demonstrations are complete, and the storyboard calls for a final Question and Answer or Comments round.

Structure the closing

Just as I have a structured introduction, I also believe it is important to provide a structured closing. (See Sidebar 7-1 on page 95.) This makes it much less likely that the presenter or the Producer will forget or overlook anything important, and it provides the participants with their assignments or other transfer tasks. Begin with a structured Question and Answer session.

The final Question and Answer (or comments) opportunity

When it's time to begin the Q & A period, display a new slide to ask learners, "What questions do you have?" Be sure to indicate to participants how you want them to respond or to contribute. "Click the Hand Raise button if you'd like to queue up to ask a question. When I call on you, click the Talk button."

Remember that, using online and audio tools, it takes participants longer to respond than it did in the classroom. Be patient and give plenty of time for them to voice or type their questions. See Sidebar 7-2 on page 96 for a recommendation I use that helps me organize the screen real estate effectively and appropriately for this part of the closing.

Audio levels and quality can vary from user to user. Be ready to adjust speaker audio settings or to signal the user how to adjust. Use a labeled screenshot of the settings and display the slide if it's needed.

For teleconference calls, audio lines might be opened allowing everyone to speak freely. Alternatively, the presenter or Producer can prompt participants to un-mute audio in order to speak. Some teleconferencing services have a Web-based call control panel. Each caller's audio can be opened and closed by the Producer. Microsoft Live Meeting has a mini-controller plug-in so all caller audio can be controlled right inside the presenter console.

Contents

In Chapter 7 you will find information about:

- The structured closing
- Clean up
- Pause for your own assessment
- Session evaluations
- Follow up and ongoing learner support
- Connect with the LMS

Display an agenda for the closing

Post a slide or message asking participants to stay logged in to complete any final tasks like evaluation questions, quizzes, assignments, and further instructions. Try to keep reminders short. Send detailed steps in an e-mail or post in a common area.

Collect Level 1 evaluations ("smile sheets")

Level 1 evaluation is sometimes written off as "smile sheets," measuring

Sidebar 7-1**Closing checklist**

- Q & A session
- Display agenda for closing
- Collect Level 1 evaluations (“smile sheets”)
- Thank the presenters and the participants
- Assignments and resource links
- Turn off recorder
- Evaluation questions
- Final remarks or questions. Remind remaining participants how to exit.
- Save Chat text
- Clean up annotations, clear text, reset files (if room will be reused)
- Remove remaining participants
- End session and exit room
- Post recording file
- Send follow up e-mails

only how the learner felt about the training or the presenter. However, in an environment where we can't see scowls or smiles (Level 0), Level 1 is good information!

Use a short questionnaire to collect evaluation data during the closing session. (See Figure 7-2 on page 97.) You can send longer forms later via e-mail. Think strategically about questions that will elicit the most valuable information from participants. Even negative responses can prompt us to find solutions and better support our learners.

Be brave enough to ask for constructive feedback from participants. Over the years, many charitable students raised my awareness of my own mistakes. I'm thankful they set me straight about things I might have continued to do wrongly.

Say “Thank you”

Take a moment at the end of your session to thank presenters and participants for joining and contributing to the session. If appropriate, thank other contributors and support staff.

Assignments and resource links

Except for an evaluation form, participants accustomed only to a classroom-learning format might not anticipate any follow-up after the training is over. Inform them of available asynchronous (self-directed and self-paced) support materials and tools. Explain how and when to use them. If your organization uses

a Learning Management System, show the learners how to access materials, assignments, or tests posted there. Direct them to a text-only discussion board where they can ask questions about the assignments or about content.

There are many more formats for collaboration and communication than ever before. These include wikis (community-created Web sites used as knowledge repositories), blogs (Web logs, or public journals written by an individual), and Podcasts (downloadable audio recordings in MP3 format, addressing training or news items). Presenters can use these tools and methods to continue supporting learning opportunities beyond the online session. Just as with synchronous online session tools, be sure

to provide detailed instructions on how participants can use these tools and resources. If learners are expected to use them, or if there are assignments participants must complete after the synchronous e-Learning event is over, be sure to address these points as well.

Turn off the recorder

If you've been recording a session for other users to see later, you should stop the recorder after giving instructions and assignments.

Remove any remaining participants from the session room

If participants don't log out, it's wise to “remove” them from the session to avoid phantom log-ins that will be seen as continued activity in the session room. These phantoms might cause accounts to appear inaccessible later.

Sidebar 7-2***Close the session room***

Watch the clock carefully when you're online, and be vigilant about keeping starts and stops within five minutes of the posted time. Remember that learners have other meetings to attend and trainers have other sessions to set up and start. If your licensing is by the minute, don't keep the room open any longer than it is needed.

Before you leave, make a "last call" for questions from any participants who are still logged in.

Q & A Layout in Adobe Acrobat Connect

In Acrobat Connect, I use a Layout for Q & A that's very different from the Layout I use for slides or sharing. The Chat pod is four times bigger than the normal Layout and the Share pod is much smaller. (See Figure 7-1) This serves a few purposes. With a large Chat pod, it's much easier to scroll back through and read missed comments and questions. Also, the large Chat pod signals the new focus of the session and de-emphasizes formal content. However, with the small Share pod, the slides are still available for reference. Presenters can backtrack to earlier slides, if necessary.

Tip: In order for this to work properly, the same shared file and the same Chat pod must be loaded into both Layouts.

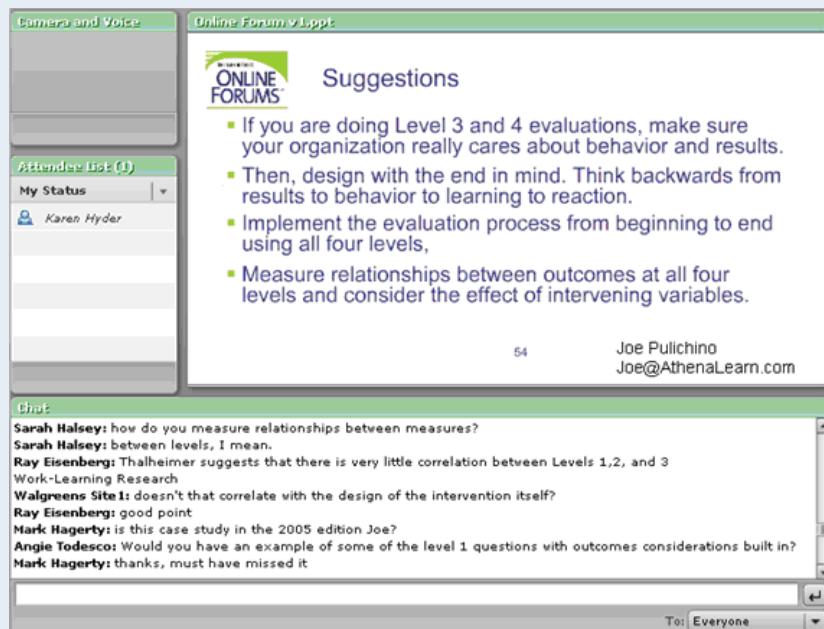


Figure 7-1 An expanded view of the Chat pod makes reading and responding easier.

ing from mistakes. Make some determinations now about what you will do the same way next time, and the things you need to find a way to do differently. Make content edits and notes now while you remember what it was you didn't like, or what participants said they didn't like, or what didn't work at all.

Your online trainer and Producer role requires that you respond to feedback, and change behavior or methods quickly to improve learning environments and serve learners effectively. (See Sidebar 7-3 on page 98.)

Be honest and realistic about technology and how it works. Set the right expectation and offer solutions. Don't build huge expectations about features, fail to test those features ahead of time, and

Clean up

Scan the list of Chat messages for comments and questions that still require a response.

- Save Chat text to refer to later. If there is no "Save" option, just copy the text and paste into a text document. If you ran out of time to respond to all questions, re-post the questions with your answers in a separate format such as an asynchronous discussion board, often called Chat rooms, and participants can access them at any time.
- Save any whiteboard files, delete files (if necessary), and properly open and close polls so the software records responses.
- When you are finally ready to leave, be sure to End the session rather than just Exit, again to avoid the session staying active.
- Enter all notes into appropriate forms.
- Post the recording link or file where participants, and those who missed the session, can access it. (Some tools have a recording editor, others do not.)

Pause for your own professional assessment

In the process of cleaning up, spend some time thinking objectively about the successes and shortcomings of the session. Inventory the technical issues, the timing, the feedback, and your own presentation skills. Be open to learning

about what you will do the same way next time,

then blame the technology if things didn't work well for everyone.

Review all the points in the session that did work well. Ask yourself what was in place to ensure success.

Go back over your Storyboard and fill in details or make changes. "Launch Application Sharing HERE." Or, "Use multiple-answer types poll." Make improvements on your introductory, tutorial, or emergency slides to give important instructions more clearly.

Continue to make small improvements, and soon your sessions will be so polished the technology will become transparent.

1. The speaker was knowledgeable about the topic.	4. The speaker effectively used these interactions.
- The speaker was knowledgeable about the topic.	- The speaker effectively used these interactions
<input type="radio"/> Strongly Agree <input checked="" type="radio"/> Agree <input type="radio"/> Disagree <input type="radio"/> Strongly Disagree <input type="radio"/> No Vote Vote submitted	<input checked="" type="checkbox"/> Polls <input checked="" type="checkbox"/> Open-ended questions <input type="checkbox"/> Application Sharing <input checked="" type="checkbox"/> Chat <input checked="" type="checkbox"/> Embedded PPT interactions
2. The presentation content matched the website session description.	5. The materials were appropriate to the presentation.
- The presentation content matched the website session description.	- The materials were appropriate to the presentation.
<input type="radio"/> Strongly Agree <input checked="" type="radio"/> Agree <input type="radio"/> Disagree <input type="radio"/> Strongly Disagree	<input type="radio"/> Strongly Agree <input checked="" type="radio"/> Agree <input type="radio"/> Disagree <input type="radio"/> Strongly Disagree <input type="radio"/> No Vote
3. I will be able to apply the information I learned in this session...	6. I would attend another session with this speaker.
- I will be able to apply the information I learned in this session...	- I would attend another session with this speaker.
<input checked="" type="radio"/> In the next 3 months <input type="radio"/> In the next 6 months <input type="radio"/> In the next 9 months <input type="radio"/> In the next 12 months <input type="radio"/> Never	<input checked="" type="radio"/> Strongly Agree <input type="radio"/> Agree <input type="radio"/> Disagree <input type="radio"/> Strongly Disagree <input type="radio"/> No Vote

Figure 7-2
Post a short series of evaluation question Poll pods and show them at the end of the session. Prompt participants to respond before they log out.

90%, 91 to 100%. This gives me a good perspective on the learners, and something I can ask about later. What did they learn that was new?

I also want to know how soon they anticipate using what they learned: immediately, in three to six months, six to twelve months, one to two years, or never.

I want to know the type of connection they used (LAN, DSL, cable, dial-up modem, or satellite) and how the connection performed. I expect responses like:

- Great. Solid. No latency or clipping.
- Good. Some clipping, but I'm used to it with Skype.
- Fair. I wish I had been on my other connection.
- Bad. Where are the recordings posted? I need to play it back later.

I also want to ask questions about their opinions, how they liked it, and did they feel that they learned.

If your team needs to seriously consider what you want to evaluate and why, look at the broader picture of evaluation as identified by Dr. Donald Kirkpatrick. With end-of-course "smile sheets" as

Session evaluations

Training professionals have a habit of asking questions at the end of sessions to find out perceived effectiveness and value. We try to ask questions that will give us useful data, data we can respond to. I prefer data provided by people who take the time to really reflect on the evaluation. As a result, I like to offer a longer evaluation where they can write comments, too. Some data is more useful than others. So what's the perfect mix? You tell me.

When I ask learners to evaluate the session, I want to know how the session worked for them both technically and educationally. If the technology was an obstacle, it's important to know that. I also want to ask how much of the information did they already know, expressed in ranges: 0 to 10%, 11 to 50%, 51 to

Level 1 evaluation, Levels 2, 3 and 4 are increasingly more difficult to measure, but often worth tracking. Learn more about Kirkpatrick's four levels at http://en.wikipedia.org/wiki/Donald_Kirkpatrick

Follow up

Much of learning takes place after training, when students attempt to apply concepts to practical situations. They might need your help, or they might need support in the form of a quick reference guide or a transcript of a live session. You can make resources available to them at any time and in almost any form.

There is now a myriad of methods to continue communicating with and supporting learners as they find opportunities to apply what you taught.

- You can send an e-mail to recap key learnings and elaborate on assignment details.
- Post follow-up messages on Discussion Boards and Chat rooms to ignite additional asynchronous contributions from participants.
- Make use of any resources you have to post assignments, files, and follow up questions to create an ongoing dialog.
- If your organization has an LMS, get training on how you can use the tools and features that it provides.

- Find out how you can build a community of learning when blending group communication with other learning resources.

The proliferation of computer and Web users, Web sites, and learning management systems means that you can post the most appropriate training material and learners all over the world can access it whenever they want. You can direct learners to use high quality supportive e-Learning materials like tutorials, videos, demonstrations, simulations, and

Sidebar 7-3

Presenter feedback

When I produce another person's session, I e-mail them a day or two after the session, to say thank you or to follow up. I include survey information and Chat text, if available, comment on what was smooth or rough, and offer points of praise for good session management or effective strategy.

Tip: Offer coaching only to presenters who agree to accept it. Respect that not everyone is open to feedback or in the mood to be evaluated. If the presenter is interested in feedback, schedule a phone conversation so you can both speak openly.

games that are widely available. E-Learning developers using software tools such as Flash, Captivate, or Lectora can also create customized movies and games so training fits perfectly.

Supporting participants for an extended learning program

If your synchronous online sessions will run for a period of weeks with assignments in between, provide structure and regular touch points. A syllabus or a visual "you are here" in the agenda can help learners stay on track.

Check up on and check in with each participant to ensure they understand the assignment and know how to get to it. Don't bombard them, but do provide a repository where they can go to get what they need.

Throughout a learning program, participants have a tendency to disappear for a few days and not respond to e-mails or Discussion Boards. Anticipate that some learners will need to compartmentalize their online learning to certain days or times.

Connecting with the LMS

Not everyone needs a Learning Management System. If you only run sessions every once in a while, or participants don't need to be tracked, you can easily manage invitations and materials using

just the features available in your Synchronous online software.

You might need a Learning Management System to help organize users and materials if you have many different courses or sessions, a lot of participants, a need to make a variety of resources available to participants before, during, and after synchronous online sessions, or you want to manage assignments and track who logs in and when.

Using an LMS is a big step

Undertaking the implementation of a Learning Management System is something that a team, comprised of representatives from IT, training, development, data management, functional management, financial, and the end-user base, should discuss and plan for carefully.

Compare tools and functionality as well as the ability to customize. Ensure that your synchronous online software will exchange user registration, test scores, and tracking information, or any other data you need.

Need to provide support tools for cheap (or free)?

Upload files and instructions to a normal Web URL, and give learners the link. Also, explore these tools:

- Vignettes for Training's Rapid LMS (free for a year) (<http://ela.vftraining.com/workshops-rapid/>#)
- Moodle, an open source and free learning management system (http://docs.moodle.org/en/About_Moodle and <http://docs.moodle.org/en/Features>)

If you do decide to use an LMS consider it in your instructional design and implementation plan. Begin using it well before the session begins. Consider using it in your instructional design, manage and track registration, provide information and preparation materials to participants, and for open discussions. By using these tools you can create learning experiences that feel friendly and social, like the classroom, but are even more productive and functional than the classroom ever dreamed of becoming.

Marketing Internal Synchronous Online Events

By Ron Miazga

Synchronous online events are powerful tools that give a company a competitive advantage. A company using this technology leverages existing business processes and invents new processes aimed at decreasing costs and increasing productivity. It's about doing more with less.

You need a plan!

This may not be readily apparent to everyone in your organization. There is a need to show decision-makers how to take advantage of synchronous online events, and how to market them internally in order to realize the maximum benefit. Let's examine the key components of an internal marketing plan.

Relate to the company objectives

What are the goals, vision, and direction of the company? This is an important first step in connecting synchronous online events to the company. Look at the company's image. How does it want to be seen? What is it trying to accomplish? Talk to the senior managers about the company's strategic business objectives for this year, next year, and the next three to five years. It's important to know the company's direction and how it expects to get there.

Once you understand the objectives you must be able to express them in clear, precise statements. Such statements might be:

- Aggressive growth
- Market leader
- Low cost provider

If a company's objective is aggressive growth and customer service targets are critical to that growth, synchronous online events to improve growth and customer service support that objective.

For example, the ability to have subject matter experts teach remote customer service providers more effective communication skills, without requiring SME travel and time away from the office, is a feature of synchronous online event capability. If the customer service providers are able to communicate better with their customers, those customers will better understand the value of the company's products and buy more. This is the benefit message that needs to be the focus of using synchronous online events.

Contents

In Chapter 8 you will find information about:

- Relating synchronous online events and e-Learning to organizational goals
- Explaining what synchronous online events are, and making them easy to use
- Branding your synchronous e-Learning events, and promoting the brand
- Getting and keeping support for your synchronous e-Learning events
- Making synchronous online events a routine business process
- Sharing your successes
- Looking for impact opportunities for synchronous online events and e-Learning

Now you can link the results of synchronous online events to the business objective of aggressive growth. There is an advantage in translating the value that results to the objectives of the company. It's an important point in your marketing for the company to see how your events support the company objectives.

When you highlight the value of synchronous online events, the outcome that you achieve is business results that support the business objectives. Because you are able to conduct a collaborative meeting across the country, and time away from the office and travel are unnecessary, you have provided a more efficient business process. You eliminate travel expenses, and therefore productivity increases. Both contribute to the company goal of being a low-cost provider.

Therefore, by increasing the skills and knowledge of the employees, and facilitating collaboration effectively across distance barriers, synchronous online events have demonstrated their effectiveness in achieving company objectives. Tie these synchronous online event experiences to the business needs of the company.

LearnNET *The next best thing to being there.*

What Is LearnNET?

LearnNET is Univar's online, real-time Web conferencing tool that allows your business to connect large or small groups of people in a variety of locations so you can do more for less money.

You can train new hires or conduct an all hands meeting in every one of your offices around the globe simultaneously. Or launch a new product in one day to 300 sales people across the country. When you use LearnNET, you can do all this and more much faster and at a fraction of the cost you'd pay for travel. All you need is a phone, a PC with an Internet connection and browser, and you're ready to go.

Why Use LearnNET?

Using LearnNET for a meeting will eliminate or reduce:

- Travel costs
- Time away from home and the office
- Wear and tear of meetings

In addition, people have found these benefits in Web conferencing, the generic name for LearnNET technology.

- Shorten sales cycles
- Expand your business reach
- Send a consistent message to the right people when you need it
- Effective and efficient in distributing knowledge and information quickly
- Increase productivity
- Make decisions quickly
- Allow meetings to be held when needed
- Expand communication
- Increase communication effectiveness
- Reach dispersed audiences
- Eliminate barriers of time and distance
- Increase impact and retention

UNIVAR

Figure 8-1
A *What & Why* piece
helps managers and decisionmakers understand
the value of synchronous online events.

Make it easy to do

Don't assume that everyone in the company knows how synchronous online events work, and how they can change business processes. To many, this is new technology offering a new way of doing things. It's about change — a change in how you learn and communicate. One key in coping with change is to make it easy to move from the old to the new.

One way to help the transition is to create a "What and Why" promotional print piece to explain the tool and its value. Figure 8-1 is an example of a promotional print piece that we used in my company.

This example concisely explains the tool — what it is, why you would use it, what it can do, when you would use it, and how to get started. The emphasis is on the benefits

of the tool and not the technology itself. What is important is what it can do, not how it does it.

In order to minimize the impact of change, and the new technology, on the time and workload of the managers and decision-makers, consider creating a new position called the "event Producer" to assist people in using the tool, as Karen has suggested in the previous chapters. This will keep the focus on the benefits and not the tool.

An event Producer would typically:

- Assist in building the event so it works well online
- Establish the event online with appropriate connections (both graphic and audio)
- Rehearse the event with presenters and familiarize them with the controls
- Meet and greet the participants to the event

- Handle the technology during the event so the presenter(s) can concentrate on the content of the event
- Track event participation

The event Producer makes it easy for everyone to use synchronous online events regardless of their technology abilities, and adds further value to the company and support for its business objectives.

Promote it

You need to position the technology so people readily identify what it is and how it is of value to them. How do you want it perceived? Branding is an important first step in promoting.

For example, we created a logo for an event with the tag line “real-time connection.” Figure 8-2 shows the branding.

We wanted to position the tool as connecting people; connecting so they could learn from each other. When people want to connect for training, education, or collaboration they would think of LearnNET. This makes it easy for people to use LearnNET, and they know what to expect. We use this branding on our Intranet, program registration system, e-Newsletter, and all correspondence relating to synchronous online events. We don’t say, “synchronous online event,” we simply say “LearnNET,” and everyone in the company knows exactly what we mean.



Figure 8-2
Branding (“real-time connection”) is an important step in promoting an event.

page 105 is an example of a typical edition.

The e-Newsletter features short articles about events in the coming month, participation programs, comments from recent participants, links to scheduled learning events, a question of the month, and a spotlight on a subject matter expert among other things. The question of the month is generally a non-business question to engage readers in a fun experience. The e-Newsletter pushes the brand identity to the employees on a regular basis.

At the end of each year the company also runs a special edition of the e-Newsletter that thanks all the presenters who have participated during the year, shares comments from event participants, and illustrates the value of synchronous online events to the company. Figure 8-4 on page 106 illustrates one of the special editions.

We also change the design and look of the e-Newsletter on an annual basis so that the message is fresh and interesting. This keeps the brand updated.

Keep everyone on board

In order to spread the word on the value of synchronous online events it is helpful to create an executive presentation for senior managers so that they understand the power of the tool. The presentation should be succinct and stress the effectiveness of the tool. It should not address the technology, but rather the benefits and how they relate to the company’s strategic objectives. The presentation talks about the benefits of the tool to:

- Shorten sales cycles

april 2006

"Courage is your willingness to take action with no guarantee of results." - Brian Tracy

Question of the Month
Last Month We Asked:
How tall is the average leprechaun?
The answer is: 2-3 feet.

This Month's Question:
What's your favorite Easter egg color?

Presenter Spotlight
Monica Witt
Click here to read her bio.
Check out her shows:
• [Outlook - Calendar and Contacts](#)
• [Outlook - Meetings & Tasks](#)
• [Express - April 6th](#)
• [Outlook - Customizing Settings](#)
• [Express - April 27th](#)

Shirley Says...
Did you know that you can save the show dates/times you have registered for on your Outlook calendar?
If you Open and Save the attachment in your LearnNET registration email confirmation, the log-on information will automatically be saved to your calendar.
You can then access the information the day and time of the show via your Outlook calendar to log-on.

Upcoming Classes
LearnNET Express Classes (30 minutes or less)

- [Excel - Using Formulas Express - April 5th](#)
- [SERC Tips and Hints - General Manager Report Toolbox Express - April 10th](#)
- [SERC Tips and Hints - Reporting Fundamentals Express - April 10th](#)
- [Excel - Using PivotTables Express - April 10th](#)
- [Access - Forms and Lists - Sales Rep Report Toolbox Express - April 10th](#)
- [SERC Tips and Hints - Sales Manager Report Toolbox Express - April 10th](#)
- [Finding Your IBCS Express - April 12th](#)
- [Lunch Break Express - Word - April 14th](#)

Figure 8-3

An e-newsletter gets the word out about your synchronous eLearning events.

- Send consistent messages
- Increase productivity
- Expand communication
- Reach dispersed audiences
- Eliminate barriers of time and distance
- Increase impact and retention of information

Synchronous online events impact the way a company does business, and contribute to its business success.

To gain widespread acceptance of your synchronous events, launch several participation programs. Have an annual program as well as seasonal programs. Figure 8-5 on page 107 shows a flyer about an annual participation program that used our branded synchronous online events tool, LearnNET.

The program should have a theme — for example, "Be a LearnNET Rockstar!" — that grabs the audience and encourages active participation. On this promotion the participants have to attend five events and then e-mail the evidence of this so that they can enter the grand prize drawing at the end of the year. After the participants confirm their attendance in five events they receive a Rockstar! key chain to reward their participation. This promotion has run for several years with a yearly theme change, and has proven to be very popular. The participation program is another way of keeping the branded product in front of the target audience.

Weave it into the fabric of the company

Marketing synchronous online events effectively requires that people see it from different perspectives. When viewed as a collaboration tool, a learning tool, and a communication tool it becomes part of the company's business operating processes. It becomes a part of an innovative, more effective way to do business.

Imagine that a company has a new product introduction at ten different locations across the country. Traditionally, they would bring everyone together at one location. They need to convey current market conditions, opportunities, strengths, competition, and target markets. They'll need to show PowerPoint slides, an Excel spreadsheet, product information on an Internet site, look at a competitor's Web site, and get feedback on their marketing plans. The objective is to share information and gain agreement.

They would start with an agenda slide and a quick overview of the current situation. Then they would pass out a spreadsheet that details significant opportunities for key customers and prospects. They would then rank the opportunities from best to worst, and connect to their Internet site to review the product information that they provide to the market. While on the Internet, they would also view their competitors' sites to look at their offerings. Lastly they would pass out a draft of their marketing plan, seek input and adjustments, and finally work out a go-forward action plan.

New product introduction is a perfect subject for synchronous online events. To begin, everyone joins in a virtual meeting place. As they enter the meeting place, a cycling slide show designed to grab their attention greets them while everyone joins the room and settles in for business. The meeting begins with a polling slide that asks people to predict the final score for this weekend's game.

That aside, it's time for the agenda and a look at the current marketplace.

Using an "application share" function they view a spreadsheet that details significant opportunities for key customers and prospects. Using filters and other sorting methods, they rearrange data looking for group consensus for their best opportunities. They rank their opportunities real-time on the spreadsheet, rearranging earlier entries. Several participants who have particularly strong feelings are given control of the spreadsheet in order to make changes on the facilitator's PC. After saving the spreadsheet, it is made available to all.

LearnNET – The next best thing to being there.

What People Are Saying About LearnNET...

"I have worked with PowerPoint in the past, but as I mentioned it has been quite a while, and anything I can pick up from these mini-classes to make me able to work more efficiently is very much appreciated!"
- Helen Rapp about Lunch Break - PowerPoint Express

"I find them ALL very helpful. I always pick up some kind of habit that I did not already know - actually several."
- Cynthia Stoen about Outlook - Calendar and Contacts Express

"Great class! It was nice to see people having fun and enjoying doing their jobs."
- Lisa Holland about Univar Benefits Presentation

"This was my first LearnNET show and I've learned so much! Both Monica and Shirley made me feel very welcome and the instructions were spot on! I think this type of event would greatly benefit from future shows and will strongly advise them to register."
- Kim Aleena about Outlook - Customizing Express

>>[Click here](#) to find out what the fuss is all about.

We Would Like To Say Thanks!

Learning Services would like to send a big THANK YOU out to all of our Subject Matter Experts for taking the time to teach LearnNET events.

Beth Warren	Jim Cook
Brian Feldman	Jenny Morse
Bruce Johansen	Joe Grum
Christina White	Karen Weber-Millstein
Cindy Kitzs	Kathy Mashburn
Dean Schulz	Kelly Cattaneo
Deanna Turner	Linda Mardis
Debbie Hansen	Mike Mandrell
Jean Budreau	Michael Cooper
Jeanne Lance	Michael Zibit
Jen Webb	Monica Witt
Jill Ingram Locke	Paul Wharton

>>[Click here](#) to register for upcoming LearnNET events.

Aggressive Growth Continues!

Thanks to you, LearnNET attendance continues to grow year after year. Our knowledge-sharing and collaboration grows as well. Check out the stats below:

Year	Attendees
YR 2000	2000
YR 2001	4000
YR 2002	6000
YR 2003	8000
YR 2004	10000
YR 2005	12000

>>[Click here](#) to register for upcoming LearnNET events.

Become A World Class Learner in 2005

2005 is coming to an end and so is your chance at the [grand prize](#). Send in your five tickets to the World of Learning by December 31st to qualify.

See who has already been entered! [Click here](#) to view our current list of World Class Learners.

>>[Click here](#) to register for upcoming LearnNET events.

Figure 8-4

**It's important to say
"Thanks" and promote
the success and value of
synchronous e-Learning.**

Collaboration, learning, and communication in one event. By orchestrating an event such as this you show the value of synchronous online events to the company. It is no longer an adjunct event, but part of a more effective way to do business.

Share successes

It's important to reinforce to senior managers the impact of synchronous online events. A good way to do this is to document stories illustrating how synchronous online events support the company objectives. Here is one example.

The VP of Marketing in one division has a problem. His product supplier wants to train his sales team on one of their products. Both the marketing VP and the product supplier want to do this as quickly as possible. The VP's team of 20 salespeople are scattered across the country. There is a three-person product team that needs to train the sales team.

The traditional approach would be to conduct three in-person meetings at three locations around

Now it's time to review product information on their Internet site using a combination of "application share" for a real-time tour, "snap shot" for select highlights that enable the facilitator to annotate on the screen, and "Web tour" that enables everyone in the meeting to explore the Web site on their own. They follow a similar process to look at their significant competitors.

Once again using the "application share" feature, they view the marketing plan document. While looking at it together, people make suggestions, generate new ideas, and build a marketing plan that is acceptable to all.

The final step in the meeting is to build an action plan to achieve their marketing strategy. They use a blank document with room to capture the "who," "what," and "when" of the action items. They fill it in and agree on each activity in their plan.

It's better than in-person because they can share in its creation and agree to its accuracy as they view the evolving document. And best of all, no time away from customers and loved ones getting to or coming from the meeting. No time wasted, and many dollars saved because they eliminated the travel expenses of transportation and hotels. When you compare synchronous online events to the traditional in-person meeting, they have accomplished more with less. They have a high quality meeting while eliminating expenses and saving time.

In the illustration above, the meeting combined collaboration, learning, and communication in one event. By orchestrating an event such as this you show the value of synchronous online events to the company. It is no longer an adjunct event, but part of a more effective way to do business.

the country. The salespeople would split up and have to travel to one of the locations, with the VP and the product team as well, attending each meeting. The traditional approach is expensive with respect to travel and time away from customers.

How can the two companies get together to complete the training, do it quickly, and minimize the expenses? Synchronous online events is the answer. The product team plans a three-hour presentation that includes a PowerPoint show on the product, and a discussion on the market applications of the product. They use all the tools that they would use in a traditional meeting.

Both the VP's sales team and the product team come together for their meeting in a synchronous online event. It is a success. The three-hour meeting accomplishes its objectives. There is one meeting rather than three, no travel, and with minimum time away from their customers.

Outcome — if they had used the traditional approach, 24 people would have traveled (the VP and the product team three times) with each spending \$1,000 per trip (\$32,000). The time away from customers would have been about 32 man-days for everyone.

By sharing such a story with the senior management team, they would show how this approach supported the company objectives. They would view synchronous online events as an effective, efficient, cost-saving communication tool.

Here is another story that illustrates how it is a collaboration tool.

"I have to go to Houston (from Seattle) to create a quarterly report with my vendor business partner. Houston for one day? There has to be a better way!" The product manager wants help. This is another opportunity to show the power of the tool. In order to maximize the benefit you need to understand their objectives and determine the final work product.

They needed to create a PowerPoint presentation that would be ready to present on next Monday (today was Wednesday). You could say, "Let's use a synchronous online event for the meeting.

Get the vendor on the phone at 7 a.m. tomorrow and I'll show

you how to leverage the power of this tool, how to change the way you work together, and, by the way, how to save time and money. Cancel the trip."

At 7 a.m. Thursday morning, they connect through a synchronous online event, each in their own offices — no travel, no time away from the office, no hassles of getting together.

First, they understand the options that are available in this collaborative meeting space. They catch on quickly. They use a "share tool" that enables the product manager to show a draft PowerPoint to the vendor in real-time. Then she gives control to him. He works on the presentation on the product manager's PC. They use a whiteboard tool, which allows them to write together on a blank screen to brainstorm ideas. They connect in a collaborative meeting, thus changing the way they do business.

Three hours later, they both say "Wow! That was easy. We didn't have to travel, (\$1,000 for air, hotel expenses), take time away from the office (two days), and eliminated the hassles of getting there (airport time). We were more productive than in an in-person meeting."

Look for stories that show the value of the tool and share them.



Figure 8-5
Participation programs help achieve wide acceptance of synchronous e-Learning among employees.

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Look for stories that show the value of the tool and share them.

Look for impact opportunities

One way to gain attention in the company is to show the impact of bringing together groups of two or more people using synchronous online events. You can make things happen faster, and at a fraction of the cost of an in-person meeting or training event. Aim an initial approach at illustrating significant cost savings and increased productivity.

Think of a situation where you can affect the bottom line of a financial measure such as an income statement. A key component of an income statement is operating expenses, what it costs to run the business. Measure the results of using synchronous online events in terms of immediate, quantifiable costs.

Because you are able to eliminate travel expenses for a meeting, you can get an immediate financial win. Earlier I told a story where there was a \$32,000 direct travel savings, and 32 man-days saved to spend more time with customers. This is a financial win that should be shared with senior managers. This will go a long way to strengthen the positioning of synchronous online events as a part of the company's business processes.

Look for these "impact" opportunities. Be inquisitive. Look for situations that involve travel and time away from the office, and that are time sensitive. Productivity increases, and operating expense decreases, are key business drivers. A good beginning point is to look for:

- Meetings with suppliers
- Product education training
- Sales meetings
- Cross-functional team meetings
- Brainstorming sessions
- Regular project management update meetings

Quantify the value of minimizing travel expenses, the hassles of travel, the time away from the office and customers.

Start with opportunities that are easy to translate to synchronous online events, and show time and operating expense savings. Let me share such an opportunity.

The organization forms a work team to develop a national quality improvement process. Three members are at corporate headquarters and three other members are in different cities. Their charter is to develop the procedures, create the forms, and develop an intranet site to serve as a repository for forms and tracking. Also, they have a tight timeframe for development, and want to minimize the expenses.

How can the group share documents, gain agreement on key activities, and minimize the investment of time and money? Using a synchronous online event is the answer. During the early stages of the project the group would meet in an online meeting place where they would share forms and procedures. They would mark up the documents and make corrections real-time, with no travel and no time away from the office.

Now comes time for a draft review of the intranet site with the work team and a representative from each of five regions around the country. For the draft review the development team wants comments from the regional representatives on key decision points. Using a synchronous online event, the meeting development team and the regional representatives share the presentation while making comments on the draft document for all to study and to gain agreement. Mission accomplished once again, with no travel, no time away from the office, and no airport time.

Speed of agreement on the first draft would be half the normal time. If all the participants would have met at corporate headquarters, that's eight people for a day at \$1000 each for air, hotel, and other expenses. The investment would have been \$8,000 plus one or more days of valuable time wasted.

The results are measurable, and it was easy to satisfy the team's needs using synchronous online events.

Summary

Although synchronous online events are powerful tools that give an organization a competitive advantage, the “how” is not always readily apparent. A critical beginning point is to focus on the benefits of the tool and not the technology. A company wants to know how using the tool can help them achieve their strategic objectives. You need to show the connection.

You also need to make it easy to use and promote it throughout the organization. This means weaving it into the fabric of the organization by showing how it can be a learning, communication, and collaboration tool. A good way to do this is to tell stories. Share among key executives the impact of eliminating travel and time barriers. Concentrate on business results and financial impact.

Here is a simple checklist to make sure you have all components in place:

- Relate to the company objectives — Understand, connect, and map the results to them.
- Make it easy to do — Explain the “what and why,” minimize the technology, and utilize an event Producer.
- Promote it — Brand it, develop an e-Newsletter, create an executive presentation, and create participation programs.
- Weave it into the fabric of the company — Establish it as a collaboration, learning, and communication tool.
- Share successes — Tell stories, explain the financial impact, and show value to senior management.
- Look for impact opportunities — Show the effects of eliminating travel and time barriers, search for critical needs, and select straightforward opportunities.

Executive Summaries

By Karen Hyder

I've asked several expert users of Web conferencing software to review four of the leading (in terms of market share) products, based on their experience as online facilitators. Each of these summaries addresses the same features and factors, and information is current as of December, 2006. You will want to review each product's Web site and possibly download the trial version before making decisions, both in case features have changed since the reviewers created these summaries, and also to make your own observations about the product's suitability for your use.

Executive Summary: Centra

Interface design and ease of use (Learning curve for Hosts and Moderators)

- Learning curve for administrators is steep relative to other tools — scheduling and creating a session are not intuitive. If you've never used another tool you won't find it too hard, but if you have, you'll be disappointed.
- The actual user interface is clean and simple. Improvements to version 7.5 have enhanced the intuitiveness of icons for both learners and presenters.
- There is no native integration with PowerPoint or other productivity tools. Presentations have to be converted to GIF, JPG, or HTML files before being uploaded to a session, although, on the plus side, Centra does build in the ability to convert them.
- Participant interface includes a list of the agenda items, which is largely nonfunctional and takes up some valuable real estate.
- Session content can be created and stored well in advance — in fact, it's much easier if you do.

Content loading and persistence

- Content can be loaded into Agenda Builder in advance and accessed during the sessions.

Connectivity

- You must save agenda items over 50K to the client side, and then users can download them when entering the session. This happens relatively quickly, and does permit more control and versatility in the actual event.
- Back-end architecture is bandwidth friendly. However, it does not do well when recovering a user who experiences a connection issue.
- A nice surprise is that the session doesn't close out if the leader becomes disconnected — a real problem with some other tools.
- On-demand sessions can become corrupt, and the application is not able to detect this.

System requirements

As listed in <http://www.centra.com/download/products/VirtualClasses.pdf> (Virtual Classes document), minimum system requirements are:

- Windows 98, 2000 (SP1), XP
- Internet Explorer 5.x, 6.x
- Netscape 4.5x, 4.7x, 7.x
- CPU: Pentium, 350 MHz
- Memory: 128 MB
- Disk: 40 MB free space
- Network: 28.8 kbps
- Monitor: 16-bit colors (high colors).

Administration, ease of deployment, scaling, LMS integration

- Centra provides seamless integration with Saba LMS.
- Centra scales easily to large audiences, with no noticeable degradation in performance.
- There are support issues — getting clear answers from Saba is not easy, and in some instances, their documentation has been incorrect.
- Centra scales up to very large deployments through satellite servers and domain architecture.
- Centra's reporting functionality is decent, but does not natively permit reports across events, time periods, etc.

Recording sessions

- Recording and publishing sessions for on-demand playback is quite easy. Enhancements to the editing features in 7.5 make this an even more attractive feature.

Participant response methods

- Available emoticons are laughter, applause, Yes and No, and a raised hand.
- Text Chat works similarly to other applications.
- There is a feedback indicator for the presenter.

Audio — VoIP/Telephony

- Excellent engineering of quality VoIP at low bandwidths. This is really one of Centra's hallmarks.
- The instructor must grant participants microphone privileges to speak — this can slow down interactivity.
- Centra 7.5 has much improved audio codecs.
- You can combine Telephony and VoIP in the same call, but it comes at a hefty cost. Centra has a unique charge for their telephony gateway when not using ASP. Some competitors have this functionality out-of-the-box.

Polls and testing

- The polling feature in 7.5 is improved, but still doesn't allow selection of multiple responses, or modifying the text font or size.
- Evaluation tools are there, but are not robust or full-featured (e.g. does not permit drag-and-drop, and does not permit individualized "Incorrect" feedback according to the response selected).
- Some users have noted inconsistent performance in tracking users — which could be a serious issue for users concerned about compliance.

Chat (Text-based instant messaging)

- Again, much improved in 7.5. Session leaders now have options for graying out read questions, time stamping, direct response to sender, and an option to alert participants (automatically pops up a presenter/host message when sent to participants).
- The floating text Chat window can be cumbersome and blocks the interface.

Q&A (Presenter-managed Chat)

- Centra combines Chat and Q&A into a single feature. If a question is sent privately to the presenter, there is no option to then make that question public or push out the answer to all participants.
- There are options to enable or disable both public Chat and Chat between participants.

Emoticons

- As noted above, emoticons are very basic — laughter, applause, Yes and No. There is also an option to indicate that a user has “stepped out.” Would be nice to see more options, particularly an “I don’t understand” option.

Whiteboard

- Overall, the whiteboard options are quite good. In 7.5, the whiteboard is object-oriented — a nice feature.
- Some tools are identified by user, others are anonymous.
- Annotations aren’t automatically saved from slide to slide; however, you do have the option to save them as a snapshot which appears at the end of your agenda.
- Markup tools for participants are associated with microphone rights, which is unfortunate — sometimes you want to give markup privileges without microphone privileges.

Application sharing

- Works effectively, with options to adjust frame rate and color depth.
- Markup tools for application sharing are limited and hard to use — but, given that some tools don’t have this feature at all, I’d rate this a plus.
- Centra does not generally preserve slide transitions and animations unless the file is brought in as HTML.

Hosting, licensing, pricing

- You can host Centra either internally or externally.
- Centra is expensive relative to other tools.
- Users hosting Centra internally have reported support issues. Centra support staff seem to have little experience with large multinational firms and the related network complexity. Support is much better with smaller networks.

Nice surprises

- There are breakout rooms to divide participants into smaller groups (not recorded for playback).
- Breakout rooms are simple to use. Participants can be randomly assigned or sent to a specific group.

- Centra permits importing a broad range of file types with associated files (e.g. a local HTML file with an embedded SWF movie).
- You can switch between normal and full screen view easily.
- Centra user training program is very effective. An annual summit supports community development.

Annoying aspects

- Floating text Chat window is annoying — should be dockable or tabbed.
- Slides are fixed size, do not rescale with window size.
- There is no resources area to permit participants to download documents during the session; no Export as PDF ability.
- Doesn't support Macintosh.

Executive Summary: Elluminate 7

Interface design and ease of use (Learning curve for Hosts and Moderators)

- Elluminate 7 has a clean, highly functional interface and some nice improvements from version 6.
- Elluminate's moderator and participant tools are easy to understand and to access. All the most frequently used functions display on toolbars or other areas of the screen. Participant management settings and privileges are very customizable. For instance, a moderator can remotely adjust the audio levels of anyone using the Talk button.
- The default screen layout displays a large workspace to the right, for slides and applications. The communication tools, direct messaging, audio, and participant list, display to the left. You can change this layout to other preset configurations to control display and size of tools.
- You can navigate slides with a click, a drop down list, or a keystroke.
- Display areas automatically scale as users resize the window.
- Shortcut or Hot keys are customizable.

Content loading and persistence

- Persistent file and session setup.
- You can upload files into the administration environment ahead of time, and you can select files from the list once logged into the session room.

Connectivity

- Participants can have a username and password, or simply log in with a URL link.
- Elluminate manages each participant's connection very well. When users identify their Internet connection speed (28.8 kbps and up), Elluminate can feed data to them at an appropriate rate.
- If participants are disconnected during the session, they will automatically be reconnected. The connection progress display is cool looking, and provides comfort to the impatient.
- In general, connectivity is excellent.

System requirements

Elluminate runs on Windows (for administrators and presenters), and supports participants on Mac and Solaris.

Requirements for PC:

- Windows 98/ME/2000/XP
- Pentium III 500 MHz processor
- 128 MB of RAM
- 20 MB free disk space on your hard drive
- Sound card with speakers and microphone or headset
- 28.8 kbps Internet connection.

Requirements for Mac:

- Mac OS 9.1 and 9.2; Mac OS X 10.1, 10.2, and 10.3
- G3 233 MHz processor
- 64 MB for OS 9.1 or 9.2 and 128 MB for OS X
- 20 MB free disk space on your hard drive
- 28.8 kbps Internet connection.

Administration, ease of deployment, scaling, LMS integration

- All users need to download and install a Java applet. The process can take several minutes.
- Users behind firewalls must have additional network ports opened. Be sure to talk to IT staff early to make the change.
- ASP clients can use the Elluminate Live! Session Administration System (SAS) to create sessions, create or upload participant log in IDs and passwords, invite participants, and generate reports. They can also control access to recordings. Server-based administrators use Elluminate Live Manager to set up sessions and users.
- Elluminate integrates with Learning Management Systems.

Recording sessions

- Sessions can easily be recorded by controls at the bottom of the screen. The recorder can be paused anytime. When restarted, new action gets appended to the original file. Recordings cannot be edited.

Participant response methods

Elluminate offers a number of ways in which participants can respond.

Audio — VoIP/ Telephony Polls and testing

- VoIP audio is excellent. Even when participants experience a momentary loss of connection, it records the audio which is then speeded up and played when they rejoin. The presenter's voice sounds a little funny, but the feature works very well.

Polls and testing

- Polls are unusual because question and answer text is displayed on a PowerPoint slide and participants are asked to respond by clicking on buttons on the toolbar. Buttons can be changed to display the needed number of responses from two responses (Yes and No), up to five responses (A through E). Participant responses are shown next to their names and presenters can display a chart with aggregate data.
- Use the Quiz Manager to create test questions with multiple choice and short answers. Quizzes can be presented to participants at any point during the session. All results are saved to an XML format.

Chat (Text-based instant messaging)

- You can send direct messaging text to the whole group, or privately to individuals. Font size can now be made larger and smaller.

Q&A (Presenter-managed Chat)

- Not available.

Emoticons

- To get low-level feedback from participants in response to questions like, "Are you able to hear me," "Do you see the slide?," "Are you ready to move to break out rooms?," presenters can ask participants to click on the emoticons found in the participant information window. Emoticons include Happy, Clap, Confused, or Disapprove. When a participant clicks on the emoticon but-

ton, others see that emoticon displayed next to the person's name in the participant information window for a few seconds.

- A participant can show he has stepped away, but has not logged out by clicking the blue door button. The participant's name in the participant information window changes to grey and is italicized; the word "Away" is displayed next to it.
- When participants click the hand raise button, a "ding" sound is produced. A blue bar flashes to indicate to the presenter that a hand is raised. A number that corresponds to the participant's place in the queue appears next to the name. The hand raise indicator displays until the participant turns it off. The moderator can also toggle the hand raise button off if a participant does not remember to do so.

Whiteboard

- Elluminate's whiteboard is easy to use. Presenters can use pointers to emphasize key text or label parts of a graphic. All participants can use whiteboard annotation tools at the same time adding free-form text and graphics using a pen or highlighter or text tools, pointer, and drawing shapes tools and a selection tool. They can also open clip art, paste text and images, select and move drawn objects and align items on the screen.
- The whiteboard is object oriented. Objects typed, drawn, or inserted on screen can be selected, moved, deleted, or formatted.

Application sharing

- When sharing an application, a moderator can use one of several settings, Share Application, Share Desktop, or Share Region. These options scale to fit, can be turned on, and will affect the display of each shared window.

Illuminate

Pricing for different licensing arrangements

# seats	Annual		Perpetual
	Server (self-hosted)	ASP (hosted)	Server
25	\$16,500	\$18,600	\$37,800
50	\$27,700	\$31,480	\$67,200
75	\$37,850	\$43,153	\$93,660

Hosting, licensing, pricing

- Licensing is available as server-based or hosted versions. Pricing is per concurrent user.
- Elluminate (SAS) can host software, or organizations can internally host Elluminate Live Manager (ELM)
- The table at left indicates the licensing arrangements. An annual fee applies if you host Elluminate on your own server (self-hosted), or if you choose to be hosted on Elluminate's servers (hosted). If you purchase the software outright, you pay the Perpetual fee indicated, plus an 18% maintenance fee from Year 2 onward.

Other features

Participant list — display of log in names

- Moderators and participants can see who's logged in by viewing the log in names in the participant list. You can also display a participant profile for each person, including location and photo (or avatars).
- Moderators can easily control participant privileges by using the controls in the participant list.
- Moderators can observe participant mood indicators, raised hands, and latency in data flow by viewing special indicators in the participant list. Elluminate calls this Elluminate Sensory Perception (ESP).

Multimedia — share movies

- Moderators can share Shockwave Flash (SWF), MPEG or MPG, or QuickTime (MOV) files. Multimedia playback requires users to have configured the appropriate software, i.e., Shockwave Flash, Windows Media Player, or QuickTime.

Webcam — share personal video cameras

- Users can share a live image of themselves during the session. The quality of the image can be reduced if bandwidth limitations restrict full motion and full color.

Nice surprises

- The Audio window displays a visual representation of audio volume. All participants can adjust their own level right on screen. Moderators can remotely adjust the audio levels of anyone using the Talk button.
- Individuals and groups can be pulled into a private meeting area so that moderators can troubleshoot technical issues away from the main session.
- Elluminate caches multimedia files locally (stored temporarily on user's machine) as participants join. When the Moderator plays the file, a local version is shown thereby eliminating delays in playback.

Annoying aspects

- Because Elluminate's file conversion creates a static whiteboard file, PowerPoint animations and builds don't work.

Executive Summary: WebEx

Interface design and ease of use (Learning curve for Hosts and Moderators)

- Webex's interface design and ease of use is relatively good. Toolbars give easy access to sharing and annotating, and Power Panels containing Chat, Video, Polls, and participants' names and feedback indicators.
- Meeting and participant options in the setup screens require research. You must turn the annotation and print options on if you want participants to use them.
- The environment is clean and you can collapse Panels. Alerts pop up so important messages and questions don't go unnoticed.
- When in Full Screen mode, Panel buttons allow users to reopen and use Chat.
- You can control participant privileges all at once.

Content loading and persistence

- Load any PowerPoint file directly into the session room. It will be converted to UCF format.
- Files and polls that are loading into a session room persist until they, or the session, are deleted.
- Content can be loaded onto separate tabs so presenters can easily change from showing one file to showing a different file. When the session ends, content is automatically removed.

Connectivity

- Connections to WebEx sessions are pretty solid. Mind your pace when application sharing because not all participants are likely to receive the image at once. Their "last mile" or their local connection to the Internet will affect the speed. Participants also notice latency if everyone is using the whiteboard at the same time.
- WebEx recovers lost connections quickly. Participants should be reminded to leave open the Bridge window that states "Do not close this window."
- VoIP audio can be choppy on bandwidth-intensive actions.

System requirements

- Please visit the WebEx site for specific system requirements (<http://support.webex.com/support/system-requirements.html>).
- Recent versions of Training Center can support Mac, Solaris, and Linux users, with somewhat limited functionality.

Administration, ease of deployment, scaling, and LMS integration

- Internal registration system can generate invitations, require or not require that participants register and use a password to join the session. There is good functionality for managing sessions built in.
- WebEx performs well when supporting large groups (up to 500) and integrates well with Learning Management systems such as Plateau and Sum Total if users have other learning materials in addition to live sessions. Presenters can create and organize sessions, track participants, set completion standards. Users can access lessons and materials as needed.
- Learning Manager by GeoLearning, an on-demand integrated LMS, will be available in early 2007.

Recording sessions

- You can record sessions with audio from a conference call or VoIP by using the WebEx Recording and Playback software. This creates files in a proprietary format with the extension WRF (WebEx Recording Format).
- Use the WebEx Recording Editor software to edit recordings.
- When users access recordings posted on a Web site, the required player software is automatically downloaded.

Participant response methods

Audio — VoIP / Telephony

- Callers can opt to join by phone or full duplex VoIP. Bandwidth can impact the clarity of the VoIP audio.
- Attendees who join by phone display a phone icon in the attendee panel, while attendees on Internet phone show a microphone icon.

Polls and testing

- Create polls in advance either inside a WebEx session room or by using Poll Questionnaire Editor, a standalone software tool that saves you from needing to log in just to create polls. Polls are saved as ATP files and uploaded into the session later.
- Poll question types can be set to allow participants to choose from multiple answers or to type in their own answers. Set Multiple choice, Multiple answer to allow participants to select several answers from the list.
- Individual responses can be viewed and saved.
- Tests can be created from scratch, adapted from another test, or converted from a poll. Instructions can be added to the test and several question types are available including Fill in the Blanks, True/False, Multiple Choice, and Essay (up to 5000 words).
- Tests can be sent via e-mail or participants can access a Web site with links to available tests before, during or after a session. Invitations and scores can be sent automatically.
- In order to connect testing, sessions must be set up with the “Require attendee registration” option turned on.

Chat (Text-based instant messaging)

- Standard text Chat works similarly to other applications. Participants are able to Chat privately with each other and to everyone.
- There are options to enable or disable public Chat, and to allow Chat between participants.

Q&A (Presenter-managed Chat)

- Q&A is a separate panel from Chat with similar characteristics. Participants can type messages to the presenters, but the messages are not seen by everyone. The presenter can choose how to reply, publicly or privately.

Emoticons

- WebEx provides Feedback toolbars so participants can send visual feedback to presenters during the session. The toolbar buttons include Hand Raise, Yes, No, Faster, Slower, and a selection of

graphical icons to convey that the participant is smiling, confused, or needs a break.

- Participants' selected icons display next to their names and can be cleared by the presenters when responses are no longer needed.

Whiteboard

- The whiteboard has useful tools and items can be deleted, but cannot be selected and moved to another location.
- Participants' annotation toolbar is not turned on by default. It must be turned on in order to use it.
- Each user has a default annotation color. Sometimes the selected color is too faint and needs to be changed.
- Participants can use a personalized pointer to identify their own text or flag an area of the screen for attention. Each person's log in name displays when they use the arrow pointer.
- Annotations can be saved.

Application sharing

- Application sharing works well and has simple tools.
- WebEx has a feature that doesn't let the presenter accidentally share the WebEx interface window, instead of the demonstration software.
- Annotation tools can be used during application sharing.

Hosting, licensing, pricing

- WebEx hosted services provide access and tools to all presenters and attendees with no additional IT support or resources. Organizations can secure and control sessions and content using on-premise EMX service by hosting the tools on an internal network.
- Pricing for (hosted) Training Center ranges depending on number of users and actual usage and can be \$150-\$225 per seat per month. This does not include conference call or VoIP costs.
- Initial one-time-only set up customization and fees can range from \$700 to \$4,000.
- Pay-per-minute use is available at \$0.33 per minute per user, plus audio.

Nice surprises

- Break out sessions allow users to connect with each other and easily use the interface tools on their own. Participants can pop back to ask for help if needed.
- Participants can be given permission to simply save or print the loaded PowerPoint files.
- Supports a large variety of files including many audio and video types, WebEx Recording files (WRF), and Flash movies (SWF). Uses Universal Communications Format (UCF) technology to transfer media files to users more efficiently. Appropriate media players are needed on each participant's Windows computer.
- Animations that were set up in PowerPoint do animate when slides are displayed.
- How Do I tutorials are very useful when learning the software tools. These are online at http://support.webex.com/support/howdoi.html#anc_hdi10.

Annoying aspects

- Opening and using polls is awkward.
- Panels don't reset back to the original layout automatically. For instance, you must perform a Clear All when you've finished showing a poll in order to close the attendees' Polling Panel. If the Polling Panel stays open, it can be distracting. Alternately, you can tell the participants to use the

panel's menu to reset to default when necessary.

- If the presenter moves the mouse to the far right side of the shared window, the learner's screen will display only the right and not the left part of the screen. Ask participants to avoid this by setting the Sharing View option to AutoFit.

Executive Summary: Adobe Acrobat Connect Professional

Interface design and ease of use (Learning curve for Hosts and Moderators)

- The learning curve for Adobe Acrobat Connect Professional is moderate to steep. This tool requires a different perspective than some other Synchronous online tools.
- There is so much flexibility with pods, layout options, and settings that it can take time for presenters and Producers to become comfortable using the interface and tools.
- Experience with Flash and Captivate is a plus for presenters, designers, administrators, and Producers.
- The application can be extended using Acrobat Connect Collaboration Builder SDK to create interactive activities and instructional tools including games, simulations, and quizzes.

Content loading and persistence

- It's easy to load PowerPoint slides, and any Shockwave files (SWF). You can convert Word documents with Flashpaper (<http://www.adobe.com/products/flashpaper/>) and load them as a SWF.
- Flash files (SWF) can be loaded and displayed during sessions. If SWFs include e-Learning or feedback interactions, participants can use onscreen buttons and functions to click through activities independently of each other.
- If animations are set in PowerPoint, for example, bulleted items set to build one line at a time, the animations will work in Adobe Acrobat Connect Professional. On-slide Hypertext links are "clickable," so it's easy for participants themselves to go to them.
- Even when the room is closed, Chat text, loaded content, and poll data persist. Come back any time, and it will still be there.

Connectivity

- Any user with a Flash software-enabled Web browser can join an online Acrobat Connect session without having to download extra software. The claim is that Flash Player is installed on 97 percent of Internet accessible computers, so everyone already has the required plug-in. Confirm that your participants aren't in the remaining 3%.
- Presenters need to download an additional Acrobat Connect add-in to have access to audio controls, uploading, or sharing tools. There is now a button in Audio Wizard to initiate the download of the add-in.

System requirements

- Presenters must use Windows or Mac. Participants can use Windows, Linux, and Solaris machines.
- See <http://www.adobe.com/products/acrobatconnectpro/productinfo/systemreqs/>

Administration, ease of deployment, scaling, LMS integration

- Users with administrative privileges can use their individual names, which they can type in to create usernames and passwords, or groups of names, properly formatted, can be uploaded into the Users and Groups portion of the Adobe Connect Enterprise Manager. Users can be assigned to groups and given access to just their associated sessions.
- A number of different kinds of data are collected on each session. Reports are generated to document who has joined the sessions, individual responses to poll questions, and the name of each

file that has been loaded into the sessions.

- Files uploaded to the session room can be backed up to the server. Files loaded from Adobe Presenter to the server can be opened into any session room using the Documents, Select from Content Library command.
- You can set privileges for participants, hosts and presenters as part of the session settings. Hosts and presenters can log in any time. Users are placed on hold until the hold is released.
- Adobe Acrobat Connect Professional integrates with AICC- or SCORM-compliant learning management systems (LMS).

Recording sessions

- Recordings are easy for presenters to create. Recordings are captured in Flash format and can be played back using a Flash Player. A URL is generated when a recording is created to direct users to that recording.
- Transcripts are generated and show gross detail based on layouts used during the session, and individual actions including new slides and participant Chat messages.

Participant response methods

Audio — VoIP/Telephony

- Multiple users can access VoIP audio and speak concurrently — although low bandwidth connections can cause latency.
- Webcams can also be used. Camera images can be freeze-framed if resources are needed for other activities.
- For teams using a Meeting license, attendees can be called on the phone to bring them into the audio conference.

Polls and testing

- Poll text is entered into separate pods and can be set to Multiple choice or Multiple answer. In order to show polls, presenters can open pods one at a time, or show several polls at once by moving to a polls Layout.

Chat (Text-based instant messaging)

- This is the best Chat tool I've seen. Presenters can create and use as many Chat pods as are needed, and the same Chat pod can be used over multiple Layouts. Chat pods can be moved and sized, and displayed text can be sized to a larger or smaller font.
- Messages can be cleared by the presenters at any time.
- Presenters can use a Private Chat pod in an area of the screen not seen by participants.
- Participants can send and receive public and private messages.
- By clicking on a name in Chat, the addressee in the To: field changes to that name. This method is much easier than having to scroll through a long list of names to address a new message.

Q & A (Presenter-managed Chat)

- If you prefer to “filter” incoming Chat messages, you can assign any Chat Pod Q & A-style control. Chat moderators respond to the group or just to the individual submitter.

Emoticons

- “My Status” indicators (I have a question, Thumbs up, Thumbs down, Go faster, Go slower, Speak Louder, Speak softer, and Stepped away) are integrated with the Attendee list. The names of those who have selected a status option move to the top of the Attendee list so presenters won’t miss responses. Unfortunately, the Chat addressee list, which is normally in alphabetical order, reorganizes in order of status.

Whiteboard

- There is a variety of whiteboard tools to use: text, shapes, highlighter, line, undo, and redo.
- When multiple participants type on the whiteboard, data flow bogs down and VoIP audio can become choppy.
- Be sure to use the whiteboard function rather than the whiteboard overlay function (which allows annotation of a PowerPoint slide). When whiteboard privileges are given to participants, they also have access to options like Stop Sharing which closes the active PowerPoint file.

Application sharing

- Access to Application sharing is right in the middle of the Share pod or Display area. Presenters can choose to share an application, an individual window, or the entire desktop and everything on it.
- When using Desktop Sharing; the Stop Sharing option is available in the lower right corner of the screen in the Windows System tray. When you are Application Sharing, the Stop Sharing button is in the top right corner.

Hosting, licensing, pricing

- The software tools can be hosted by Adobe, or can be installed inside an organization and administered by internal staff.
- Pricing models have been recently reworked with the rebranding of Macromedia Adobe Breeze to Adobe Acrobat Connect and Adobe Acrobat Connect Professional.
- View this link for a table of pricing feature information: <http://www.adobe.com/products/acrobatconnectpro/purchase/comparison.html#note03>.

Other features

- Wired connections are best for consistency of data flow. Presenters should have a DSL/Cable connection and minimum of 1 GHz CPU processor speed for application sharing.

Nice surprises

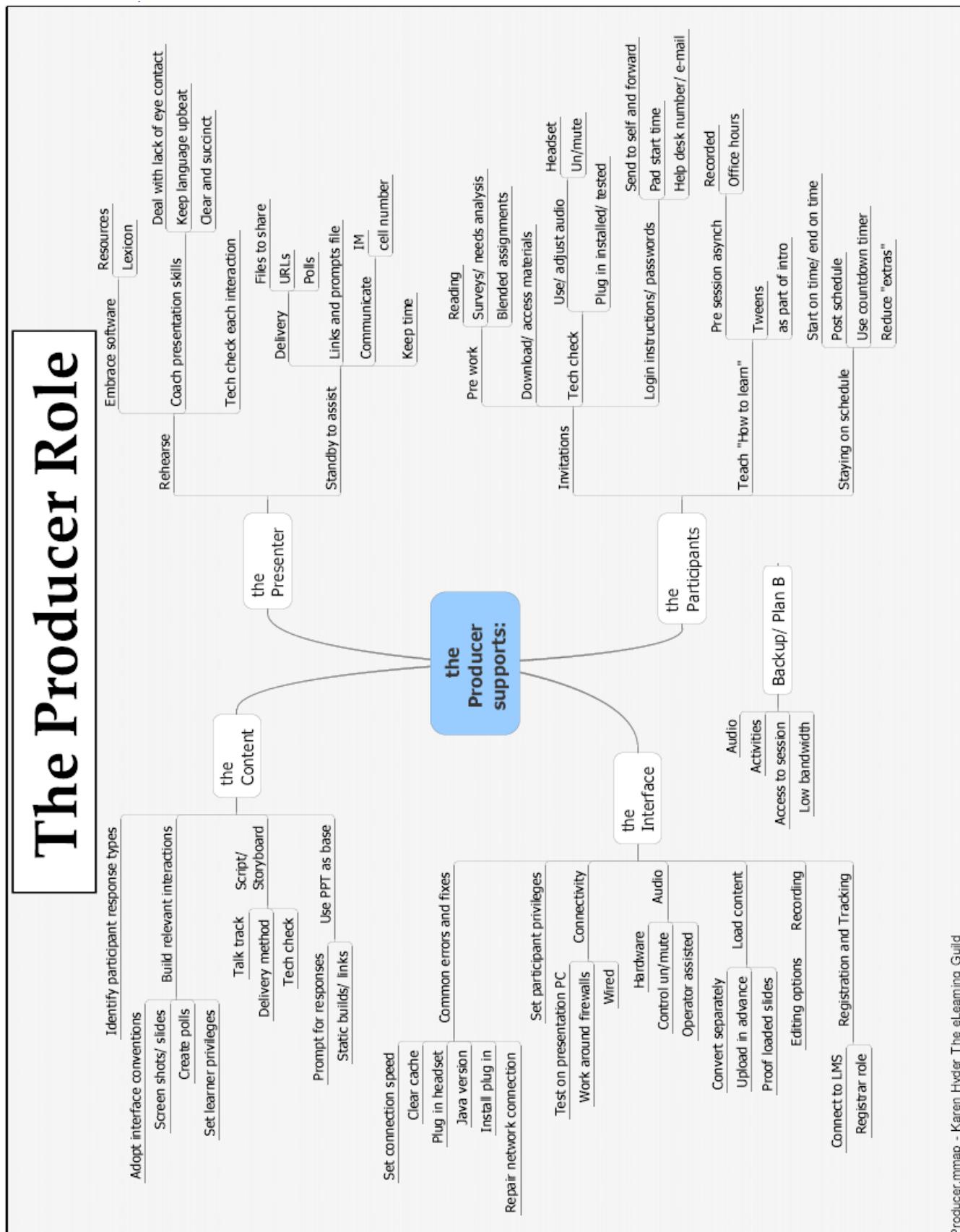
- Flexibility of pods and layouts allows presenters and Producers to organize complex content and polls, and display each with a single click.
- Layouts that organize the content and polls become the section heading in the recording. It’s easy for those who view the recording to navigate to the sections they are interested in.
- Poll pods can be open in a hidden, presenters only, area and can be dragged in as needed.
- Chat messages can be cleared at any time.

Annoying aspects

- VoIP audio can be challenging to optimize. There are several factors and settings that impact the audio. To increase volume inside Adobe Acrobat Connect Professional, you must right mouse click to access the Settings option.
- Some tools are buried deep in the options and take a few clicks to get to.
- When the Presenter Only area is open, and pods are dragged around, the display area can resize to a very small size. The redrawing can take several seconds. There is a lock option, but it restricts certain desired actions as well as undesired actions.

APPENDIX B

The Producer Role



Speaker Tracking Form

Online event:
Session number:

Session Name:

Session URL:

Speaker Contact Information

Presenter:

Job Title:

Primary Phone:

Company:

Phone During The Event:

Contact (other than speaker):

Time Zone:

Phone:

Email:

Email:

Speaker Technical Set-up
Prep Session date(s):
Dates

File Name(s)/Type(s):

Sent user id, pw and link

Handout Name:

Initial meet

Presentation Name:

Prep session

Additional Files:

Dress rehearsal/ Finalize room

Web Link(s):

Handouts in

Audio check

Machine Type:

Event date and time

Connection Type/ Check:

Quality:

Audio Type/ Check:

Quality:

Setup Notes:
Research:
Host Prep Notes

Activity:

Activity:

Activity:

Activity:

Activity:

Activity:

Activity:

Activity:

Poll Text:

Speaker Observations:

How did it go overall?:

Comfort with tools:

Effective use of tools:

Content:

Credibility:

Timing:

Vocal quality, understandability:

Should we use this speaker again?

Technical issues:

Use of Tools:

Chat:

Layout

Q & A:

Application Sharing:

Polls:

Whiteboard Tools:

URL Push:

Pointer:

Use Of Graphics:

Clarity Of Slides:

Used Template:

Speaker Experience

Face-to-Face events:

Our online software tool experience:

Other synchronous programs:

Speaker Co-Operation/Availability

How available before event for rehearsals:

Handouts on time:

Handouts formatted correctly:

Time considerations:

Unavailable dates:

Recommendation:

Survey Results:

Max number logged on during session:

Number of respondents to survey:

1. The presenter was knowledgeable about the topic.

Strongly Agree Agree Disagree Strongly Disagree

2. Presentation content matched session description.

Strongly Agree Agree Disagree Strongly Disagree

3. I will be able to apply the information I learned in this session.

In the next 3 months In the next 6 months
 In the next 9 months In the next 12 months Never

4. The speaker effectively used these interactions:

Polls Open-ended questions Application sharing
 Chat Embedded PowerPoint slides

5. Materials were appropriate to the session.

Strongly Agree Agree Disagree Strongly Disagree

6. I would attend another session by this speaker.

Strongly Agree Agree Disagree Strongly Disagree

Comments:

Chat Text



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Guild Benefits	Associate	Member	Member+	Premium
eLearning Insider	✓	✓	✓	✓
Annual Salary Survey	✓	✓	✓	✓
Past Conference Handouts	✓	✓	✓	✓
Resource Directory – Access & Post	✓	✓	✓	✓
Info Exchange – Access & Post	✓	✓	✓	✓
Job Board – Access Jobs & Resumes	✓	✓	✓	✓
Job Board – Post Resumes	✓	✓	✓	✓
Job Board – Post Jobs	X	✓	✓	✓
Guild Research – Online Briefings	✓	✓	✓	✓
Guild Research – Reports	X*	✓	✓	✓
Guild Research – Archives	X	✓	✓	✓
Learning Solutions e-Magazine	X*	✓	✓	✓
Online Forums – Archive	X	X	✓	✓
Online Forums	\$	\$	✓	✓
Face-to-Face Conferences	\$	\$	\$	✓*
Pre-Conference Workshops	\$	\$	\$	✓*
Event Fee Discounts	X	20%	20%	20%
Other Event Site License Discounts	X	X	20%	20%

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