EBOOK

A JUMP START FOR VIRTUAL FACILITATION

We all know the virtual environment is different from the traditional classroom and the same rules may not apply equally. Our training designs for virtual sessions have been developed to maximize participation and learning, and rely on a variety of virtual platform functionalities.

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COMPANIES

There's a big difference between occasionally working from your kitchen table and setting up shop in your home for an extended period of time.

The Core Attributes of a Great Virtual Facilitator

1. Be an active listener.

You are encouraging active participation, so be a great virtual listener—voices, raised hands, audience feedback, chats, lack of chats, tone of voice—and react to their participation. Also, listen to what is NOT being said.

2. Be enthusiastic.

Attribute 2

Your voice is the most important content-delivery tool in the virtual classroom. Make it interesting. Think about shows and podcasts that lure you in.

Remember, your hand motions, body language, and big smile may not be viewable, so make the extra effort to relay all your emotions through your voice.

3. Have a participant-centered mindset.

Attribute 3

Keeping a participant-centered focus helps you achieve your mutual objectives. Think about what you want learners to do at the end of the session. If you keep the end in mind, you will get there.

If the session or technology drifts away from your plan, find a shortcut to refocus on the participants and their needs.

4. Use humor; make people laugh.

The virtual classroom should be fun. Bring your best sense of humor. Participants should want to be there because they're having a good time. The learning is important to them, so make sure it's also very entertaining and engaging.

Solicit your peers for ideas on humor and fun. Search the Internet for relevant anecdotes, and build them into your script.
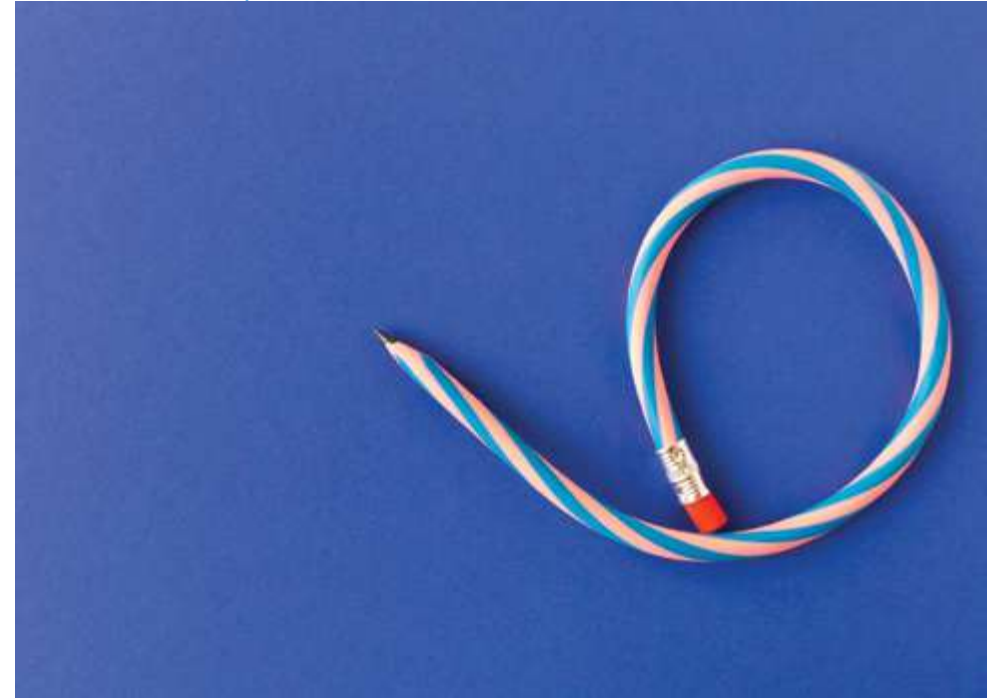
5. Be flexible.

No plan survives its first contact with reality. When problems occur, stay the course and manage the situation with grace.

You may need to change your tactics based on environmental factors or audience reaction, but you know what is important and you may need to flex your approach to make the intended impact.

6. Build trust.

Attribute 6

Not just between you and your participants, but among the participants as well. Listening—and showing that you are listening—by connecting, using names, and seeking their input is the first step in building trust.

ABLE
Demonstrates Competence

BELIEVABLE
Acts with Integrity

CONNECTED
Cares about Others

DEPENDABLE
Honors Commitments

7. Be comfortable with silence.

Attribute 7

Just as when you're face-to-face with people, sometimes people have their heads down and are working diligently. You want to be comfortable with silence, so it gives them a chance to do their best work. Recognize that the online environment may not be as comfortable for everyone. Also, remember that everyone may be on mute. So when no one laughs at your joke, it's OK—*you* know it was funny.

8. Engage participants' emotions.

Attribute 8

The emotional connection you have with your learners is another one of your secrets to success in the virtual classroom. You need to become comfortable addressing and acknowledging people's feelings—the full range of their emotions. When you encourage conversation, you'll say, "Tell me more." When you are eliciting emotions, say, "Tell me why." You can also request of them, "Tell me about a time when you felt <insert emoji here> at work."

9. Consistently seek out their voice.

Attribute 9

Consistently seek out their voice and reinforce it throughout the session; e.g., "As Julia said..." and "Tell me more about that."

In virtual settings, it sometimes helps to call on individuals directly since you can't influence someone into answering by using eye contact as you might in the classroom.

You Got This!

Summary

What makes you a great facilitator in the traditional classroom needs to be extended to the virtual environment. The principles that underlie teaching or training live are much the same as in a virtual classroom. Your goal is to connect people, at a deep level, to information and strategies that can transform their world.

Use this link to download and print!

Prepare Your Command Center

OK, having the ultimate home office for broadcasting live events would be great, but this is not realistic. However, there are a few things that will facilitate a great experience.

Technical Best Practices

When possible, a primary computer for delivering, a secondary computer for accessing/monitoring as a participant, and a landline telephone are optimum.

Primary Equipment

1. Hardwired/cable high-speed Internet connection on a laptop or desktop computer. Avoid Wi-Fi as primary because of connectivity issues.

2. Landline telephone—Landlines still provide much higher audio quality. (Yes, some people still have these!)

3. High-quality headset for the landline connection—We suggest Panasonic KX-TCA60 Hands-Free Headset (about $20 from Amazon). If you are using a wireless telephone handset, have a hardwired line to access if the power goes out.

4. Do not use a cell phone or Bluetooth® headset, as they are unreliable.

Secondary Equipment as Backup

1. Mobile/cell telephone.

2. Secondary computer to see what participants are seeing. It also serves as a backup should the primary fail.

3. Wireless high-speed Internet connection on the secondary computer (backup computer should not go through the primary cable/Internet connection; a cellular modem is ideal on the secondary computer as backup and to see any lag times the participants are experiencing).

4. The secondary computer should be able to operate on battery (in case of a power outage on the primary computer).

Being **comfortable** is necessary. So is being seen as **professional** and **credible**. The environment you project is as important as content knowledge. Having what you need at your fingertips and avoiding other external interruptions are expected by your audience.

Environmental Best Practices

Technical requirements tend to dominate the discussion regarding your broadcast center. However, there are numerous best practices associated with your nontechnical setup that help create an effective environment.

The Simple Things

- Dedicated **notepad** and pen/pencil to jot down notes, participant names, questions, reminders—whatever you need to get back to later. Your brain is fully engaged at the moment, so don't expect it to remember anything!

- **Water** or coffee or your beverage of choice (not condoning adult beverages!).
  AND... use a sippy cup or lids on bottles—nothing worse than a spill in the middle of a session!

- **S**nacks—this is a tough one. For longer sessions, reserve this for breaks. Otherwise, best to avoid—chewing noises are just plain awkward.

- **Paper version of your materials** with facilitator notes to allow for reference, quick looks forward and backward without online scrolling of a presentation, and jotting down reminders in context (if you are quick enough).

- **Notifications turned off**—no one wants to see who commented on your retweets!
  Or incoming email or anything ...

The Harder Things

Distraction-Free Is Best

That's right. The things we take for granted come across as big distractions to the audience. Take a moment to ensure those other creatures in your home are cared for and ready to assume *A Quiet Place* mentality.
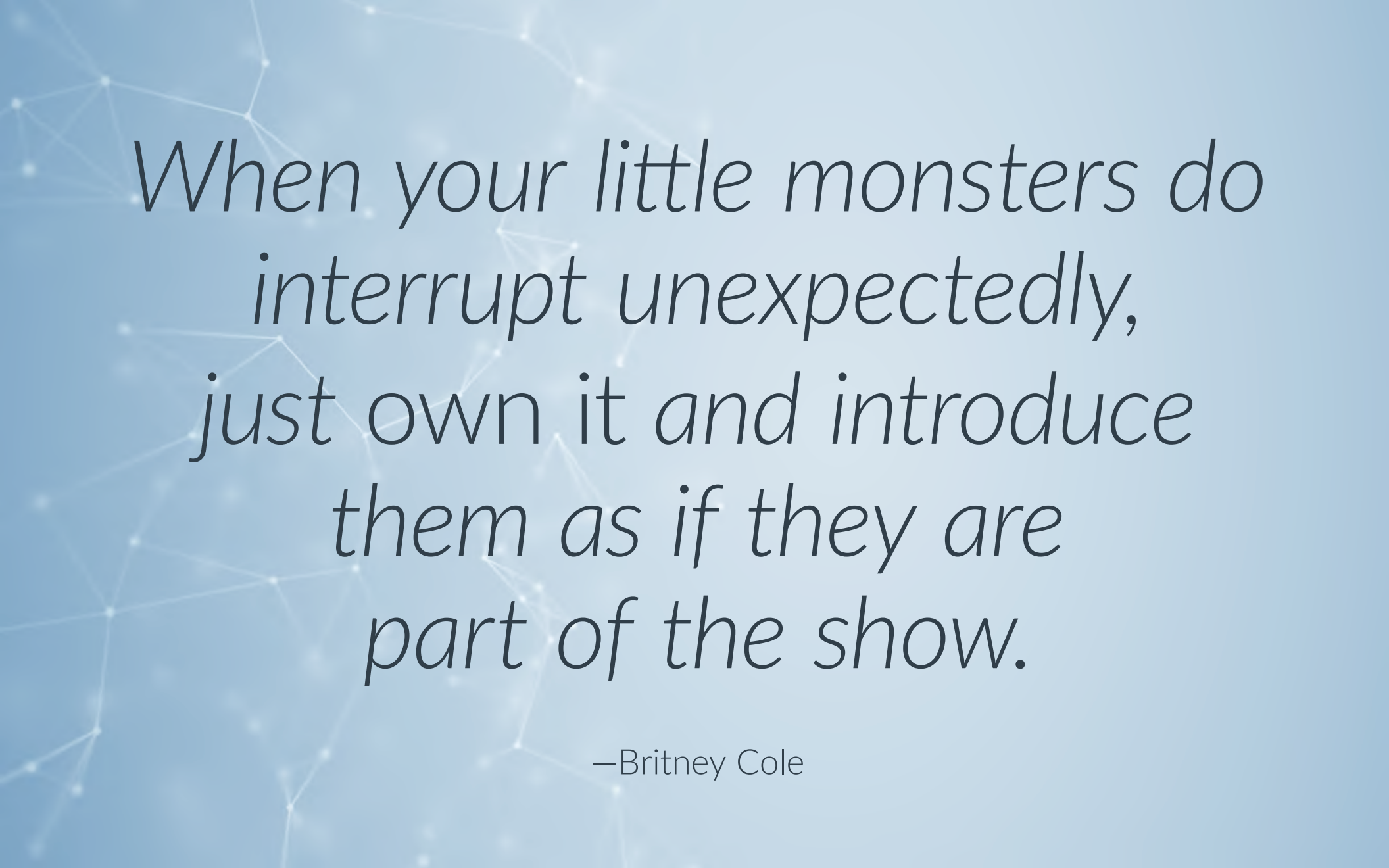

Pets who need to contribute
to the conversation

Kids and spouses

Your phone: turn on DND

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When your little monsters do interrupt unexpectedly, just own it *and introduce them as if they are* part of the show.

—Britney Cole

Prepare as You Always Do

Detailed **preparation** to know your **audience**, **content**, and **materials** will be a confidence boost, as always, and allow you to focus on the subtleties of working in the virtual world.

You Are Proven, Professional Facilitators

Just like every session that has come before, there are things you always do and will continue to do to prepare for a session in the virtual environment. There are some nuances due to the virtual scenario, but the tried-and-true behaviors you have all mastered continue.

As always, a key part of setting up a session for success is **knowing the context for the session**: understanding the alignment with organizational vision and goals is key, and it needs to be part of your message and reinforced throughout the delivery.

Number of good facilitators who thought **context** was important
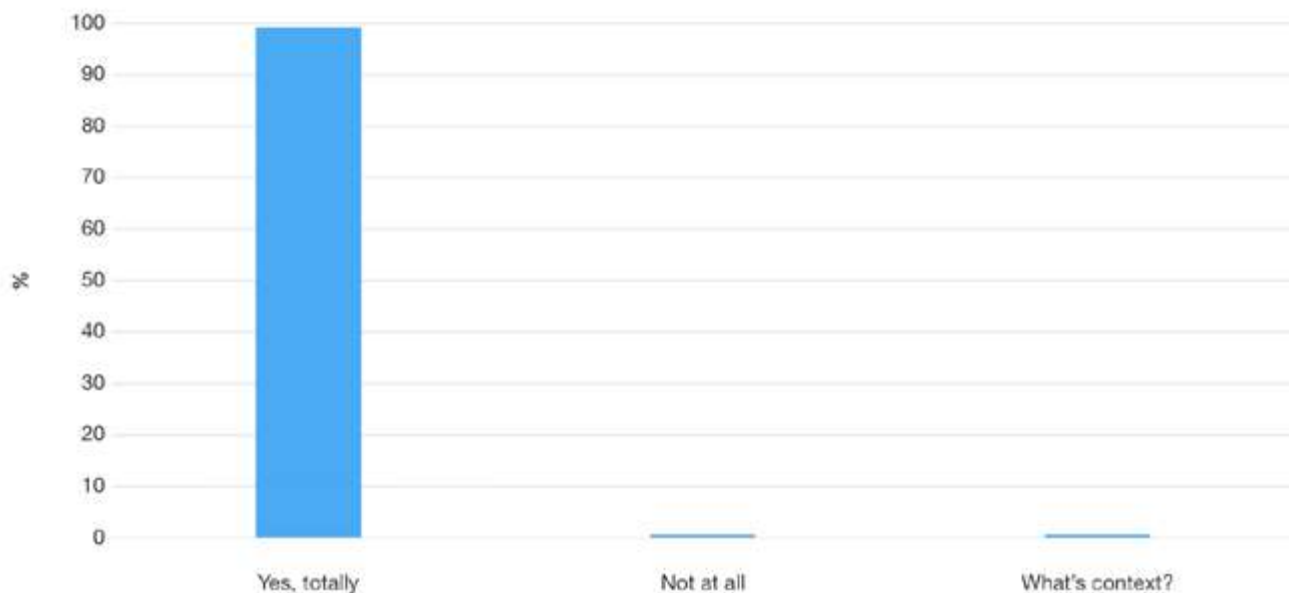
Know Your Audience

F2F, T4T, Virtual, it doesn't matter. You need to know your audience as always: understand the needs, expectations, learning preferences, and challenges of your participants.

When virtual, you'll need to assess your learners' comfort and familiarity with the platform, specifically, and with the online experience overall. You'll need to account for this with upfront communications, the overall pace of delivery, and instructions and patience during the session.

Your Audience Is Mixed

In addition to helping those who are not comfortable, recognize that you will most likely have a mix of technical prowess and comfort with online interactions: different learner types, just like a traditional classroom, requiring you to also ease the frustration of those who are ready to continue but have to slow down.

Think Global

One thing that virtual learning does is allow interaction from across the globe. This is great for gaining perspective from other cultures and areas of the business, but you must anticipate how language, culture, and time zone differences affect your audience. Slowing down to ensure comprehension, repeating key points, and recognizing pure exhaustion from being awake at odd times is part of your challenge.

Know Your Content

Keep them focused. Know your content well so you can keep the pace quick to prevent the urge to multitask. Keep in mind WIIFM, or the What's in It for Me factor, and reinforce both the *why* and *what* of what's being taught.

Slide	Activity	Tools	Reference
54	**Facilitating Visibility and Networking for Growth** Discuss how a virtual leader must recognize that he or she will not always be around to help, so it is important to encourage networking.	Open mic	Wksht #14, HB 44
55	**Having Career Development Discussions** Discuss how building career development discussions into routine communication is important.		HB 44
56	**Career Development Discussions** Discuss how in the daily crunch to accomplish work, career development discussions are often neglected and ask participants to choose those things that most closely describe their discussions with their team members.	Check mark	Wksht #15, Tool #5
57	**Virtual Situational Leadership® II (Optional)** Discuss the connections between virtual leadership and SLII®.	Chat box, open mic	
58	**The Case Study Replay** Have between one to three groups rescript the conversation from Worksheet #2: Leading Virtually—A Case Study.	Raised hand, open mic, chat box	Wksht #2
59	**Action Planning** Ask participants to identify two or three things that they are planning to do differently as a result of the training.	Check mark	Wkshts #16, #18
60	**Our Journey** Revisit the program outcomes and ask participants to place a check mark by those they feel have been accomplished.	Check mark	
61	**Honorable Close**	Open mic	

Trust Your Materials

The facilitator materials have information about when to leverage platform functions in coordination with the learning design activities.

Platform functions are discussed in the Virtual Environment and Platforms section, but as you review content, ensure you visualize how each activity would be conducted using the functions prescribed.

Learn the Content	Trust Your Materials
• Become thoroughly familiar with the purpose, outcomes, and training designs.	• Review the PowerPoint slides in the presentation view to understand animation.
• Review the virtual training design, referring to the specific timing of activities; determine the pace of your delivery to stay within the timeline.	• Become familiar with the videos that you will be streaming in your virtual sessions.
• Identify activities that can be compressed, if necessary, to make up time.	• Become familiar with the progression of activities and how they connect to ensure smooth transitions.
• Study the virtual leader notes thoroughly; be clear about key takeaways.	• Read any related white paper articles that you find.

Preparation time is never wasted.

—Anonymous

Facilitating Skills for Any Virtual Platform

Often, people who have **not actively participated** rate the session **lowest**; people who are **involved** and chatting/talking are **learning**.

Top-of-Mind Tips

Here are some tips to keep top of mind as you develop, practice, deliver, and reflect on your virtual facilitation.

Creating Meaning and Personal Connection

- Warmly **welcome** as many participants as you can as they come online.

- Review **What's in it for me** every 10 minutes so people can relate what you are teaching to their world.

- Listen to responses and **probe** for more information; e.g., "Can you tell me more?" "What can you do to prevent that?" "How does that help you achieve your goal?"

- Avoid reading the responses directly from the chatbox; instead, **elaborate** on them.

- **Address** your participants and make your comments personal; e.g., "Very perceptive of you, Roger. Could you say more about that?"

- Hone techniques to **bring everyone back** into the conversation.

- If participants are slow to volunteer when asked, keep the energy going by **selecting a participant** by name to move things along. If you think, "Wow, I've been talking a lot," it's probably true. Take it as an opportunity to ask someone to share their thoughts.

- **Keep track** of who is involved and **participating**; have a copy of the participant list and use it to track participation and interaction.

- **Check in** with those who haven't been heard from by privately chatting with them to see if it is OK to call on them in a few minutes.

Note: Often, people who have not participated rate the session lowest; people who are involved and chatting/talking are learning.

Top-of-Mind Tips, cont.

You and Your Presentation

- **Be positive and use humor**; your voice is the most important content–delivery tool in the virtual classroom. Make it interesting.

- Stay focused and tuned in to keep participants engaged. **Tell anecdotes** but avoid stories that aren't related to the core learning topics. Keep it relevant and **keep it brief**.

- **Get to the point quickly** so people stay attentive. Avoid going into lecture mode.

- Ask **provocative questions** so people want to listen.

- Remember, **it is about them hearing their own voice**, not about you hearing yours.

- Use **multiple teaching methods** to explain the most important concepts to ensure that participants are using different modes of learning.

- **Link new information** by asking participants how this relates to something already discussed.

- **Avoid repeating yourself** (a common tendency since you cannot see the participants).

- **Prompt** participants' attention to relevant reference **material pages** (participant workbook, handbook, etc.) to support visual learners.

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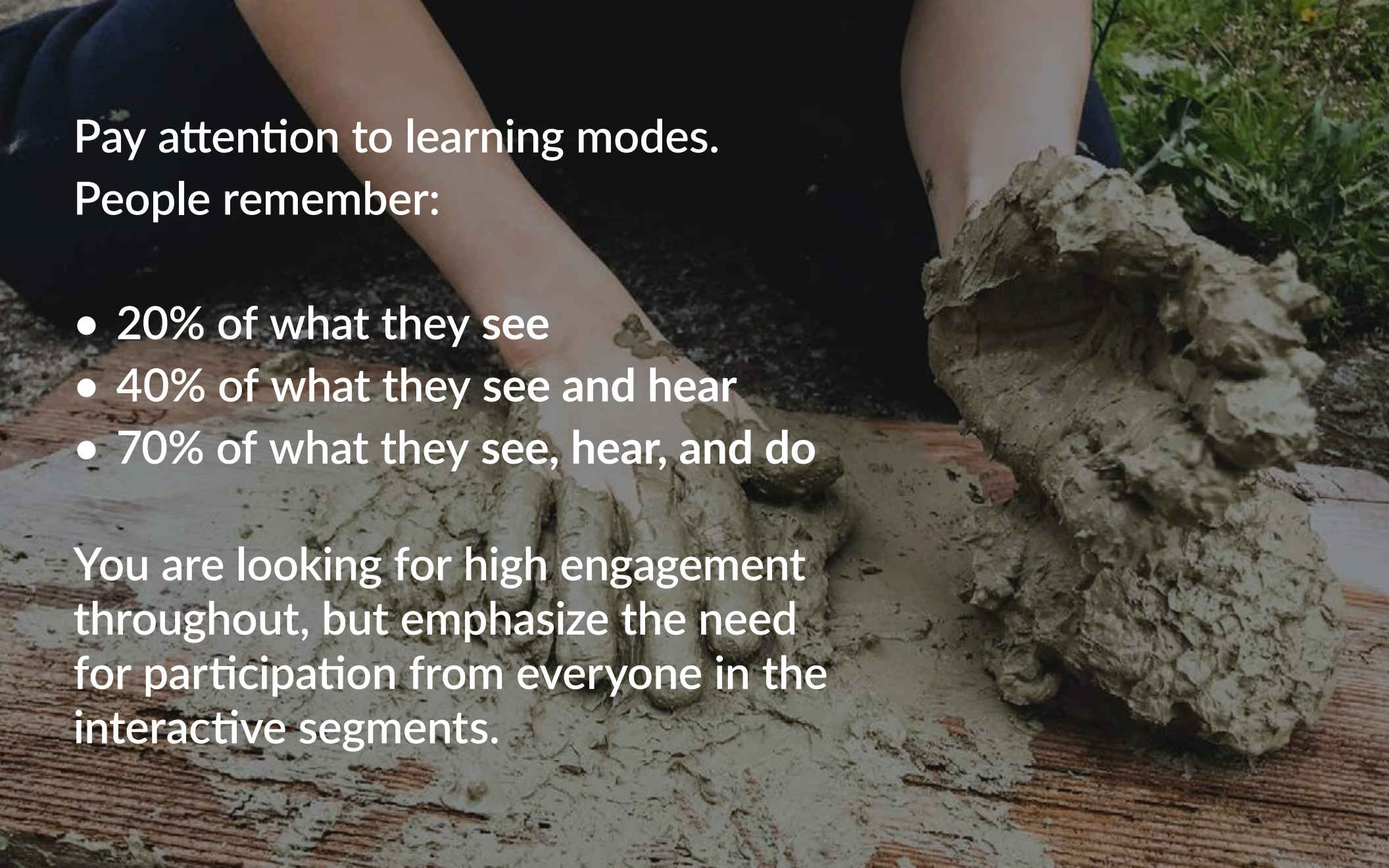# Top-of-Mind Tips, cont.

Virtual Interaction

- **Show** users where to find emoticons and feedback **tools** provided in the virtual classroom.

- Give participants something to do **every 3–5 minutes:** chat, answer questions, use annotation or feedback tools.

- Frequently, use the Yes checkmark, No X mark, and Raise Hand platform tools to **gauge audience understanding**.

- Take a poll or survey after key concepts to **ensure comprehension** of materials and content.

- Draw pictures, have conversations: **involve participants in making diagrams**, charts, or pictures on the screen.

- Give participants **choices** (type in the chatbox, write on the screen, or share verbal responses).

Top-of-Mind Tips, cont.

Session Logistics

- **Manage time** to ensure objectives are met.
- Allow for short **breaks** if the session runs beyond 60 minutes.
- Become comfortable in **quickly addressing various issues**; many things happen at once in the virtual classroom.
- Enter breakout sessions and **check in** with each group. Answer questions or address technical issues.
- When problems occur, stay the course and manage the situation with **grace**.

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Pay attention to learning modes.
People remember:

- 20% of what they **see**
- 40% of what they **see and hear**
- 70% of what they **see, hear, and do**

You are looking for high engagement throughout, but emphasize the need for participation from everyone in the interactive segments.

Working with a Producer

Your Producer Can Help By:

- Uploading videos, documents, and materials
- Ensuring that participants are connected to the session
- Setting up breakout rooms and other technical features that require setup
- Tracking breakouts and other timed activities
- Handling technical issues and questions
- Starting and stopping recordings and publishing the session
- Monitoring chat and clearing chat, starting and clearing polls, and starting and clearing whiteboards
- Monitoring the overall environment and audience participation and mood

*Always test materials and review responsibilities
with the producer prior to the session.*

—Brent Bystedt

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Meet with your producer prior to the session to ensure you are both on the same page and ready for a successful session.

- Share the training design, PowerPoint deck, and leader notes.
- Review protocols, roles, and responsibilities. Discuss how you will work as a team. Develop a plan for seamless handoffs.
- Debrief the experience as soon as possible. Identify what to do more of and what can be done better or differently to improve the next session.
- Monitor the overall environment and audience participation and mood.

Blanchard highly recommends you engage a producer for your virtual sessions to handle all aspects of learner care and technical support, including the quality of the Internet connection, the stability of the computer, and the reliability of the landline connection. The producer is the virtual trainer's backup and troubleshooter.

Expectations for Your Learners

Your Learners Should Prepare, Too

Your learners should receive a series of communications prior to your session. You may not be responsible for making this happen, but you should know what their process is, so you can be on the same page and have empathy for the journey they're about to embark on with you. As a reference for you, this sample email shows the types of preparation your learners should have gone through. You can revisit some of these with your audience as necessary during the session. Download Participant Email.

Participant Guide

Adobe Connect
VISUAL QUICK START GUIDE FOR PARTICIPANTS

Participate in Adobe Connect Meetings

Adobe Connect is an enterprise web conferencing solution for online meetings, eLearning and webinars used by leading corporations and government agencies. This Visual Quick Start Guide provides you with the basics participating in an Adobe Connect meeting, virtual classroom, or webinar.

Attend an Adobe Connect meeting

1. It is recommended that you test your computer prior to attending a meeting. You can do this by going to http://admin.adobeconnect.com/common/help/en/support/meeting_test.htm

2. The **Connection Test** checks your computer to make sure all system requirements are met. If you pass the first three steps of the test, then you are ready to participate in a meeting.

Tip: The fourth step of the **Connection Test** is for the Adobe Connect Add-in which is only required for Meetings Hosts and Presenters who need to share their screen. Installing the add-in is not required, but may enhance your meeting experience.

3. If you do not pass the test, perform the suggested actions and run the test again.

Join a meeting

1. You have likely received an email invitation with meeting access information. When the meeting time arrives, click on the link or enter the URL into your favorite web browser.

2. The meeting login screen appears. If you do not have a username or password for the Adobe Connect account, choose **Enter as a Guest**, type in your first and last name, and click **Enter Room**.

3. The meeting launches in your browser. If the meeting host has not yet arrived to the meeting or meeting security requires the host to approve your attendance, you will be placed in a waiting room.

4. Once the meeting host accepts you into the meeting, the meeting room interface appears.

Meeting audio

Meeting hosts have control over how the audio portion of your meeting is conducted. They can choose to use Voice-over-IP (VoIP), integrated Telephony, or Universal Voice (a non-integrated teleconference).

Option 1: Voice-over-IP

When this option is selected, you can hear meeting audio through your computer speakers. If a meeting attendee is speaking using VoIP, you will see a microphone icon next to their name.

In some cases, meeting hosts may give you the ability to broadcast audio using VoIP. When this is the case, a dialog will alert you that you have the rights to use your microphone. Clicking the **Speak Now** link will activate the microphone icon in the **Application Bar** at the top of your screen.

Tip: If you are having issues using VoIP, it is recommended that you run through the Audio Setup Wizard to optimize your experience. To do this, select '**Audio Setup Wizard...**' from the **Meeting** menu.

Option 2: Integrated Telephony

If the meeting host has set up the room to use an integrated teleconference, then Adobe Connect will prompt participants to select how they would like to hear the audio. You can select to listen through your computer speakers if the host has enabled this, you can view the dial-in information, or you can have Adobe Connect dial-out to your telephone by entering your phone number and clicking **Connect.**

This dialog can also be launched by clicking the telephone icon in the **Application Bar.**

Option 3: Universal Voice

Adobe Connect can also bridge non-integrated audio conferences into a meeting room so that the meeting can be recorded and the audio can be broadcast through the computer speakers.

It is also normal for your participants to receive guides and tutorials for the platform that you will be using. Here is a sample participant guide for Adobe Connect.

Adobe Connect Participant Guide

Social Expectations of Your Participants

You don't need to explicitly share this, but these are the norms you should expect from your participants:

- Be empathetic, warm, and friendly when communicating.
- Be polite and respectful when communicating.
- Before speaking, raise your hand (using the tool in the Participant Panel) so the instructor can unmute you and invite you to speak.
- When talking, start with your name, so the facilitator and learners know who is speaking.
- Ask questions rather than make statements; this will reduce defensiveness.
- Frame questions in a tentative manner to further reduce defensiveness; for example, "Don't you think it'd be better if we..."
- Use the chat function as a live feed, contributing and sharing information with others.
- Type in mixed-case letters, unless an acronym is being used. Using all caps is considered shouting.
- Type or say only the things you would say when you're face-to-face.

Developing Your Virtual Facilitation Skills

Whether you are **new to virtual facilitation** in general, or **new to a platform**, **organization**, or **content**, there is always *room to grow!*

Developing and Practicing Your Skills

Virtual delivery is a viable learning modality whose demand will only increase. Not only does it reduce travel expenses and time away from the job, but it also allows for the connection of distant portions of the organization. By allowing more touchpoints, virtual delivery can spread activities over time to help learners build their knowledge more effectively. While there may be some bumps when getting started, becoming comfortable with virtual facilitation is achievable.

Get Your *Learn* On

There are a few ways you can immerse yourself in the virtual experience as a learner to gain some valuable insights.

Attend the class you will be facilitating as a participant; it will help you gauge people's reactions to the content and design as well as the facilitation.

Listen to podcasts and radio programs to learn how other people use their voices, tone, pauses, etc. Nonvisual mediums are helpful because you can really focus on how a person's voice and delivery create an impact.

Go to workshops or take classes online. A quick search of the Internet will take you there.

Practice, Practice, Practice

For your own delivery skills, nothing builds expertise, comfort, and confidence like practice and feedback.

Do several dry runs of your presentation to practice working within the time limits; rehearse and check your timing until you are comfortable with your delivery. Open up your virtual classroom platform.

- Load all the visual aids into the virtual platform; ensure that all videos are uploaded and ready to stream.
- Facilitators tend to speak too fast during these practices because they cannot see the virtual audience. You might want to put a picture in front of you that represents those you are presenting to as a reminder that people are listening to and interacting with you.
- Record the practice session using your virtual classroom platform recording features while delivering the content.
- Make any needed adjustments and repeat the process during subsequent dry runs until you are comfortable with the virtual classroom platform and training design.
- Compare the time you are spending in each activity to what the training design suggests.

Practice, Practice, Practice, cont.

- Practice with your **producer** to develop a plan for seamless handoffs.
- Practice delivering key content sections while using the **annotation tools** to highlight key words and definitions or to move the participants' eyes to another area of the screen.
- Practice **streaming video** in your virtual classroom platform. Ensure your computer meets the technical requirements to play the videos.
- Practice dividing up participants and directing them into **breakout rooms**.
- Develop your virtual facilitation skills by practicing your presentation on a **live, low-risk audience** at least three times.

Critique each facilitation section by listening to the recording you made of yourself.

- Ask yourself:
  - Is there energy in my voice?
  - Would participants be interested in what I am saying?
  - What could I ask to get participants talking more in certain sections?
- Look for ways to emphasize key points by using some of the platform tools (highlight, underline, pointers, etc.).
- Compare the time you are spending in each activity to what the training design suggests.

Deep Dive: Learn from the Best
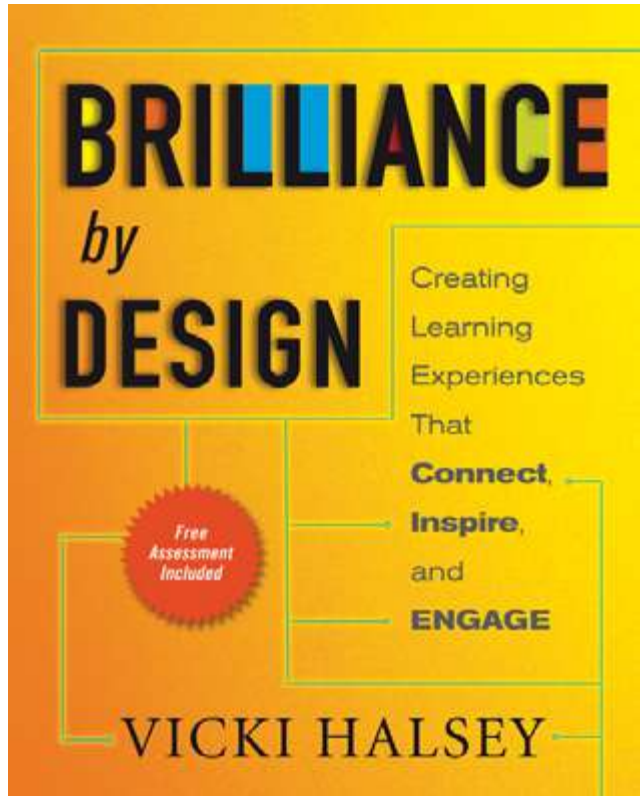
Your goal is to connect people, at a deep level, to information and strategies that have the ability to transform their world. Create a human connection, despite physical distance, and use the technology as an asset. You have to make your point quicker, use shorter introductions to content, and keep learners' attention through interactivity. —Vicki Halsey

Meet Vicki Halsey

Vicki Halsey's work on designing engaging content for learners is world-renowned. Much of what this ebook espouses comes from Vicki's years of experience and ability to successfully transfer the learning process to the virtual environment. Jump right into her video and take advantage of an excerpt from her book *Brilliance by Design* that speaks specifically to virtual facilitation.

Brilliance by Design Compressed-chapter 10 only

Chapter 10 BBD Study Guide

The Virtual Environment and Platforms

There are several leading platforms that provide virtual learning. You've probably used each of them at some point already. Each platform has matured significantly, and it is not possible to cover the finer details of each. However, there are some common features that you should look for and master as you deliver virtual experiences.

The key skills of **connecting with your participants** and **providing engaging interactivity** will remain the long-term skills you'll need to develop, but there is a level of competence with the platforms you will need to develop to carry the day.

Primary Features

The primary features you will rely upon are listed below in a high-level overview. This list is provided to raise awareness and give a brief introduction. Further below are links to the leading platforms where you will need to spend some time learning the systems in greater detail.
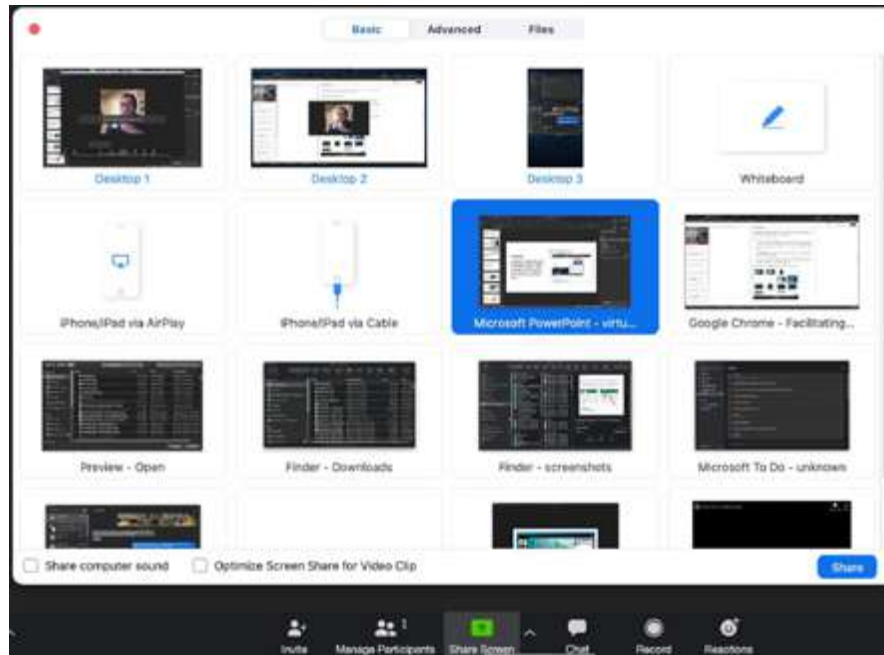

Sharing Content

In addition to sharing your video and chat, sharing your screen or a document for all to view is typically the focus of the virtual session.

Sharing options typically include:

- Your screen or desktop, and, therefore, everything you have showing on your own computer. You can often specify which screen if you have multiple monitors.

- A specific application that is currently open (e.g., browsers and Microsoft® Office applications.)

- A specific window that is currently open on your computer to show only a single document or browser window.

- A document from the platform library to lessen the bandwidth of the overhead associated with sharing your screen. Experiment with transitions and builds in Microsoft® PowerPoint to make sure they work as expected.

Primary Features, cont.
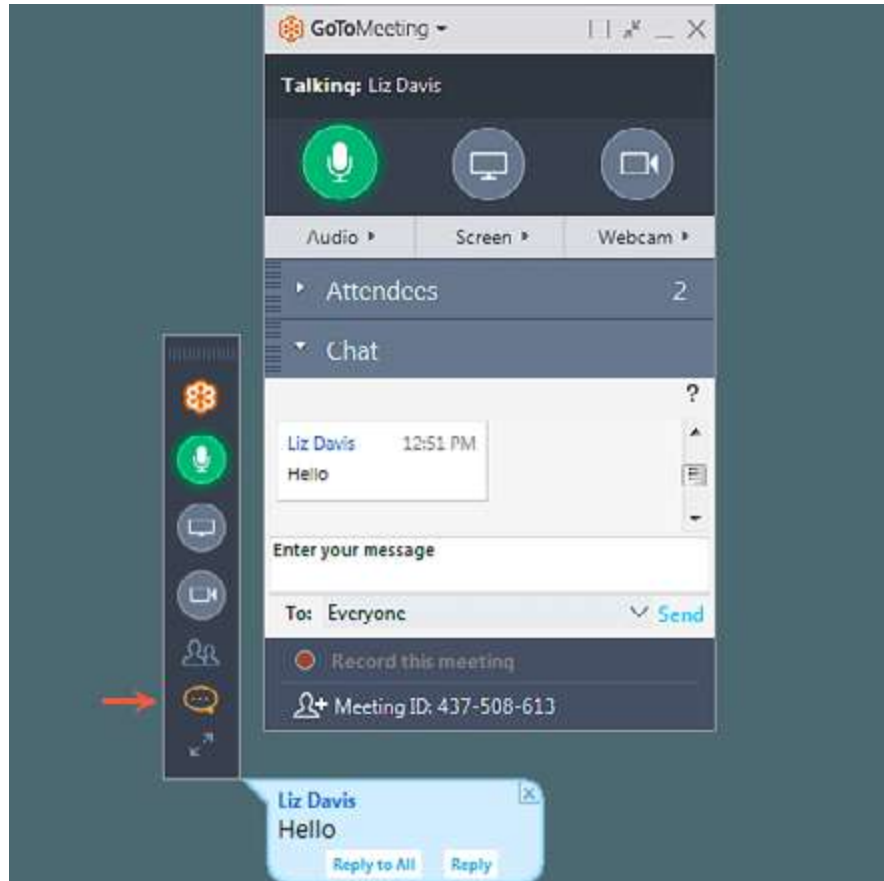
Chat

Chat is the most basic tool and the most familiar one. We all do it on smartphones all day long and it works the same for the most part in the platform tools.

Chat windows typically sit alongside the main window or can be popped into a floating window. "Where did my chat window go?" is a common refrain.

Chat windows can be your key to engagement, but can also overwhelm your message if you aren't mediating your delivery with chat activity. If the participants are digging into relevant content, let it flow and jump in, and then get on track when appropriate—try not to stifle interaction! For platforms that have dedicated Q&A features, encourage participants to differentiate their activity between the two features if possible.

Chats can usually be public or private. At some point, someone will mess that up and post something not meant for the larger audience. As the facilitator, you may have the ability to control chat activity. Keep that in mind—you may have to use it from time to time.

Primary Features, cont.

Feedback

Feedback mechanisms vary between the different platforms, but the key features are "raise your hand" and status feedback like "slow down" and "speed up."

Having a moderator helps—they can watch the feedback being provided by your participants and respond in real time if appropriate.
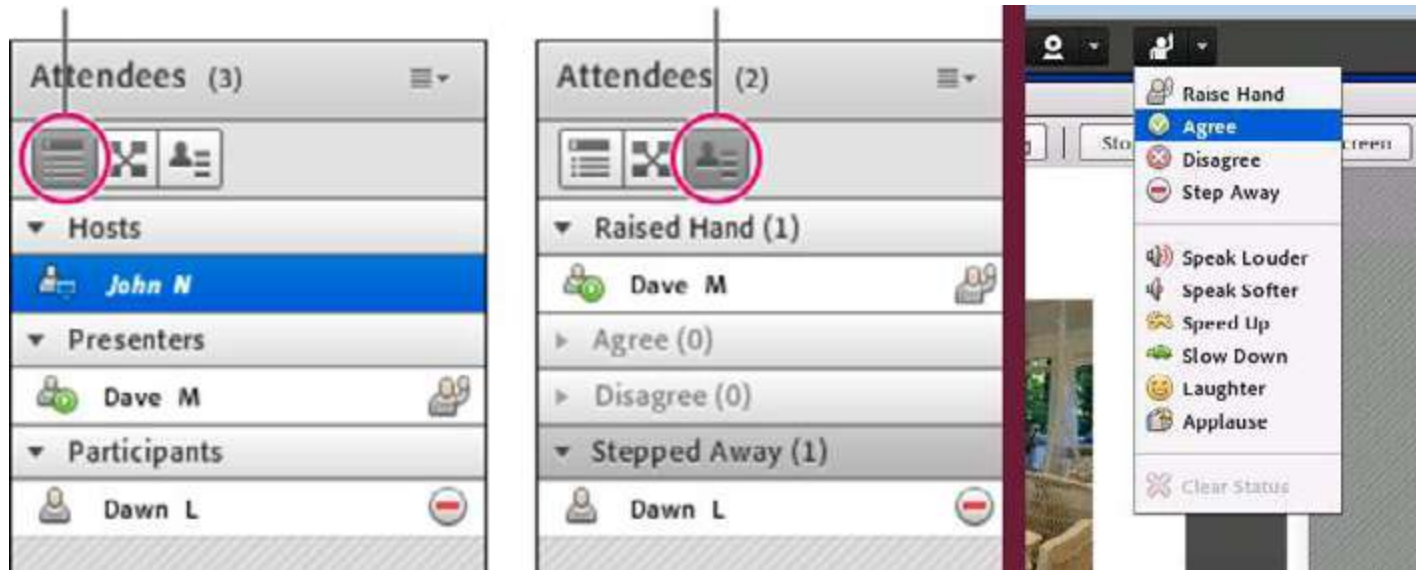
Primary Features, cont.

Pointer Tool/Annotation Tools

The pointer tool is a basic tool to allow you to direct the participants' attention to a certain place on the screen. When you are not sharing your desktop or an application and the mouse movements are not being tracked, the pointer tool serves as your guide. Usually, the pointer tool is just one of the annotation tools, like typing text or drawing lines and boxes and circles on the screen. If you allow it, the participants can also annotate, which is helpful for them to elaborate and ask questions.

Primary Features, cont.

Polling

The use of polls is a well-accepted mechanism for interacting with individuals or groups and gathering their dedicated feedback. Where the feedback tools are individual in nature, the polls allow you to canvass the whole audience at once. You can do this for pace, comprehension, mood, content refreshers, discussion starters, and such.

They can also be anonymous, which can help with some who are hesitant to provide feedback in open chat or voice.

Primary Features, cont.
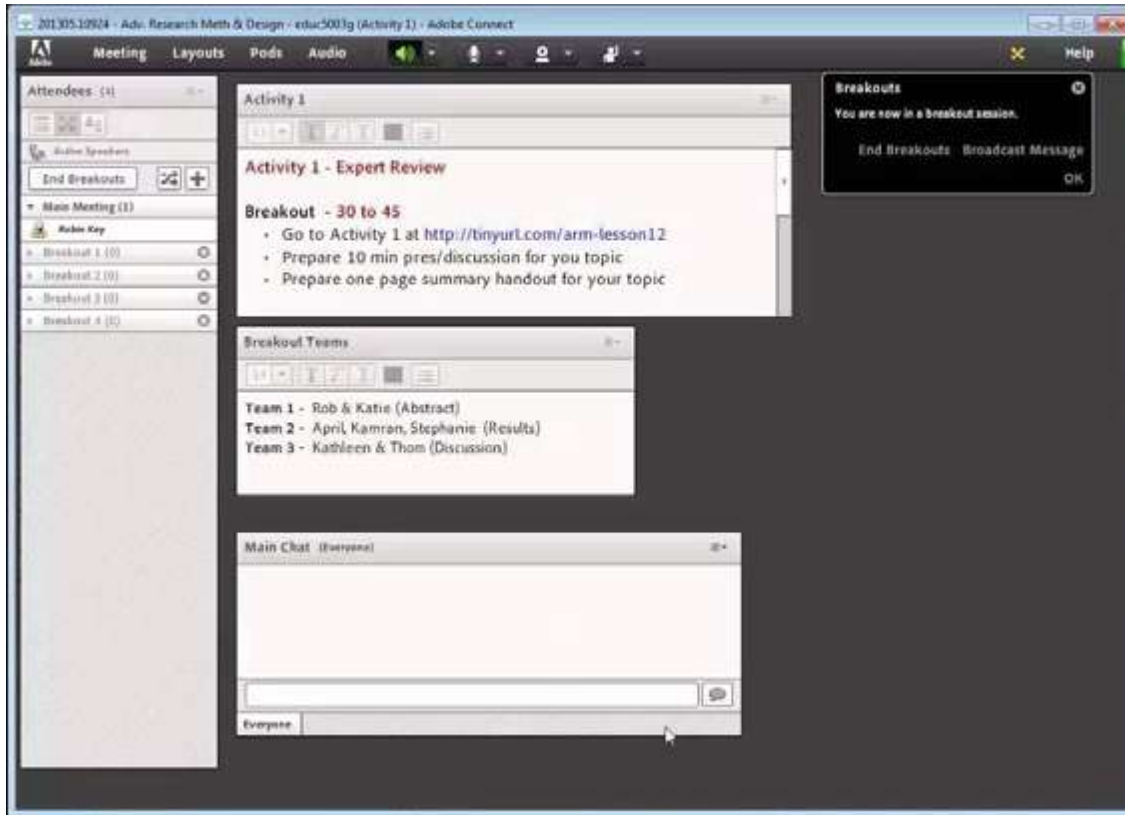
Breakout Rooms

Breakout rooms are simply awesome for all types of reasons. They spur a different mindset, they allow for digging deeper into content with smaller groups, they allow for competition, and—perhaps most importantly—they turn off your voice for a while.

Breakouts allow groups of two or more to move to a private space and work independently from the other groups. You can jump between groups and check in, answer questions, and provide guidance.

Primary Features, cont.
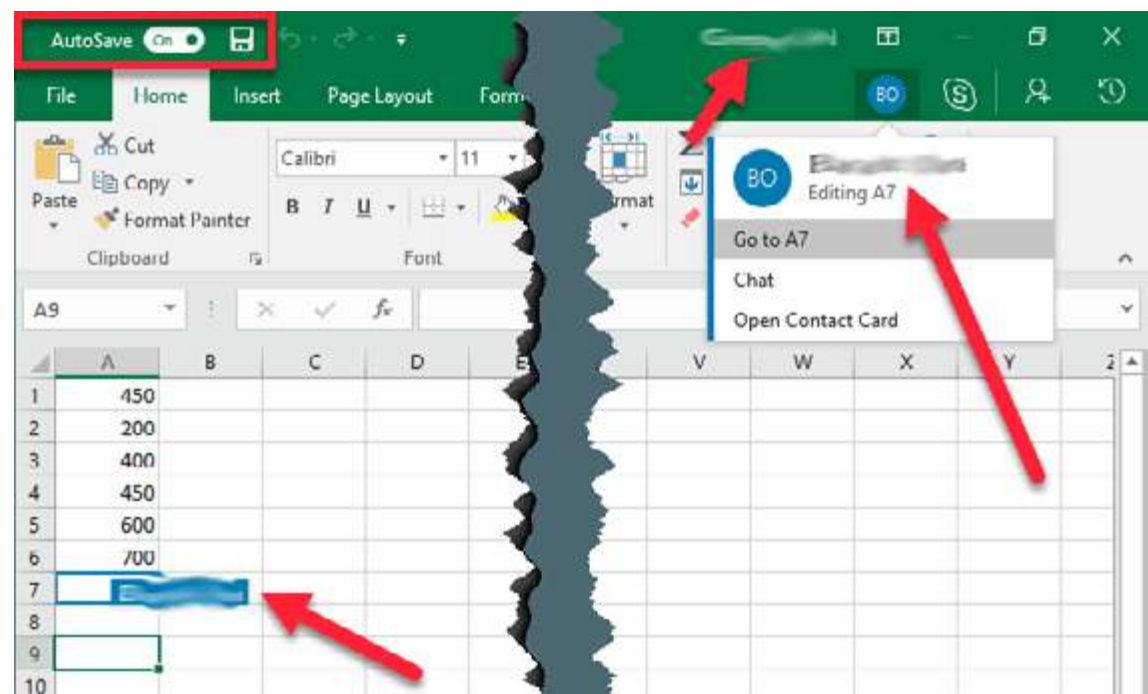
Co-Authoring

This is a basic feature for most virtual work these days; it allows you to have multiple people working in the same document at the same time to collaborate rapidly. Brainstorming the new team charter or their reactions to a video they just watched can be powerful. This is sometimes easier than trying to keep up with a chat window that is filling quickly. The ability to even do this and the functionality itself varies between platforms. So, if this interests you, investigate and practice.

Primary Features, cont.
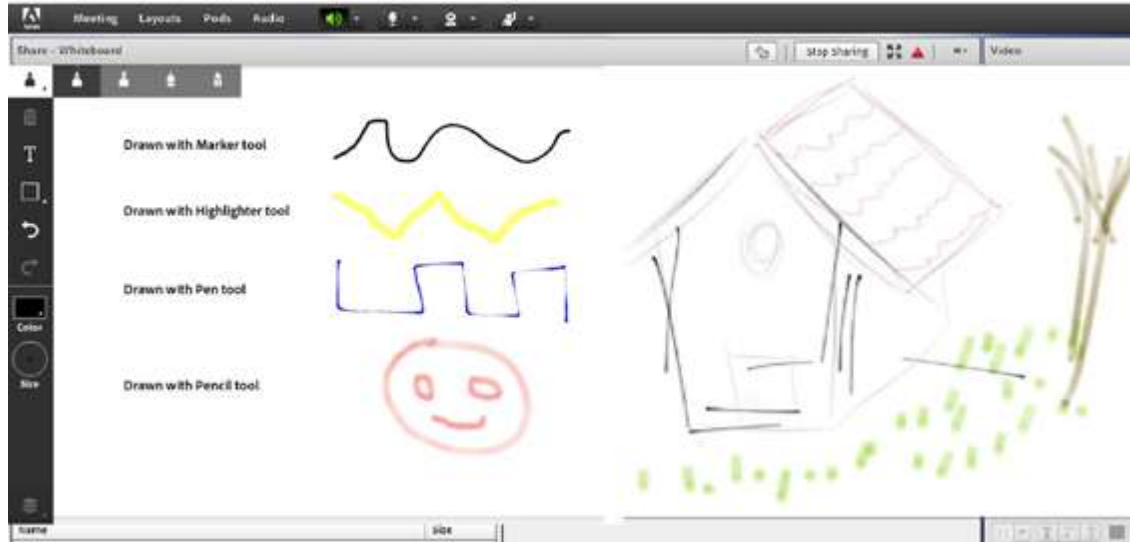
Whiteboards

Sometimes there is nothing more fun than everyone laughing (politely) at Ann's birdhouse or nothing more engaging than everyone drawing Blanchard's SLII model on the virtual whiteboard, but these are great ways to broker conversations and engage interactions differently. You can take screen snips of chats and polls, paste them on the whiteboard, and allow everyone to annotate further.

Primary Features, cont.

Video Streaming

Video streaming has become part of F2F, eLearning, LMS, and all other types of learning. It is also key to virtual learning. Bringing in stakeholders, experts, humor, or examples via video streaming breaks up the class as well as provides a great source of content that is simple (when technology lets it work). Just click play and you can collect your thoughts, watch participant activity, and take a sip of water!

If your session is designed with video clips, you'll want to investigate how your platform recommends streaming them, because some uploading may be required beforehand. Also, some platforms stream better by "sharing content/file" from within the platform as opposed to sharing your desktop to show a video you have playing.

Primary Features, cont.

Recording

Most platforms allow for recording the session. This is helpful for so many reasons: for those who attended to get a refresher, for those who missed to attend later, and for those who weren't invited to the first one to benefit from later. Remind everyone that their thoughts and actions will live on in eternity!
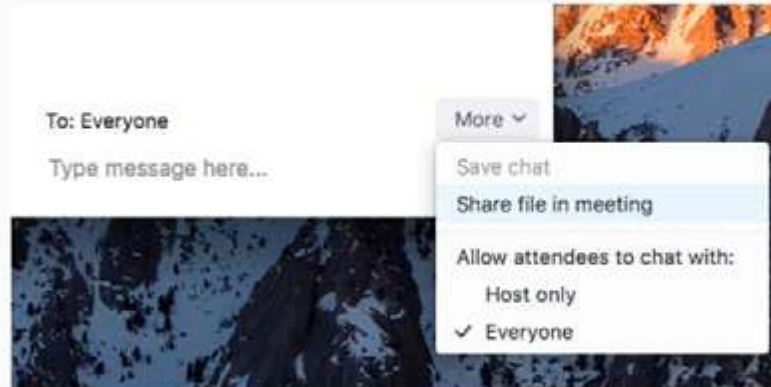
Primary Features, cont.

Using In-Meeting file transfer

1. During a Zoom meeting click on **Chat**.

2. Select **More** and choose the option to **Share file in meeting** to send a file.

3. The following indication will be seen once the file is successfully sent.

File Transfer

The simple ability to share files without emailing and posting URLs to third-party applications can be a rewarding feature. Platforms usually allow you stage content like workbooks, scenarios, quizzes, challenges, and any type of collateral to help facilitate the session or better enable the learners to follow the class. Some platforms enable you to share a file via the chat function and others have distinct widgets and library functions.

Leading Platforms

The platform you'll end up using is probably not a decision that you've made individually. The key point is that you will need to become familiar with that platform's feature set as quickly as you can. The mantra *practice, practice, practice* rings true when preparing to lead a virtual session in an unfamiliar platform for the first time.

The links provided below were what was immediately available from the vendors at the time this was written and are provided as a place to get started. If your organization has a relationship with a platform provider, there may be a tailored process to get you on track, which you should avail yourself of.

Microsoft Teams

Meetings in Microsoft Teams

Adobe Connect

Adobe Connect Getting Started

Adobe Connect Tutorials

Adobe Connect Training Events Catalog

Zoom

Zoom Getting Started on Windows and Mac

Zoom Video Tutorials

Live Training Webinars

WebEx Training Center

WebEx Get Started Training

Sharing Content in WebEx

GoToTraining

GoToMeeting Training

GoToMeeting Videos

GoToMeeting Training Catalog

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