

## Thirteen Best Practices for Live Online Training

A Guidance Communications White Paper

Whether you need to deliver webinars to prospective customers, update your sales force on the latest product features, or train corporate employees at facilities around the world, chances are you already know the chief advantage of live online training:

You can **train lots people fast, wherever they are, with zero travel costs.**

This factor alone is driving organizations to adopt live online delivery for more and more of their training events.

Fortunately, platforms such as WebEx and Citrix have matured to the point that they are now capable of providing complex training effectively. Also, learning practitioners have worked with these tools long enough to create techniques for using them well.

This paper reviews the basics of live online learning. We then present 13 best practices for making your events **memorable, engaging, and effective.**

### Pros and Cons

We're using the term *live online training* to mean any learning event delivered over the Web in real time. Other terms used for this mode of delivery include webinars, web seminars, virtual classroom, and *synchronous* e-learning.

Learning professionals distinguish live online training from two other common delivery methods:

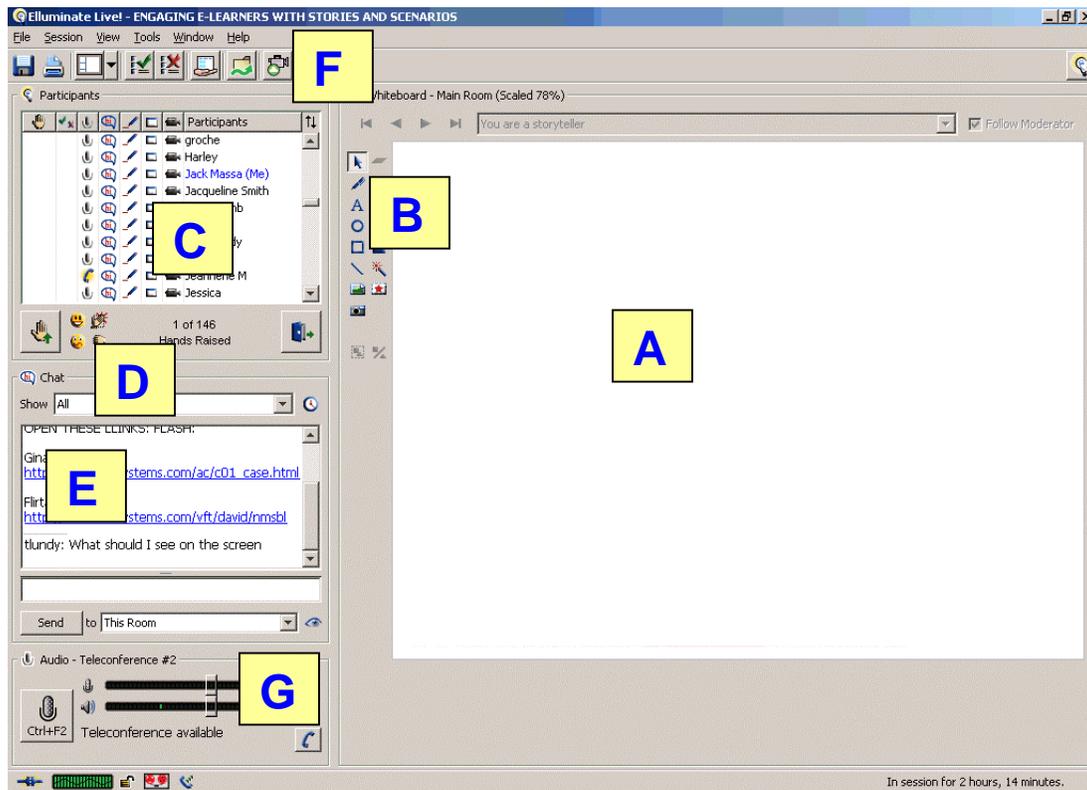
- On-site classroom training, also called instructor-led or face-to-face.
- Self-paced training, which may be delivered by self-study workbooks or by computer-based or web-based tutorials (called *asynchronous* e-learning).

The table summarizes the pros and cons of live online training compared to these other modalities:

Pros	Cons
Reach more learners with the same event and same instructional design	Requires adequate technical infrastructure (computers, broadband, headphones)
Easily reach geographically-dispersed learners	Technology sometimes unreliable
Flexible scheduling for learners and instructor	Requires <i>scheduled</i> learner and instructor time (unlike self-paced training)
Relatively simple and cheap to develop	Success depends on the skill of the instructor (more difficult to deliver well than classroom)
Allows interaction with live instructor or subject matter expert	Instructor less accessible than in a classroom
Content is easily updated	Hard to make it interactive and engaging
Sessions can be recorded for later reuse	Hard to measure learning
<b>And most significantly..</b>	
Save money on travel costs	Hard to ensure attention and engagement

## Interface and Tools

The figure shows a typical user interface for a participant in a live online session. In this case the platform is one of the leading synchronous e-learning tools, Elluminate.



**A) Whiteboard** - The main display area, most often used to show PowerPoint slides. Can also serve as a virtual whiteboard or flipchart.

**B) Annotation tools** - The instructor and learners can mark up and draw on the whiteboard.

**C) Participant list** - Shows who is online and their status.

**D) Interactive icons** - Learners can raise their hands, give applause, show their mood, etc.

**E) Chat area** - The instructor can control when it's displayed and whose entries are shown.

**F) Participant toolbar** - For answering poll questions and other actions.

**G) Audio controls** - The instructor can mute or unmute participants. Most platforms support both telephone conferencing and VOIP.

### Other common functions not shown in the figure:

**Poll window** - Learners respond to multiple-choice questions. The instructor can then share results with the group.

**Application sharing** - Instructors or learners (when enabled) can share an application running on their desktop. Useful for software demos and practice exercises.

**Breakout Rooms** - Learners can be assigned to separate virtual rooms with their own audio and chat areas. The instructor can visit each room. Good for group discussions and team activities.

**Video** - Live web cams can show the instructor (and participants). A separate window can display pre-recorded video clips. But be aware: video requires adequate bandwidth and can be tricky to synchronize for all participants.

## Thirteen Best Practices

The greatest challenge to success in live online training is to ensure that learners stay **attentive** and **engaged** and that **learning actually happens**. Instructors do not have the facial and body-language cues they can rely on in the classroom to judge attentiveness. Conversely, learners cannot take in and review material at their own speed, as they can with self-paced training.

The following best practices are designed to overcome these hurdles. They are gleaned from participating in numerous online sessions and from the research cited under **For Further Reading**, below.

### 1. Investigate technical limitations

Make sure learners will have the required computing and network infrastructure to view the training. Understand bandwidth issues and test your training with the slowest connection speeds.

### 2. Plan the "choreography"

An online event needs to be choreographed like a dance or managed like a TV broadcast. Several authors recommend you script the session using a multi-column document, with headings such as:

Topic | Objective | Learning Content | Graphics | Talk Track | Technology Required | Interactions

### 3. Team up to fill all roles

Good live online training requires two presenter roles:

- An instructor / facilitator who does most of the talking.
- A moderator/producer who handles the technology. This person can also do introductions, respond to chat questions, and troubleshoot any technical issues.

If at all possible, have two people online to fill these separate roles. If that's not possible, the instructor should practice ahead of time and have a second PC connected to show what the audience is seeing.

It can also work well to have two instructors who swap off the moderator role.

### 4. Test early and often

If you've not delivered training this way before, test the course several times to work out the bugs.

### 5. Keep it short

Authorities agree that 60 to 90 minutes is the optimum time for a single online session, with two hours at the maximum limit.

If you have a one- to three- day instructor-led class that you need to transfer to the virtual classroom, first consider trimming out the nonessential content. Then consider breaking the class into multiple sessions with assignments and self-paced learning activities in between.

### 6. Make sure the audience can use the application

If learners are unfamiliar with the platform, start the session by introducing the interface components. Let them test the interactive tools.

### 7. Engage learners from the start

Use interactive openers. For example, ask people to type their names and job titles/organizations into the chat area, and then welcome them verbally. Another popular ice-breaker is to show a map and have everyone use an annotation tool to indicate their location.

## **8. Engage learners with frequent interactions**

Interactivity is the most important technique for keeping learners attentive. A good rule of thumb is to ask questions or provide other interactions for every three to five learning points or slides.

## **9. Minimize text on PowerPoint slides**

Keep PowerPoint slides as clean and concise as possible. Do not expect participants to read the words the instructor is speaking. Research shows this actually detracts from learning.

## **10. Keep visuals simple and on-point**

Use visuals (graphs, charts and pictures) to illustrate learning points. But avoid extraneous visuals that do not support the learning content.

## **11. Vary the methods of interaction**

Do not rely on a single interactive tool (such as chat or polling). The sameness can be boring and annoying. Instead, vary the ways that you ask learners to respond.

Some examples:

- Learners use annotation tools to check or mark up a diagram or slide.
- Brainstorm ideas and write them on the whiteboard (or allow learners to write them).
- Ask learners to take 60 seconds and write down the most important points they've just learned (used by learning expert Bob Pike in one of his webinars).
- Provide a participant guide or worksheets (emailed ahead of time) with activities for learners to perform on their own, then ask them to report results via polling or chat.
- Show a scenario and then use polling or chat to collect responses. Share the results with the group.
- Display an online board game, with each learner represented by a different marker. Learners who answer questions correctly move around the board until the "winner" crosses the finish line.
- Assign learners to breakout rooms where they can discuss a problem or case study. Then reconvene the whole class and let one person from each breakout room report.
- Use application sharing to have learners demonstrate the steps in a software procedure. Assign each step to a different person, which will keep everyone attentive.

## **12. Close with Q&A**

It's often a good idea to close a session with a Q&A period. Learners can submit questions via chat, and the instructor can read them and respond.

## **13. Record for playback and evaluation**

Most platforms make it easy to record and save online sessions. Recordings can be valuable to reach more learners, but also to evaluate your performance and improve subsequent sessions.

## For Further Reading

Ruth Colvin Clark and Ann Kwinn, *The New Virtual Classroom: Evidence-based Guidelines for Synchronous e-Learning* (Pfeiffer, 2007).

Jennifer Hoffman, *The Synchronous Trainer's Survival Guide: Facilitating Successful Live and Online Courses, Meetings, and Events* (John Wiley & Sons, 2004)

*The E-Learning Guild's 144 Tips on Synchronous e-Learning, Strategy + Research* - [www.elearningguild.com](http://www.elearningguild.com).

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## About Guidance Communications

Guidance Communications, Inc. ([www.guidancecommunications.com](http://www.guidancecommunications.com)) is a business communication and training company based in Atlanta. We help organizations communicate through the Web and other media. Our mission is to make complex information clear.