

February 2021

At QTS, We Make Training Happen. Together, we make it even better.

Converting Traditional Training to a Virtual Format

OVERVIEW

The spread of the coronavirus has created a fundamental shift in how we conduct the business of work. Physical proximity has become increasingly irrelevant to daily operations—including training. This presents new challenges for trainers as they navigate transforming traditional in-person trainings into a virtual format. What follows is a set of guidelines, tips, and resources to help with this transition.



STEP ONE

Map Your Learning Objectives for a Virtual Setting

The first step in moving to a virtual platform is to review the existing learning objectives and how they are formatted—i.e. how they are presented, in what order, and how mastery is assessed. Once you have the existing design clearly laid out, follow these steps:

1. Determine what activities are essential for mastery and get rid of anything that is not necessary.
2. Group the learning objectives logically based on how it should be presented—chronologically, by topic or skill, etc.
3. Examine the learning objectives and tasks in each group and determine which require facilitation and which can be completed independently before or after virtual sessions. Examples would include reading instructions,

descriptions, or case-studies, assessment of current skills or knowledge, watching of instructional or informational videos, etc.

4. Determine how long each activity will take and create a map for your training.

STEP TWO

Determine Training Platform

In order to finalize the activities you will use in virtual training, it is important to know what the capabilities of your videoconferencing software are:

- Does it have a whiteboard?
- Screen-sharing?
- Chat features?
- Breakout rooms for small-group learning?
- Does it allow for multiple facilitators?
- Document sharing?
- The ability to record sessions?

STEP THREE

Design the Activities

One of the most important things to keep in mind is that you are converting a learning experience, not just delivering a presentation. Your virtual training should be as interactive and engaging as your in-person training. It should not be a lecture. If you have lecture style content to deliver consider using a short video to be watched prior to the virtual session. (Huggett, 2020, p. 62) These videos can be made interactive and include checks for understanding. See “Checks for Understanding” on page 4 and 5 for ideas.

Select the best activities for the learning objective: virtual chats, polls or quizzes, break-out sessions for small-group discussion or activities, white board activities, screen-sharing, annotating, etc. Do NOT try to exactly recreate in-person training. The original design was based on being able to see and engage with the participants, which allowed the trainer to know at a glance who was understanding the concepts and who needed more help. (Slade, 2020)

Tips and Tricks

1) ADAPT IN-PERSON ACTIVITIES

IN-PERSON ACTIVITY	VIRTUAL ACTIVITY
Paired or small group discussions	Paired or small group chats
Paired or small group tasks	Use shared documents or white boards
Competition between teams	Use programs like Kahoot or Gimkit that allow for individual or group quizzing competitions
Group presentations	Create using shared documents and present using screen sharing or presentation tools

2) CONSIDER TIMING

As you design your activities, consider timing. Virtual training sessions cannot be timed in the same way in-person training can. In-person training in a controlled environment allows for full-day sessions. Virtual environments are not controlled environments and the chances for distractions and lack of engagement increase greatly. Ideally, training should be 60 minutes in length, include a 10 minute break and a variety of activities. At the minimum, sessions should be broken into 20-minute segments where activities shift between self-directed, small-group activities, and instructor-led activities (Murphy, 2008, p. 6).

Please note that some activities can be shortened to take less time in the virtual format. One example would be student responses to a question—instead of taking the time for each student to answer aloud, answers could be typed into the chat window and the facilitator can read excerpts in order to highlight answers that show particular insight or correct misunderstanding. Likewise,

CONSIDER TIMING CONTINUED

some things may take longer—instructions such as how to screen-share or enter breakout rooms may require extra time. *Note: In order to save time, these types of instructions could be provided via pre-recorded videos that participants must view before the virtual session.*

3) CHECK FOR UNDERSTANDING

It is particularly important for the trainer to ensure that they are regularly soliciting responses from everyone in order to be sure that they are engaged with and understanding the material. (Slade, 2020) See the chart below and on page 5 for tips on how to do this:

CHECKS-FOR-UNDERSTANDING WITHIN VIDEOCONFERENCING SOFTWARE

TOOL*	DESCRIPTION	PURPOSE	EXAMPLES
Webcam	Allows presenter to see the participants	Allows the facilitator to see participants faces to gauge understanding and engagement	Click on individual image or view them in tiled windows to see reactions
Chat	Feature in most video-conferencing platforms for communication between participants and facilitator	Students can respond to facilitator questions or prompts, ask questions, or engage with other participants	Using typed responses or emoticons such as thumbs up or down
Whiteboard	Space on which participants can draw or type	Allows for brainstorming and group writing or drawing. Often available in breakout rooms	Space can be divided among participants or groups to summarize info, draw examples, etc.
Annotation	Available on some videoconferencing platforms—it allows participants to draw on the presenter slides	Allows students to interact with the presentation	Respond to questions by drawing circles, underlining, drawing an X through information, etc.

In addition to tools included in videoconferencing applications, there are a wide range of tools available outside of videoconferencing software, that can be utilized to ensure students are engaged and understanding the material. The table on page 5 lists tools that range from creating simple online polls, to embedding quizzes in recorded videos, to quiz-based games that allow for competition between individuals or teams.

*All of these tools can be found in a number of popular platforms including Zoom, GoTo Training, Google Meet, Cisco WebEx and Kahoot

CHECKS-FOR-UNDERSTANDING OUTSIDE VIDEOCONFERENCING SOFTWARE

TOOL	DESCRIPTION	LINKS
Polls	Online set of questions to which students respond	polleverywhere.com directpoll.com participoll.com asktheroom.com
Google forms	Online quiz creation allowing for multiple choice, Likert scale, T/F, Y/N, grids, drop-downs, short and long-answer responses	google.com/forms
Typeform	Allows for creation of branched quizzes	www.typeform.com/quizzes/
Survey Monkey	Online poll/quiz creation allowing for multiple choice, Likert scale, T/F, Y/N, grids, drop-downs, short and long-answer responses	surveymonkey.com
Wondershare QuizCreator	Includes audio and video, voice-overs, text-to-speech in addition to multiple question types	wondershare.com/pro/quizcreator
Playposit	Create quizzes embedded in instructional videos to check for understanding	go.playposit.com
Vizia	Create quizzes and polls embedded in instructional videos to check for understanding	vizia.co
Kahoot!	Online quiz competition application that allows for individual and team play. Originally intended for educational institutions	create.kahoot.it
GimKit	Online quiz competition application that allows for individual and team play. Includes gaming style elements such as power-ups and the ability to earn (virtual) cash Originally intended for educational institutions	GimKit.com

STEP FOUR

Step 4: Prepare Employees for Virtual Training

Make sure they have access to the technology and a place to work such as a home office or another quiet space that limits distractions.

Ensure they know how to access and use the platform and tools required. Most videoconferencing platforms have existing instructional videos—check YouTube!

Consider a short, pre-training videoconference dedicated to explaining and practicing the features and tools they will be asked to use.

Allow extra time at the beginning of sessions than you would in a traditional in-person training. This allows for technology and connectivity issues to be addressed, as well as for participants to settle in and familiarize themselves with tools if they have not received prior training.

TIP: Be aware that the start of your first meeting may be delayed if participants previously worked together in a traditional setting. They may want to chat and catch up on work and life events, making it difficult for training to begin on time.

STEP FIVE

Schedule the Session

Be sure to send invites that require an RSVP to judge meeting size and predetermine breakout/small groups.



Tips & Tricks for Planning & Facilitating

1. Do not be afraid to use pre-existing content as long as it is appropriate to the **task** and platform—and open source or royalty-free. There is no need to reinvent the wheel if it already exists either in-house or online.
2. Design informal performance support or job aid documents for quick reference—such as checklists and how-to instructions. (Slade, 2020)
3. Recruit a second **facilitator as Producer** to help with technology, navigation, moderating the group chat and breakout rooms, and answering questions, especially if your group is large.
4. Open the session a few minutes early to allow participants to log in and work out any tech issues before the meeting starts.
5. Actively engage participants—do not just talk at them! Utilize the tools available and encourage an active dialogue with the participants.
6. Ensure there is an avenue for participants to ask questions or get help after the session ends.

Works Cited

Huggett, C. (2018, February). Converting your classroom training to virtual training. *In Focus: Learning Technologies*, 61-64.

Murphy, Maureen (2008) Matching workplace training to adult attention span to improve learner reaction, learning score and retention. *Journal of Instruction Delivery Systems*, 22 (2). pp. 6-13.

Slade, T. (2020, March 17). Ask a trainer: Converting in-person training for virtual delivery. In *Association for Talent Development*.

At QTS, we make training happen.
Together we can make it better.

