

The Virtual Trainer's Guide to Online Course Design:

5 TECHNIQUES TO DESIGN INTERACTIVE ONLINE TRAINING

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Some people think that virtual training is boring and not an engaging way to learn. They may have attended a lecture-style webcast, or they can't imagine how they could meaningfully interact with others online.

However, virtual training can be an effective way to learn, if you have an interactive design. A design that engages participants, creates a comfortable space for learning, and helps them apply a new skill. Good design is more than just posting slides online and clicking through them while someone talks. It's about creating a high-quality learning experience.

Here are five techniques that will help you design an effective and interactive virtual class:

Technique #1: Determine What You Are Designing For

When you begin to design a class, it's tempting to just open up a blank slide presentation and start writing, or to take a slide presentation you've used in an in-person class and believe you already have a design.

Imagine if you were to build a house by starting to dig the foundation before creating a blueprint, or by using a blueprint that doesn't fit the terrain of the land. Neither method brings success. Starting to create slides (or re-purpose existing ones) before you have a blueprint prepared will not lead to success either.

The first step in designing an interactive class is to determine exactly what you are designing for. What's your overarching goal for the session? What are you trying to accomplish? What topic are you trying to convey? What information should be shared, or what skill needs to be learned?

How about your participants – how many of them will you invite to each session? What do they already know about the topic? What experience do they have that you can draw upon? What questions are they likely to ask? What concerns will they share?

And given the answers to all of the above questions, what's the best way to achieve your goals? Do you need a main presenter who will provide one-way communication to a large audience? Will it be a facilitated meeting with every participant taking an

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active role in the speaking? Will it be a panel discussion with interactive questions and answers from a large audience? Will it be a small-group training class that requires participants to have hands-on skill practice?

Each of the above examples represents a different type of session, and therefore will naturally have a different type of design. Once you determine your goal, and the type of session you will have, you can design appropriately.

It's a common mistake to mix the session types in thought and design. In other words, you might think you are designing a training class when actually it's just a presentation with one-way communication. Break through this common barrier by designing a session that builds on your established framework and desired outcome – an interactive training class.

If you really do just have a one-way presentation, panel discussion, or facilitated meeting in mind, then use the rest of the techniques found in this white paper to add some interactivity. Your participants will most likely thank you for it.

If, on the other hand, your desired outcomes will be met by an interactive virtual training class, then use the rest of the techniques to gain ideas on how to do it.

Technique #2: Interact from the Start

An interactive virtual class should be engaging from the moment that your participants register. That means that expectations should be set from the very beginning that it's going to be an active learning experience. Use the following moments to create a great opening:

- The first email message a participant receives upon enrolling for the class
- Every reminder message that is sent
- Upon logging into the virtual session
- At the start of class

First Message

Start creating interactivity from the first message a participant receives about the class. For example, the messaging received upon class enrollment could invite them to do one or more of the following:

- Engage with other participants on a discussion board
- Print a handout with a relevant pre-class exercise, that will be referred to during class
- Respond to a topic-related question or two, bringing their answers with them to class
- Send questions they have about the topic to the facilitator

When sending this pre-class request, keep in mind your participants and their likelihood of actually completing the assignment. They will automatically be more apt to complete it if any of the following conditions are true:

- It's a topically relevant activity that's fairly easy to complete
- It's a class that has active support from the learners' managers, who have encouraged them to participate in the training
- It's a class topic that participants are highly motivated to learn about
- It's a series of classes, and the upcoming session is not the first event in the series

Even if none of the above situations are true for your learners, you can still set the stage for interaction and encourage completion by keeping the assignment “short and sweet” – relevant to the learning and quick and easy for learners to do.

Your virtual class design plan should include all pre-session communication messages to participants.

Reminder Messages

The encouragement to interact should continue with any reminders that you send. These reminders should not only include class logistical information, but also information that lets participants know the session will be interactive.

For example, you could give them a heads-up that they should prepare to be hands-on during the session and that you'll expect them to respond often. Remind them to close out of their email and other programs at the start of the session so they can give the class their full attention. Consider sending them a "do not disturb – training in session" sign that they could hang on their office door. By communicating these expectations prior to the session, participants will not be blindsided when they are asked to jump in 'with both feet' when the session begins.

Upon Login

The next opportunity to create an interactive environment is the moment a participant logs into the platform. Consider this scenario – a participant logs in and sees a message that says, "Welcome, this session will begin at 10:00 AM." The participant is forced to sit and wait and do nothing, meaning they will most likely check out, check email, and not check back in right away. They may even miss the first few moments of class. At best, the participant will sit passively staring at the screen. None of these potential responses sets the stage for an interactive class.

The alternate scenario is one that engages participants in discussion and activity right away. A participant logs in and is greeted with a warm welcome from the facilitator. The participant is asked to respond to a poll, or to use the chat feature to answer an on-screen question. This scenario creates an interactive learning environment – one that involves participants immediately.

Ideally, you are encouraging participants to join a session at least 5-10 minutes early, so that they can be ready to begin at the actual start time. You could even set your calendar appointment requests to begin 5-10 minutes prior to the actual class start time.

Use the platform tools to create interactivity from the moment participants log in.

A welcoming activity could include:

- Asking participants for their response to a thought-provoking quote
- Inviting participants to introduce themselves to one another with an icebreaker question
- Encouraging participants to share their “burning questions” about the topic
- Launching a poll question for participants to answer

Any of these activities can enhance learning as long as they are relevant to your topic and course design. They can reference the pre-class assignment, give a preview to the training topic, or help participants learn how to use the interactive platform tools.

The welcoming activity should not be a teaching topic or essential learning point of the class, because you do not want to penalize those who join on time but are not early enough to participate in this initial activity.

Start of Class

At the official start time of your virtual training class, begin with an interactive exercise. If you need to welcome participants or do some other housekeeping task that requires the facilitator to talk, be sure these participant-passive moments last no more than a few minutes. Participants need to interact with the tools and with each other within the first 3 to 4 minutes, or you will have lost the opportunity to set the stage for an interactive experience.

Another way to keep your audience engaged during the housekeeping slides is to have the trainer turn on their webcam. Video conferencing in online training personalizes the training environment for the audience by putting a face to the voice of the trainer. Also, an active video stream can be more engaging than only seeing static slides.

From there move to your opening activity. This opening activity should give everyone the chance to be hands-on with the environment. So for example, you could “go around the room” and have each participant individually introduce themselves to the group. Even if each person is limited to 30 seconds, and you have a small group of 15 learners, the 12th participant isn’t interacting until at least 6 or 7 minutes into class, and the 15th person even later.

A better example of an opening activity would have all participants typing or clicking at the same time. For introductions, there could be a list of questions on screen and participants need to answer them in the chat window. Or the facilitator could move through a list of questions, asking participants to raise their hand every time a statement is true for them (lowering after each question is asked.) Or participants could mark on screen using annotation tools in response to an activity slide. Whatever the actual activity, it should get every participant involved.

Technique #3: Select Activities for Maximum Involvement

Once you have set the stage for interaction, it's important to keep the momentum going. You've established that participants are expected to join in and take part in their learning. You've gotten them involved from the start, so it's important to maintain that same level of energy.

Remember, it's not about interaction for the sake of interaction. It's about engaging participants in their own learning. Consider Confucius' proverb: “What I hear, I forget. What I see, I remember. What I do, I understand.” This age-old adage still applies to today's virtual learning.

On average, you should aim to design a virtual class that engages participants approximately every 4 minutes. This frequency keeps attention and keeps focus on the learning. It helps keep participants from getting bored or distracted by what's going on around them in their physical environments.

Because of the high involvement levels, you'll probably want to keep your virtual classes short – no more than 60-90 minutes maximum. If you have more content than this, create a series of multiple short sessions.

One of the biggest advantages to using a virtual classroom is the plethora of tools available to get participants involved in their learning. When designing, use the platform tools to engage participants, and use your creativity to design unique interactions.

Use the Platform Tools

Think about ways participants can use all of the online tools available to them. If you use handouts, have participants 'raise their hand' when finished with a worksheet exercise. When asking questions, direct participants to respond via chat. When surveying the group, create challenging poll questions to check for knowledge or to get participants thinking.

Here is a list of common platform tools and ways you can use them to engage:

Tool	Use
Poll	<i>Ask challenging questions</i>
Chat	<i>Encourage dialogue</i>
Raise Hand	<i>Ask yes/no or agree/disagree questions</i>
Screen sharing	<i>Share software programs or websites with participants</i>
Material distribution	<i>Offer handouts and other paper-based resources</i>
Tests	<i>Check for knowledge transfer and comprehension</i>
Audio	<i>Allow verbal responses from participants and encourage open dialogue</i>

In a recent online survey compiled by Roger Courville of [1080 Group](#), attendees rated multi-select polling as the most engaging activity in a virtual class. Single-select polling followed close behind. This makes sense because poll questions cause participants to think and ponder their responses, helping them stay connected to the class content. Make use of these research results by designing thought-provoking questions that keep participants involved while driving toward the learning outcomes.

Use your Creativity

Be resourceful when designing activities for the live online classroom. Your use of the technology tools is only limited by your imagination and creativity.

For example, if you usually toss a foam ball from one participant to another in the in-person classroom, think about how that could be done in the virtual classroom. You might select the first person by typing their name in the chat window, and then ask them to select the next person, and so on, until everyone has been chosen.

Or create a competition between teams using poll questions to respond. Divide the group into two teams, and invite them to quickly create a team name (they can use chat or talk verbally – both ways work for them to communicate with each other – it's not secret so it's okay if the other team can hear). Ensure that each person knows their team assignment by having the facilitator type each team's list on screen.

Or use private chat to assign pairs. Let each person know who their partner is, and allow them to use private chat to connect with each other on a discussion question. This activity gives every participant an opportunity to be involved in a group conversation.

Also, use your creativity to add variety to the training class. Instead of having participants take one poll after another, or respond via chat every time there's a question, switch it up as often as possible. Keep it moving, and keep it interesting.

Technique #4: Create Materials for Facilitators and Participants

Facilitators, producers, and participants depend upon your design work to be able to know their roles and play them well. Create materials that set them up for success.

Facilitator & Producer Guides

A good design will include the creation of facilitator and producer guides with explicit instructions for activities -- especially since the interactive design will require action on their part as well.

The guides can be fully scripted, with instructions for each speaker to “say” and “do” activities. Or they can be simple bullet point lists with general instructions for managing activities.

The instructions should include enough information for the activity to run as planned, for the general amount of time expected. Learners should be able to easily complete the activity because the facilitator and producer have enough information to make the exercise run smoothly.

If you will be both the designer and the facilitator, you could take shortcuts on creating facilitator guides, by using abbreviations and notes that only you understand. However, if anyone besides you will deliver the training program, then you should create a guide for reference and consistency

Participant Resources

Participants will benefit from having reference material related to the training class content. This material can be printed handouts that are sent to participants ahead of time, or via material sharing within the platform.

The participant resources should not be just a copy of the facilitator's slides. The slides will have activity instructions, copies of poll questions, and other items that simply won't be useful for participants' post-class reference. When asked about this topic, my favorite response is, “the best slides make the worst handouts.”

The better option is to create a useful participant handout that can be a job aid back in the workplace. Provide resources, tips, techniques, content, and information that participants will actually use on the job. It will be far more useful than a deck of reference slides.

A producer is a second person who joins the facilitator in a training class. They can serve as the session host, offer technical support, or act in a co-facilitator role.

A sample facilitator guide template for virtual classes is available for download at: www.cindyhuggett.com

Technique #5: Use Each Session as a Design Review

When designing a virtual class, hold a pilot, so that you can observe and perfect the learning environment. Use the opportunity to review your design for timing, interactivity, and the learning outcomes.

Then, after the initial pilot, use each session as an opportunity to review and refine your design. You can collect feedback from participants and facilitators to incorporate suggestions and improvements. This feedback can be by your own observation, or anecdotally collected through comments made verbally or in the chat window. You might also create a web-based survey to gather relevant details from everyone involved with the virtual training event.

In each session, look for feedback on:¹

- Activity choices – did the activities help lead to the desired learning outcome(s)?
- Activity flow – How well do activities flow from one to the next?
- Activity transitions – Are transitions between activities smooth and seamless?
- Facilitator materials – Do they have enough instructions for facilitators to explain and lead activities? Do participants know exactly what they should be doing at all times?
- Visual aids – Do the visual aids (slides, video feeds, graphics, etc.) appropriately match the course content?
- Timing – How does the actual timing compare to the expected timing? What activities need more time? Less time?

A good practice is to create a set time point when you will update materials for each training class, and mark them with version or revision dates. If your materials are electronic (which is likely the case), store them in a central location in order to maintain clearly delineated version control.

¹ This list is adapted from my book, [Virtual Training Basics](#), ©ASTD Press, 2010.

By using each session as a design review, you can consistently monitor the participant interactivity levels and their engagement in the learning content. Continuous improvement will lead to better virtual training classes.

In Summary

If you apply the five techniques outlined in this paper, you'll create an interactive learning experience. To recap, here are the 5 elements of engaging course design:

- 1. Determine what you are designing for**
- 2. Interact from the start**
- 3. Select activities for maximum involvement**
- 4. Create materials for facilitators and participants**
- 5. Use each session as a design review**

About Cindy Huggett, CPLP

Cindy is the author of *Virtual Training Basics*, and the soon-to-be-released *The Virtual Training Guidebook: How to Design, Deliver, and Implement Live Online Learning*. She has been delivering synchronous online classes for a variety of audiences for over 12 years.

Her favorite passion is to help trainers deliver effective and engaging live online classes. She also assists clients on their transition to blended solutions and conversion to virtual training.

Cindy served on the national ASTD Board of Directors in 2009-2010, and was one of the first to earn the Certified Professional in Learning and Performance (CPLP) designation.

You can find Cindy sharing training tips via twitter at @cindyhugg, or contact her via her website www.cindyhuggett.com.



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