

KASSY  
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**STONE**

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# **INTERACT <sup>AND</sup> ENGAGE!**

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**2<sup>nd</sup> Edition**

**75+**

**ACTIVITIES FOR VIRTUAL TRAINING,  
MEETINGS, AND WEBINARS**

## More Praise for This Book

“Captivate your online participants from start to finish. *Interact and Engage!* offers stimulating starters and clever closers with amazing activities in between to meet your every need.”

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“I love what this second edition brings! Just when Zoom fatigue is gripping us all, this second edition brings fresh new ideas for us to make our virtual sessions more engaging, more effective, and, most importantly, more relevant for the audiences we are all trying to connect with through our screens.”

—Rob Lauber, CEO and Founder, XLO Global; Former CLO, McDonald’s

“Facilitation is the skill and art of making engagement happen. Virtual meetings, sessions, and learning activities soar when we design and leverage facilitation to maximize the experience of participants. This new edition of *Interact and Engage!* presents a powerful set of activities that will supercharge the energy and impact of virtual gatherings. A must read!”

—Elliott Masie, Chair, Masie Learning Foundation

“The biggest mistake virtual instructors make is assuming that the engagement skills they use in the classroom transfer to online. *Interact and Engage!* provides an amazing reference of easy-to-use and well-tested methods to master the hardest skill in teaching: engagement! It’s a must for every virtual instructor.”

—Bob Mosher, CEO and Chief Learning Evangelist, APPLY Synergies

“If you want virtual delivery to deliver results, begin by designing your events with the tools and activities in this book. Kassy and Tom have once again given us a gift of clear, specific instructions on how to engage audiences in an environment where disengagement is so easy.”

—Patti P. Phillips, CEO, ROI Institute

“*Interact and Engage!* has a permanent spot on my desk. It’s my go-to resource when I am looking for ways to get the most out of a virtual meeting through activities that are easy to execute and create an inclusive environment for collaboration.”

—Humera Malik Shahid, Chief Diversity, Equity and Inclusion Officer and VP, Talent Development, Intuit

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—Brenda Sugrue, Global Chief Learning Officer, EY

“We’re all being asked to up our game in the virtual learning space and the new edition of *Interact and Engage!* arrives just at the right time. Drawing from their extensive experience in the professional development field, Kassy and Tom give us an insightful, pragmatic, and proven resource to help meet the challenge. This book is now my go-to reference when designing or refreshing virtual learning events. I encourage others to pick up a copy and keep it close.”

—Kevin D. Wilde, Executive Leadership Fellow, Carlson School of Management,  
University of Minnesota; Former CLO, General Mills

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ATD Press is an internationally renowned source of insightful and practical information on talent development, training, and professional development.

ATD Press  
1640 King Street  
Alexandria, VA 22314 USA

Ordering information: Books published by ATD Press can be purchased by visiting ATD's website at [td.org/books](http://td.org/books) or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 2022939952

ISBN-10: 1-953946-40-2  
ISBN-13: 978-1-953946-40-9  
e-ISBN: 978-1-953946-41-6

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# Acknowledgments

**T**he first edition of this book was a first for both of us, and it wouldn't have been possible without the help and support of many people. The same is true for this second edition, so we want to thank everyone involved in both.

First, a big thank you to everyone who has participated in and produced Kassy's online train-the-trainer, train-the-designer, and train-the-producer programs for the last two decades. These experiences have provided the bulk of the activities we are sharing in this book, and we appreciate your interaction, feedback, and ideas over the years.

When Hunter Gilliam said to Kassy, "You do it, you're the actor. Just make it sound great, like you're on the radio!" he inspired her to make her first virtual training in 1999 engaging, rather than worrying so much about the technology. So, thank you, Hunter.

Without Cindy Huggett's support, guidance, and cheerleading, the first edition of this book would never have gotten out of Kassy's head and into print. Thank you, Cindy, for your ongoing support and friendship.

Thank you to Nanette Miner, "The Training Doctor," for inspiring Kassy to be a better trainer. Your masterful instructional design showed her how much more she could get out of training if she followed a well-designed trainer manual.

The Institute for Corporate Productivity (i4cp), where Tom is a senior research analyst, deserves thanks for letting us use data from the October 2021 survey that we helped them craft on trends in virtual classroom training. Such data and findings are

usually reserved for paying i4cp member organizations, so we appreciate being allowed to include some of it in this book's second edition.

And finally, we want to thank the team at ATD for their assistance and support, most notably Justin Brusino and Jack Harlow for the first edition, and Alexandria Clapp, Kathryn Stafford, and Melissa Jones for the second edition. There are many others, of course, who helped with design elements, marketing and promotion, the ATD conferences, and more, and we sincerely thank you all.

# Introduction

## **Now More Than Ever: We Need to Interact and Engage**

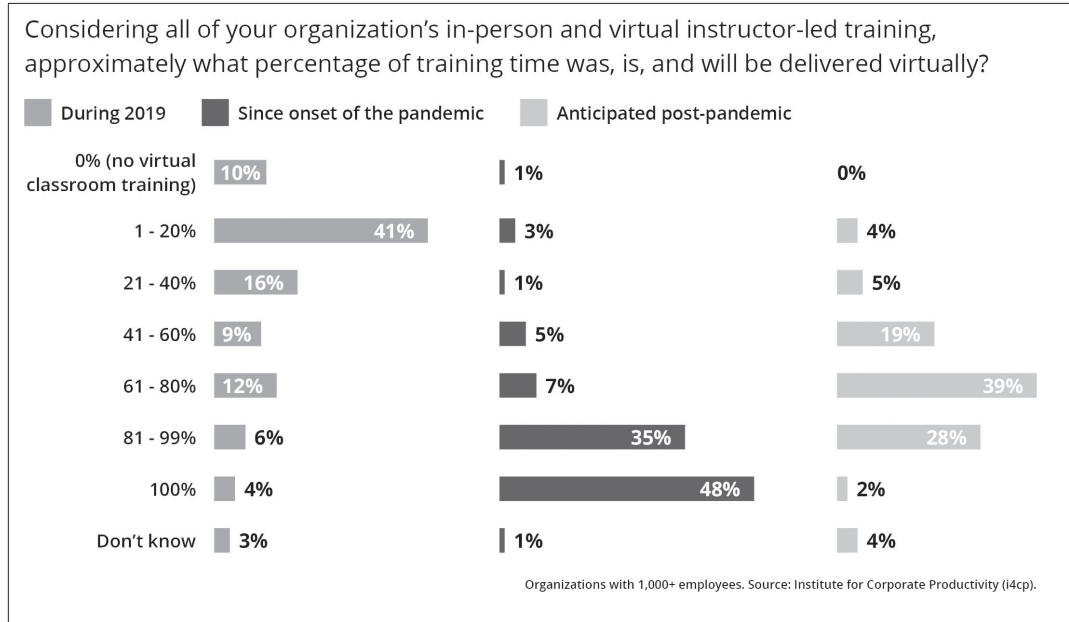
Creating outstanding online meetings, webinars, and training programs can be difficult, whether you're a novice instructional designer or facilitator, or an expert. This has always been true. But then 2020 came along, and with it, the COVID-19 pandemic and a significant increase in remote work and virtual events.

On one hand, the events of 2020 and the years that followed helped to normalize meeting and conducting training online. For people in job roles that shifted to working remotely, online meetings became the norm. According to research by ON24, the use of webinars increased 162 percent and attendance quadrupled in 2020. And a study by the Institute for Corporate Productivity (i4cp) in October 2021 found that virtual training went from being an infrequently used approach (with 51 percent of survey participants indicating it comprised 20 percent or less of their organization's instructor-led training) to by far the more commonly used approach (with 83 percent indicating it comprised 80 percent or more of their instructor-led training since the onset of the pandemic; Stone 2021; Figure I-1).

On the other hand, the shift was so abrupt and so broad that many people struggled—at least at first—to feel comfortable using Zoom, Teams, Webex, and other such platforms on a more regular basis. Making sure online meetings, webinars, and training programs

were interactive, engaging, and effective was seen as a noble goal—but first everyone just needed to get through the day-to-day of their new way of working.

**FIGURE I-1. SURVEY OF VIRTUAL TRAINING USE, OCTOBER 2021**



Due to the urgency of the situation, many meeting leaders, webinar presenters, and virtual trainers fell into bad habits. For veterans of these platforms, it simply meant more—a lot more—of what they’d been experiencing for the past two decades: Leaders, presenters, and trainers lecturing. Participants finding the events uninteresting, resorting to multitasking, or zoning out. Poorly conveyed information leading to training scenarios that weren’t able to drive optimal knowledge, skills, or behavior change.

Research makes clear that online meetings, webinars, and training are here to stay, even after the COVID-19 pandemic fades into the rearview mirror. Some people will continue to work remotely indefinitely (likely more than did so pre-pandemic), while many others will work in hybrid scenarios, spending at least some time each week or month working remotely. Additionally, 69 percent of participants in the i4cp study indicated that their organization planned to conduct 60 percent or more of their instructor-led training virtually going forward—a massive increase over the 22 percent who used virtual classroom training that frequently prior to 2020.

Before diving into the technology and the actual activities presented throughout this book, let's take a minute to define and describe virtual meetings, webinars, and virtual training.

## Virtual Meetings

A *virtual meeting*, as the term is used in this book, is much more than a conference call in which multiple people are using the same audio or video call to discuss strategy, a project, or another joint concern. Virtual meetings allow participants to share their screens, content slides, videos, and more. Participants can text chat with one another in addition to talking by audio. And they can collaborate on whiteboards while taking notes. Platforms for virtual meetings include Zoom, Microsoft Teams, Webex, GoTo-Meeting, and Adobe Connect.

The trend toward more virtual meetings started as early as the mid-1990s, when the International Teleconferencing Association reported that the teleconferencing industry in North America had grown 30 percent a year between 1993 and 1997. And then in 1999, Webex ran an ad campaign starring RuPaul and using the slogan, “We’ve got to start meeting like this!”

By 2012, 60 percent of C-level executives in North America surveyed by Frost & Sullivan said they were using web conferencing tools in their companies. Fast forward to March 2020 and the response to the COVID-19 pandemic led online meetings to become the standard approach for millions of employees who were now working remotely.

The events of 2020–2022 have proven the futility of making long-range predictions about most things, including the future of work. That said, it seems pretty clear that even as some companies revert to more on-site work, and therefore decrease their use of virtual meetings in coming years, the genie is out of the bottle. Online meetings have been normalized for just about all purposes: sales calls, deal completion, project updates, team building—almost any kind of meeting imaginable really.

Even with this sudden boost in experience with and focus on virtual meetings, we all still have more experience—going back to our earliest childhood days—meeting with others in person. So, most people are still learning how to make virtual meetings as effective as (or better than!) the in-person meetings they are used to. Including some activities, such as those provided in chapter 4, is one way to increase interactivity, engagement, and ultimately the value for the meetings you design, lead, and participate in.

## Webinars

Web conferencing as it is known today arose in the late 1990s, and somewhere along the line the term *webinar* became the portmanteau of web and seminar. Broadly, a webinar is a live presentation that occurs over the web. It is different than a virtual meeting, because while there can (and should) be interaction with the audience, a webinar presentation is largely happening in one direction: from one or more presenters to a potentially very large audience. Webinars are most commonly used in marketing to educate potential customers about the features of a new product or service. Educational or thought leadership geared webinars, on the other hand, share information about a topic without a direct intention of selling a product or service.

This book primarily uses the size of the audience to distinguish between a webinar and a virtual training event, because this factor determines how much the facilitator can interact with participants—and thus the ways that the facilitator can engage participants through activities. Webinars have several dozen or even hundreds of participants, whereas virtual training programs are best designed for a maximum of 20 participants. Many of the techniques for keeping a webinar or virtual training audience engaged are similar, but some activities and approaches are more effective with a smaller group.

Some facilitators refer to their recorded online presentations—whether scripted recordings with no audience present or recordings of what were live events with an audience at a specific date and time—as webinars. In either case, the person watching the recording has no opportunity to interact with the presenter or anyone else. This changes the engagement potential drastically, reducing the audience from participants to simply viewers. These programs are thus a different concept from webinars, and so deserve a different name. This book will follow others, such as Cindy Huggett’s *The Virtual Training Guidebook* (2014), and call them “webcasts,” because they are so similar to broadcast television programs.

Just as virtual meetings (and virtual training programs) can be executed very well or very poorly, so too can webinars be interactive and engaging—or boring lectures that quickly drive participants to multitask or, worse, snooze. That didn’t change much during the 2020s spike in webinar usage—and for some, the situation might have actually gotten worse.

## BACKSTORY

Reasons pop up all the time that cause people to miss an interactive, engaging live webinar event they signed up for (last-minute schedule conflicts, emergencies, higher priority meetings), so they often ask me for recordings to watch after the fact. That's fine. However, know that by simply watching the recording you won't get as much value as you would from attending the live event.

A recording is different in kind—it turns a webinar into a webcast. There's no opportunity to ask questions, get feedback, interact with other participants, share responses in polls, or even become more adept with the webinar platform. As I often say, watching a webinar recording is like being a fly on the wall at a party that occurred last week.

So while sharing webinar recordings is OK, let's be clear that the value of watching it will be greatly diminished by not participating live.

—Kassy LaBorie

But there's an antidote: well-designed activities meant for large audiences that make the most of the tools available in the webinar platform. This book provides many openers, icebreakers, and closers that can be used in these events, plus an entire chapter full of activities specifically designed for webinars (see chapter 5).

## Virtual Classroom Training

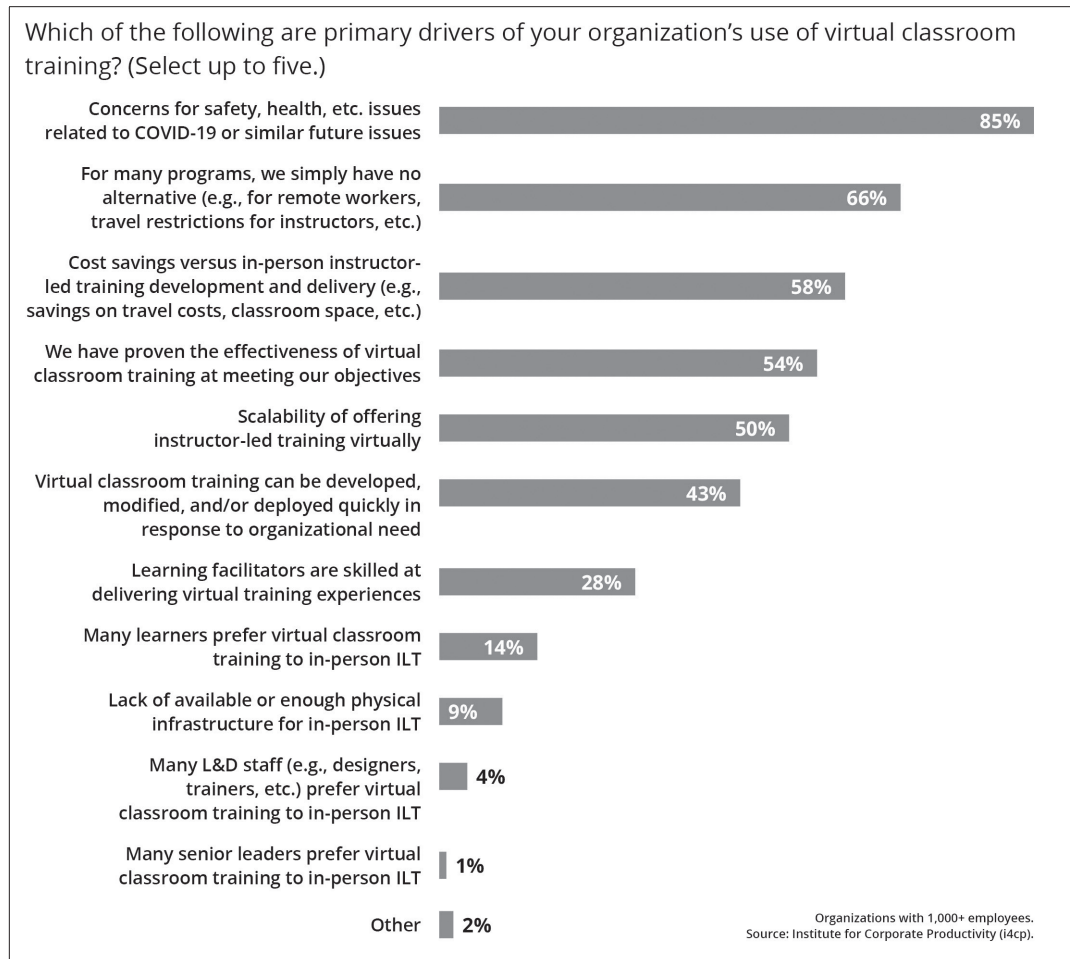
Online training, or e-learning, comes in a few varieties and goes by many names. The talent development industry rightfully distinguishes between that which participants perform on their own at any time and that which participants attend with an instructor (and usually other participants) at a set date and time. The first type of online training is often called *self-paced e-learning*, *on-demand e-learning*, or *asynchronous e-learning*. Its popularity since the 1990s has been fueled by their appealing 24x7, anytime-anywhere nature; the rise of vendors with large libraries of off-the-shelf self-paced courses; and the growth of rapid e-learning development tools that create everything from basic voice-over PowerPoint courses to rich animation and video courses to more advanced simulations with branching logic. For some in the industry, this type of online training has even become synonymous with the word *e-learning*.

The second type of online training is in some ways the opposite of self-paced, individual courses. It too goes by several names, such as *virtual classroom*, *virtual instructor-led training (vILT)*, *synchronous online learning*, and *live online training*. At its essence, it is a training experience in which multiple participants and one or more facilitators (such as a trainer and a producer) come together at the same time in an online classroom that allows them to communicate, interact, and collaborate with one another; view presentations, videos, or other content; and engage in large- and small-group learning activities.

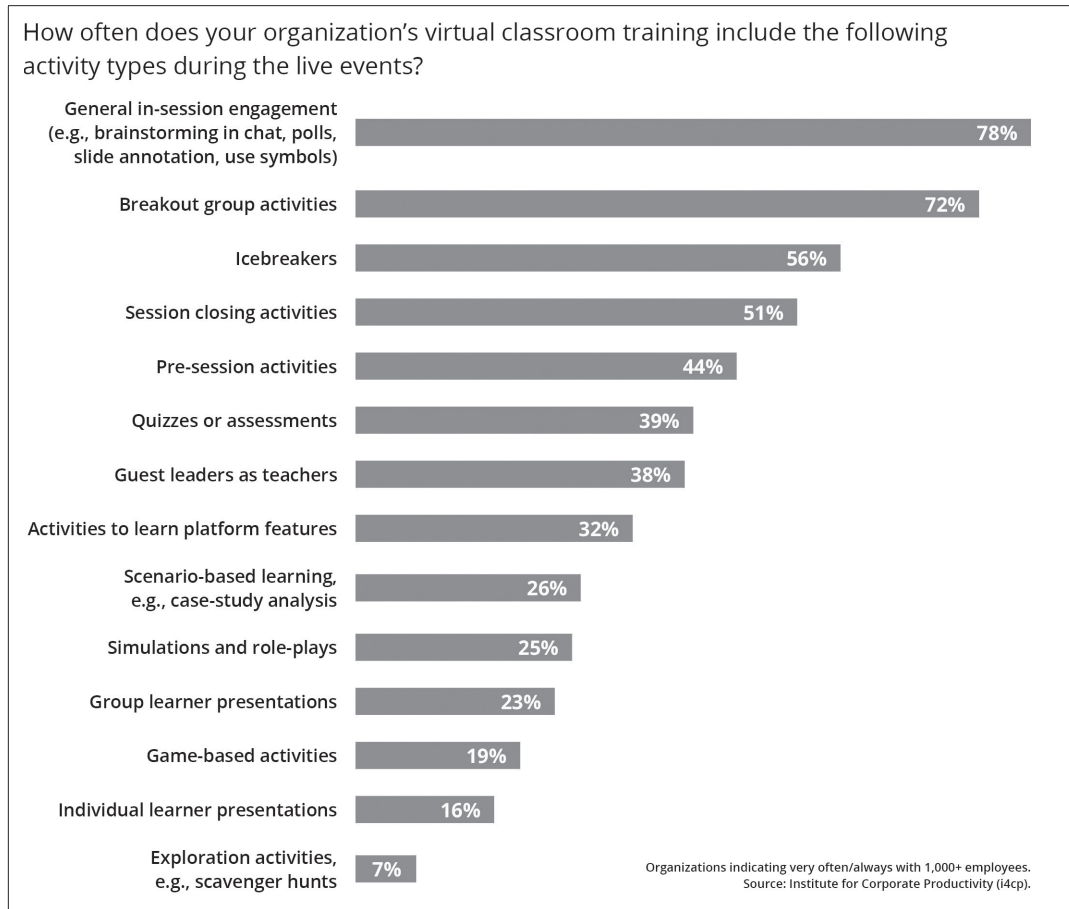
Each type of online learning has its pros and cons (see chapter 6). And both were already increasing in use during the first two decades of the 21st century, before the outbreak of COVID-19 eliminated, seemingly overnight, the use of traditional, in-person instructor-led training for all the workers who suddenly found themselves working remotely. That led to an increase in online training, including a shift in virtual classroom training from being a trending but niche approach to one that was quickly normalized.

A host of factors will likely keep virtual classroom training at the forefront of employee learning. While self-paced e-learning has the advantage of scheduling flexibility, virtual classroom training retains the benefits of the in-person classroom experience while lacking most of its downsides. Research from i4cp in October 2021 made clear the key drivers for the continued use of virtual classroom training (Figure I-2). At that time, continued concern for the safety and health of employees was still paramount, making it the number-one driver indicated. But other top drivers of the use of virtual classroom training will outlive the COVID-19 pandemic, such as cost savings from the reduction in travel and physical classroom space, the now better-proven effectiveness of virtual training at meeting learning objectives, and the scalability compared with in-person instructor-led training.

So regardless of what the future holds in terms of remote and hybrid work, it seems that virtual classroom training has now matured well beyond a niche approach and will continue to be a critical way of imparting knowledge, increasing skills, and changing behaviors.

**FIGURE I-2. PRIMARY DRIVERS OF VIRTUAL CLASSROOM TRAINING**

But, as with online meetings and webinars, much virtual classroom training is still not as engaging and effective as it could be. This was excusable in 1999 or even 2010, because the platforms were new, best practices were not easy to come by, and the focus was not on adding engaging activities. Now that virtual classroom training has become nearly ubiquitous, however, there is no excuse for boring, lecture-style live online training. (Such events might as well be called “dead online.”) The activities and other tips found in this book are the remedy to poor virtual training experiences (see especially chapter 6). Research by i4cp presents a snapshot of the broad range of activities that organizations are using in virtual classroom training in particular (Figure I-3).

**FIGURE I-3. ACTIVITIES USED DURING LIVE VIRTUAL TRAINING EVENTS**

## Engaging Through Activities

Participants in online meetings, webinars, and training events want and need them to be great experiences. But what do great experiences look like? The business buzzword answer has long been that it's all about participant *engagement*—and for once the buzzword is on track. A great online meeting engages all participants, while still achieving its objectives. A great webinar that gets information to stick engages participants as much as possible even with a large audience. And a great training event engages learners so that they retain knowledge, gain new skills, and see the desired behavior changes and performance improvements.

Engagement in live online events looks essentially the same no matter what the context. Table I-1 shows the difference between an engaged participant and a disengaged attendee.

**TABLE I-1. ENGAGED PARTICIPANTS VERSUS DISENGAGED ATTENDEES**

<b>Engaged Participant</b>	<b>Disengaged Attendee</b>
Focused and attentive	Uninterested
Active	Passive
Enthusiastic and eager	Bored and frustrated
Spontaneous	Reactive
Curious and inquisitive	Indifferent
Asks questions	Goes through the motions
Willing	Resistant

Put another way, meeting facilitators need to stop running their online meetings like a typical marketing webinar, where they read PowerPoint slides to a large, mostly passive audience, only allowing for a few questions if there's time at the end.

Webinar facilitators need to stop assuming their webinars can serve as robust training programs. Such events have large audiences and don't allow for collaboration, hands-on or other realistic practice, expert coaching, and so on, which are the interactions needed for robust training to take place. Facilitators are setting participants up for disappointment and failure if they expect anything more than knowledge-level learning from a webinar.

And if online facilitators are expecting rich training outcomes—changed behavior and improved performance—they need to design their live online training programs in a way that enables such results. They need to limit participants to a reasonable number (a maximum of 16 to 20); break out the audience into even smaller groups for activities; engage via audio, chat, and whiteboarding; and think of the event in the same way they would an in-person training session.

Well-designed online activities—those aligned with and in support of the event's goals—are critical to maximizing engagement and avoiding these tendencies. They provide structure and purpose to interaction and collaboration. They keep facilitators from becoming captive to the features of their live online platform tools.

Facilitators need to avoid using polls just to break up an otherwise lecture-driven webinar or to randomly ask a question in chat during an online training event; otherwise, they are simply falling victim to “shiny object syndrome”—the “Ooooh! Aaah! That feature is nifty. I’ll use it!” response. Facilitators should not use a tool just for the sake of using it. Rather, they should use it in support of the goals of the meeting, webinar, or training event.

That said, getting accustomed to the technology is the first step to knowing what is possible during online meetings, webinars, and training events. Facilitators need to become so familiar with the technology that they don’t notice it anymore—that using it becomes as natural as using the tools found in classrooms and conference rooms for in-person meetings and training events.

## What You’ll Find in This Second Edition

So how can virtual facilitators captivate online participants and get them to interact and engage? With an expanded collection of more than 75 activities ranging from openers and icebreakers to closers, this new edition offers a host of ways to ignite online events, specifically online training programs, meetings, and webinars. Accompanying many of the activities are backstories, mostly from Kassy LaBorie’s nearly 25 years of experience, which provide the context for their inspiration. We’ve also taken what we’ve learned since publishing the first edition and provide updated competency models for both trainers and producers, as well as our latest insights on using advanced techniques and features.

Chapter 1 focuses on the technology platforms themselves and explains industry terms such as *chat*, *annotation*, and *breakouts*. It also discusses the producer’s role, which is critical to successful online events. Chapters 2 through 8 make up the meat of the book, providing examples of activities arranged by type. Welcomers and warm-ups—activities delivered before a live online session begins—naturally come first (chapter 2). These are followed by icebreakers—activities for the beginning of a live online event (chapter 3). Chapters 4 to 6 provide activities specific to meetings, webinars, and training events. Chapter 7 presents closers, and chapter 8 offers some fun activities for celebrations, such as holiday parties, good-byes, and baby showers.

Chapter 9, similar to chapter 1, focuses on online platform features, but goes into more depth on some key advanced features. Chapter 10 wraps up the book and provides some concluding thoughts, including guidance on how to convert or create your own online activities.

It's not a requirement to read the chapters in order, from cover to cover. Think of *Interact and Engage!* as a recipe book. Virtual facilitators, producers, and instructional designers can flip through these pages and jump to the chapters most appropriate to their interests and needs.

Now, let's begin!

# 1

## Required for Engagement: Knowing the Live Online Platform

**T**he first step to engaging an online audience is to learn the delivery platform inside and out, backward and forward, and upside down. In fact, when facilitators don't know how to use the online technology's features, they'll likely lose their audience while they figure out how to upload their slides, share their desktop, or get their mic to work.

This chapter describes the critical features of live online platforms and breaks down what each does and how they work to support the interactive activities described in the chapters that follow. Included is a robust checklist to locate and understand the most common features of the most popular platforms, including Zoom, Webex, Microsoft Teams, and Adobe Connect. But before getting into the key features, let's start with some initial important considerations and tips.

### **What Is the Goal, and Who Is the Audience?**

Always begin with the end in mind: What is the goal of the live online event? Whether a meeting, webinar, or virtual training session, when designing the overall event and its activities, think about what goal you are trying to achieve and any objectives that support it. Is the event meant to be informative, experiential, or fun? Or perhaps all of the above?

In addition, carefully consider the audience and the context for the event. Do your attendees know each other or are they complete strangers? Are they experienced leaders, peers, new hires, or the general public? Are they advanced in their understanding of the subject matter or are they relative novices? How experienced are they with online events in general, and with the specific online platform you will be using? And how much time is allotted for the event: 45 minutes to an hour? Two hours? Three or four hours with multiple breaks?

With answers to these questions, you will be well positioned to consider which features of the live online platform to use for each part of the program. Without these answers, it is easy to make mistakes such as using a feature just for the sake of it or providing a false sense of interactivity for the participants. Take the event seriously; it will be obvious which technical features to use.

## **Leverage an Online Producer**

A producer who helps with delivery is critical to ensuring that your online event will run smoothly. The technology requires too much attention on its own, encompassing everything from managing technical details to troubleshooting the inevitable problems. It's too much to expect one person to manage all that while also engaging participants and presenting content. Plus, if participants sense you're more preoccupied with fiddling with the technology rather than interacting with them or sharing knowledge, they'll simply log off and ask for a copy of the slides.

Unfortunately, an October 2021 i4cp survey found that, for virtual training events in particular, not having a producer was the number-two barrier to learning success. (The number-one barrier was one common to all workplace learning: participants lacking time in their day to devote to learning.) So what makes a producer so important?

The producer provides a second set of hands, focusing primarily on the technology to ensure that all the features of the online platform work smoothly and as planned. By relying on the producer to open the poll, highlight a point on a slide, or set up the breakout groups, the facilitator is free to give all their attention to the participant experience. The producer can worry about the technical details, and the facilitator can worry about the people and the training.

So, what specifically do producers do during a live online event? And do they do the same thing in a meeting as they do in a webinar or a training?

Producers enable great events in three areas: technology, support, and communication. A producer knows every feature of the online platform, uses them adeptly as needed, and can fix problems when they arise. They support participants by helping them connect to the event, partnering with the facilitator on polls, breakouts, chat, and more. And they're constantly analyzing the event in real time to preempt possible issues. Communication is also critical for a producer—even though they aren't the primary presenter, facilitator, or trainer—because they must appear professional and model the use of relevant equipment (such as the webcam or audio); convey technical information clearly, patiently, and concisely; and listen carefully for cues from the facilitator and for potential issues from participants.

A producer who masters the components of the Virtual Producer Capability Model enables the facilitator to focus on the participants and their interactions. Working together as a team ensures that engagement is the priority and that the online event is a success. For a more detailed description of the Virtual Producer Capability Model and the companion Virtual Trainer Capability Model, see the appendix.

## See What the Participants See

Even the most experienced in running and supporting live online events might struggle to see the event from the participant's point of view. That is, unless they *can* actually see it from the participant's point of view. How? By simultaneously logging in as a participant on a second (or even third) computer. A savvy facilitator or producer will use this technique to:

- Check for lag between the facilitator's actions (advancing a slide and rearranging screen real estate) and what participants are seeing.
- Help participants troubleshoot an issue they are having with the interface.
- Improve the program for the next time based on the live experience seen from the participant's point of view.
- Accurately provide directions on where participants should look, what they should see, and how the program should operate (rather than saying, "Does everyone see this?" make a commitment to know the answer by looking at a second screen).
- Present confidently and under control by knowing exactly what participants are seeing when you are presenting.

At a minimum, a second monitor is needed to give another point of view. But to truly see and interact with a different system, use a second computer. This could also serve as a backup if anything goes awry with your main one. If some participants are attending the live online event using a smartphone or tablet, consider also using one of those devices to gauge their experience.

## **A Note About Audio: Using Phone or Computer**

Regardless of which online platform you use, make it a priority to learn the exact setup of the audio choices. Additionally, make sure to always present from a clear connection or line, eliminate all background noise, and use a hands-free headset to easily interact with all the features of the online event. One of the quickest ways to lose the audience is to have poor audio quality. Don't let that happen.

Here is a checklist to ensure that the event's audio is engaging:

- Does the platform use teleconference, VoIP (computer audio), or both?
- If using a teleconference, is it an integrated teleconference provided by the platform or by a third party?
- If it's an integrated third party, does the integrated teleconference also work with the breakouts? If using a nonintegrated teleconference:
  - What are all the telephone controls that can be pressed using the telephone buttons?
  - Does this teleconference also include sub-conferencing for manual audio breakouts? What are the controls to initiate sub-conferencing?
- What are the muting and unmuting controls?
  - Is "mute on entry" available?
  - How can individual connections be muted and unmuted?
  - Can all connections be muted and unmuted? Does this also mute the facilitator?
- What are your backup plans?
  - What teleconference lines could serve as an alternate if the one you're using stops working?
  - What is the plan if the VoIP computer audio stops working?

Before declaring the audio ready, don't forget one last important detail: Participants almost always need help understanding how to connect to the audio. Be prepared with a

slide or send them the information in advance. Have the producer log in 30 minutes early to help participants connect.

## Online Platform Features

One challenge with learning to use an online platform is the number of features available. Commonly used features include screen sharing, audio, annotation, and chat. The following checklist walks through the features referenced in the activities in this book. Included is a section for each feature titled “When to use.” Pay close attention to these descriptions, because it is one thing to activate a feature, but entirely another to know why to use that feature in the first place.

### Audio

The connection to the phone or computer audio (VoIP) for sound.

**When to use:** Always require attendees to join audio, whether it is computer audio (VoIP) or a teleconference. Make sure they not only join, but have a clearly audible connection or line, eliminate background noise, use a hands-free headset, and can control the mute and unmute themselves.

**Note:** Attendees always need help understanding how to connect to the audio. Be prepared with a slide or send them the information in advance.

### Webcam

A live video feed using cameras from each participant’s computer.

**When to use:** Using a webcam personalizes a live online learning event. It works well for introductions or any time that seeing a person or an object would be helpful for learning to occur.



### Notes:

- Pay attention to your lighting and what will appear on camera behind you. Be sure your face is centered and look into the camera when speaking.

- Check whether the webcam feature shows a live feed by default. How do you control who sees your webcam and when?
- Check to see if your platform includes virtual backgrounds. You may be able to upload images and video files to serve as a background or there may be built-in options.
- Check to see if your platform includes virtual filters. Blurring of the background is the most common.

**Tip:** Prepare participants ahead of time before asking them to be on a webcam. No one appreciates the surprise!

## Participants Panel

The list of attendees or participants.

**When to use:** The participants panel is your key to knowing who is online, how their audio is connected, and what feedback they are providing throughout the session. Focus more here than on your slides to engage your audience!

**Tip:** Look at the participants list and use attendees' names often and regularly. Their names are to each of them, as Dale Carnegie has said, "the sweetest, most important sound in any language."

## Feedback and Reactions

Icons to indicate status, such as "raise hand," "green check," and "away."

**When to use:** Feedback tools are a simple and highly effective way to check in with attendees. This is your online connection to the types of nonverbal cues they give during in-person events. Encourage attendees to click the green check any time they are nodding their head in agreement. For example, tell them:

- "Give me a green check if . . ."
- "Let's applaud your colleagues' efforts!"
- "Please mark 'away' if you need to step out."

**Notes:** Every platform is different. Check who can see what and when. For example, in Webex Meetings, the host and presenter can see an attendee's raised hand, but other participants cannot.

## Chat

A designated area for typing publicly shared and private messages for dialogue, questions, and comments.

**When to use:** Chat is one of the main methods of communication in the virtual classroom. Do not underestimate the power of this simple tool as it can be your main lifeline! Use it for commentary, questions, and conversations. Create *chatversations*! Send links through chat to quickly provide online resources to participants.

**Notes:** Most platforms have this feature, but it may operate differently. For example, some platforms allow public chatting while others do not. And some even let hosts see the private chats among participants. Questions to ask include:

- Can the chat file be saved?
- Can the hosts view private chats?

## Whiteboard and Annotation Tools

A space for collaboration using annotation tools.

**When to use:** Use this tool for collaborative activities like brainstorming and creative thinking. Annotating answers and ideas on a whiteboard is one of the most effective ways to gauge participation levels. It not only provides immediate responses, but also allows you to easily save results and refer back to them at a later time.

**Notes:** Be sure to activate the annotation tools for participants. Enable these privileges to allow them to collaborate and write their ideas and comments on the files shared or on a whiteboard. Questions to ask include:

- Can your slides and files function as whiteboards that are shared and then annotated upon?
- Can they be saved?

**Tip:** Have participants place a pointer or type their initials on the whiteboard space prior to typing a response. This is called “claiming their real estate” and will keep them from typing over someone else.

## Share File

Instead of sharing a computer screen to show an application, this feature allows a file, like a .ppt file, to be uploaded into the main meeting room environment.

**When to use:** Share files (for example, PowerPoint files) that are prepared for interaction with enough blank space for annotating answers to questions, thoughts, and ideas. Files can often be annotated upon for increased interaction and engaging activities. Use compelling images rather than words and ask your participants to respond using the chat, the feedback, and the annotation tools.

**Notes:** Some platforms, like Zoom, now allow files to be shared as virtual backgrounds. This feature allows the presentation to exist as if it is behind the presenter. Check to see if this is possible in your platform.

**Tip:** Develop the slides to be uploaded to the platform so they become the working space for the event. You don't have to share the PowerPoint application unless you need to use the application itself, for example to teach it.

## Share Screen, Desktop, Application, or Web Browser

This feature allows attendees to view programs and websites directly from the presenter's computer.

**When to use:** Software and systems training is often conducted live online using desktop, application, or web sharing. This allows attendees to view the entire desktop, one application at a time, or even a web page, because the presenter controls the navigation of it. Think of it as allowing others to look over your shoulder as you present from your computer. They'll see your mouse, and if you are desktop sharing, any pop-ups you may get. Be careful!

**Notes:** Most platforms have this feature. In fact, this is the persistent view for the Citrix GoToMeeting suite of products. Learn how to control when the desktop is shared and when it is not. Questions to ask:

- Can you enable annotation tools for participants?
- Can it be paused?
- Can you grant remote control of the shared screen, allowing attendees to control it? (This is great for collaborating on a document or demonstrating software.)

Attendees do not need to install the software on their computers to view it from yours. For hands-on training, however, ask attendees to open their own applications and toggle between the platform window and their application as you demonstrate the steps.

Some platforms now allow a presenter to share their screen, desktop, application, or web browser to a breakout room. Research to see if your platform includes this feature.

## Polling

A tool used to formally survey an audience and view collected results.

**When to use:** You can survey attendees with prepared questions and answers using polling. Remember to respond appropriately to the answers and build your comments and discussion into the training experience. Avoid polling just for the sake of interaction.

**Notes:** Create the polling files in advance if possible and use them repeatedly in your live online sessions. See if your poll files can include one question or many on the same file. Determine if your questions can be multiple choice, multiple answer, or short answer.

## Breakouts

A tool to allow participants to work together in small groups, sharing files, screens, whiteboards, and discussion.

**When to use:** Working in small groups with other online participants is an effective and engaging way to apply key takeaways from any training event. Use breakouts for activities like role plays, problem solving, and case studies where teams work together to create solutions and share ideas.

**Notes:** Not all platforms have this feature. Check whether your platform does and then recheck the audio settings to ensure that they are compatible with breakouts. Questions to ask include:

- How many breakouts can you create?
- How many people can you place in each room?
- Can you preload content into the room?

- How is content saved and shared?
- How do you join the breakouts to assist?
- How do attendees indicate they need help?
- Can you send a broadcast message?
- How will you keep track of time?

**Tip:** Create a slide in your visuals that includes two sets of instructions for all breakout activities: activity directions and technical directions (Figure 1-2).

**FIGURE 1-2. SAMPLE ACTIVITY DIRECTIONS AND TECHNICAL DIRECTIONS**

Take Charge! Scenarios	
<p><b>Instructions:</b></p> <ul style="list-style-type: none"> <li>• Discuss in your small group what you will do for each of the scenarios in the space provided.</li> <li>• Take notes on the table.</li> <li>• You will have 10 minutes to work.</li> <li>• Pick a spokesperson to report back during debrief.</li> </ul>	<p><b>How it will work:</b></p> <ul style="list-style-type: none"> <li>• Each room has separate audio and a whiteboard.</li> <li>• We will announce time alerts and call you back for debrief.</li> <li>• If you have questions at any time, send a chat message to the Host.</li> </ul>

## File Transfer

A simple way to share files for participants to quickly download.

**When to use:** Handouts and manuals can be easily provided to participants using file transfer. Load class materials for quick access as needed.

**Notes:** Check whether files can be transferred and if there are limits on file size or type. Be sure to provide instructions on how and where to save the file so participants can open it.

## Recording

An archive of the session, including all the visuals and audio for playback at a later time.

**When to use:** Make recordings of your learning events, which attendees can use to reference and review the activities. It's also helpful for people who arrive late or leave a session early. By watching the recording, they do not lose out on any of the session discussion or activities.

**Tip:** Recordings of interactive online training are not a replacement for that learning event. Avoid thinking that a recording will drive learning in the same way as the live session. It won't. Most people do not watch a recording for more than 10 minutes.

### Closed Captioning or Transcriptions

**When to use:** When presenting to a global audience or one in which those in attendance may be hearing impaired, it is an excellent idea to have the words of the presenter and potentially the attendees captioned or transcribed for viewing or even reading via a text file later.

### Share Sound From Computer

**When to use:** Playing music or audio along with a movie during a session is a great way to engage an audience. Be sure to follow all copyright laws.

### Additional Features

This chapter includes the most common features of online platforms as of this writing. Stay current with the innovations coming from your platform vendor because new features will be added regularly and the best online event designers, facilitators, trainers, and producers will want to know about them before their participants do.

## Conclusion

This chapter focused on the critical features of the most popular platforms and described how they work to support the interactive activities described in the rest of this book. Understanding these technology basics is an important prerequisite for developing and using engaging activities. The next seven chapters include more than 75 activities you can use directly or modify to suit your needs. Each activity outlines which of these features are used, and you can refer to this chapter if you forget what a feature does or when to use it. Now on to the fun stuff, starting with activities appropriate for the beginning of virtual events.

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She trains and coaches producers, the virtual classroom trainer's partner in effective facilitation, as well as instructional designers tasked with creating or converting content for virtual classroom delivery. Kassy also advises learning and development leaders in areas like virtual classroom strategy, technology selection, and logistics. She has more than 20 years of experience helping organizations, learning teams, and training professionals successfully move to the virtual environment.

Since 2008, she has participated in more than 100 industry conferences as a speaker, expert panelist, and workshop trainer. Kassy is a regular presenter at such events as ATD's International Conference & EXPO, ATD TechKnowledge, *Training Magazine's* conference, TechLearn, Learning Solutions, and DevLearn.

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Kassy has also worked as an independent master virtual trainer, a Microsoft software trainer, and a senior trainer at Webex, where she helped build and deliver training at the Webex University. In addition to *Interact and Engage*, Kassy's authored *Producing Virtual Training, Meetings, and Webinars: Master the Technology to Engage Participants* (ATD Press, 2021) and *The Virtual Trainer's Guide to Becoming a Hero*, which is available for download on her website. You can learn more about Kassy by visiting [kassyconsulting.com/about](http://kassyconsulting.com/about).



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ISBN: 978-1-953946-40-9



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