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About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. This workshop is designed to last approximately 75 minutes. If the section on selecting a platform is not relevant to your particular audience, you might eliminate that section to shorten the workshop.

This workshop was designed to be delivered virtually so that you can demonstrate some of the techniques described in the workshop. If you wanted to deliver the workshop in person, some of the activities will have to be modified.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldly. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Email them to participants to print themselves (in black and white is just fine). This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare, chat pods, open answer poll

questions, or whiteboards ahead of time. And be sure to (virtually) circulate and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

AUDIENCE

This workshop is appropriate for supervisors, managers, and trainers who have responsibility for training others at any level.

Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. Often you can just highlight 2-3 of the bullets. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

THE DAY OF THE WORKSHOP

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for "rabbit holes" that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **"Nudge Your Neighbor" activities:** Keep these to just 30-60 seconds (unless otherwise noted) and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

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Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction	Pre-activity Presentation	 2 min	PPT 5 PPT 6-7, PW 3
Choosing a Platform	Poll Presentation Poll Presentation Nudge Your Neighbor	2 min 7 min 2 min 3 min 2 min	PPT 8-9 PPT 10-11, PW 4 PPT 12 PPT 13, PW 4 PPT 14
Designing the Training	Poll Presentation Nudge Your Neighbor Presentation Breakout Group Activity	2 min 7 min 1 min 4 min 10 min	PPT 15-16 PPT 17-18, PW 5 PPT 19 PPT 20, PW 6 PPT 21
Delivering the Training	Poll Presentation Nudge Your Neighbor Presentation Nudge Your Neighbor	2 min 6 min 2 min 6 min 1 min	PPT 22-23 PPT 24-25, PW 7 PPT 26 PPT 27-28, PW 7-8 PPT 29
Close	Review Presentation Action Plan Final Comments	4 min 1 min 5 min 1 min	PPT 30-31 PPT 32, PW 8 PPT 33, PW 9 PPT 34

NICE · CXone   Total Time = 75 min   PPT = PowerPoint Slide   PW = Participant Workbook

Welcome!

After you log in and get situated, answer the three questions below (you can write on this screen using the T tool). Then tell us something interesting about yourself in the Chat.

What do you like best about training remotely?	What is hard about training remotely?	How long are your usual remote training sessions?

Training Remotely

A Training Workshop

Course Overview

The **goal** of this course is to learn something new about training remotely that will make the experience more effective for participants.

○ Introduction and overview

○ Choosing a platform

○ Designing the training

○ Delivering the training

○ Close

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Choosing a Platform

Poll Question

What platform do you currently use for remote training?

    A.   Zoom

    B.   WebEx

    C.   GoToMeeting or GoToTraining

    D.   Adobe Connect

    E.   Microsoft Teams

    F.   Blackboard

    G.   Built into our LMS

    H.   No platform

    I.   Some other platform

How important is the platform?

Common Features on Virtual Platforms

- Polls
- Chat
- Whiteboards with annotation tools
- Breakout rooms
- Feedback tools
- File transfers
- Share files
- Share desktop

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Poll Question

What are your two favorite features to use when training remotely? [Select two]

A. Polls

B. Chat

C. Whiteboards with annotation tools

D. Breakout rooms

E. Feedback tools

F. File transfers

G. Share files

H. Share desktop

Evaluating Virtual Training Platforms

- Know what you need first

- Look for flexible solutions with interactive features

- Ask detailed questions about support and updates

- Consider how a solution handles security, privacy, and compliance

- Check for experience with companies like yours.

- Investigate the costs

Source: Josh Bersin, "A Framework for Optimizing the Virtual Live Learning Experience"

Nudge Your Neighbor

In chat, put one thing you most want to remember about choosing a platform for training remotely.

Designing the Training

Poll Question

When designing training to be delivered remotely, what is the single most important thing to consider?

A. What the outcomes of the training should be.

B. What tools and features are available on the training platform

C. How comfortable the instructor is with the content and the platform

D. The same things we would consider for any training – the need and the expected results

E. How comfortable the participants are with learning remotely

F. Other consideration (put into chat)

Basic Principles for Remote Training

- A common visual experience for all learners.
- Short bursts of content interspersed with peer interaction.
- Peer group breakouts
- Motion
- Accessibility

Source: Josh Bersin, "A Framework for Optimizing the Virtual Live Learning Experience"

Foundational Considerations

- Outcomes first
- Consider the size of the audience
- Length of the training
- Provide something for participants to do in the first five minutes
- Restructure introductions
- Ask real questions
- Use polling for multiple choice questions and chat for explanations
- Provide a visual map
- Tools need to serve the learning and not just be cool

Nudge Your Neighbor

In chat, what is one thing you consider when designing remote training that we might not have mentioned yet?

Activities

With the entire group

- Raise your hand if…
- Chose an emoticon that represents…
- Type your response in chat…
- Answer this poll question…

With small groups

- Whiteboard annotation or drawing activities
- Team competitions
- Scenarios
- Case studies
- Role plays
- Creating something together

With pairs

- Ask each participant to choose an accountability partner at the start of the event
- Assign partners for a private chat discussion activity

Source: Cindy Huggett, "Creating Collaboration in Virtual Classes"

Breakout Group Activity

- Brainstorm some activities that can be successful in remote training.

- Aim to come up with at least five activities using five different formats within five minutes.

- List your ideas on a whiteboard to share with the other groups.

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Poll Question

When conducting a remote training, how do you use the webcam?

A. As the instructor, I keep my camera on the whole time

B. I require everyone to have their camera on the whole time

C. I have everyone use their cameras only during introductions and for discussions

D. I only use my camera during the beginning of the session and don't require anyone else to use theirs.

E. I don't use cameras at all

F. I let everyone decide whether to use their camera or not

The Great Camera Debate

- Don't use cameras when covering content that is complex or which requires substantial attention.

- Use the webcam with introductions and with extended discussion.

- Recommend participants use their cameras in breakout groups.

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Unpredictable Technology

- Have a backup plan
- Have a support team to call upon
- Check for updates before every virtual session
- When possible, make it seamless for participants
- Use a second monitor to see what participants see.

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Nudge Your Neighbor

To your assigned partner, private chat one thing you could do as a back up for when things go wrong in a remote training.

Moderators

- Supports the technology
- Supervises activities
- Manages administrative tasks
- Serves as a host

Other Best Practices

- Master your platform and your content
- Practice, practice, practice
- Warm-up your voice and hydrate
- Keep reinforcing positive learning behaviors
- Keep your eye on the entire room
- Acknowledge questions and feedback
- Ask people to wait to answer
- Adjust your camera and lighting to show you well
- Be sure to check for understanding and build participants' confidence
- Use your mouse pointer wisely

Nudge Your Neighbor

To your assigned partner, private chat one thing you most want to remember about delivering training remotely.
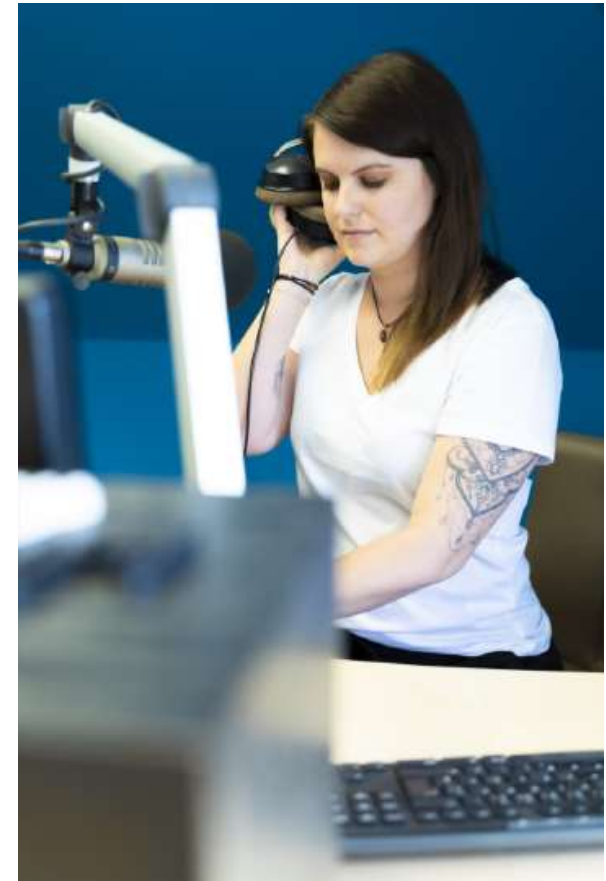
Close

Review

Choosing a Platform
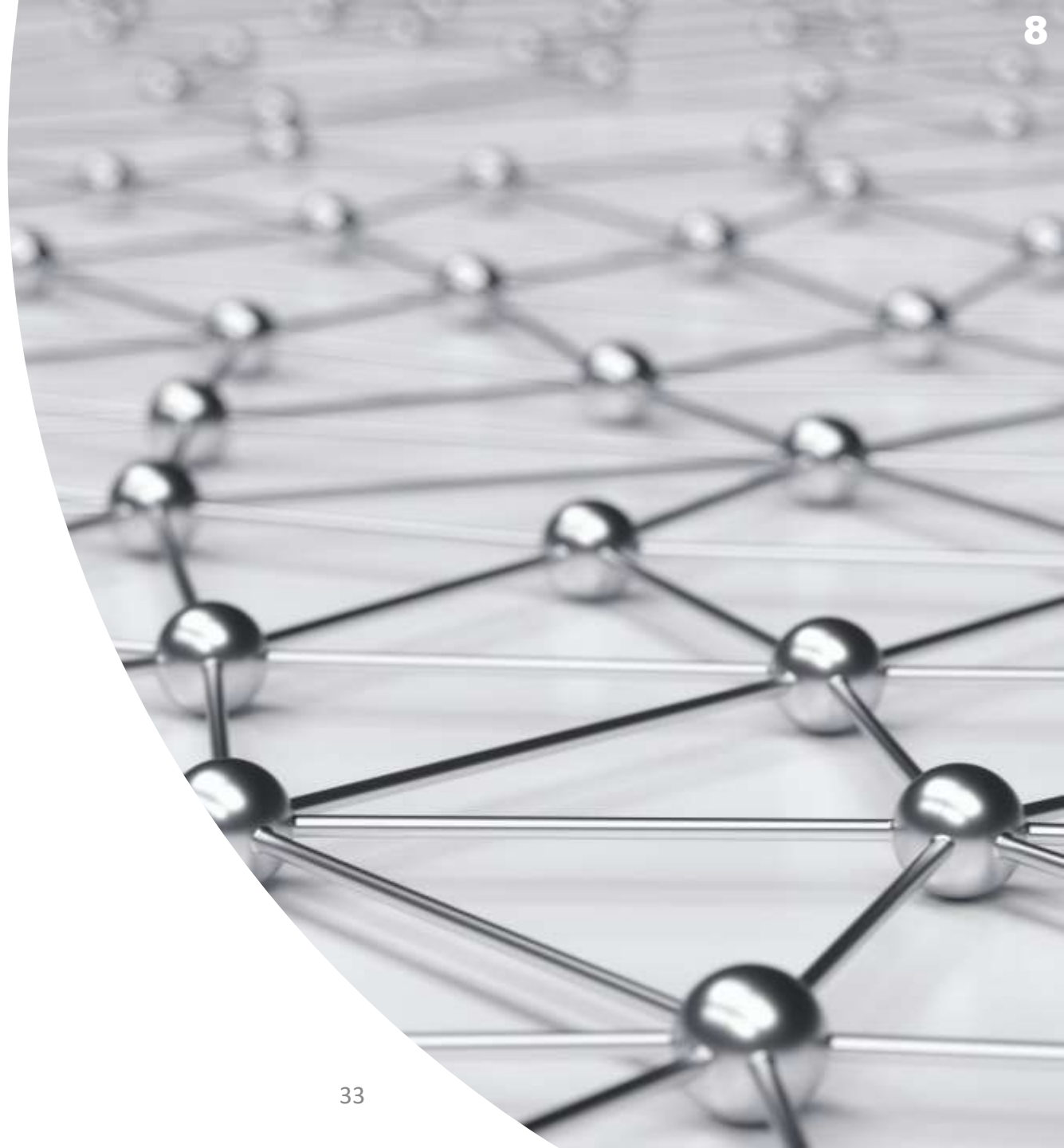
Designing the Training

Delivering the Training

Three Resources

- Kassy LaBorie,
  www.kassyconsulting.com/resources/
- Cindy Huggett,
  www.cindyhuggett.com/resources/
- InSync Training,
  www.insynctraining.com/resources/

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③-②-① Action Plan

③

Things I learned or was reminded about training remotely

②

Things I want to do to improve my remote training

①

Thing I am going to do right away to improve my remote training

Training Remotely

A training workshop

https://www.niceincontact.com/

Developed by Elaine Carr and Laura Grimes
of Harrington Consulting Group
(https://www.harringtonconsulting.us/)

Speaker Notes – Slide 6

If you can make this slide a whiteboard that participants can write upon, that is the best use of the screen. You might need to provide a bit more instruction about using the platform's text tool, but that just gives you opportunity to interact with people.

Comment on their responses and indicate which topics we will be covering in this training.

If your platform does not have whiteboard functionality, then you have several options:
- Set up an open-answer poll question for each question and have them all on the screen for people to answer before class begins.
- Set up different chat boxes for each question.
- Number the questions and have people answer them in chat, with the number of the question before their answers. This is the least preferable of the options.

You want to interact with them as soon as they log in and get them use to talking, sharing, and interacting right from the start. Be very welcoming.

Speaker Notes – Slide 7

Introduce yourself briefly.

Speaker Notes – Slide 8

Although more offices are opening up, increasing the possibility of in-person training sessions again, it is likely that we will all be doing more virtual training sessions moving forward. We want to make the best use of these sessions and maximize their effectiveness for participants.

Here is what we want to accomplish in the next hour. Because this session is only an hour, we can't begin to cover the topic in its entirety, but at the end of the session, we'll give you some good resources for learning more. And we will cover a lot of the highlights of the topic.

Go over the agenda and then establish any housekeeping rules. For instance, please use the "Away" button on the feedback tools if you need to step away from the training for a moment. Also mention that you are going to need their participation throughout the next hour, unmuting themselves to participate in discussions and ask questions as needed.

Speaker Notes – Slide 9

We are going to begin by talking briefly about choosing a platform.

Speaker Notes – Slide 10

Set this up in your platform's poll and show as a poll question for them to answer.

If you are all from the same company and use the same platform, you can skip this poll question and instead ask:

How well do you think our current platform meets your needs for training?

A. Excellent. I can do everything I need with our platform.

B. Fairly well. I struggle using some of the features and/or would like other features available.

C. Terrible. There are a lot of features I would like available and/or the features available are difficult to learn and use.

Speaker Notes – Slide 11

Discussion: Ask people to turn on their mikes and answer the question, explaining their answers. Or they can answer in chat.

Some think the platform doesn't matter. Most of the platforms offer the same or similar features, so it really doesn't make a difference which one is used as long as the instructor has time to learn it and practice it. Any skilled trainer with a passion for training will be able to figure things out if they have an open mind.

Others, however, find that the platform is critical and can make or break the experience. We have to consider the comfort and accessibility for both the instructor and the participants. And if you are having to learn a new platform every week, it becomes disruptive to the learning.

Speaker Notes – Slide 12

Here are some of the common features of most virtual training platforms. [You don't have to explain every item in the list but below are explanations in case there are any questions.]

- **Polls**: Allows us to survey the participants and view the collected results. Most systems allow multiple choice, multiple answer, and short answer questions and some systems allow more than one poll to be presented at the same time.
- **Chat:** A designated area for typing in public and private messages to others in the virtual classroom. Some platforms do not allow private chatting, while others do. Others do not allow public chats. Many allow the instructor or moderator to turn on or off the feature and to select what kind of chatting is allowed.
- **Whiteboards with annotation tools:** Turns the current slide into a shared collaboration space. Annotation tools include pointers, a text tool, and drawing tools of various types. By sharing the annotation tools, participants can type their replies directly into the appropriate place on the screen and the answers are then organized and saved all together. The instructor usually has the ability to move responses that are on top of each other since participants won't see each others' replies until they click somewhere else on the screen. The advantage of using a whiteboard over chat is that the responses to a particular questions can be viewed all together and organized by category or other organizing factor.
- **Breakout rooms:** Allows participants to work together in small groups, sharing files, screens, whiteboards, and discussion.
- **Feedback tools:** Buttons available to participants to do things like raise their hand, mark they are away, give applause, ask the speaker to slow down or speed up, etc. The actual tools available will vary from platform to platform.
- **File transfers:** The ability to share files with participants to download quickly. File size limits and functionality may differ greatly from platform to platform.
- **Share files:** The ability to upload a file, such as a .ppt, into the main meeting room so that all can view and interact with it at the same time. Some platforms do not allow people to share files, but they can share desktop.
- **Share desktop:** The ability to share a file, application, computer screen, or website directly from someone's computer (usually the presenter's) so that everyone can see what is happening.

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Speaker Notes – Slide 13

It can be hard to just select one favorite, so set this up as a multiple select question so that people can choose their two favorites. Be sure to share the results after a minute or so.

Speaker Notes – Slide 14

In 2020, Adobe published "A Framework for Optimizing the Virtual Live Learning Experience," by Josh Bersin, who is a much-respected analyst, educator, and thought leader. In the article, Bersin lists out these considerations for evaluating virtual training platforms.

- **Know what you need first.** What are the problems you need solutions for when it comes to delivering training remotely?
- **Look for flexible solutions with interactive features.** Are their features enough to allow instructors creativity in meeting the needs of their learners? Does the tool work with your existing authoring tools and Learning management system (LMS) through an API or existing integrations? How does the tool handle storage of presentations and online learning materials?
- **Ask detailed questions about support and updates.** How often does the vendor update the software? What kind of customer training and support does it offer? Look for consistency and thoroughness.
- **Consider how a solution handles security, privacy, and compliance.** You must be able to protect sensitive company data and limit access to the training to those authorized to attend. You also must be able to track participation and completions. If security is a high concern, look for providers with customers in government and regulated industries.
- **Check for experience with companies like yours.** . Ask for customer references with companies your size and in your industry with similar challenges. Consider speaking directly with references so you can have candid conversations.
- **Costs:** What costs are associated with using the platform? Is there a separate cost for specific features that are considered add-ons? Is there a flat fee plus a per-minute cost or are a certain number of sessions/participants/minutes online included in the monthly or annual cost? Does the platform require a separate vendor (with a separate cost) for audio or any other requirement? Make sure to ask what additional fees might arise. [This is not one of the suggestions from Bersin's article, but it is an important consideration.]

Speaker Notes – Slide 15

Allow 1 minute for responses and then move on.

Speaker Notes – Slide 16

Now let's move into best practices in designing training for remote delivery.

Speaker Notes – Slide 17

This is not meant as a trick question although we will present an answer a little later. But you truly want to know what people think right now. Put this poll into the polling function of your platform and present it to participants then present the chart of responses.

Speaker Notes – Slide 18

Going back to Josh Bersin's article for Adobe, he presented some basic principles for remote training.

- **A common visual experience for all learners.** Just as in a physical classroom (to a certain degree), the participants need to have a common visual experience, including the display of video, slides, and chat. A common visual experience for all learners minimizes distractions and ensures focus on the content that needs to be retained.
- **Short bursts of content interspersed with peer interaction.** Ideally, participants should be doing something every 3-5 minutes in remote training, with a maximum of 7 minutes between interactions. This is much shorter than in physical classrooms where the rule of thumb is interaction every 10 minutes, with a maximum of 20 minutes between interactions. Well designed virtual training includes careful sequence planning to ensure that the content builds on one idea after the next, and that the interaction activities are appropriate for the content being delivered.
- **Peer group breakouts:** Small group projects are a hallmark of many live training programs as they enable learners to collaborate and learn from one another. The same should be true of virtual training programs. Breakout activities are one of the most effective ways for participants to learn and practice.
- **Motion:** The human brain is wired for detecting motion. When people interact with a computer alone, they are constantly making something move. To combat limited attention spans for starting at words on a slide, online presenters need to provide a variety of slides, layouts, videos, and interactive features
- **Accessibility:** Virtual classrooms improve upon accessibility of in-person training thanks to automated closed captioning, keyboard commands, color controls, enhanced navigation features, and partnerships with screen readers for the visually impaired.

Speaker Notes – Slide 19

When designing remote training, here are some foundational considerations that should be incorporated into every program:

- **Outcomes first:** Just as with any training, design begins with understanding what outcomes are desired from the training. What is the purpose of the training? What should participants know and do as a result of the training? The objectives of the training are key for designing an effective program.
- **Consider the size of the audience:** Generally, remote training classes have the same size considerations as in-person classes do – Smaller groups for greater interaction, without getting too small. As a general rule of thumb, class sizes between 12-25 are optimum for most topics, but smaller and larger can be accommodated. Since breakout group size should not exceed 5 or 6 people so that everyone can participate, consider how many breakout groups your platform can handle in setting the maximum size of the class for each session.
- **Length of the training.** It is much, much harder to sit and stare at a computer for hours on end than it is to physically be in a classroom. Most experts agree that a session should not be longer than 90 minutes. That does not mean you cannot hold a day-long training class. You must be sure, to give a break at least every 90 minutes, and that break should be at least 15 minutes long. You can do 4 90-minute sessions in a day with a 15-minute break between sessions 1 and 2 and between sessions 3 and 4, and a longer break of 60 minutes or longer between sessions 2 and 3. It is still good practice to break up the sessions and hold them on different days. However, it is easier in some circumstances for participants to reserve a full day rather than reserve time on four different days. Additionally doing the sessions on different days means that you can give participants activities to complete between sessions. For four sessions, it doesn't have to be four different days – two sessions can be on one day and two on another day, just being sure to provide a break between the sessions.
- **Provide something for participants to do in the first five minutes:** We began our session with an activity as soon as you came into the virtual classroom. This conveys the message that the program is going to be interactive, and that people really have to be present and participate to get the most out of the session.
- **Restructure introductions:** Don't spend 20 minutes asking everyone to introduce themselves with their cameras. None of you have time for this in an online class. If you want users to introduce themselves, post a slide asking for specific information such as name, title, and reason for being here, or topic of interest today, and ask everyone to post this information in a public chat for all to scan. That will only take about 2 minutes and will serve as a nice multi-purpose resource for later when you may wish to review and assess stated goals mid-way through, or at the end of class.
- **Ask real questions:** Real questions stimulate conversations and draw in multiple participants. Use effective, probing questioning skills. Ask open-ended questions. Then request elaboration. When asking a question, make it clear how participants should respond—verbally, in chat, by doing something on the whiteboard, by changing an emoticon, etc. And remember that we often have to wait just a little longer for answers in the virtual environment.
- **Use polling for multiple choice questions and chat for explanations:** It's much easier to compile the answers in your polling feature than it is in chat, so use polls for multiple choice questions and chat for open-ended questions and explanations.
- **Provide a visual map:** of what's going to happen, where we are now, and where we've been. Make it easy for participants.
- **Tools need to serve the learning and not just be cool:** Whether it be a cool add-on tool for collaboration or polling, or a video, or an intriguing picture, choose your methods and media based on the learning objectives, not on your need to experiment with new tools. Basically, this brings us back to outcomes first.

Speaker Notes – Slide 20

Allow 1 minute for responses, being sure to comment on some of their good ideas.

Speaker Notes – Slide 21

ANIMATED

Cindy Huggett, a well-known expert in virtual classrooms, has published a resource on her website about creating collaboration in virtual classes and breaks down collaboration into three types: the entire group, small groups, and pairs.

- [CLICK] With the entire group, the slide lists some activities that can be done. Be sure to phrase your questions in a way that requires everyone to response. You might say, "There are 25 of you, so I'm looking for 25 different responses." If you just completed a large group whiteboard brainstorm activity, ask everyone to put a checkmark (or other stamp) next to the ideas they agree with or next to the three best ideas on the slide.
- [CLICK] When you break the participants into smaller sub-groups of 3-5 people, the slide lists some activities you can use. You want to provide both visual and verbal instructions for the breakout group, and you might have people to take a screenshot of the instructions to reference while in their breakout groups (unless the platform allows you to set up the breakout rooms ahead of time with the instructions or a form). Many times, platforms will allow the instructor to share the whiteboard from the breakout group with everyone after they return to the main classroom so that groups can report back to everyone. Just be careful that the reporting back or debriefing doesn't take more time than needed. Asking for insights from doing the breakout activity may be enough.
- [CLICK] And yes, you can do activities in pairs without going into breakout rooms. You will need to enable private chat in the platform so that partners can chat with each other. You can type the partner assignments into chat, then ask everyone to find their partner (private chat a hello to them) and raise their hand, then pose the discussion question, allowing 1-2 minutes for chatting. This is an alternative way we could have done the "Nudge Your Neighbor" activities in this workshop.

Speaker Notes – Slide 22

Breakout Group Activity

Groups should be 3-5 people each. They will have 5 minutes to come up with five ideas using five different formats (such as chat, breakout groups, whiteboards, annotation tools, feedback tools, shared files, etc.) They should list their ideas on a whiteboard (if the platform allows that) to share with everyone else. [The instructions also appear in the workbook for people to reference while they are in their small groups.]

Give a one-minute warning before time is up, then bring everyone back. Share their whiteboards on the screen (all at the same time, if possible, but one at a time if not) and suggest people take screenshots to save for their own reference. The groups should not have to explain what is on their whiteboards, but if there are questions, allow a little time for this.

If the platform does not allow you to share whiteboards from the breakout groups, make sure each group designates a scribe and that scribe should put their ideas into chat when they get back to the main classroom (or each member of the group puts one of their ideas into chat, with the group determining who would put which idea).

Be sure to thank everyone for their good work in the breakout groups.

Speaker Notes – Slide 23

It's finally time to highlight some of the best practices associating with delivering training remotely.

Speaker Notes – Slide 24

Put this question into your platforms poll and give 1 minute for everyone to answer. Then present the responses.

Speaker Notes – Slide 25

ANIMATED
You will find a lot of disagreement among experts about using cameras in remote training. Many feel like requiring everyone to use their camera makes it more like in-person training and allows them to read their audience better. Others feel like cameras are a distraction and take focus away from the content. So let's turn to research on camera use.

Unfortunately, the research does not yet give us an overwhelming answer, but currently it is looking like using video thumbnails makes learners like the training more BUT learn less. There are some subtleties in the findings and the matter isn't settled yet, but this is where things are leaning.

People like human connection, so the video adds to that. But people are also easily distracted by other people and by movement, so the video thumbnails can detract from their attention to the learning. With these things in mind, this is what we suggest for cameras. [CLICK to go through the points on the slides one-by-one.]

Speaker Notes – Slide 26

Technology can be unpredictable. No matter how good your internet connection is, unexpected things happen. You lose power, a thunderstorm interferes with reception, someone disconnects your cable while digging to lay new pipes, or many other unexpected things.
- You have to have a plan for when the unexpected happens.
    - Can you use your cell phone as a hub and reconnect to the internet over it? Where's the nearest coffee shop where you can reconnect to the internet?
    - You might be able to call into the training even though you can't connect to the internet. This would at least allow you to let participants know what is going on, giving them a break while you go somewhere to reconnect.
    - If you are using a moderator who is a co-host, they might be able to advance the slides and conduct activities while you call in and provide content until your connection is restored.
    - Do you have a second computer you could switch to if something happens to this computer? Using a separate phone connection rather than sound over the computer can insure you keep an audio connection even if you lose the computer or the internet.
    - Be creative and think ahead so you have a plan for whatever misadventures might happen.
- Even if you don't have a moderator to handle technological issues for you, having someone you can call upon at a moment's notice to jump in and lend a hand or a support line you can call at the vendor to get immediate attention is helpful.
- Because platforms are changing all the time, make it a habit to check for updates before every virtual session.
- When things go wrong, and eventually they will, try to make it as seamless as possible for your participants. Let them carry on with the training as much as possible rather than listening to your "self-talk" about what is happening.
- It's also good practice to use a second monitor or a second computer so that you can log in as a participant and see what they see. The instructor view on the platform is great for so many things, but now and again, it helps to be able to see what everyone else sees.

Speaker Notes – Slide 27

This time, assign partners and have them private chat each other.
We don't need to know what they say to each other, so no reporting back to everyone else.
Give them 1 minute and then move on.

Speaker Notes – Slide 28

It is a best practice for remote training to have a moderator. The moderator serves as an instructor's "second set of hands" and allows the instructor to focus on the content and the participants' learning.

The moderator handles things like helping participants with technological issues, deploying poll questions and their results, setting up breakout groups, adding links to chat for participants' reference, and generally support the trainer "behind-the-scenes." In some cases, the moderator hosts the session, providing housekeeping guidelines and introducing the instructor.

If you are doing a training without a moderator, try to at least arrange for someone to join you at the beginning of the session to assist with any technological challenges participants are having. This will help keep the class on track and keep one person's issues from sidelining the whole class.

Speaker Notes – Slide 29

Here are a few more best practices for delivering training remotely:

- **Master your platform and your content:** Take the time to become proficient with the platform and all of its features plus understand your content so that you can deliver the training well.
- **Practice, practice, practice:** Get lots of practice not only with the platform but with actually delivering the content. Make notes for yourself of important things to remember or the steps needed for an activity – like activating breakout groups or deploying a poll question. Ask a friend or a colleague to serve as your audience for the practice.
- **Warm-up your voice and hydrate:** Especially if you are not using the webcam as much, your voice is the primary connection you have to participants. Warm-up your voice ahead of time so that it sounds warm and inviting, and be sure to drink water during the session to keep your voice hydrated.
- **Keep reinforcing positive learning behaviors:** Thank people for their responses and for especially good answers and ask them to give you feedback (If you can see my desktop, raise your hand).
- **Keep your eye on the entire room:** Scan the windows to see if any new indicators have appeared. Don't try to multi-task or glance at email while training. Keep your eye on the participants so you can be sure to meet their needs.
- **Acknowledge questions and feedback:** If it is appropriate, acknowledge a question or comment or even answer it right away. Simple acknowledgement helps the room feel alive, and the participant feel like they aren't alone either. Keep a visible "parking lot" to put questions that you will cover later or where you need to do some research before answering.
- **Ask people to wait to answer:** Sometimes when you ask people to answer in chat, one or two people answer quickly and others then either copy their answers or feel like they don't need to answer. To combat this tendency, ask people to prepare their answers in chat but wait to send them until you tell them to. This allows everyone time to think for themselves without seeing everyone else's answers first. Some of those first chatters might also think through their answer a little more, too.
- **Adjust your camera and lighting to show you well:** Generally, the camera should be situated at your eye level and the light source should come from behind your computer. Sit at least an arm's length away from the camera. And be sure your background is uncluttered. Take the time to look up some videos on YouTube to learn more about simple adjustments you can make to look better on camera.
- **Be sure to check for understanding and build participants' confidence:** Personally engage with participants – all of them – to secure the relationships that build commitment to the learning. Personal engagement is a key element in building participants' confidence.
- **Use your mouse pointer wisely:** Go into your controls and make the mouse pointer as large as possible to make it easy for participants to see it on screen. And avoid using the pointer to circle around text or to highlight text since that actually makes it harder for participants to see what you are trying to emphasize, is distracting, and may even make people nauseous. Move the mouse on screen only as needed.

NICE·CXone

Speaker Notes – Slide 30

Use the same assigned partners.
We don't need to know what they say to each other, so no reporting back to everyone else.
Give them 1 minute and then move on.

Speaker Notes – Slide 32

In today's training, we have covered three topics involving remote training. For each topic, as it appears on screen, put into chat one thing that you remember about that topic. [Alternatively, have everyone unmute and just call out their one thing. Be sure to keep this moving.]
[CLICK to reveal each topic and give a minute or so for people to respond.]

Speaker Notes – Slide 33

There are a ton of resources out there on virtual training, but here are three that have been in this field for many years and have developed some real expertise. They all offer a number of free resources on their websites that are quite helpful.

Speaker Notes – Slide 34

Have everyone complete their 3-2-1 action plan, giving them a few minutes to do so right now. Then ask them to private chat their partner the 1 thing they are going to do right away.

Make any final comments and thank everyone for participating.