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Best Practices for Facilitating Virtually

You're about to facilitate your first virtual classroom session. You're familiar with the content, may have delivered it face-to-face in a classroom setting, and have been a participant in a virtual classroom before. Surely, it can't be that hard to facilitate online.

Whether you are about to lead your first virtual classroom facilitation or have been facilitating virtually for a while, freshen up on best practices to ensure superb participant satisfaction, engagement, and learning transfer.

Here are 10 best practices that are essential for a positive experience for yourself and your learners.

- 1. Know the technology** – To be a successful virtual trainer, you must learn the basics about technology you're using. You need to know how to use the audio in the virtual classroom, advance the slides and read comments in the chat box, for starters. The more you know about technology, the more comfortable you'll be in the virtual classroom.
- 2. Learn the class content** - preparing for a virtual class is no different than preparing to facilitate any instructor-led class. It's important to learn the class content and the design. Facilitators should have a working knowledge of the content prior to delivery.
- 3. Have a dress rehearsal** – Broadway shows and other live performances hold dress rehearsals, and so should your virtual training event. For the first couple of times you deliver each class, plan to walk through it in full as if you were delivering it. Your producer or any co-facilitators should also participate just as they would during the live training event. If your training is 90-minutes long, you would have at least a 90-minute rehearsal.
- 4. Prepare pre-session activity** – for participants who tune in early, be sure there is a chat question, exercise or poll that will prepare them mentally for the content to follow and can set the scene for later involvement and interaction.
- 5. Avoid distractions** – ask participants to turn off e-mail, phones, and limit other distractions. As facilitators, we have to honor our participants and fully focus on them, so do the same.
- 6. Log in early** – Logging in 15-20 minutes before the session starts will give you time to test your audio and reacquaint yourself with the platform tools. Check that there isn't unnecessary feedback coming from microphones. Greet all participants as they enter the virtual classroom and instruct them to take advantage of your pre-session activity.

7. **Use a hands-free headset** – While adding a hands-free headset can add cost to your initial set-up, it will help you give a more authentic delivery. More important, it allows you to control other tools and features more easily. Further, a hands-free headset will improve the audio quality of the presentation, which will be of benefit for those attending live and those watching the recording post-training.
8. **Record your sessions** – Recordings of your sessions can be available shortly after you complete the session. This provides a great tool to bring new advisors on your team up to speed quickly and supports those advisors who had to miss your live session due to a conflict on their calendar.
9. **Involve participants** – involve participants early and often. When the training isn't face-to-face, the trainer is competing for attention with everything else going on around the participant and on their screen. As a rule, try to involve participants every four minutes. And, be sure to involve ALL participants. Call on people directly who haven't contributed, be sure all participants have a chance to contribute. You can use such tools as:
 - “Show of hands”
 - Text chat
 - Online breakout rooms
 - Shared whiteboard
 - Polls
 - Quizzes
 - Photo share
 - Stretch breaks
10. **Preparing your participants** – use these tips to help prepare your participant for success.

Technical Needs: be sure they have -

- Strong (wired) Internet connection
- Reliable computer or laptop
- Hands-free headset (not a speakerphone)
- Software for virtual classroom platform

Other Preparation item that will help them be successful:

- Find a quiet space to focus and learn.
- Set your devices to “do not disturb” mode (hang sign on door if needed).
- Put away distractions (including “to-do” lists that are in view).
- Close out of email and other browser windows.
- Be sure to test your connection using the provided link at least 24 hours prior to class start time.