Tips for Successful Virtual Facilitation

You probably know that converting classroom activities to virtual activities isn't as simple as just finding an online meeting room to use. Instead, it requires some reimagining and redesigning, while remaining focused on what you want your learners to take away from the experience. As the need for online delivery increases, here are a few tips on how to convert in-person sessions to virtual sessions, along with some best practices for virtual facilitation.

1. **Adapt the in-person content for virtual facilitation**

   - **Review and rework your in-person content to make it effective on a virtual platform.** Begin by reviewing the learning objectives. What's essential for learners to walk away with? What points must be covered in live, virtually delivered sessions? What can be done as independent work between sessions or as follow-up work if you're doing only one session?

   - **Look at your script and your slide deck.** Decide how you'll break up the content that you'll be delivering live. Can you break up the content into smaller (30-, 45-, 60-minute) modules so you can deliver the program over several days? Webinars that last more than 90 minutes can be a struggle for participants, but if you need to go beyond that, build in breaks and provide a little reward for returning on time and a consequence for being late. If your redesign involves spreading the course over a few days, assign work for learners to do on their own between sessions.

   - **Change modalities frequently to hold learners' attention.** Learners will stay more involved if they have to switch gears, rather than doing the same thing for 30 minutes. For example, if you have eight points to talk through, pose a question or show a quick video (if your platform allows it) after the first four points. Or if your platform provides tools like status checks and drawing capabilities, you can use these to make sure learners are following along.

   - **Cover the most important points up front.** Virtual learning can be unpredictable. You may encounter questions or technical issues you don't expect. Organize your slides so that the least valuable information is near the end, in case you don't get to it.

   - **Email note-taking handouts with prompts to learners before the session(s).** They can take notes as you facilitate—if they're listening and writing, they're paying attention.

   - **Consider delivering supplemental information in handouts.** Examples of supplemental information include links, big chunks of text, and detailed data that learners can download and digest between or after sessions.

   - **Keep learners engaged by promising a "wow" piece of content at the end.** Consider giveaways like checklists, posters, a practical tool, or an unforgettable quote. Tease the giveaway when you're one-third of the way through your facilitation, and then mention it again at the two-thirds mark to keep people listening.

2. **Simplify your slides**

   - **Streamline your classroom slides to be appealing on the virtual platform.** Edit out extraneous text or graphics. Simplify. Increase the number of slides so that you make fewer points per slide. Learners need frequent visual stimulation to stay engaged.

   - **Focus on graphics that bolster your points; avoid eye candy and distracting GIFs.** You want the visual stimulation to be meaningful, not irritating or trivial. No kitten videos!

   - **Use high-contrast colors, simple backgrounds, and clean fonts.** The look of your slides matters more than ever. Remember that your slides will be viewed on a small screen; they must be readable at 50 percent. Keep the size of the font above 20 points for readability.

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3. **Know your platform's tools for interactivity and engagement, and use them**

   - **Choose a platform that works for you.** There are many platforms to choose from, each with different options. We've heard from people who've had success with Zoom, GoToMeeting/Training/Webinar, WebEx, AdobeConnect, and MS Teams. Some questions you should ask when considering a platform include the following:

     - What is the maximum capacity?
     - What types of participant interactivity tools does it provide (e.g., chat, video sharing, polls, breakout rooms, whiteboards, etc.)?
     - How much does a license cost for the facilitator? Are there costs per participant? Are there different options based on audience size or frequency of use?

   - **Use your platform's tools to direct attention.** Whatever platform you decide on, leverage its tools to visually underscore the points you're making. For example, draw lines, use arrows, use the pointer, or circle key points to help learners follow along.

   - **Keep it interactive and vary the way you're engaging learners.** Inject frequent interactivity into your facilitation, and mix up the ways you interact with learners. Depending on your platform, you'll find there are many options to engage and involve learners. Take advantage of options like polls, surveys, and status check emojis (thumbs up/down), or use the chat feature to ask preplanned discussion questions. It's also helpful to vary the interactions. For example, if you asked learners to give a checkmark on the first activity, ask for a thumbs up for the second activity. Check in immediately with any learners who don't respond, and ask if they have questions or technical issues.

4. **Use breakout rooms**

   - **Use breakout rooms to encourage learners to engage with one another.** Breakout rooms can be a powerful tool for social learning when you're facilitating virtually. If your platform has this capability, you can put learners into breakouts for small-group discussion so they can work together as they would in-person. Assign each breakout group a case study, scenario, or controversy to discuss. Give them clear, concrete instructions so that they understand what they're expected to bring back to the large-group discussion.

   - **Mix up the breakout groups.** For example, if you put like DiSC® styles together the first time you do a breakout, put dissimilar styles together for the next one. Plan breakout groups ahead of time, unless you're using a randomizing feature available on some platforms.

   - **Pop into the breakout rooms to provide guidance.** As the facilitator, join each breakout room in progress to make sure learners are on task. You may want to ask a question, do some coaching, or prod the group to deepen its discussion.

   - **Don't have breakout room capabilities in your platform?** Instead, organize shorter sessions with 10 or fewer people to allow learners to have rich, engaging discussions with one another.

5. **If possible, enlist a colleague or assistant**

   - **Virtual facilitation often goes more smoothly with additional help.** So, it can be handy to have an assistant who can help with technological problems, monitor engagement, and communicate with learners during the session so you can concentrate on conveying the content. The assistant's main job is to respond to chats related to technical issues. If you're using a platform with more sophisticated tools, the assistant can also help you with polls, whiteboards, and timers.

   - **Don't have an assistant to partner with?** If you don't have an assistant to partner with and aren't familiar with the platform you're using, consider (1) conducting smaller sessions, (2) conducting shorter sessions, or (3) having a low-tech backup plan if advanced features (e.g., breakout rooms, whiteboards, polls) are not working. Also, consider advising participants at the beginning that if they drop off and are unable to reconnect, you will follow up with highlights of the session. You can also plan periodic breaks, which will allow you to connect with participants who are having difficulties.

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6. **Prepare thoroughly**

- **Always be prepared!** Organize your materials carefully so you can find them immediately during the session—you don't want to keep people waiting while you hunt for information. Also, consider creating a backup plan for participants who can't join the session because of technology challenges or if the technology fails on your end as the facilitator. Familiarize yourself thoroughly with the technology, and think through how you'll make sure learners are listening and learning. Decide how to handle questions and comments from learners during the session. Being organized and prepared will help you remain calm and project confidence throughout the session.

- **Prepare the participants.** Ask your learners to be prepared as well. Provide them with instructions on how to test their system connection ahead of the session. Announce that you'll open the session 15 minutes early so people can come in and get comfortable with the technology. Be there when it opens with casual icebreakers and reassuring chitchat.

7. **Adjust your expectations**

- **You won't get the same kind of immediate feedback from learners—and it's okay.** Virtual facilitation is different—you won't be able to see the heads nodding, the smiles, the confused faces that you're used to getting in the classroom. While this lack of visual cues can make it feel like the learners aren't excited or engaged, it's not necessarily a sign that things are going wrong. Just make sure you stay engaged with the learners and keep your energy high.

- **Some learners won't engage.** As with classroom training, about five percent of learners will engage a lot and five percent won't engage at all. Don't sweat it. It's normal.

8. **Keep the learning personal**

- **Remember to use names.** A simple but powerful tip is to acknowledge each learner by name and respond to each of their questions and comments. Make their participation count.

- **Let learners see you.** Appear on the camera when you give your introductory remarks (which you may want to script for maximum impact). Appear on camera before each break and at the end, to provide a personal and compelling wrap-up. Dress up and keep smiling, as you would in the classroom, even when the camera is not on you. Your expertise and professionalism will come across, even virtually. If you don't have access to video, put a headshot of you on the slide when you introduce yourself so learners have a face to put with your voice.

It takes some reimagining, extra planning, and a different type of preparation, but following these tips will help your virtual sessions be just as impactful as your classroom experiences. You're on your way!

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