

Advice from the Virtual Trenches (Mar 11)

Never mind Kirkpatrick Level 1 evaluations; here are Rules for the synchronous facilitator.
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By Jennifer Hofmann, M. Ed.

It was a dark and stormy night, and, like most nights, I was in training session--a synchronous training session in a virtual classroom platform. The difference was, this time I was a learner, and not the facilitator.

I know I am a particularly harsh critic when it comes to the quality of synchronous training. I have a difficult time participating in a program even when delivered by my closest colleagues--professionals I consider among the best synchronous facilitators in the world--always thinking to myself how I would do things differently as far as pacing, engagement techniques, and interpersonal style. Everyone has their own style, opinions, and perspective, and I do my best to respect them when in their classes.

This particular experience, however, was delivered by a third-party training organization. It spanned a total of 12 hours of instruction over several days, and by the end had me ranting in the debrief. This article is the (much more staid and constructive) outcome of that debrief, and focuses on two observations:

First, the experience strongly reminded me of why the industry struggles to accept synchronous delivery as legitimate. Though most certainly technical experts with an in-depth command of the material, the various presenters, to differing degrees, ignored not only the best practices of synchronous facilitation, but forgot the skills that made them effective classroom trainers.

Second, I've decided to change my team's facilitator evaluation approach. Instead of wheeling out the old Kirkpatrick Level 1 at the end of the session, I reduced the evaluation metric to a simple set of rules for the facilitator--you conform to the rules, odds are your session will at least be moderately engaging and effective. If you don't follow them, you are not doing a good job--really, you're not, no matter what your Kirkpatrick Level 1 is telling you. So, without further ado, here is a brief description of the new evaluation approach, in the form of absolute Rules (note the capital "R"):

Note: These Rules have NOTHING to do with the material--the technical accuracy and sufficiency of instructional content for the virtual classroom will be the topic for another day.

Rules for the Synchronous Facilitator:

- Use an instructional designer when developing the material to ensure logical sequencing and opportunities for learner engagement. Match the content design to the environment. Don't rely on slides and the virtual classroom to ensure success. To paraphrase: "Those who live by PowerPoint, die by PowerPoint."
- Use a synchronous producer. No matter how well you know your technology and your content, a producer will make the experience better for everyone, including you.
- Learn the virtual classroom software before you deliver. This may sound like a no-brainer, but nascent virtual presenters often don't get that transferring from a traditional to a virtual environment is not a "plug-and-play" experience.
- When presenting, speak to the learners, not to the computer. The computer doesn't care.
- If the technology fails, it is usually not the fault of the learners. Don't ask what button was pushed at a workstation 1,000 miles away--recognize the symptoms, or better yet, let your producer help the learner (in a non-intrusive way such as private chat) while you go on with the class.

- Take the phones/microphones off of "MUTE," especially when learners are paying for the class. Learners, by and large, want to be actively engaged in the learning process. If you are going to mute them, just e-mail a URL to the recording--I promise they won't watch it.
- Focus on the chat and feedback indicators (hand raises, emoticons, etc.). Ignore them once, just once, and learners will probably ignore you for the rest of the session--AND share their feelings with everyone else in the class. Remember, learners have e-mail, private chat, Skype, and Twitter to come up and slap you around (even DURING the session)--without you seeing it coming.
- Eliminate your verbal crutches. (Cool, gotcha, you know, umm, aaaaaaaaaahhhhhhhh). They make you sound less intelligent than you probably are.
- Know your audience, and plan for them. Respect them. If you have an audience that has proven pre-requisite knowledge, don't re-teach it--EVEN if the Facilitator Guide (you'd better have one) says to cover that material. If something MUST be reiterated, get your learners involved in teaching the group.
- * Every three to five minutes learners need to do something to be actively part of the learning. And watching YOU do something different every three to five minutes doesn't count.
- In the virtual classroom, learners have zero tolerance for what they consider to be "nice to know" information--and perception is everything. So make everything relevant. Even the orientation to the virtual classroom.

And while we're on the topic of opening a synchronous session and first impressions:

- If you need to spend an excessive amount of time establishing your credibility, you aren't credible. Learners expect that whoever arranged this training (boss, the training provider, university, etc.) has already established you as the expert."
- Don't rely on your technical expertise to establish your credibility. Rely on engagement and developing a relationship virtually with the learners to establish your "Sync-Cred."
- Don't go on about your fancy title. I am a "President, Founder, and CEO" myself, as are a multitude of independent 1099s. Adult learners are there to learn, and are often just being polite in pretending to care.
- Remember your own experiences in the virtual classroom. Think of all the negative interactions, and don't replicate them.
- Don't talk about wanting an interactive and engaging experience at the beginning of a session and then proceed to talk non-stop--often learners fail to learn because 75 minutes of non-stop lecture in a virtual classroom is a great chance to catch up on e-mail.

Lastly, I'd point out that many (if not all) of the Rules as I've set them out are, if you look closely enough, directly grounded in well-researched Adult Learning Principles. By all means, you can choose to ignore these rules (or ones just like them) and stick with your bad habits in the virtual classroom--just don't be surprised at the results.

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