

Eliciting and sustaining productive engagement

- Virtual training and facilitation is in its infancy
- The things we do to with Face-to-face training and facilitation also apply to the virtual environment such as soliciting input ahead of time; use of old fashion forms or setting up a chat area.
- Elluminate has that functionality; e.g. leaving messages on the wall
- Twitter chat gives you a sense of the group; find out who is and who is not comfortable with the issues beforehand; during the training or facilitation, it helps sustain productive engagement.
- Phone interviews
- Second Life provides us with the ability to ask questions as in F2F. Facilitator can have back and forth interaction with the participants
- Toys - send toys such as modeling clay, silly putty (pliable materials) ahead of time to the participants. This will give them something to do and provide an alternative to multitasking which is an issue with virtual interventions.
- Emoticons are helpful to get people's reactions

Designing a Virtual Meeting

- Designing training is easier than facilitation
Design has to allow pre-meeting time to give the participants opportunity to use the tools
- If using avatars in Second Life, that will take longer - when people are seated, it is easier, moving around makes it harder
- Movement is trickier virtually and people (avatars) tend to bump into each other
- Apply voice, text messaging, emoticons
- Keys: tools must be simple; NORMS are critical (how they need to participate; what they would like to get out of this; minimize multitasking - difficult
- Design must be consistent:
 - In training, the predominant mode of delivery is still the lecture method with Q &A. This makes it difficult to engage people especially because you do not have face clues; emoticons are not enough
 - Maybe include cameras to be able to have live interactions
- Use engagement tools; this takes a lot of work

Helpful resources

- Read everything you can
- Virtualis: uses it a lot because as a learner, Joan has a need to walk through the process
- Currently, the technology (other resources) are on training and less on facilitation
- Training is more one way and more on presentations
- Developing avatars is expensive. Dan Parks from Virtualis has extensive sets of avatars he has built. It costs between \$10-14K to build avatars and specialized sessions for

hundreds of people; He has also built a virtual computer that allows for scavenger hunts.

- Key: keep your tools simple (maybe a sticky wall that is transferable within the Virtualis location)

Learning Styles

- Use more tools; e.g., inventories that participants complete and send back to the facilitator/trainer
- Send people handouts (printed materials) to accommodate this learning style
- Most difficult is accommodating oral learners who have a need to ask a lot of questions because there is no way to accommodate their questions in the virtual environment
- Use of break outs (Virtualis: transport the participants to various areas. Although it is not seamless, it is easy to do that. Dan is willing to do anything; try working with him on various learning styles
- Twitter time - 25 seconds is a lot of time in the virtual environment
- Combining tools like Twitter chat with photos - at least you are able to "see" the person talking
- Key: do what you normally do in F2F situations
 - Find out as much as you can beforehand - use surveys
 - Send materials to them before the session
 - Adapt your style to the platform you are using
 - Accommodate short attention span with use of emoticons, polling, etc.
 - Take into consideration the various roles: facilitator/trainer; technician, designer (such as Dan in Virtualis who will do the customization)
 - Preparation /delivery ratio is about 1:1 - include rehearsal for participants

Criteria for choosing resources

- "I only do virtual sessions if I am begged by someone." (Client says "we have to...")
- Prefer to use tools I am familiar with
- If clients have their own virtual program, I have to learn their system.
- Polling is a standard tool for most platforms
- Second Life is more fun and is visual
- Key:
 - Do what the customer wants (in-house facilitator/trainer are familiar with their platforms)
 - Bring your own platform: important to understand the desired outcome; the number of participants; tricks and what you have used that best deliver the outcome(s)
 - Choose platform with greatest flexibility
- A checklist does not exist now - can be developed
- Interesting finding: students (this case with hospitality program; Gen Y do not use Twitter; they use texting and prefers F2F over virtual)
- Virtual meetings, training, facilitation is considered a lot because of the economy. The question is do we really need to go virtual? Write a white paper re the value of F2F meetings and the real cost savings of going virtual. (also look into the ROI for the stakeholders)

Additional comments

- Virtual platforms - are here to stay: get into it; embrace it; and do it cautiously
- Tools are being developed
- Weigh the value for each individual facilitation/training
 - Is it appropriate for the group?
 - Are the tools adequate - appropriate participation?
 - Will the use of these tools reach our goals?
 - Look at what will meet the needs of the client
 - Identify the pros and cons
 - Tutorials do not always work; one cannot stop to ask questions

Experts and other documents to read: Joan will send list

Documentation

- Save the entire conversation on Twitter chat
- Record and then transcribe
- Video recording
- Add a documenter to the team (one who takes notes) in addition to the technician, facilitator, designer