



# The Virtual Trainer's Checklist for Interactive Delivery, Counter-Intuitive Design and Social Interaction

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*Jenina Smith, Chief Marketing Officer  
Solutions Cube Group*

For most organizations, it's no longer a question of, "Are we going to use web-based live online learning tools?" Organizations have made this choice, and are now looking for innovative ways to use the tools and reap the benefits of reduced costs and increased productivity and reach. How can the rich set of features and capabilities of online solutions be integrated into learning solutions that generate business value? This paper explores some counter-intuitive delivery and design strategies for working with online training tools.

### Recap of Learning Landscape

The overwhelming number of tools, technologies, and design/delivery options in the field today makes it hard to know where to start. The graphic on the next page summarizes the strategic choices and options we have as learning professionals. It's an architectural blue-print that connects the jigsaw pieces into a cohesive map of the learning landscape. How we navigate these choices translates into the strategic success of our learning programs.

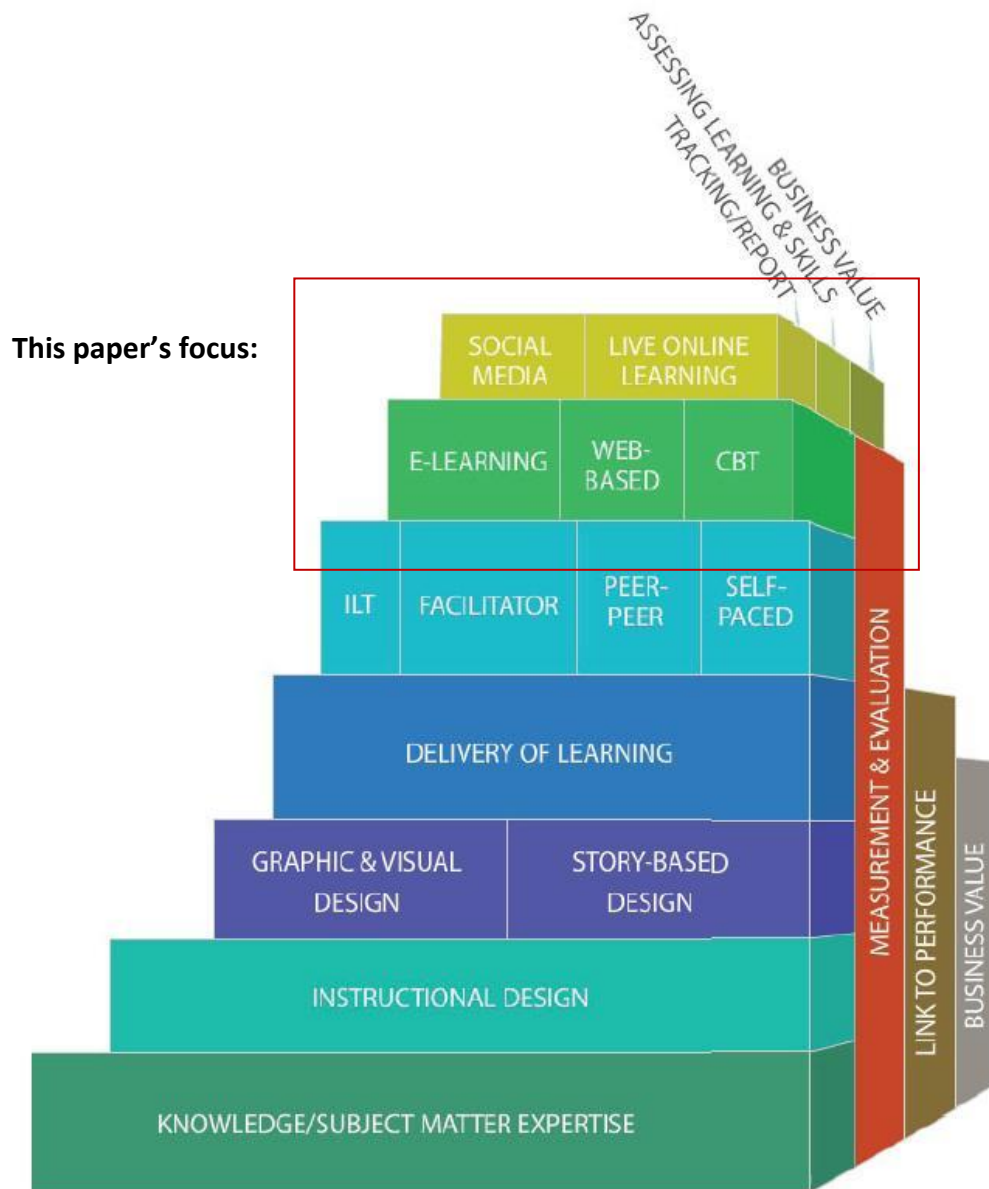
This paper focuses on the powerful combination of the four top elements of the current learning landscape:

1. Web-Based Live Online Learning
2. Social Media
3. Instructor/Facilitator Led Training
4. Story-Based Design

### Top Elements in the Learning Landscape



**The strategic choices and options we have to educate as learning professionals:**



***Additional resources for information on the learning landscape and how to maximize your program's value:***

“Maximizing the Value of Online Learning in Your Organization”

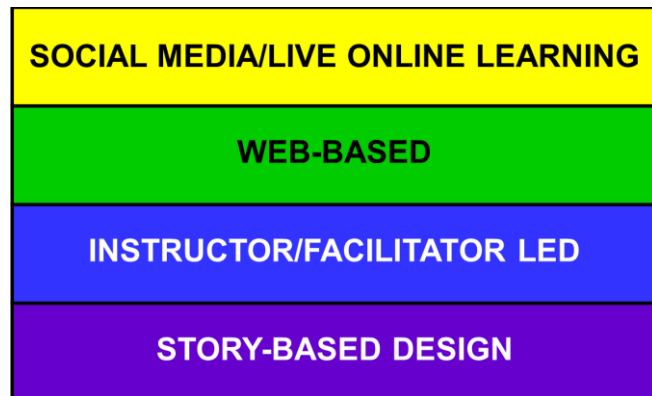
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## Web-Based Live Online Learning + Social Media = Complete Learning

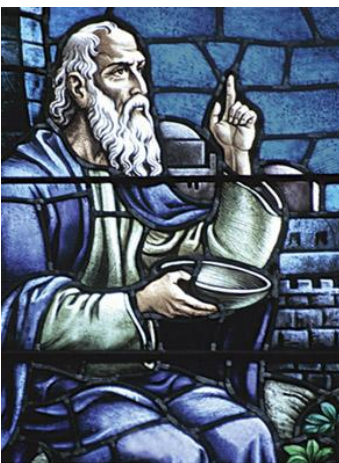
Learning professionals are not new to web-based online learning. The tools have become an essential part of what we depend upon to bring rapid real-time solutions to our stakeholders. The good news: the tools keep becoming more robust. There isn't necessarily bad news. However, our challenge lies in becoming more strategic in how we integrate these tools.

*“Imagine short bursts of engaging, interactive content guided by the expertise of a professional trained in stimulating adult learners. Then add peer-to-peer sharing through a mix of informal, social media type tools...”*

*Generate a powerful mix of new possibilities...*



Remember the conversational master Socrates? Didn't they refer to him as a "gadfly" extraordinaire? Picture a small, pestering fly inciting a large, stubborn horse to change its position with its agitating antics – that's a gadfly. Today's instructors need to likewise engage their students in short bursts of educational activity, fabricating temporary learning spaces woven together with the natural power of story and energized by fertile social media conversations.



*Extensive work with web-based live online training tools has taught me that short bursts of learning (seventy-five minutes or less) designed following counter-intuitive story principles and buoyed with social media tools yield unbelievable results.*

## Continuing the Conversation with Social Media

We hunger to belong. Most people want to be part of a conversation even if it's just listening. Engaging in conversation is a human need and desire. We don't have to look far to realize that despite the huge number of outlets available for digital conversations, people are feeling more and more isolated in organizations and in their personal lives.



Learning must be designed with an eye for:

1. Jumpstarting a conversation that will be explored during a learning event
2. Moving a conversation towards the next burst of learning when delivering a multi-module learning intervention
3. Continuing the conversation after the formal learning has ended

We don't need to reinvent the wheel. While every organization will have its own set of policies around social media, you should be able to find an external or internal tool that you can use. Social media tools come in a variety of shapes and sizes. Try not to become too attached to any one tool. Some will work better in some circumstances than others. Here's a list of a few of the more popular external tools:

1. Facebook Fan Pages & Groups
2. LinkedIn Groups
3. Twitter with hashtags (these are tools for tagging the stream of 140-character comments made by people into a searchable collection, '#anyname')
4. Video sites with conversation starters (<http://www.vimeo.com/user2343092/videos>)
5. Bookmarking sites (Stumble Upon, Reddit, Delicious)

Blogs or wikis can be easily set up with little to no experience. Be committed to these outlets, and develop a queue of materials (these can be links, quotes, pictures, short case studies/vignettes, editorial posts, stories, comments, etc.) to keep the conversation lively and interactive. People need conversation triggers to effectively engage in learning, but with enough stimuli, they'll begin to join in and feed the fire.

While you may want a few simple ground rules, resist the temptation to censor conversations. If it's a multi-module learning event, build flexibility into your design to incorporate what emerges in the conversations into the design of your next module.

In music, John Cage and others have talked about the spaces in between the notes as being as important as the notes themselves. That is very true here. Learning is synthesized and hopefully transformed into performance behaviors between events. The social media conversations that fill these spaces are like chemistry beakers where people will mix their learning in beakers bubbling with insights.

## Instructor & Facilitator Led Training

Nothing replaces the effectiveness of a strong group leader; even well designed learning events fall flat without someone capable in charge. Leadership guides and scripts are not enough. I've seen too many organizations roll out live online learning programs that leverage stakeholders across the organization to lead training segments. Armed with a script and some sort of train-the-trainer session, these folks are expected to hit the ground running and captivate their audience. Sometimes they do, but more often than not, I have seen these sorts of learning interventions sputter and fail.



Let's put aside titles, certifications and formal professional training for a moment. What do these live online learning leaders look like? What do they need to be able to do?

For the sake of simplicity, let's say these leaders come in two flavors:

### ***Instructor as Subject Matter Expert (SME)***

These learning events look more like briefings. In fact, I am tempted to call them exactly that. Imparting information, and using technology effectively to do so, is the hallmark of an effective organization. Keep SME briefings as short as possible (I recommend 20-40 minutes). Be clear with people as to what the goals of these events really are. Whenever possible sprinkle in a dash of fun.

Assuming a modicum of capability as a communicator, the person or people with the deepest and most influential voice of expertise and knowledge should take the helm. Even in these events, tie this string around your finger:



***“Remember to tell a story that imparts the relevance, significance or connection of the information being imparted with the audience and to the organization as a whole. Answer the questions, What’s in it for me? & What’s in it for us?”***

One of the great benefits of using an online training solution is the ability to present SMEs to a wide audience regardless of the distance. This saves in costs and brings a richer learning experience for participants.

## Facilitator as Conversation Leader

For a moment, go back to our image of Socrates as the pestering gadfly. Live online learning as a real-time and social media-time conversation offers endless possibilities for engaging employees in new ways. Learning leaders are facilitators. Their job is to be present and sensitive to the dynamics of the group. Even with the constraints of the digital divide, a facilitator must become attuned to all of the mental and emotional nooks and crannies participants might inhabit during a learning event.



**Arrange learning in structured linear blocks. Move from one topic to the next. Know your key landing points.**

This is straightforward. Now here's the kicker. A facilitator of live online learning must be prepared to paddle through tributaries. Remember to allocate extra time for tangents. Keep in mind that the conversation becomes as important as the content. Our tendency is to give too much credence to our beloved information. We think, "If people only swallow the information and digest it in the way I give it to them, we'll all live happily ever after in a high performing organization." After all these years of knowing better, I'm afraid I still get seduced by this alluring temptress.

Think of the facilitator as an orchestrator. The learning design is a score in front of you. However, you never know how much or how little music you will need to fill the space of learning.



***"Distill the essence of your key messages so that they can materialize in lots of different places and times throughout a learning event. Then saturate the conversation with opportunities to discover these."***

**Here are six best practices for live online learning facilitators:**

1. Keep the events small (10-20 attendees)
2. Go in with the mindset that less is more
3. Value the conversation over the content
4. Provide structure and process for the conversation (examples of process include clear time limits and simple ground rules for the conversations)
5. Pace yourself – without the sense of being in-person, technology can be overwhelming to master in a training session – don't try to do it all at once
6. Learn the tools – in order to effectively monitor, engage and assess students, simple-to-use technology is key

A good facilitator gives control to a group without ever losing control of the overall goals or flow of the conversation. In some ways, this is easier with technology, as trainers can be aware of group questions, concerns, and commentary without being so easily blown off course.

Don't be ashamed to get some professional help. I know lots of outstanding trainers that are retooling themselves as conversation facilitators.

## Story-Based Design Principles

***“The shortest distance between two people is a story.”***  
***“If a picture is worth a thousand words a story is worth a thousand pictures.”***

Terrence Gargiulo, President, MAKINGSTORIES.net

Story has a natural connecting power. Let's try on some different storytelling hats. Have you considered that...?

- A learning event is an unfolding story
- People craft a story to make sense of what they are learning
- Stories are at the intersection of people's synthesis of learning
- Stories are tools for thinking
- You can move through complex information more efficiently through story devices than through standard forms of discourse
- Breaking a story or a group of stories up into a bunch of smaller pieces throughout a learning event will help you anchor your learning and hold people's attention
- Scenarios can be used as mini virtual reality simulators to engage people in stimulating conversation

As you design conversationally driven web-based live online learning programs, keep in mind what I call the “Triple Threat of Storytelling:” telling stories, listening to stories and triggering stories.

Telling stories is the tip of the iceberg. We need to be able to listen for the stories, look for patterns that are emerging, and explore the contours of this terrain as meaning emerges. Search for context and the story behind the story being shared. And perhaps most central to our discussion:

**“Learning events need to trigger and elicit stories from participants.”**



Don't be concerned if stories don't get shared during a live event. As long as people are reflecting on stories, they'll be making invaluable links to your key messages. Stories touch our imaginations. Real changes in behavior related to performance percolate in our imaginations before they ever become visible.

Stories that create engagement don't need to be long drawn-out dramas. Two or more anecdotes woven together can be more effective than one big story.



**Stories beget stories...**



**Cast your story net wide to capture the imagination of as many people as possible.**

Just as words mean different things to different people, stories are indexed with different "tags" in peoples' heads. The danger of limiting yourself to one big story is that you're treating stories as encoded messages. Stories tickle, tease, and invite participation. So collaging two or more stories together increases the likelihood that your stories will resonate with your learners.

The same holds true for stories you're likely to hear from others. In fact, they may not even look and feel like stories when you see them. They might be a pointer to a story – a short phrase uttered by someone that acts as a placeholder to an experience. These can be probed and expanded upon as time and circumstances permit during learning events.

Does your learning organization have a story-bank? Stories are happening all the time. Here are a couple of quick ideas to get started:

***What do I need to do to start a story bank?***

- Become mindful of stories.
- Develop mechanisms for collecting stories from customers, employees, stakeholders, and from other domains.

- Offer people formal/structured and informal/unstructured opportunities to share stories.

### ***How do I get stories for my story bank?***

- Listen carefully to comments during live online learning events, meetings, project debriefs, mentor and coaching programs.
- Invite veteran employees to special focus groups designed to elicit stories.
- Mine your social media outlets on a regular basis for stories.
- Hold story contests. For more info see: <http://scr.bi/aMPXG4>
- Provide story prompts to get people going. Stories are some of the best prompts I know. One story usually leads to another.
- Give people timelines.
- Generate a good stream of questions.
- Show genuine interest and curiosity in others, their experiences, and how they have formed their worldviews.

Stories map to one another. We create relationships between stories and look for parallels between them. In this way, stories are also building blocks for learning. We learn by associating new pieces of information with existing ones. When experience remains isolated in a single domain, it is horribly inefficient. Roger Schank, founder of the Institute for the Learning Sciences at Northwestern University and founder of Socratic Arts, asserts that intelligence is the ability to easily index our vast array of experiences and make connections between old ones and new ones.

I feel we have a tendency to confuse communication with learning. Most of us spend the majority of our time in organizations communicating in the explicit ways expected of us. If we can't say it straight, or make it immediately digestible, then we have failed. Conversational forms of learning thrive on implicit communication. Stories are implicit. Although this may seem counter-intuitive, stories used to stimulate the storytelling of others will yield the best results.

## Getting Started

I'm new to virtual training and I want to start slowly...	I'm ready to dive into virtual training...
<ul style="list-style-type: none"> <li>✓ Make the event small (10-20 attendees)</li> <li>✓ Find an organizational group looking for ad hoc training (in other words there is no current solution in the organization)</li> <li>✓ Keep the event short (45-60 minutes)</li> <li>✓ Use compelling visuals to compliment the stories you are sharing</li> <li>✓ Open your event with a collage of three short stories</li> <li>✓ Write one scenario with a poll question</li> <li>✓ Write one "what would you do in this situation" scenario and solicit open-ended feedback</li> <li>✓ Compile a list of post-event resources that draw upon external blog postings and discussion-based social media outlets. (Hint: Use the "blog" search capability in Google with a keyword related to your learning event to find a list of blog resources to share)</li> <li>✓ Take a training course from a professional or your online training solution provider</li> </ul>	<ul style="list-style-type: none"> <li>✓ Take an existing internal learning piece and translate it into a new live online version</li> <li>✓ Break it up into short pieces (60-75 minutes in length)</li> <li>✓ Build in a 20% time cushion to allow conversations to expand as needed. For example, if the session is 60 minutes prepare 48 minutes of content (3x13 minute conversation, leaving nine minutes for opening and closing and a 12 minute cushion. Remember, if you end early, no one is going to be upset – although it rarely happens because the conversations are rich.</li> <li>✓ Reverse engineer the course and design each module as a series of three or more conversations</li> <li>✓ Use stories/scenarios/vignettes to trigger conversations</li> <li>✓ If the learning event doesn't have any pre-event work associated with it, create optional supplementary material in a social media domain</li> <li>✓ Setup a social media outlet to encourage significant conversations between learning events</li> <li>✓ Develop an active queue of contributions to stimulate conversations on social media outlets. Make sure many of these include stories.</li> </ul>

I'm new to virtual training and I want to start slowly...	I'm ready to dive into virtual training...
	<ul style="list-style-type: none"> <li>✓ Mine social media conversations to inform and tweak the design of later modules of the live online learning intervention</li> </ul>

### FOUR TOOLS YOU MIGHT FIND USEFUL

How to Select a Story for Training: <http://scr.bi/amnWd4>  
 Nine Ground Rules for Working with Stories: <http://scr.bi/dw2bbj>  
 Using Stories at All Hands-on Meetings: <http://scr.bi/7hqGzd>  
 “Maximizing the Value of Online Learning in Your Organization”  
[\[on-demand webinar\]](#) and [white paper](#)

## AUTHOR BIO



**Terrence L. Gargiulo, MMHS** is an eight times author, international speaker, organizational development consultant and group process facilitator specializing in the use of stories. He holds a Master of Management in Human Services from the Florence Heller School, at Brandeis University, and is a recipient of Inc. Magazine's Marketing Master Award, the 2008 HR Leadership Award from the Asia Pacific HRM Congress, and is a member of Brandeis University's athletic Hall of Fame. He has appeared on Fox TV, CN8, and on CNN radio among others.

Highlights of some of his past and present clients include, GM, HP, DTE Energy, MicroStrategy, Citrix, Fidelity, Federal Reserve Bank, Ceridian, Countrywide Financial, Washington Mutual, Dreyers Ice Cream, UNUM, US Coast Guard, Boston University, Raytheon, City of Lowell, Arthur D. Little, KANA Communications, Merck-Medco, Coca-Cola, Harvard Business School, and Cambridge Savings Bank.

**For More Info on Story-Based Design & Web-Based Learning:**

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