



SECTION I

# Getting Started





# ONE

## Introduction

Virtual learning, in the space of just a few years, has greatly enhanced its position as a learning solution among a growing number of organizations. Behind virtual learning's rise in such a short span of time is better, more reliable delivery technology and an increasing number of tech-savvy learners. In addition, the great economic meltdown that began in late 2007 forced companies to find cost-saving alternatives to traditional classroom training.

But whether this shift is driven by cost-cutting business imperatives or strategically nuanced decision-making encouraged by improved technology options and a more accepting workforce, companies are choosing virtual learning solutions in greater numbers than ever. Still, for many training and learning professionals, virtual learning remains an uncertain option for a whole host of reasons. A few of them are fact, but most are fiction.

This book is designed to carefully pick apart the underlying assumptions and misconceptions about virtual learning by providing a range of field-tested tools, tips, and techniques that ensure learner value and keep trainees engaged with a learning event even if the facilitator is in another state, region, or country.

Yes, virtual learning does still have some flaws and limitations, and these shortcomings are what critics point to as they dismiss virtual classroom

training as a viable training solution. It's boring, these critics say, or virtual learning audiences don't pay attention and use the time to catch up on email. While these criticisms do reflect a small slice of reality on some level, my opinion of virtual learning is obviously a little more balanced.

## **AN ENDORSEMENT OF VIRTUAL LEARNING**

In the case of virtual classroom training (and face-to-face classroom training for that matter), the magic is not found in the sophistication of the technology but in how well the physical and virtual tools are used to create and facilitate an engaging learning event. The same technology that's behind highly interactive, engaging, and interesting virtual learning experiences is what also creates ineffective and boring virtual training solutions that invite criticism.

You can suffer a "death by PowerPoint" experience virtually or in person. The only differentiator between a successful or unsuccessful training event is good design executed by a skilled facilitator. It's all about creating an ideal mix of appropriate technology, excellent design, and engaging facilitation. If this book has one main goal, it's to guide you toward always hitting that ideal learning mix.

## **HOW VIRTUAL TRAINING COMPARES TO OTHER TYPES OF TRAINING**

First, virtual classroom training combines elements of traditional face-to-face training with elements of self-paced e-learning. As such, face-to-face and virtual classroom training both require facilitators. Like self-paced e-learning, a reliable Internet connection is needed to connect learners in different countries, regions, or time zones. Table 1-1 compares several components of three types of training delivery.

Many elements of face-to-face and virtual classroom learning also align. Figures 1-1 and 1-2 show typical face-to-face and virtual classroom setups respectively. Note how the group dynamics in the classroom setting—participant discussion led by a facilitator with support materials—are replicated in the virtual setting to achieve the same group dynamics.

**Table 1-1** Virtual Classroom Training Compared to Other Types of Training

<b>Component</b>	<b>Traditional Face-to-Face Training</b>	<b>Self-Paced e-Learning</b>	<b>Virtual Classroom Training</b>
Information Flow	Two-way information flow between facilitator and learners	One-way information flow between technology and learner	Two-way information flow between facilitator and learners
Facilitator	Physically present with participants	Not applicable	Physically separated from participants
Location	Physical classroom or meeting room	Accessed via a computer or mobile device	Accessed via a computer and sometimes a mobile device
Materials	Handed out during class	Downloaded from course site	Emailed or mailed to participants in advance or downloaded from virtual classroom
Typical Exercises	Facilitated discussion; small group work	Drag and drop exercises; online simulations	Facilitated discussion; small group work in breakout rooms and polls
Duration	Varies from an hour to multiple days	Modules broken in to small chunks of time, such as 30 minutes	Typically chunked into 60–90 minute sessions

The facilitator’s role and responsibilities in a virtual classroom are similar to what you’d expect a facilitator to do in a physical classroom. They include basic tasks, such as:

- Navigating through course slides and other materials
- Facilitating and encouraging interaction among participants through questions and dialogue

Of course, the obvious difference is that the learners experience the virtual facilitator as a displayed static image or a live webcam video feed. Dynamic participant interaction is accomplished via text chats and verbally through a



Figure 1-1 Face-to-face classroom setup.

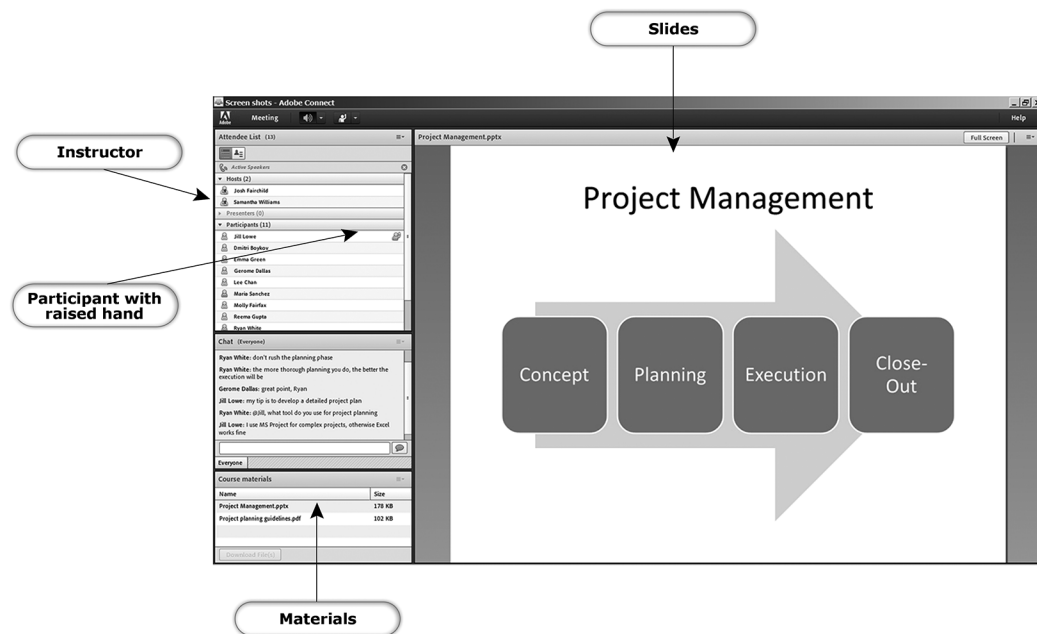


Figure 1-2 Virtual classroom setup.

voice over internet protocol (VoIP) or a teleconference associated with the session. Any notes or points of interest the facilitator wants to emphasize are jotted down on an electronic whiteboard that all the participants see simultaneously. If the facilitator poses a question, the “raised-hand” response serves as a graphic representation associated with the individual learner that appears on the screen. Facilitators have the option of querying all the learners simultaneously using polling tools built into the virtual learning software. Handouts, job aids, and other supplemental material are emailed or posted for participants to download.

## **WHEN TO USE VIRTUAL CLASSROOM TRAINING**

In most cases, answering a few targeted questions about the specific training need, technology available, amount of content, basic participant demographics, and the virtual learning experience of the facilitation team should be enough to determine whether or not virtual classroom training is appropriate for a particular learning program. Here are a few questions you can use to begin this process.

### **Training Need**

- Does virtual classroom training offer a better solution (i.e., more efficient, cost effective, or scalable) for the business need or performance problem than traditional classroom training?
- Does the organizational and learning culture support the use of virtual classroom training?

### **Technology**

- Is the company’s virtual classroom tool stable, reliable, and supported by the information technology (IT) department?
- What equipment is available, and is it the right equipment needed to deliver virtual classroom training (i.e., headsets for VoIP and wired Internet connections)?

- Will the participants have access to appropriately equipped computers, laptops, or tablets, as well as telephones or microphone-enabled headsets?

## Content

- Is it possible to group the content into 60 to 90 minute segments?
- Does the topic require participant collaboration, interaction, and dialogue?
- How much time and resources are needed to develop or repurpose face-to-face training for the virtual classroom environment or develop new material for the virtual classroom? Is it possible to do the work and meet the delivery deadline?

## Participants

- Is the environment conducive to virtual classroom training (i.e., private and free from distractions)?
- Do participants have sufficient technical skills to participate?
- Are the participants geographically dispersed?

## Facilitation Team

- Are the facilitators skilled in virtual classroom facilitation?
- What virtual learning support staff can you call on to assist in the session?

Answering these questions provides some initial insight into the appropriateness of a designing a virtual learning solution. Developing questions appropriate for your organizational situation will further refine the broad questions provided here and help you make a final decision about whether to offer a virtual training solution.

Here's additional helpful delivery mode decision-making support. According to the U.S. Distance Learning Association (USDLA), virtual classroom



training works best to achieve higher cognitive levels when a synchronous learning environment supports a high level of dialogue and interaction. In other words, don't spend time in the virtual classroom dumping a torrent of information on learners. Instead, use the time to interact with learners to discuss, evaluate, and synthesize information.

Noted adult learning scholar Ruth Clark emphasizes that virtual classroom training is the right choice when learning objectives can be best achieved through:

- Display, explanation, and discussion of relevant visuals
- Interactions using virtual tools, such as polling, writing on whiteboard, and chatting
- Collaborative work among small groups of participants

## **BENEFITS OF VIRTUAL CLASSROOM TRAINING**

As noted earlier, companies are increasingly using virtual classroom training to deliver learning solutions. Additional financial and social benefits driving this increased use are discussed below.

### **Global Reach**

More organizations than ever are using virtual learning to bring individuals and teams together for learning events in an increasingly global business environment. Whether it's a global sales team connecting from offices in different countries or managers separated by multiple zones, the ability to easily connect people and train them in the same virtual classroom is one of the main benefits spurring the increased use of virtual learning. Even facilitators benefit from the technology's reach. Learning sessions may be conducted just as easily whether the facilitator is working from home, office, or any other appropriately equipped location.

## Time and Travel Savings

Clearly, virtual learning eliminates the costs associated with traditional classroom learning events, such as travel expenses (airline flights, car rentals, hotel rooms, and meal expenses). For example, if 20 employees need to fly domestically to attend a three-day learning event at a cost of \$1,000 each for travel, hotel, and meals, an organization would save \$20,000 by delivering the training virtually as a series of short sessions. Costs associated with workflow disruption and lost productivity are also eliminated, since participants join virtual classroom training from their workplaces or home offices. At the same time, virtual training is an efficiency “force multiplier” for facilitators, since they spend more time leading training and less time traveling.

## Environmentally Friendly

Since virtual classroom training eliminates the need for air and automobile travel, it’s an environmentally friendly alternative to traditional classroom training in which participants and facilitators are geographically dispersed and must travel to the same location. Airplane and automobile emissions are the biggest polluters related to workplace learning. In addition, because training materials may be distributed electronically, virtual training saves paper and, by extension, trees that would be lost by printing materials. For organizations looking to demonstrate their commitment to “green” alternatives and their focus on reducing their carbon footprint, the virtual classroom is an efficiency and public relations win-win.

## Chunked Content

According to research published in the *Journal of Applied Psychology*, a distributed approach to learning, where training is delivered as a series of shorter events with time in between, increases learning transfer by 17 percent over a single event. Setting up a series of in-person events for such chunked delivery is often an impractical design option, especially if participants are physically dispersed. However, virtual classroom learning is perfectly suited for delivering a

## LINKING VIRTUAL TRAINING TO CARBON EMISSIONS SAVINGS

The World Bank Group strives to be a carbon neutral organization for internal operations. As a knowledge and learning officer, I built the business case for virtual training by connecting it to this corporate initiative.

We are a globally dispersed organization with offices in 110 countries. Bringing trainers and participants to a central hub can, at times, require long flights—a significant source of carbon emissions. Using online tools, I calculated the carbon emissions savings that would be realized by conducting virtual training instead of in-person training, along with savings on travel costs.

Because numbers on carbon emissions don't have meaning for the average person, I used online tools to convert the emissions savings into tangible results. Then, I presented a slide at the beginning of each class showing the amount carbon emissions eliminated by delivering training virtually.

Delivering training in the virtual classroom not only helped the business achieve its goals, but also helped meet our demand for training global staff.

By hosting this session virtually, we avoided 44 tons carbon emissions, which is equivalent to:



- Recycling 20.2 tons of waste
- Growing 1,535 trees for 10 years

**TIP****Anna Heinrich, Virtual Classroom Instructional Designer, InSynch Training**

What's nice about training people in the virtual classroom is that you can spread out content over time. In traditional training, participants typically only work on skills during the class, not in the learner's true environment where he will be practicing the skills. But, if you design your virtual classroom training as a sequence of short sessions, you can work on a skill in the virtual classroom, then give participants time to practice the skill on the job between sessions. The result is a deeper understanding and discussion of the course content because participants have the opportunity to apply skills on the job between sessions and discuss their experiences during sessions.

series of chunked learning events with time in between those events for learners to practice and internalize content.

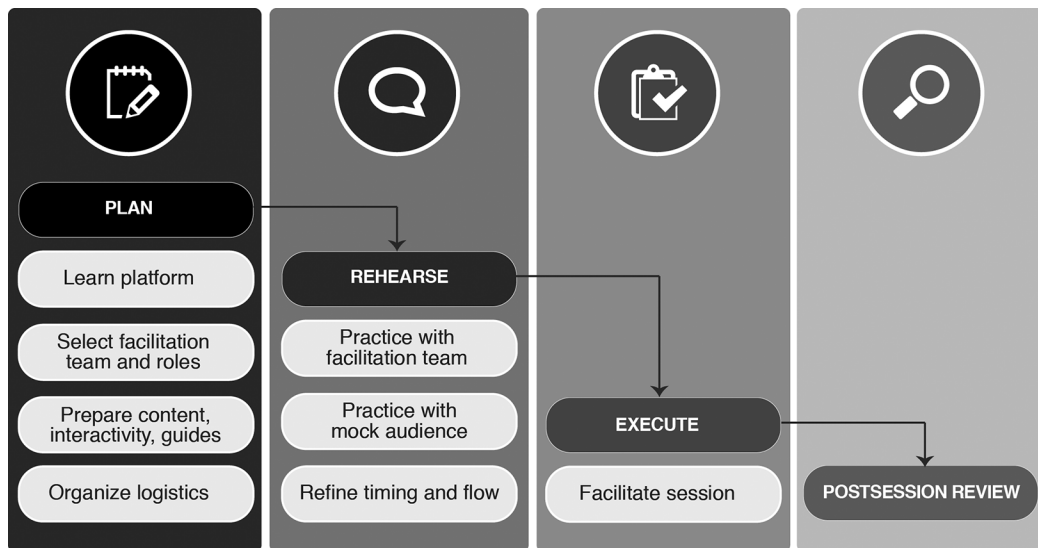
**Security and Weather Disruptions**

Virtual classrooms are also immune to disruptions because of changes in airline or train schedules or the closing of major road systems because of political instability, weather, or repairs. Examples of such disruptive events in 2010 include the Arab Spring civil uprisings or the Iceland volcano eruption that spewed engine-killing ash into the jet stream and restricted air travel for weeks.

Virtual training has many advantages over traditional classroom training, from the ability to connect participants globally to reduced travel and lower carbon emissions. Furthermore, the flexibility of the virtual classroom allows trainers to develop shorter segments of content, which helps to improve learning transfer.

**THE PREP MODEL**

After designing and delivering hundreds of virtual classroom sessions, I developed the PREP Model (Plan, Rehearse, Execute, and Postsession Review). It reflects my practical, real-world, and time-tested approach to virtual classroom



**Figure 1-3** Stages of the PREP Model.

training (see Figure 1-3). Even if you have little virtual training experience, you might guess that the model is heavily weighted toward planning. That’s because virtual training is a lot like video and audio broadcasting, where many hours are needed to prepare for a broadcast during which disruptions and mistakes are amplified. An unprepared facilitator stumbling through a session saying “umm” constantly can make seconds feel like minutes to the participants, who will interpret the facilitator’s lack of preparation and uncertainty as incompetence. Not only does this negatively impact the confidence of the facilitator, but it disrupts the learning process. Following the PREP Model, which will be covered in detail in Section II of this book, will ensure that your virtual classroom design and delivery is flawless. Chapter 7 is dedicated to an explanation of the model.

## KEY TERMS

Table 1-2 offers definitions of key terms for the virtual classroom that will help set the stage for this book. For a complete list of virtual classroom terms, see Appendix A.

**Table 1-2** Virtual Classroom Terms

<b>Term</b>	<b>Definition</b>
Breakout Rooms	Private meeting subrooms that the facilitator creates for small group work. Participants can have private discussions and collaborate on the whiteboard or chat.
Chat	A feature that allows participants and facilitators to send text messages in real time to chat publicly or privately with others in the classroom.
Drawing and Pointer Tools	A feature that allows the facilitator and participants to graphically mark up the screen in real time when a slide or whiteboard is displayed.
Facilitator	The main speaker, often a subject matter expert, who leads a virtual classroom session.
Instant Feedback	A feature that allows participants to communicate with facilitators at any time throughout a virtual classroom by selecting from a menu of feedback options, such as raise hand, agree, and stepped away. Also referred to as a raise hand feature, status change, or emotion indicator.
Poll	A feature that allows the facilitator to post questions to participants and show poll results in real time or after all responses have been received.
Producer	The virtual classroom technology expert who partners with the facilitator to deliver virtual classroom training.
Screen Sharing	A feature that allows the facilitator or participant to share their own screen, a website, or other application, such as Microsoft Excel, with the class. Also referred to as application sharing.
Voice over Internet Protocol (VoIP)	Instead of using a phone, transmitting voice through the Internet (e.g., Skype).
Whiteboard	A feature that allows for capturing of ideas/information by typing, highlighting, and drawing tools on a digital whiteboard.

## CASE STUDIES

A vast array of organizations, from corporations to nonprofit organizations to the U.S. military leverage virtual classroom training to support organizational objectives. Next you will find a series of brief case studies that demonstrate

how five organizations—Oracle, The Nature Conservancy, UPS, The Army National Guard, and Deloitte Touche Tohmatsu Limited—have used virtual classroom learning in their training and development strategies.

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### **Oracle—Bigger Reach and Higher Quality**

Reported by John Hall, Senior Vice President, Oracle University

Oracle University first began offering virtual classroom training in 2007. Today, the organization delivers all of its 2,000 courses virtually in 13 languages. According to John Hall, Oracle started offering its courses in the virtual classroom because its 390,000 customers wanted the benefit of time and cost savings offered by virtual training. Oracle's customers also sought virtual learning's broader reach that would allow expanded options for those unable to physically travel to a classroom training event. For example, someone working in Europe can join a virtual classroom that is being conducted during regular business hours in the United States from his home after work.

Hall says the results from the investment in virtual training have been promising. In a recent student satisfaction survey, live virtual classroom training scored two points higher than face-to-face training. Hall reports that the exceptional results are due to the following key factors:

- Courses are supported by a producer focused on any technical issues, so that the instructor can focus on delivering course content.
- Courses are designed specifically for virtual classroom delivery.
- Top instructors have more time to teach since they don't have to travel and, even if an instructor is traveling, classes can continue no matter where the instructor is located.

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### **The Nature Conservancy—Mission Alignment**

Reported by Todd Slater, Technology Learning Center Program Director, The Nature Conservancy

The Nature Conservancy operates in all 50 U.S. states and in over 30 countries. Since it's such a geographically distributed organization, in-person training is rarely done. According to Todd Slater, virtual training makes sense in terms of cost and efficiency (e.g.,

no travel costs and better use of staff time) and helps the organization stay mission focused by reducing its carbon footprint. Both of these outcomes are important to a nonprofit organization and its donor and support pool.

Slater also says that virtual classroom training has even more practical benefits—it creates a better learning experience for participants. Staff members are able to learn from a globally dispersed peer group, rather than just those in their immediate area or office. This leads to new perspectives being formed and improves the organization’s global effectiveness.

Virtual learning has also changed how the organization delivers training, Slater said. Content is delivered in smaller chunks over an extended period of time. For example, a class might be administered over the course of one to three weeks, so that the learner is online for short periods of time. Self-paced exercises might be included for offline completion, along with a one-hour virtual classroom session that learners can fit into their schedules.

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### **United Parcel Service (UPS)—Uniting a Decentralized Learning Community**

Reported by Anne Schwartz, Vice President, Global Leadership and Talent Development, UPS

According to Anne Schwartz, the international package delivery giant first considered virtual learning around 2007 to 2008 because traditional classroom training could not meet the demand for their training needs. In addition, Schwarz said that serious consideration of virtual learning was directly connected to technological advancements that allowed training generalists to easily create and deploy rich and effective training. Specifically, these improvements included virtual classroom tools that allow for an interactive and engaging experience with high-quality audio and video, breakout rooms, and chat and assessment capabilities.

Schwartz advises companies thinking about deploying virtual learning to identify early adopter departments or divisions and to consider what type of training is most appropriate for virtual learning. Next, she said that UPS asked 40 global learning professionals to evaluate three web conferencing platforms for functionality and ease of use. After selecting the platform, UPS gave licenses to the selected business unit learning leaders and asked them to pilot a training program for employees. Because UPS has a decentralized learning community, the business units picked the topic, created and deployed the training, and measured the business results.

In one of the first pilots, automotive learning leaders hosted 27 classes in two weeks with 450 attendees. Although the training team spent extra time developing the



virtual course, they ultimately saved time due to reduced travel time. When the results of virtual training were compared with face-to-face training, it was determined that virtual learning saved two weeks of time due to reduced travel time, while achieving the same results as traditional training.

Schwartz says that UPS now uses virtual classroom training to teach mechanics and automotive management, telephone service center employees, sales, international management, and many other employees about topics once learned only in physical classrooms.

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### **Army National Guard—Versatility and Access for Citizen-Soldiers®**

Reported by Colonel Thomas Perison, former Chief of Training Division for the National Guard Bureau (2012–2013)

Members of the Army National Guard are Citizen-Soldiers® who hold civilian jobs or attend college while maintaining their military training part time. They are prepared to be deployed overseas or domestically in the United States. To maintain currency in a particular area, Army National Guard soldiers are required to complete 39 to 60 days of training per year, depending on their specialty. Training may consist of a combination of hands on, self-paced distance learning, and virtual classroom training. Individual Army National Guard Units also need to maintain a certain percentage of soldiers with a particular skill set, and training can reach many more soldiers when delivered virtually.

Perison reports that virtual classroom training is a great tool because time constraints can be minimized. Since soldiers don't have to travel to attend training, they can actually get more of it. It's not cheaper to develop training for the virtual classroom, but it saves time, which is the biggest constraint. Furthermore, since Army National Guard soldiers also work, the impact to employers is also reduced because soldiers can join a virtual classroom training session after work instead of taking time off from work to travel to a training center.

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### **Deloitte Touche Tohmatsu Limited—Connecting Staff and Senior Partners**

Reported by Nick van Dam PhD, Chief Learning Officer in Global Talent, Deloitte Touche Tohmatsu Limited

Deloitte Touch Tohmatsu has used virtual classrooms since 2001, but its use has increased significantly in recent years. According to Nick van Dam, virtual classrooms are

used to build competencies for all career levels at Deloitte. Learning events focus on the inherent collaborative and social learning functionality in virtual classroom learning.

With its staff of 200,000 globally dispersed employees, a tremendous advantage of virtual classroom learning is vital staff connections that would be impossible to make through physical classrooms only. For example, the company offers a year-long leadership course that includes virtual classroom, in-person, self-paced videos, coaching, and mentoring.

A senior leader, such as a tax professional in The Netherlands, might begin the training journey with the learners by inviting them to the virtual classroom session. During the session, the leaders offer their views on leadership theories and put forth best practices they have found effective in the organization. This virtual classroom session offers a unique opportunity for staff in the leadership program to get to know senior partners personally.

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