LIVE VIRTUAL WORKSHOP TRAINING GUIDE (VIA ZOOM)

Using technology to facilitate workshops can seem daunting, but it doesn't have to be a stressful experience. With proper preparation, online workshops can be as engaging, effective, and inspiring for participants as in-person workshops.

Here at CTRI/ACHIEVE, we use the Zoom platform for hosting our live virtual workshops because the Pro plan includes features such as screen sharing, group chat, and breakout rooms that encourage viewer participation and enhance the learning experience. Whether working with Zoom or your organization's platform of choice, here are some tips on how to maintain consistent quality of training while leading virtual workshops. **We recommend that you keep reviewing this page ahead of time before your first few live virtual trainings.**

As trainers, we are committed to:

- **Preparing** ahead of time
- **Engaging** our participants
- Structuring our training for **participation**

01 | PREPARE

- Consider the size of your group. This will make a difference as to how training is structured. Smaller groups who know each other will more easily discuss things as a whole group, whereas larger groups will need more breakout rooms to facilitate discussion.

- Set up your Zoom meeting ahead of time. Send the meeting link, password, and manuals to your participants a few days beforehand.
    - When using Zoom, make sure to use a password for security.
    - Get familiar with the platform! Practice sharing your screen, muting/unmuting participants, and creating breakout rooms.
    - For large groups, pre-assign breakout rooms to save time during your training.

- Embed videos into PowerPoints. Do NOT switch between your PowerPoint and your desktop (see "Workshop Materials" on the trainer site for instructions on how to do this).

- Be mindful that most trainers find they run behind their usual schedule while using Zoom. Be prepared to adjust your timing accordingly.

- Show up 30-45 minutes before your training to get your virtual training space ready.

- Prepare your training space:
    - Have two screens, if possible
    - Make sure you are comfortable (have water, snacks, etc.)
    - Make sure the video image of you is clear and clean
    - Remove distractions – make sure you have good audio, that there is lighting on your face (not behind you), and your office is tidy!

02 | ENGAGING

- Look at the webcam! If you are using presenter notes, place your webcam on the same monitor, directly above your notes.

- Don't disparage virtual training to participants. Instead, be excited about the possibilities it offers.

- Show excitement and present with the same level of passion as you would in person!

- Talk to individual participants at breaks or in between activities, much like you would in person.

- Use participants names whenever possible.

- Smile often!

03 | PARTICIPATION

- Never talk continuously without interaction from participants for more than 20 minutes (less is even better).

- For small groups, try to have everyone unmuted together for some parts of the training.

- Use polls when appropriate (for both information gathering, but also humour).

- Use the chat function. This can be helpful to draw people in who don't want to talk. Encourage people to type questions or just make comments.

- Give time for self-reflection. During your presentation (and perhaps before a breakout), give time for people to think about the question and write down their thoughts.

- Consider giving "homework" during lunch.

- Give clear instructions on how to comment and/or ask questions during day:
    o They can use the "raise hand" feature (be sure to tell them where to find this). You can then call on them by name (e.g., "Robin, I see you raised your hand"), and have them unmute themselves and talk.
    o They can also type questions in the chat.
    o Let them know when you will be responding to their questions. In some sections of presenting, you may wait to finish your thoughts before taking questions.

- In breakout rooms, consider the following:
    o 3-4 participants is ideal (with only two, someone may be left out because their partner has no audio or video). In small groups of 10-15, you could try groups of two if you monitor and make sure everyone is partnered up. Due to the increase in numbers of times breakout groups are happening in virtual training, sizes of 3-4 are better than 5-6.
    o For some activities it will be beneficial to have a designated person report back to the larger group about their group's insights.
    o Move people to different groups, but not ALL the time. Consider what activities/discussions work for people to meet again with the same group.
    o Make sure you have only 1-2 concise and clear questions for discussion.
    o Use the "broadcast message to all" feature to give groups notice of when the breakout room is closing (e.g., "One more minute before we come back as a large group").

o If the discussion questions aren't in the manual, "broadcast" your one or two questions to them again so they see them in the group.

ADDITIONAL GUIDANCE

Directions to participants:

- Ask participants to turn their cameras on so that you can see their smiling faces and talk to them. Explain how to "hide self view" so they don't have to look at themselves too.

- If there are technical problems and you lose the connection (get kicked out of the Zoom meeting), instruct participants to go back to the original link to login and reconnect.

- For large groups, ask participants to mute their microphones when not talking to the group. For small groups, ask for anyone with small kids/background noise to stay muted except when speaking. Participants should communicate with you through the chat or "raise hand" functions described in the previous section.

Other Zoom training tips:

- Pause for longer than usual after asking a question or responding to questions to get feedback.

- Use opening time (icebreakers) to have everyone play around with Zoom and become familiar with the functions (e.g., "Everyone raise your hand and type your favorite color in the chat").

- Add a couple more videos to your presentation than you might normally, and space them out throughout the day.

- If seeing your own image is a distraction, turn off this view.

- Encourage more regular physical breaks, take a full lunch, stand up and stretch. Keep in mind that participants only have your face to look at, so you should approach the training with more of a conversational feel.

- Model how the skills you are teaching can be used in a virtual format.

SUPPORT LINKS

FOR QUESTIONS ON THE TRAIN-THE-TRAINER PROGRAM AND CTRI RESOURCES:

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EXTERNAL LINKS ON USING ZOOM:

Setting Up Zoom Meetings & Inviting Participants
Full Zoom Tutorial
Zoom Breakout Rooms
Zoom Help Centre