VIRTUAL TRAINING TOOLKIT

UNBOXED
TRAINING & TECHNOLOGY

PLANNING FOR VIRTUAL TRAINING DOESN'T HAVE TO BE HARD

At Unboxed, we're all about keeping it simple.

We know the needs of your workforce are evolving. This toolkit is designed to empower you to create a plan to keep your team engaged and growing through virtual training and touchpoints. It outlines simple, tactical steps you can take to set your team up for success.

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ROADMAP FOR SUCCESS

As you plan for virtual training, we know there's a lot to consider. How can you continue to weave in a human element, so morale doesn't dip? How can you position your team to level up their skills even if they're not in the office?

We've broken out everything you need to know into four key steps. For each, we'll explore some key considerations and tips to keep in mind along the way.
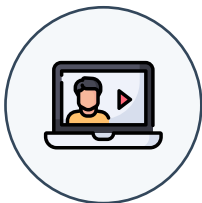
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STEP 1
Choose The Right Tools for the Job

The first piece of the puzzle is making sure you and your team have the tools and tech they need to learn and connect virtually. Below are platforms we recommend to make virtual learning as seamless as possible.

MICROSOFT TEAMS

Microsoft calls Teams "the digital translation of the open office space." If you're already using Office 365 or Microsoft products, there's lots of potential for integrating Teams into your pre-existing workflows. It's great for a decentralized staff that needs to communicate and collaborate frequently and quickly.

Capabilities	Helpful Resources
Calls Allows video and audio conferencing **Sharing** Allows file and screen sharing **Recording** Gives an option to record meetings **Chat** Robust chat app that focuses on creating project- or goal-oriented "teams" **Channels** Teams can be split into channels to allow for multiple workflows on the same project **Integration** • If you use Outlook, Teams' meeting links appear directly in your calendar to make joining calls easy • If you use Office 365, Teams can integrate seamlessly across the Microsoft product suite for easy collaboration	Welcome to Team Video (2 mins) Learn More about Teams and Channels 5 Ways to Make Group Chats the Best Place at Work

ZOOM

If you're looking for a way to host meetings with clients and stakeholders or hold internal workshops, Zoom might be a good choice for you. With a free tier and a low cost of entry for enterprise accounts, Zoom is accessible to large and small organizations alike.

Capabilities	Helpful Resources
Calls Allows video and audio conferencing **Sharing** Allows file and screen sharing **Recording** Gives an option to record meetings **Chat** Allows you to send messages within a meeting **Desktop vs Mobile** More functionality exists in the desktop and web-based app if you're looking for options to transcribe calls, set participant settings, or use the chat functionality	Getting Started Guide Video Tutorials

WEBEX MEETING & TRAINING CENTER

Many people are familiar with WebEx meetings, and for good reason. They've established themselves as a major player in the video meeting market for many years and they have a great reputation for stable video calls with a broad feature set.

Capabilities	Helpful Resources
Calls Allows video and audio conferencing **Sharing** Allows file and screen sharing **Recording** Gives an option to record meetings **Chat** Allows you to send messages within a meeting **WebEx Training Center** • Includes added functionality for hosting virtual training sessions like interactive whiteboards, polling, emoticons, and private virtual breakout rooms • Due to the added functionality, if you're planning to host a more formal virtual instructor-led session, we recommend using WebEx Training Center	WebEx Training Center Overview WebEx Training Help Center WebEx Meetings Help Center

OTHER OPTIONS

Google Hangouts Meet/Chat
If your organization uses G-suite or frequently uses Google Docs/Sheets, consider looking into Google's chat and video platform: Hangouts.

Adobe Connect
If you have the internal tech support to customize a tool, Adobe Connect offers some of the most robust customization options on the market.

A whole host of additional options
Skype, GoToMeeting, CyberLink, and more

STEP 2
Leveraging Existing Content for a Quick Win

When you're shifting to virtual training, it's important to focus on how you can leverage existing content and how you can inspire your team to create and share additional content with their peers. Here are a few things to consider.

1. How can you use your learning platform to boost engagement and facilitate social learning?

2. How can you leverage off-the-shelf training to upskill your team while they're remote?

3. How can you use subscriptions to content marketplaces to supplement your virtual training?

4. How can you repurpose or reimagine your existing training in a virtual setting?

We'll dive in to each of these four questions in more detail in the following pages and provide some helpful tips to consider along the way.

LEVERAGE YOUR LEARNING PLATFORM

Social Learning Activities

When it comes to your learning platform, it's critical to set clear expectations with your team around the importance of a growth mindset or an attitude of continuous learning, so your learners consistently turn to the platform as a development tool. Continuous learning focuses on the idea that any skill, knowledge, or behavior can always be improved and that no person will ever know all there is to know about any given topic.

ORGANIZATIONS WHO SUCCESSFULLY CULTIVATE THIS MINDSET BOAST[1]:

37%
greater employee productivity

58%
more prepared for the skills of the future

92%
more likely to innovate

Facilitating this attitude of continuous learning is particularly important for your learning platform because it's the place your learners turn to for required and optional training curricula. If they don't have a growth mindset, learners won't take optional training or go above and beyond to engage with the content. So how can you use your learning platform's features to boost engagement?

Here are a few fun ways you can use your learning platform to keep learners talking to their peers, sharing best practices, and building a sense of community.

[1] Source: Leading in Learning - Deloitte

Discussion Topics

This may sound simple, but posting prompts or thought-provoking questions in your discussion thread will help generate conversation among your team and promote social learning. In virtual training, learners can quickly start to miss the social element of in-person training – this is an easy way to reincorporate that feeling online.
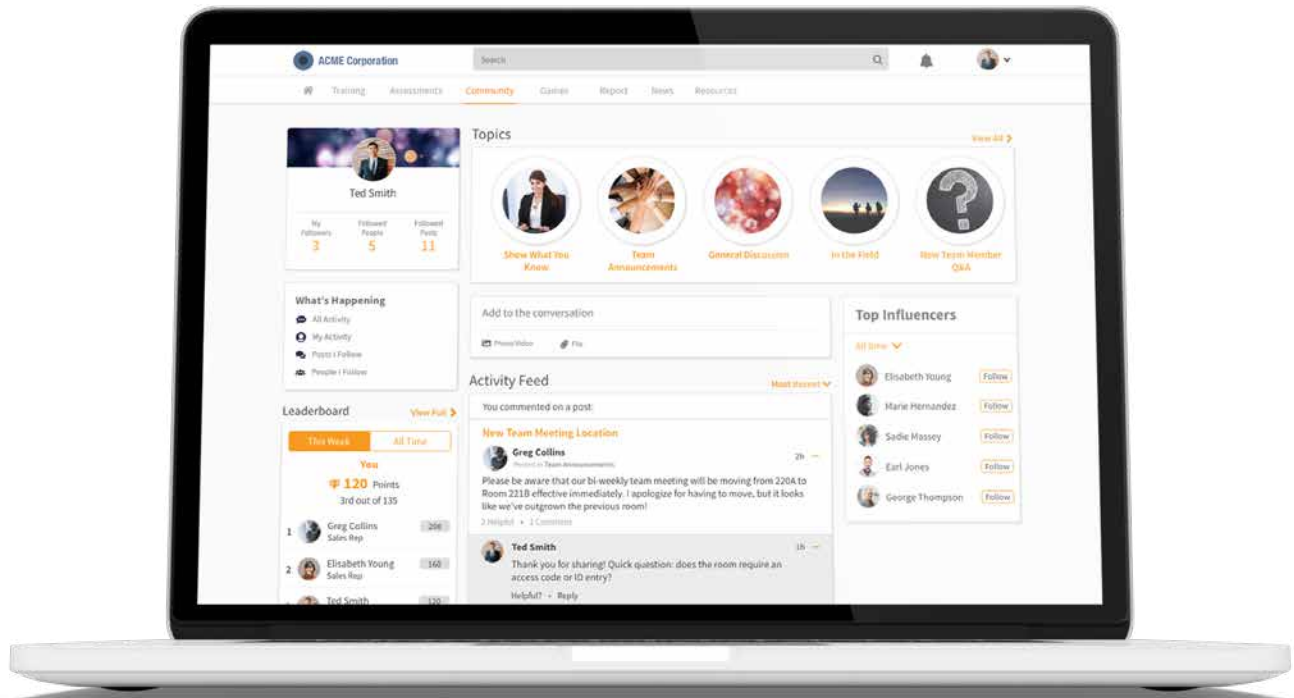
Think about topics you've been focusing on, skills you've recently trained on, and challenges your team may be facing. Consider questions like these:

a. What is one big success you've had recently and what do you attribute that to?
b. What challenges are you facing in your role and how have you been working to overcome them?
c. What is one best practice you've learned that you wish you'd known sooner?

Ask the Experts Panels

Invite someone from your company who is an expert in a given area to host a virtual Ask the Experts Panel. Whether it's a product you're featuring, a skill your team has been working on, or even a tenured employee sharing what they've learned, it's a chance for someone to share their knowledge with the larger team.

Advertise the session beforehand and have your team send in questions on the relevant topic using the discussion board in your learning platform. Then, pick a day and time for your expert to log on and answer those questions.

Scavenger Hunts

Remember, it's not just the experts that have something to share. You can also create an online scavenger hunt where you direct your learners to seek out additional resources on a specific topic and require each learner to come back and share something they found that was useful.

Learners tend to respond well to information when it's presented by their peers – someone they see as an equal who truly understands their role.

LAUNCH OFF-THE-SHELF TRAINING

One considerable challenge is thinking through how you can upskill your team virtually. Especially when, in the current market, many affordable, off-the-shelf training solutions lack quality, are outdated, and miss out on sustainment.

ReadySet

Our turn-key solution, **ReadySet**, takes a radically different approach. ReadySet is high-quality off-the-shelf training built with four guiding tenants:

High Quality Curated, high-quality, proven training content based on 10+ years of experience building custom training programs for Fortune 500 organizations.	**Action-Oriented** Includes follow-up activity workbooks, recommended manager check-ins, pre-and post-assessments, and calls to action to practice new skills throughout.
Modern Interactive micro-learning modules are delivered via a modern, web-like experience and focus on one key skill each to drive engagement and increase retention.	**Measurable** Learners take a baseline quiz to assess their skill level coming into the program and a final assessment to see how they've improved along the way.

ReadySet curricula include:

READY SET > Lead

Upskill your people leaders with ReadySet Lead.
10 micro-learning courses:

- Establishing Team Values
- Motivating Your Team
- Leading a Team Meeting
- Conflict Resolution
- Effective 1:1s

- Goal Setting
- Coaching
- Giving Feedback
- Performance Management
- Delegation

READY SET > Sell

Reinforce critical sales behaviors with ReadySet Sell.
8 micro-learning courses:

- Prospecting that Works
- Asking the Right Questions
- Communicating Effectively
- Positioning Against a Competitor

- Analyzing Needs
- Effective Proposals
- Differentiation
- Asking for the Sale

Also available:

READY SET > Respect   **READY SET > Secure**

Teach key compliance behaviors with **ReadySet Respect** and **ReadySet Secure**.

OUR OFF-THE-SHELF CONTENT TAKES A RADICALLY DIFFERENT APPROACH

Learn More

PULL FROM CONTENT MARKETPLACES

You should also consider how you can use what's available on content marketplaces like LinkedIn Learning and Open Sesame to jumpstart your training. Many organizations may have a subscription to a marketplace already that's rarely used—start there! The main thing to keep in mind is culling through their massive libraries.

Here are some tips for curating marketplace content:

Verify the Quality of the Content	Consider: • **Seat time** – Is the session too long or too short? • **Relevancy** – Are the topics applicable to your industry and organization? • **Instructional Design** – Does the training look good? Is the content interactive or are learners merely listening to a recording?

Consider Curated Lists	Direct your team's attention to the most helpful resource:
	• Create Your Own
	  – Use the tips under Verify the Quality of the Content as your guide to compile your own list.
	  – LinkedIn allows you to create lists and share them with your team via their LinkedIn Learning Paths
	• Use Existing Curated Lists
	  – Open Sesame Curated Lists

Contextualize with Follow-Up Touchpoints	Think about how you can supplement boxed content with contextual examples of how it applies to your company. Consider adding on: • Discussion Threads in your learning platform • Virtual Group Meetings on the topic • Ask the Experts Panels • 1:1s with managers

REVISIT EXISTING TRAINING

In addition to considering ways to supplement your offerings, take another look at the content you already have. What can be repurposed? What needs to be reimagined?

When revisiting your existing training, start by asking yourself a few questions:

a. How old is the content? Is it worth transferring over or does it need some work?
b. Are there elements you can re-use? How can you use existing videos or job aids as resources to support your virtual training?
c. What are the key objectives? How well do those translate virtually?
d. Is the juice worth the squeeze? Will this content truly benefit my learners or is it just busy work?

As you think through these questions, let the learning experience be your guide. If something isn't going to benefit your learners or teach them something new, it may not be worth pursuing. At the end of the day, begin with the end in mind and try to think from the learner's perspective by asking, *"What's in it for me?"*

Once you've established which content you want to move forward with, determine how you want to roll it out. Here are a few tips to help you strategize:

- **Weigh your options.** Examine each learning objective to decide how your existing content can translate into a virtual classroom versus what might work better as pre- or post-class activities. If it's something learners can work through on their own, consider self-paced options (like videos, courses, or job aids) and save instructor-led sessions for practice, discussion, and application.

- **Watch your time.** If you're converting an in-person training that was 5 days long, you can assume that was about 6 hours of instruction per day, or 30 hours of total content. If you're converting to courses, limit you seat time to 15- to 30-minute chunks. After that, you'll start to lose learners' attention. If you're shifting to virtual instructor-led, bucket your sessions to about 60 to 90 minutes each.

- **Phase it out.** When you move all your resources to the web, there is a chance you could face technical problems. It's a good idea to launch a pilot "classroom to eLearning" program to identify the technical and logistical problems involved before rolling it out to your entire audience.

- **Make a plan for measuring success.** Consider building out virtual surveys so learners can give their anonymous feedback on things like the effectiveness of the facilitator, the value of the training, the length and format of the training, etc. This will help you plan for future sessions and refine the training you've already provided.
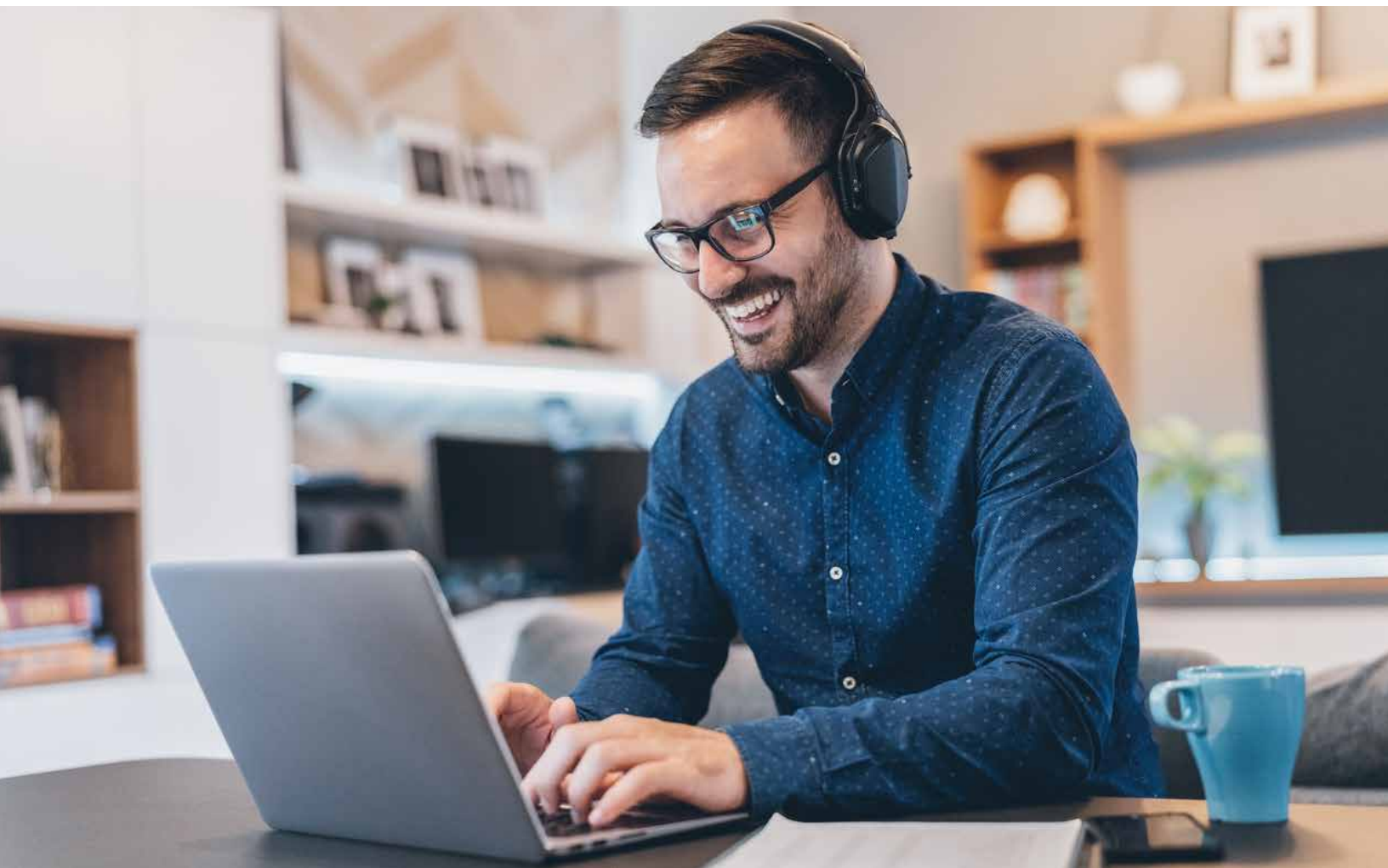
STEP 3
Plan For Virtual Group Sessions

Virtual group sessions can have all the same benefits of an in-person session for your participants if you plan them well. Here are some quick tips for putting together an impactful virtual session.

1. **Consider the availability of your team members:** Choosing a synchronous learning opportunity can be challenging for learners with unique schedules. Keep your team and their availability in mind. When scheduling your session, avoid difficult or peak times where your team is busiest or when some team members aren't available.

2. **Prepare your facilitators:** Equip facilitators with a pre-session checklist and thorough talking points, and make sure they have the presentation in advance if possible so they can practice. If they're new to facilitating, consider a Train the Trainer session.

3. **Know your platform:** Which virtual platform is best? Depends on your needs, but we recommend something that allows for breakout rooms, chat, and whiteboarding. Polling functionality is a plus, too. Check out this quick overview of different platforms.

4. **Consider how formal your session is:** What type of virtual session fits the content best? Sometimes a formal session is best, with a strict agenda and more input from the facilitator. Other times, it can be best to hold a more informal session, like a Lunch and Learn. In these types of sessions, you choose a topic to discuss and focus on interactivity and input from participants on the topic.

5. **Incorporate interactivity:** To keep participants engaged, minimize lecturing and maximize participation with fun activities. Keep in mind the functionality available within your chosen platform. Need some inspiration? Check out this article.

6. **Create opportunities for connection:** If possible, incorporate breakout rooms where your participants can collaborate in small groups. Remember, though, you'll need to add 2-3 minutes to each of these activities to allow for the logistics of migrating participants to their virtual rooms.

HOW TO LEVERAGE VIRTUAL TOOLS

Did You Know?
According to ATD, 80 percent of online presenters use fewer than 25% of the interactive features available in these type of platforms.
Don't let your training fall in this category.

Here's a rundown of a few options you can use to boost engagement virtually.

Activity Type	Use Cases	Tips
Discussion	• Sharing thoughts and opinions • Discussing key takeaways	• Ask open-ended questions and unmute participants who raise their hand to answer. • Utilize the Chat functionality when you want responses from everyone.
Polls	• Icebreakers • Opinion-based questions • Uncovering trends • Quick knowledge checks	• Load polls ahead of time to make them easier to run during your session. • Set the polls to reveal results so learners can see.
Knowledge Checks	Confirmation of understanding	• Use the quiz builder function. It sends out the question and captures results. • If your platform doesn't have a quiz builder, the polling functionality can work for this, too.
Webcam	Creating personal connections	• Use for things like facilitator introductions, guest speakers, and learners sharing. • Make sure you have a strong internet connection. If bandwidth is an issue, it may be best to avoid webcam.

Activity Type	Use Cases	Tips
Whiteboard	Collaboration Activities	• Whiteboards usually include an arrow feature for pointing at something on the slide, a highlighter, a drawing feature, and a text/writing option. • Can be used with the full group (if the class isn't too big – recommend 30 or fewer participants). • Also works well for small group activities.
Groupwork	• Small group practice • Teambuilding • Activities	• Use Breakout Rooms to allow learners to enter private "virtual rooms" where they can talk freely, chat each other, and share ideas. • Host, facilitator, and panelists may enter the breakout rooms to check on progress and answer questions.
Video	Provides fun visual to break up the instruction	• Sometimes streaming can be difficult in virtual sessions and the video may look choppy. To avoid this, send the link to participants so they can watch on their own. • We usually recommend assigning videos as prework to avoid the above bullet point.
Emoticons	Gauging how learners are feeling in a virtual environment	• This is a low-pressure way to see how learners are feeling using smiley face options. • This is also helpful when checking for understanding or asking true/false questions – learners would use the green check for yes/true and red "x" for no/false. • Another fun tip – ask learners to display a coffee mug during breaks if they step away from their computer.

STEP 4
Layer in Virtual Manager Check-Ins
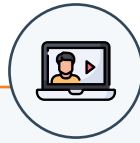
Studies show good training only sticks when there is ongoing sustainment and support. That's why it's crucial to weave in regular manager check-ins, especially to support virtual training. Here's what you need to keep in mind about these meetings.

BENEFITS OF VIRTUAL MANAGER/EMPLOYEE 1:1 MEETINGS:

For People Leaders	For Teams
• Gives an opportunity to proactively check in with their team members • Provides visibility into whether the team member is completing their assigned training • Helps uncover any challenges the team member is facing with job-related responsibilities • Designates time for personalized ongoing coaching and support	• Helps team members feel visible and valued even when they're not in the office • Provides motivation to complete assigned training since there is an affiliated check point • Creates an expectation of ongoing conversations around how to tactically apply their learnings on-the-job • Gives them a chance to ask for help

Here are a few tips and best practices your managers should keep in mind.

Frequency and Duration	• Check-ins should happen at least once every other week to maintain a sense of connectedness between a team member and their manager • Meetings should last for 30-60 minutes depending on each individual's unique needs • Managers should coordinate with each team member to find out their preferred cadence, time of day, and day of the week and try to accommodate those requests
Meeting Logistics	• Use a platform like Microsoft Teams to host the call and have both parties turn on their webcams to facilitate that one-on-one personal connection • Encourage both managers and team members to turn off email or chat notifications during the meeting to minimize distractions
Good Topics for 1-on-1s	• Questions to prompt personal reflection • Practice exercises including role plays and real-life scenarios • Key takeaways from any training, Lunch and Learn Sessions, or learning platform's Discussion Boards • Challenges the team member is facing while working from home • Things the team member is passionate about and how they can harness that energy while remote via research opportunities, peer teach-outs, and stretch assignments • Action Plans and SMART Goals for how a team member can improve in a given area over the next 30, 60, and 90 days

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HOW UNBOXED CAN HELP

We know it's a lot to think about. Let us help!

Whether you need a hand putting together your overall virtual training strategy, need someone to help create or facilitate virtual sessions or reimagine existing deliverables, or are looking for an learning platform with social capabilities, we have your back.

CONNECT WITH US AT UNBOXEDTECH.COM OR GIVE US A CALL (888) 723-9770.