Getting Started with Online Training and Facilitation

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If you are used to training or facilitating people in person and are asked to train or facilitate online or over the phone, you might understandably feel a bit nervous. The good news is that most of what you already know and do as a facilitator in person also applies online and over the phone. With an understanding of the challenges and opportunities of this different medium, you can adjust the tools and approaches you already use, resulting in engaging and effective trainings and meetings online and over the phone.

Two of the biggest challenges for facilitating remote groups (whether online or over the phone) are **managing distractions and multitasking** and **reading the group**. Without the social reinforcement of being in the same room as others, it's easy for people to zone out or start doing other things while meeting on the phone or online, and as a facilitator you have much less control over your participants' surroundings. And without being able to see people's non-verbal signals well (even if you have web cameras), reading how people are doing and how engaged they are can be challenging. Conveniently, there is a lot of overlap in solutions to these two challenges. Managing both of these involves *engaging your group frequently and in varied ways*.

There are many different options and strategies for engaging a remote group, and will vary according to the technology that you are using. At the lowest tech end of the spectrum is simply a conference call line. At the other end of the spectrum is web conferencing software with fancy features like built in tools that allow participants to raise their hands, take a poll, go into breakout rooms, etc. The technology you use is simply a tool. The options at your disposal will vary along this spectrum, but the principles of using them successfully are consistent all along the range. What follows are various options to fit different technology levels. When it comes time to design your session, you can choose strategies that fit with the technology you already have, or choose your technology to line up with what you want to do.

Engaging and reading the group out loud: At the most fundamental level, keeping a remote group engaged and reading where they are means not falling into the trap of assuming silence means agreement. Frequently during your meeting or training, especially if you are making a decision, check in with the group in a way that allows you to hear from everyone. In a phone meeting, you can have each person choose a seat around a virtual table, which everyone draws on their own paper (we call this "circling up"). Now that you are all around a table, you can do a "go-around" during which each person responds to a question in turn. Or you can

ask a volunteer to go first and then they choose who goes next and so on until everyone has responded. Sometimes a more general, simultaneous check-in can do the trick. For example "On the count of three, everyone make a sound that represents how you are feeling about ___ right now."

Engaging and reading the group using text chat: Web software allows more options for efficient, simultaneous check-ins. Whether you are meeting online or over the phone, having a simultaneous online text chat going (for example with Skype, or built into Google Hangouts) provides a lot of additional options. For example, you can say "Type in the chat box one word representing how you are feeling right now," or "Type 'done' in the chat box when you have finished journaling."

Engaging and reading the group using a shared document: Having a document or slides visible to the group, and which the group can all edit, opens another level of possibilities. Tools like this are built into web conferencing software, or can be added to a phone or online meeting using Google Docs or other online document sharing tools. With a shared document you can all write on, you can have the group do many different things, like brainstorm simultaneously in writing on the slide, write their name along a spectrum for a spectrum activity, dot vote on options for an activity or a decision, draw a picture together, and so much more! Many in-person activities that involve moving to different locations around a room, writing on a butcher block paper, or drawing can easily be adapted in this way. You can use this approach to engage and read your group in many ways, for example "Write on the slide one thing you are taking from this session" or "Write your name where on the spectrum you are in terms of agreeing or disagreeing with this proposal," etc.

Engaging and reading the group using web cameras: Web cameras can bring more social connection into a meeting or training. Unfortunately, even with the best software, due to bandwidth challenges and the general low quality of the images, web cameras can't be relied upon to provide consistent connection or time-accurate non-verbal feedback. Without relying on them as an accurate, ongoing way of reading the group, you can still use them in various ways to read and engage the group. For example, you can ask for thumbs up/thumbs down on a decision, ask people to show you something on the camera, do a short stretching routine together, give high-fives or "do the wave".

While we often discuss mitigating the challenges of remote facilitation, there are also great advantages to be leveraged. Having a simultaneous text chat going, for example, often results in an ongoing stream of feedback and questions that you might not get from participants during an in-person training where they would have had to interrupt the trainer to ask a question. Writing activities on a shared slide online allow you to gauge a group anonymously, and can result in more candid responses. With web conferencing software, creating random

groups and moving people in and out of breakout rooms can be done much more quickly and easily than in person. Having instructions written up on a slide and allowing people to respond out loud or in writing according to their preference can create a more supportive environment for a group with varied proficiency in the language in which the training is being given. And of course, the most common reason we do remote meetings and trainings is that it allows us to bring people together who we might not be able to (or able to as frequently) if we needed to meet in person.

When building your remote meeting or training, mix in a variety of methods that will help you read the group and keep them engaged throughout and take advantage of the opportunities of online facilitation. While you are planning your session, don't let the difference in medium separate you from what you already know and do when working with groups in person. Many classic tools such as guided visualization and journaling, for example, seamlessly integrate into remote settings, and others just need a little adjusting. Don't lose your breakout activities, either. While you may not want to break out as frequently in remote trainings, these are great for breaking up the session and engaging everyone. They can be done easily with some web conferencing software, and with low technology by breaking onto separate calls and then returning to the main group. And lastly, don't forget to have fun!

Example 1: In [the online graduate program I currently work with](#), we use *Blackboard Collaborate* for synchronous (same-time) online learning sessions because it has an advanced tool-set, including breakout room capability which is really important for the training methodology we use there, and it has a simple system for recording and sharing sessions. The tradeoffs are that Blackboard Collaborate takes some time to learn for both trainers and participants (but that works fine for this program since they meet repeatedly over 1.5 years), the software requires high speed internet access (which works because our participants are US-based and able to get this access), and it costs money (which is fine for this program).

Example 2: I have supported JOIN for Justice in developing their [online organizing institute](#), and they evaluated a number of options and chose *Adobe Connect* for similar reasons to Blackboard Collaborate above (robust feature set including breakout rooms, worth the time because they meet repeatedly over weeks). Adobe Connect is often easier for people to connect to than Blackboard Collaborate (doesn't require software installations, can be a bit more intuitive, deals better with shaky internet connections), and also provides more customized views. For the small number of users they have using the platform, it is not cost prohibitive, though it would be much more expensive for a larger program like the first example.

Example 3: In many cases, we are working with a smaller group of people that meet very infrequently or for a one-time gathering, and we don't want to lose attendance or engagement because of anyone having challenges connecting. And/or we are working with a group with no

budget for software for online training. In those situations, I am most likely to use *Google Hangout* these days (though I frequently try other software) because it seems to be simple for people to learn, has options for dealing with bandwidth issues, has audio, video, text, and screen sharing. The trade-offs are that you have to get creative to do breakout rooms and some other interactive activities, which can make things more complicated during the session, but not impossible. Also, there are group size limits (some accounts limit to 12 or 15), so it has to be a small group. There are a number of other free tools out there with similar benefits and challenges, and different ones may be a good fit for different groups. I use Google Hangouts not necessarily because it is the best, but because it is being so widely used (and is intuitive enough) that people are often either somewhat familiar with it already or pick it up more quickly.