

FIVE KEYS TO GETTING STARTED WITH INTERACTIVE ONLINE TRAINING

A 1080 Group White Paper
Prepared for Citrix Online

March 2008

WHAT YOU WILL LEARN

In today's global business environment, every organization has no choice but to seek ways to optimize their budgets, respond nimbly to changes, and improve productivity. For trainers, this often means needing to reach more trainees in more places without additional budget.

Live, online training using Web-based seminars ("Webinars") represents an advance in organizational effectiveness that can no longer be ignored. Customers can be reached at a greater distance, with greater frequency, and at a lower cost than ever before. Similarly, internal audiences benefit by having the right message delivered at the right time...all with the convenience of not leaving their desk. Organizations leading their industries will easily recognize the opportunity to create competitive advantage. Organizations that don't will be forced to catch up.

Putting the benefits of Webinars to work in an organization is something even part-time trainers can do quickly and easily. To look at how trainers utilize online training, 1080 Group, LLC conducted both primary and secondary research into how firms of all sizes are using Webinars to reach their customer base.

This white paper focuses on two things:

- Five key activities any trainer can use to jumpstart a Webinar training program and succeed
- A reference checklist for Web-based trainers to ensure effective training sessions

“Travel for internal meetings and training averages \$1,200 to \$1,500 per trip (for domestic North American travel). Employees also face downtime at work and disruption of normal work activities.”

Forrester Research,
December 2007

WEBINARS FILL UNIQUE ROLE IN TRAINER’S REPERTOIRE

No one argues that in-person, “instructor-led training” sessions play a valuable role in educating customers and employees. But with average travel costs of up to \$1,500 per trainee, programs that don’t provide flexibility to trainees are incomplete and become ineffective.

Live, Online Training Bridges Time and Distance

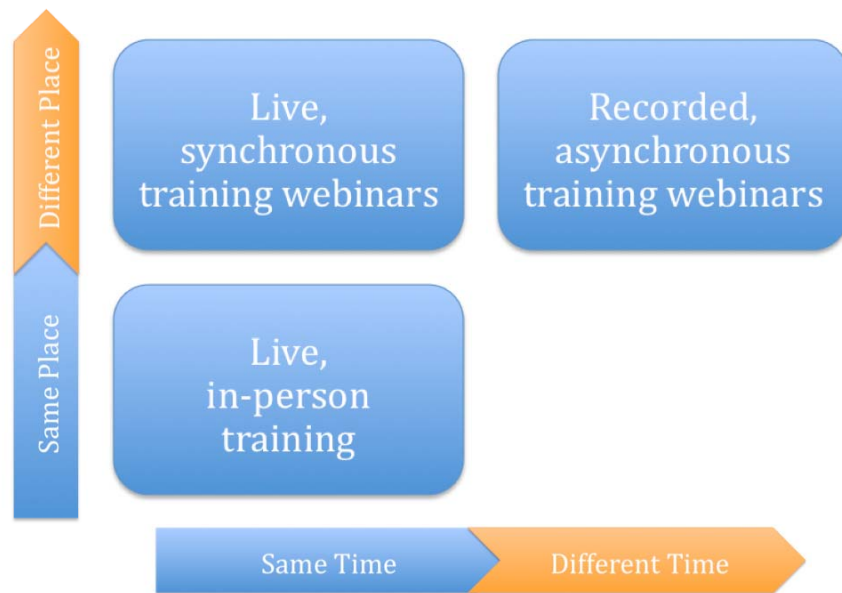
Webinars uniquely allow trainers to extend the reach of key training messages across time and space, retaining the ability to interactively engage adult learners with a complete audio-visual experience. Not only can trainees participate from the convenience of their desktop, but trainers can easily increase the frequency of their classes by scheduling the same class at multiple times.

Webinar Recordings Become Foundation of Learning Library

In the research 1080 Group conducted for this training white paper, we explored how current users recommended optimizing exposure of their key training messages. Overwhelmingly, 86% of respondents favored giving trainees optimum access by utilizing Webinar recordings as an “on-demand” content library.

Trainers Blend Experiences to Optimize Relevance

Marketers have long recognized the importance of segmentation to improve communication efforts. Similarly, trainers now recognize such concepts as time-place segmentation as critical to uniquely meeting the needs of differing ‘training engagement’ preferences of trainees.



Increasing the reach of key training messages is both a function of distance and time availability

FIVE KEYS TO RAPID ONLINE TRAINING SUCCESS

Intuitive Web-conferencing solutions make it easy to produce interactive online training sessions, freeing up time that might otherwise be spent implementing, learning, and managing complex tools.

Delivering a successful online training session, however, requires more than a Web conferencing solution. Trainers will also benefit from proven project-management principles that can be applied to their Webinar programs, from pre-session planning and promoting to presenting and post-session assessment and evaluation. The five keys to quickly implementing successful online training programs include the following:



Define Your Outcome and How You Will Measure It

A common problem for organizations when implementing new training initiatives is having unclear or conflicting expectations about what they will accomplish. A small investment of time in planning will pay dividends for both your trainees and your organization.

As you begin to move your training online, use the following four guidelines to help you quickly determine your high-impact opportunities:

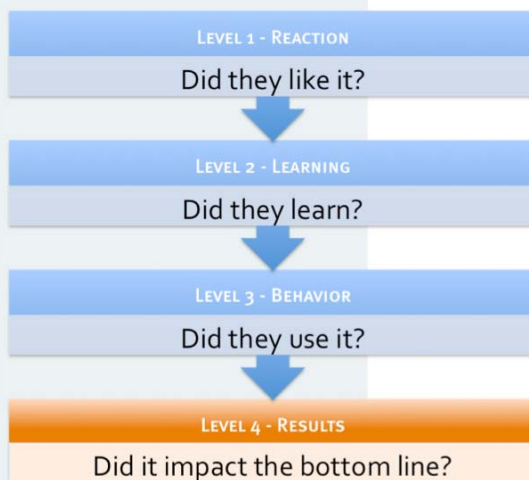
- **Define the learning objectives:** What do you want trainees to learn or do as a result of the training session? Be specific and realistic. Consider starting with a 'Level One' measurement to confirm that you are on the right track, growing into additional measurements as you learn and adjust.
- **Match content and medium:** Is the information you need to share available in a format you can show from your computer's desktop?

Some learning goals obviously cannot be done online (e.g., if trainees need to take apart and re-assemble a device), but nearly all learning initiatives have informational components that are well-suited to online training.

•**Determine availability of speakers:** Are there one or more subject matter experts (SMEs) required for the session? Eliminating travel for speakers makes it easier to schedule them, especially if you need to have more than one speaker presenting at the same session.

•**Determine and share benefits internally:** How does the organization benefit by moving training online? Common business benefits of online training include saving travel dollars, increasing the frequency of key training messages, and responding more quickly to business needs that necessitate communication.

Donald Kirkpatrick conducted landmark research showing four levels of training evaluation. It was first published in *US Training and Development Journal*.



Key Takeaway: Give yourself an early 'win' by starting with an objective that you can obviously bring positive impact. A good Web-conferencing solution will let you grow as you move more and more training online.



“SaaS customers always have the most recent version of the software and they never have to worry about upgrading, an often risky activity.”

Julie Craig
Senior Analyst

Enterprise
Management
Associates

Focus on Content by Minimizing Setup and Maintenance

Trainers are being asked to get more done with limited resources, often on top of their other duties. In 1080 Group’s research, respondents were asked to rank the benefits of training Webinars to their organizations. The top response: “reaching more trainees with the same headcount.”

With time as a key constraint, trainers should carefully consider three impact points relative to their Web-conferencing solution:

- **Shorten the time it takes to get started:** How quickly will the solution allow you to move some of your training initiatives online? Choosing a vendor whose online-training tools are available as a service (i.e., software-as-a-service or SaaS) enables you to start setting up your first training session in a matter of minutes instead of needing time to set up the infrastructure to support a premise-based solution.
- **Eliminate the need to have meetings with IT:** Can you eliminate the need to have extra meetings with the team(s) that own installing and maintaining software? Any software product requires maintenance, upgrades, and compatibility considerations as systems evolve. SaaS options free up that time for the IT group and the trainer.
- **Choose a solution that is simple, but not simplistic:** Can you support requirements for both newer and advanced users? A well-designed solution will put a rich set of features at the fingertips of trainers and trainees alike, but not at the expense of encumbering usability. Ideally it is easy to set up a meeting, easy to join that meeting, and intuitive for novices to instantly put it to use – all the while providing what is needed for the organization’s power users.

Key Takeaway: Ease-of-use has far-reaching benefits to your organization. For example, other activities such as how quickly you can run practice sessions or add other subject-matter experts from outside your team are also positively impacted.



Invite Trainees with Clear, Response-Friendly Instructions

With adult learners also feeling time-constrained, getting them to participate in training requires making it easy to respond to your invitation. To deliver value to each invitee, remove complexity by remembering the following:

- **State what invitees will learn:** Can the invitee, at a glance, answer “what’s in it for me?” A best practice for copywriting invitations is to make sure the invitee understands clearly what they will get out of participating in the training session. “How to” and “best practices” titles quickly let invitees know that they will be learning something useful.

- **Make it easy for invitees to respond, remember, and attend:** How many actions does it take to respond to an invitation or attend a training session? The more clicks needed to accomplish something, the more chance you have to lose the invitee to distraction. Ideally the invitation takes the invitee to a registration page in only one click, the confirmation email the registrant receives provides an option to conveniently add the included attendance instructions to their calendar, and only one click is required to attend the training session.
- **Use automated reminders to improve attendance:** Can you flexibly choose automated reminders to suit your session needs? Automated reminder emails reduce your need to 'calendar' another action item and can be delivered with precision. A best practice is to deliver each registrant a reminder email either one day or one hour in advance, and sometimes you may want to do both.

Key Takeaway: Your key training messages will find the broadest audience when they find your session easy to join and intuitive to participate in.



Deliver and Record Engaging Content to Optimize Reach

The primary benefit of live online training is the opportunity to deliver content interactively from the desktop, even if all participants are in different locations. Trainers who begin to move their initiatives online also quickly discover an extra benefit: sessions are easily recorded, unlike recording in-person sessions where production is both expensive and time consuming.

"Reach" refers to both how effective a trainee is engaged with key training messages and the availability of those messages across time and distance. Presenting and recording content will deliver the best results with the following best practices:

- **Use rehearsals to improve interactive skills:** Can trainers and other subject matter experts conveniently learn and use the Web-conferencing solution? In-person trainers "learn the room" in advance of a training session, and so should online trainers. Even experienced presenters will deliver more interactive sessions by taking a moment to practice using real-time screen sharing and annotation, polls and surveys, question and answer tools, and dashboards.
- **Engage audiences with live, interactive "dialogue":** In addition to what you have to say, how much are you listening? A great opportunity with a live audience is to let their feedback inform your delivery. Online there may be questions submitted through the Q&A tool, or it may be subtler, such as noticing "attentiveness" on the presenter dashboard.
- **Publish recordings for on-demand viewing:** Who are the most likely viewers of your recorded content? In addition to providing registrants who could not attend the live session a means of

86%

Percentage of 1080 Group research respondents who believe blending live sessions with on-demand recordings is best for improving trainee participation

accessing the content, consider that there may also be an extended audience. 1080 Group research shows that trainers also use registration for on-demand content to identify registrants for future communication, gather feedback, and assess overall interest of various content types.

Key Takeaway: Creating value for your audience and your organization is both an act of increasing the reach of your key training messages, and interacting with your audience. This also extends to questions you may ask of on-demand viewers. It extends the life of your content and maximizing its value.



“Evaluation of training courses is important even if a course is only offered once. Feedback from previous training courses can help in the design of future courses.”

The Role of Trainee Reactions in Online Learning

Lori K. Long, Ph.D.
President
LKL Consulting, LLC

Leverage Reporting and Analysis to Assess Achievement

Monitoring and measuring are essential to learning and improving your training programs. Trainers should have easy access to data to evaluate registrant and trainee responses, assess the effectiveness of the training program against the desired outcomes, and inform appropriate follow-up actions.

Trainers using online training should have the ability to monitor individual or aggregate responses to facilitate the goals of individuals or groups. Since individual responses “roll-up” to group responses, consider the following principles when leveraging reporting and analysis:

- **Monitor registration reports to gauge invitation response:** Are you delivering relevant messages to training invitees? Your organization’s goal is to reach trainees for a purpose. Measure invitation effectiveness by comparing quantity of registrants to quantity of attendees. Use registration questions to pre-assess registrant interests or key knowledge areas.
- **Assess trainee responses based on learning objectives:** What are the key learning outcomes, and how are they being measured? Internal training activities may require tracking as proof of attendance or demonstration of competence. External training activities may provide feedback that informs internal decisions, or may be correlated with other activities beneficial to the organization (e.g., did a trainee’s product usage increase?).

Key Takeaway: Online trainers have a rich set of tools available for monitoring and measuring each step of a trainee’s engagement. These can provide valuable insight into other group and organizational objectives for the sake of establishing benchmarks and measuring improvement.

SUMMARY

Using Webinars for online training delivers powerful benefits to any organization. Among the most commonly cited benefits are reducing expensive travel, involving people – both presenters and attendees – who could not otherwise attend, saving time away from the office, and flexibility of scheduling.

Fill the Unique Gap in Every Training Initiative

In between live, in-person training sessions and delivering pre-recorded, “asynchronous” content to remote trainees, Webinars uniquely allow trainers to interactively engage their audience with a complete, live audio-visual experience. Not only can trainees participate conveniently from their desktops, but trainers may also more conveniently invite remote subject matter experts to optimize the experience.

Increase the Reach of Key Training Messages

Webinars first provide trainers the ability to reach trainees who otherwise may not be able or willing to travel. Additionally, trainers who don't have to travel can now more frequently deliver those same live, interactive sessions. Finally, recording Webinars not only increases the availability of content for a global audience, but becomes the foundation of a valuable learning library.

Quickly Deliver Results, Learn, and Grow

Even the smallest organizations now have a “level playing field” opportunity to securely reach customers in disparate locations, all at the same time. Through real-time registration, attendance tracking, polling, Q&A, and surveys, assessing customer interests and needs is instant and measurable. Additional data gathered from customers registering for on-demand recordings allows organizations to respond to ever-changing market conditions.

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ONLINE TRAINING CHECKLIST

Keep this checklist as a reference.

 Step	Key Questions
<input type="checkbox"/> Define the learning objectives.	What will the learner know or be able to do as a result of the training? What level of learning evaluation will you use to measure it (Reaction, Learning, Behavior, or Results)?
<input type="checkbox"/> Assemble and format the contents.	Is content available in a format that can be shared from the trainers' desktops?
<input type="checkbox"/> Determine availability of speakers.	What subject-matter experts should present or assist? Are they available?
<input type="checkbox"/> Determine and share benefits internally.	Are stakeholders aware of what "success" looks like? Are they all in alignment with what the outcome should be?
<input type="checkbox"/> Create a compelling description, invitation, and schedule.	Do invitees understand the value of what they will learn? Will the training session be held at a time that works for them?
<input type="checkbox"/> Leverage both proactive and passive awareness.	In addition to direct invitations, what other places should you promote your training sessions?
<input type="checkbox"/> Set up registration to gather useful information and automate reminders.	What vital information do you need from trainees who register? Are there pre-assessment questions needed to determine knowledge levels, areas of interest, or other useful information? Will registrants receive an advance email reminding them to attend?
<input type="checkbox"/> Use rehearsals to improve interactive skills.	Do presenters have intuitive grasp of the tools at their disposal, such as responding to questions submitted, using polls, monitoring dashboards or trainee attentiveness, etc.?
<input type="checkbox"/> Engage trainees with live, interactive "dialogue."	Are presenters using polls and responding to questions frequently enough to keep trainees engaged?
<input type="checkbox"/> Record sessions and publish for on-demand viewing.	Will registration be used for the on-demand recordings? Will the questions be the same or different than the registration for the live training session? Should recordings be promoted?
<input type="checkbox"/> Leverage reporting and analysis to assess achievement.	Will pre-assessment questions asked at registration be used to gauge effectiveness? Were learning objectives met or missed, and how will that influence future sessions?
<input type="checkbox"/> Share results or important information.	What information should project stakeholders receive? Is there actionable information that needs to be distributed?