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Virtual Platform Features Checklist – Discover what you can use to train online!

Platforms for live online meetings, webinars, and training sessions have many of the same features. They may lack one or two features or may have it but called it something else. To learn your tool's features, use this list to guide you through what to look for when planning the delivery of your online meetings, webinars, and training sessions.

To create an effective learning experience, become familiar with the features and options available. Features themselves do not create engagement. It is how they are used that makes the difference!

Listed below are the most common features used to create and deliver an online learning session.

☐	**Audio:** The connection to the phone or use of computer audio (VoIP) for audio.	**When to use**: Always require attendees to join audio, whether it is computer audio (VoIP) or a teleconference. Make sure they not only join, but have a clearly audible connection/line, that they eliminate background noise, use a hands-free headset, and can control the mute and unmute themselves. **Note:** Attendees always need help understanding how to connect to the audio. Be prepared with a slide or send them the information in advance.
☐	**Webcam** A live video feed using cameras from each participant's computer**.** *Lake picture source: Pexels.com* *Picture of Kassy taken by and used with permission from, Kassy LaBorie. All rights reserved.*	**When to use**: Using a web cam personalizes a live online learning event. It works well for introductions or any time that seeing a person or an object would be helpful for learning to occur. **Notes:** Pay attention to your lighting and what is behind you that will appear on camera. Be sure your face is centered and look into the camera when speaking. Check whether the webcam feature shows a live feed by default. How do you control who sees your webcam and when? Check to see if your platform includes "virtual backgrounds." Images and video files can often be uploaded to serve as backgrounds. Check to see if your platform includes "virtual filters." Blurring of the background is the most common. **TIP:** Prepare participants ahead of time before asking them to be on a webcam. No one appreciates the surprise!

☐	**Participants Panel** The list of attendees/participants.	**When to use**: Participants Panel is your key to who is online, how their audio is connected and what feedback they are providing throughout the session. Focus more here than on your slides to engage your audience! Look at the participants list and use attendees' names often and regularly, their names are to each of them, "the sweetest, most important sound in any language." -Dale Carnegie
☐	**Feedback/Reactions** Icons to indicate status such as: "raise hand," "green check" and "away" options.	**When to use**: The feedback tools are a simple and highly effective way to check in with attendees. This is your online connection to the types of non-verbal cues they give during in-person events. Encourage attendees to click the green check any time they are nodding their head in agreement. For example, tell them: "Give me a green check if…" "Let's applaud your colleagues' efforts!" "Please mark "away" if you need to step out." **Notes:** Every platform is different. Check who can see what and when. For example, in WebEx Meeting Center, the host and presenter can see an attendee's raised hand, but other participants cannot.
☐	**Chat** A designated area for typing publicly shared and private messages for dialogue, questions, and comments.	**When to use**: Chat is one of the main methods of communication in the virtual classroom. Do not underestimate the power of this simple tool as it can be your main lifeline! Use it for commentary, questions, and conversations. Create "**chatversations**"! Send links through chat to quickly provide online resources to participants. **Notes:** Most platforms have this feature, but it may operate differently: some platforms allow public chatting while others do not. And some even let hosts see the private chats among participants ● Can the chat file be saved? ● Can the hosts view private chats?
☐	**Whiteboard** A space for collaboration using annotation tools.	**When to use**: Use this tool for collaborative activities like brainstorming and creative thinking. Annotating answers and ideas on a whiteboard is one of the most effective ways to gauge participation levels. It not only provides immediate responses, but it is also easy to save results and refer back to them at a later time. **Notes:**

		Be sure to activate the *Annotation Tools* for participants. Enable these privileges to allow participants to collaborate and write their ideas and comments on the files shared or on a whiteboard. - Can your slides and files function as whiteboards, shared and then annotated upon? - Can they be saved? **TIP:** Have participants place a pointer or type their initials on the whiteboard space prior to typing a response. This is called "claiming their real estate" and will keep them from typing over one another.
☐	**Share File** Instead of sharing a computer screen to show an application, this feature allows a file, like a .ppt file, to be uploaded into the main meeting room environment.	**When to use**: Share files *(for example PowerPoint files)* that are prepared for interaction with enough blank space for whiteboarding answers to questions, thoughts, and ideas. Files can often be annotated upon for increased interaction and engaging activities. Use compelling images rather than words and ask your participants to respond using the chat, the feedback, and the whiteboard tools. **TIP:** Develop the slides to be uploaded in this way so they become the "working space" for the event. There is no need to share the PowerPoint application unless you need to use the application itself, for example to teach it. **Note:** Some platforms, like Zoom, now allow files to be shared as virtual backgrounds so a presentation can exist as if it is behind the presenter. Check to see if your platform has this feature.
☐	**Share Screen, Desktop, Application, or Web Browser** Sometimes referred to as "share screen," this feature allows attendees to view programs and websites directly from the presenter's computer.	**When to use**: Software and systems training is often conducted live online using desktop, application, or web sharing. Allow attendees to view the entire desktop, one application at a time, or even a web page since the person presenting controls the navigation of it. Think of it as if others are looking over your shoulder as you present from your computer. They see your mouse, and if you are desktop sharing, any popups you may get. Be careful! **Notes:** Most platforms have this feature. In fact, this is the persistent view for the Citrix GoToMeeting suite of products. Learn how to control when the desktop is shared and when it is not. - Can it be paused? - Can "remote control" of the shared screen be granted, allowing attendees to control it? (This is great for collaborating on a document or demonstrating software)

		Attendees do not need the software on their computers to view it from yours. For hands-on training, however, ask attendees to open their own applications and toggle between the platform window and their application as you demonstrate the steps. Some platforms are now allowing a presenter to share their screen, desktop, application, or web browser into breakout rooms. Research to see if your platform includes this feature.
☐	**Polling** A tool used to formally survey and audience and view collected results.	**When to use**: You can survey attendees with prepared questions and answers using Polling. Remember to respond appropriately to the answers and build your comments and discussion into the training experience. Avoid polling just to "get interaction." **Notes:** Create the polling files in advance if possible and use them repeatedly in your live online sessions. See if your poll files can include one question, or many on the same file. Determine if your questions can be multiple choice, multiple answer, or short answer.
☐	**Breakout** A tool to allow participants to work together in small groups, sharing files, screens, whiteboards, and discussion.	**When to use**: Working in small groups with other online participants is an effective and engaging way to apply key learnings from any training event. Use breakouts for activities like role plays, problem solving and case studies where teams work together to create solutions and share ideas. **Notes**: Not all platforms have this feature. Check whether the platform does and then recheck the audio settings to ensure that they are compatible with breakouts. ● How many breakouts can you create? ● How many people in each one? ● Can you preload content into the room? ● How is that content saved and shared? ● How do you join the breakouts in order to assist? ● How do the attendees indicate they need help? ● Can you send a broadcast message? ● How will you keep track of time? **TIP:** Create a slide in your visuals that includes two sets of instructions for all breakout activities: 1. Activity instructions. 2. Technical directions.

		Refer to the example activity below:
		Take charge! Scenarios **Instructions** • Discuss in your small group what you will do for each of the scenarios in the space provided. • Take notes on the table • You will have ____ minutes to work • Pick a spokesperson to report back during debrief **How it will work** • Each room has separate audio and a whiteboard • We will call time alerts and call you back for debrief • If you have questions at any time, send a chat message to Host
☐	**File Transfer** A simple way to share files for participants to quickly download.	**When to use**: Handouts and manuals can be easily provided to participants using File Transfer. Load class materials for quick access as needed. **Notes:** Check whether files can be transferred and whether there is a file size limit. Be sure to provide instructions to the participants so they know how and where to save the file so they can open it.
☐	**Recording** An archive of the session, including all the visuals and audio for playback at a later time.	**When to use**: Make recordings of your learning events to provide attendees with an archive of the activities for reference and review. It's also helpful for people who arrive late or leave a session early. By watching the recording, they do not lose out on any of the session discussion or activities. **TIP:** Recordings of interactive online training are not a replacement for that learning event. Avoid thinking that a recording will impact learning in the same way it did for those who attended live. It does not replicate the live interaction. Most people do not watch a recording for more than 10 minutes.
☐	**Closed Captioning or transcriptions**	**When to use**: When presenting to a global audience or one in which those in attendance may be hearing impaired, it is an excellent idea to have the words of the presenter and potentially the attendees captioned or transcribed for viewing or even reading via a text file later.
☐	**Share Sound from computer**	**When to use**: Playing music or audio along with a movie during a session is a great way to engage an audience. Be sure to follow all copyright laws.

	More?	Did you discover anything else in your platform that is not on the checklist above? List below and make notes:
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