

THE VIRTUAL TRAINER'S GUIDE TO BECOMING A HERO

A COLLECTION OF VIRTUAL
TRAINING LEADING PRACTICES

KASSY LABORIE



Hiya! I'm
KASSY LABORIE

... a professional speaker, bestselling author, and founder of Kassy LaBorie Consulting, LLC. As a keynote speaker, I inspire audiences worldwide to embrace the power of virtual learning and transform online interactions from blah to AHA!

In addition to delivering engaging keynotes, I'm also a master trainer and consultant specializing in virtual platforms like Zoom Microsoft Teams and more. I coach trainers, guide instructional designers, develop technical producers, and partner with organizations to build innovative virtual strategies that foster human connection in a digital world.

With over 25 years of experience, I'm passionate about helping learning teams and leaders thrive, proving that virtual spaces are not just necessary—they're opportunities to innovate and connect!

Becoming a Virtual Trainer is a HERO'S Journey

Virtual Trainers are heroes. So are the instructional designers and producers who support them. Never was this more apparent than when a global pandemic changed the world, catapulting learning and development into the spotlight. We adapted quickly, mastering the tools of virtual training, meetings, and webinars that became essential both at work and in our personal lives.

YES, BUT—we still face the challenge of authentically connecting and building meaningful relationships in a digital world. As we continue to navigate remote and hybrid environments, the truth remains: **Tech is cool, but PEOPLE are COOLER!**

Much like the Hero's Journey described by Joseph Campbell—a narrative in which a hero embarks on an adventure, overcomes challenges, and emerges transformed—**virtual trainers are on their own hero's journey.** Whether they stepped into this role by choice or necessity, they have faced their fears, embraced technology, and created transformative learning experiences.

This book offers a refreshed collection of techniques, strategies, and, most importantly, encouragement for those committed to making online interactions not only functional but also deeply engaging and effective. Packed with practical ideas for fostering human connection, it's a guide to turning the tools of virtual learning into bridges that bring people together.

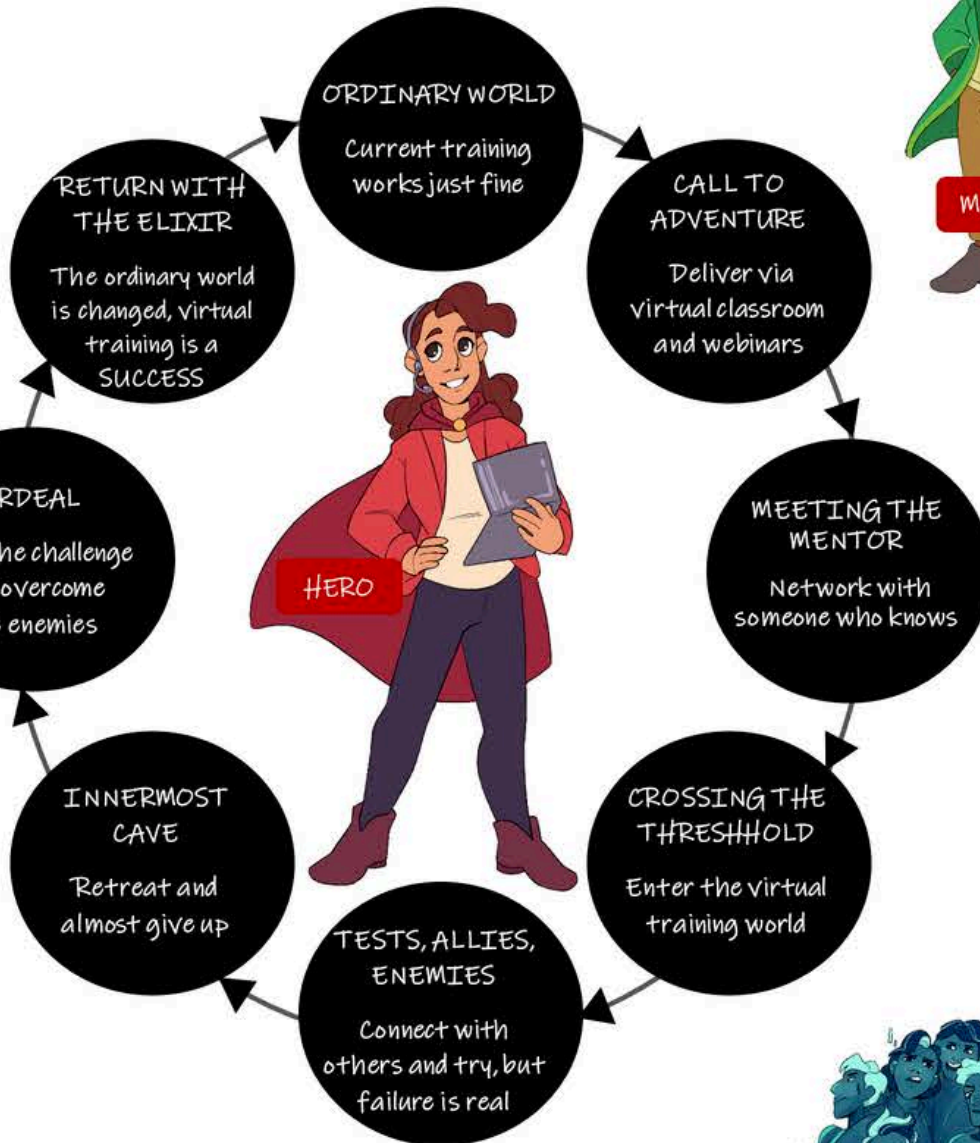
So, dive in. Enjoy learning, exploring options, and sparking connections. Because when trainers embrace the power of people, heroes emerge—not just behind the screen, but across every virtual room they lead.

Kindly,

Kassy



THE *Virtual Trainer's* JOURNEY



Face **FEAR** and accept the virtual training challenge. You are not alone!
 Prepare for **TECHNICAL ISSUES**.
 Learn from each one.
 Combat **DISBELIEF** with repeated positive experiences!

VIRTUAL TRAINING HERO TECHNIQUES



01: CREATE ENGAGEMENT USING NONVERBAL FEEDBACK / REACTIONS

Use nonverbal feedback to create interaction and engagement in your online meetings, training, and webinars.

- Enable it in Zoom
- It's already there in WebEx Training Center and Adobe Connect

Participants use it when you request it AND respond to it.

Pay attention to get attention.

VIRTUAL TRAINING HERO TIP
Create engagement using nonverbal feedback

ZOOM enable it from Meeting Settings



ADOBE CONNECT
on the top Menu Bar

WEBEX TRAINING CENTER
bottom of
the Participants Panel

NEW!

Menus may have moved, & functions may have changed,
but look for reactions in all the online meeting tools you use today!

Cool! Just enabled non-verbal feedback in my Zoom account! Did not know that was there! Thank you, Kassy!



02:

LOOK GREAT ON WEBCAM

I have not always been a big fan of being on webcam for the duration of a Virtual Training or Webinar, but I have recently changed my tune.

I LOVE it now!

I find it humanizes the experience and brings us all together. There is something amazing about seeing everyone and smiling that just eases us all into this unknown environment.

That said, there are so many more ways to create engagement, so don't stop at just being on webcam and be sure to use all the features like chat, feedback, whiteboard, polling, breakouts, etc.!

VIRTUAL TRAINING HERO TIP #2

Look great on webcam!

Smile. And the participants will smile too.

Pay attention to the lighting. Do not be backlit, side-lit, or screen-lit.



Adjust the webcam angle. Position the lens equal to the forehead.

Look at the participants, not yourself. Don't treat the webcam as a mirror.

Create a professional & interesting background. Keep it simple, clear, & organized.

And here's something I just learned about: Finishing Powder. A photography YouTuber I was watching recommended it to help reduce shine on your subject's, or your, face. Being a guy, makeup has never crossed my mind. But using it to reduce a little shine while under the lights might be something I'll look into.

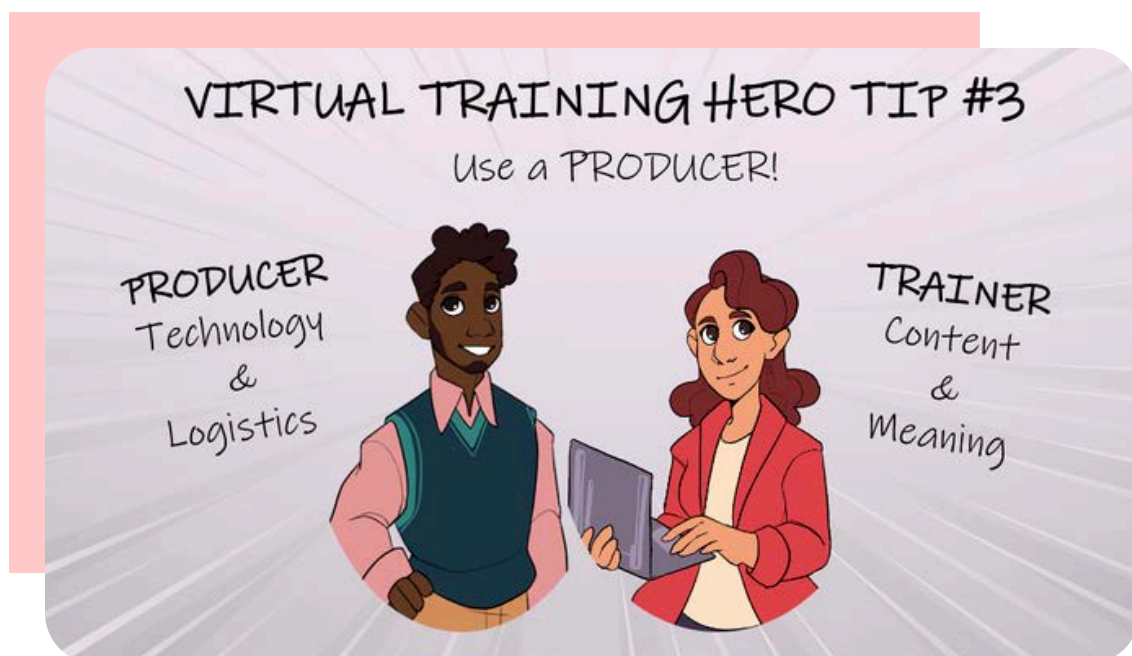


03: USE A PRODUCER WHEN TRAINING ONLINE

Trying to manage the launching of polls, the flow of chat, the muting and un-muting, and the setup of breakouts just to name a few, takes knowledge, skill, & focus. These are referred to as the "production tasks" associated with running a successful & engaging live online training, but they take your focus away from the sharing of your message and content, and importantly, the participant's connection to it!

Don't have a Producer?

- The first 15 minutes - Ask someone to help you just for the beginning when most technical help is needed.
- Take a break - Give participants a break and set up the breakouts during that time.
- Contact The Virtual Learning Collaborative - They have producers who can help.



04: LET PARTICIPANTS ANNOTATE TO INTERACT

I like to make my slides a "working space" that we can all collaborate upon.

Here are some ideas:

- Put an image related to the topic in the center of the slide. Ask participants to type their reactions all around it. Call on them to explain.
- Insert a blank table on your slide, add each participant's name to one box, request they answer a question using the text tool in their designated space. Call on people to share.
- Make a graph or a continuum to add to your slide and let participants add pointers, initials, or shapes (if you'd prefer anonymity) where they would place themselves. Discuss as needed.
- Teach participants to use these tools and features during opening exercises.

VIRTUAL TRAINING HERO TIP #4
Let Participants use Annotation Tools!

Zoom
Meeting Settings: Enable Annotate
Annotate toolbar: Text, Erase, Arrow, Eraser, Format, Lasso, Rotate, Clear

Cisco WebEx Training Center
Cisco WebEx Training Center - Example Training Session
Annotate menu: Annotate, Highlight, Lasso, Erase, Arrow, Eraser, Format, Lasso, Rotate, Clear
Enable 'Annotate' Privilege

Adobe Connect
Grid of text boxes:
* Lead a team of more than 5 salespeople
* Sold intangibles
* Been in for greater than 10 years
* Work for a global organization
* Lead virtual teams
* Use social media to build a network
* Have had a previous Dale Carnegie training experience
* Give virtual sales presentations
* Have off-site sales meetings
Toolbar: Enable Participants to draw

NEW!

Look for updated menu options, & increased functionality across all the platforms, including MS Teams!

05:

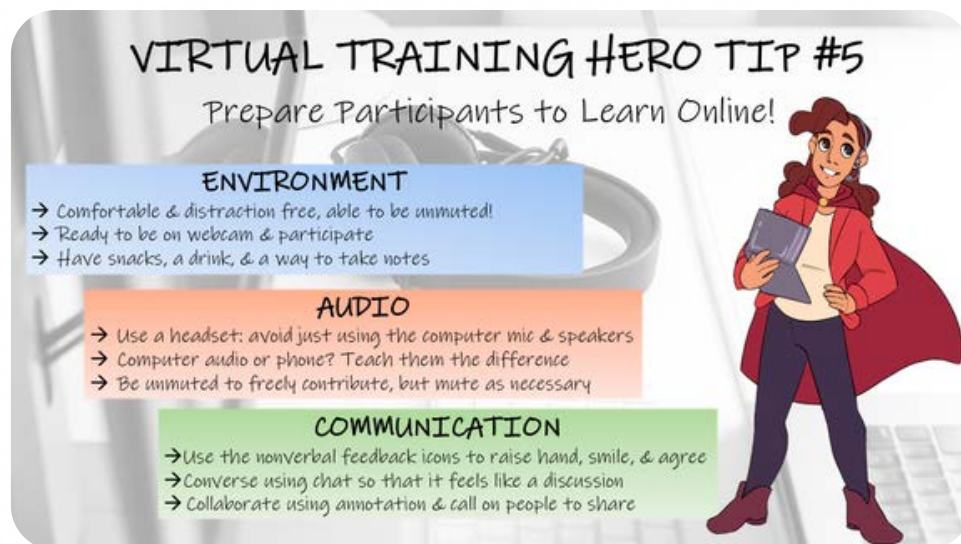
PREPARE PARTICIPANTS TO LEARN ONLINE

Let's face it: connecting to the virtual classroom training session is the hardest part. It's where we spend the most time with technical support issues and overall confusion.

Participants not only do not know how to properly join a session, but they also do not know how to participate once they are there!

Set them up for success in these 3 ways:

- Help them prepare their ENVIRONMENT so they can focus and learn while live online.
- Teach them the most effective techniques for connecting to and managing their AUDIO.
- Ensure they know exactly how best to COMMUNICATE using the features of your virtual training platform.



I REALLY appreciate your graphic above because taking a few minutes at the beginning of the call to establish [expectations] allows for a much more enjoyable experience - whether it's an informal gathering among friends or a formal meeting among colleagues and/or clients. Creating breakout rooms in Zoom during my next workshop will be an exciting way to bring intimacy and connection to a larger audience.



06: ANNOTATE ON TRANSPARENT IMAGES

Whiteboards are great, but they look boring! Plus, they're separate from your main training files, meaning you have to click away to facilitate the activity that asks attendees to annotate.

The solution? Design your slides to be annotated upon. Using an image is visually appealing and by making it transparent, it is easy to use the tools and then to see all the annotations!

Love this idea too, Kassy LaBorie!
Creative and inspiring!



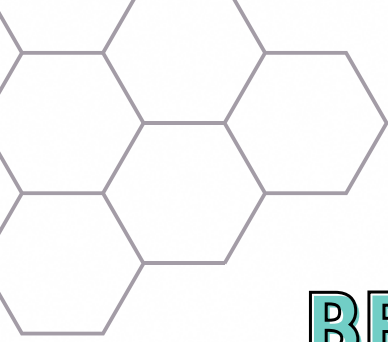
VIRTUAL TRAINING HERO TIP #6
Annotate on Transparent Images!



In PowerPoint → Select the Picture > Choose Picture Format > Click Transparency

Ahh, the time I've wasted in Photoshop fixing images for slides.... Thank you for the tip, Kassy - I didn't know this!!!





07:

BE QUIET ON PURPOSE

Have you ever been to an online training or webinar when the trainer/presenter asked a question (great!), requested you answer via chat (super!), and then - as soon as the first chat came through - they READ IT OUT LOUD? (!!)

And then they kept reading the next one, and the next one... to the point where you just stopped typing yours because... YOU COULD NO LONGER THINK!

Virtual Training Heroes - MUTE YOURSELF. Unlike radio broadcasting, silence is not the enemy. Take a breath. Read their responses to yourself and think about what they are saying. Let approximately 75% of the participants respond and then begin to debrief and call upon them to share and explain.

They need time to think. They then need time to figure out which tool to use to send their response. When you talk out loud regarding the first one, the rest of the participants can no longer focus on their own.

VIRTUAL TRAINING HERO TIP #7

Be QUIET on PURPOSE!

1 ONCE YOU ASK FOR A RESPONSE, YOUR PARTICIPANTS NEED TO:

- Hear it.
- Understand it.
- Think about it.
- Form a response.
- Find the chat, annotation tools, or raise hand button
- Type it or unmute.

2 GIVE THEM TIME.

- Tell them **HOW** to respond: chat, annotate, or raise hand?
- Wait for ~75% of them to chat or annotate & once they do,
- Call on them to **share & explain!**



08:

USE MY VIRTUAL TRAINER'S MANTRA TO CREATE ACTIVE LEARNING

Virtual training often defaults to presenting content via lecture with a call for questions at the end. Participants tune out, work on other projects, and do not actively learn when they are not engaged.

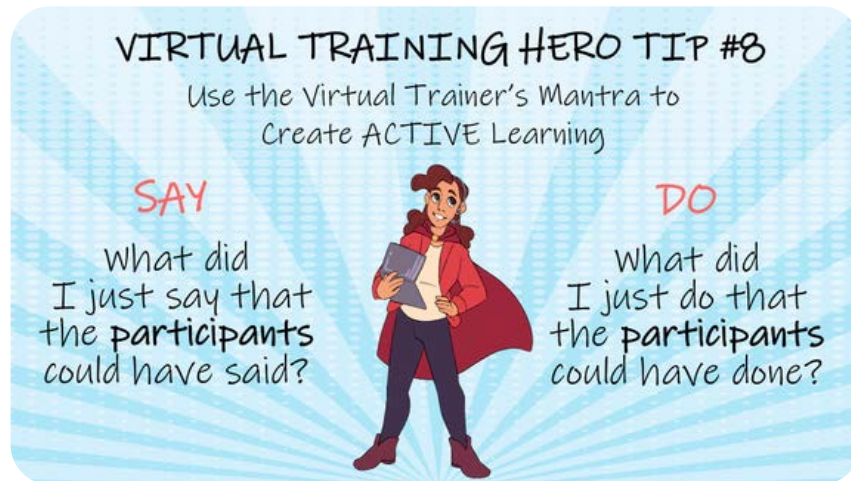
You have the power to change this! When designing and delivering your virtual training, ask yourself the following questions and make the necessary changes that will be in the best interest of the reason you are there - your participants!

- What did I just SAY that I could have let the PARTICIPANTS say?
- What did I just DO that I could have let the PARTICIPANTS do?

For example:

- Must I read those bullets or could they have read them and then used annotation tools to indicate which ones they want to review in-depth?
- Must I lecture the process, or could I tell a story, create a scenario, and ask participants to collaborate on meaning and application?

Give it a try!
Use the features of your platform to let them SAY and DO instead of you!



This is a great reminder not just for virtual trainings but for all trainings and workshops!



09:

WAIT FOR THE AUDIO ICON AND THEN SAY HELLO



Let's join together and agree to stop greeting our virtual classroom participants like this: "Who just joined the call?"

Let's do this instead: When first starting your online session, open the participant list. It not only displays the names of everyone who has joined, but it also indicates who has yet to join the audio! Greet people, using their names, once the audio icon appears next to their names. They cannot hear or speak until that is there. Rather than asking, "Who just joined?" look at the list and see who just got the audio icon. And then pleasantly surprise them by saying, "Welcome, Tom - we're happy you have joined us today!"

- No icon? Look for a phone number instead. Note who does not yet have an icon next to their name and say, "Tom or Kassy, is that you that has just joined us? Welcome!"
- When using broadcast audio, icons won't appear as you are likely pushing sound out through computers. Greet people when they appear on the list, as they should be hearing you when they connect their computers.
- Closed

Captioning:
Know who is attending and use this feature as needed.



VIRTUAL TRAINING HERO TIP #9
Wait for the Audio Icon and then Say Hello

The graphic illustrates the correct greeting protocol in three stages:

- Before:** A participant list shows "Kassy LaBorie (Host, me, participant ID: 244104)" with a yellow circle around the name, indicating no audio icon is present.
- After: Computer Audio:** The participant list shows "Kassy LaBorie (Host, me)" with a yellow circle around the name and a microphone icon, indicating audio is available.
- After: Phone:** The participant list shows "Kassy LaBorie (Host, me, participant ID: 244104)" with a yellow circle around the name and a phone icon, indicating audio is available via phone.

A cartoon superhero character in a red cape and jacket is shown holding a laptop, representing the host.

10:

IF YOU NEED THE CONTROL, USE A POLL IF OPEN-ENDED IS WHERE IT'S AT, USE CHAT

Which feature should I use when designing this learning activity? There are quite a few features to choose from when planning your virtual training programs, so deciding which one is right might be confusing.

- A POLL requires you to create the possible choices, so if you only need their opinion from a specific list, use polling.
- A CHAT is completely open-ended, so when you need to brainstorm a list of ideas or want to have an open dialogue, using chat will be most effective.

Consider your learning objective and the experience you want to create when choosing which feature you want to use. Polling and chat are just two examples.

VIRTUAL TRAINING HERO TIP #10
If you need the **control**, use a **POLL**
If **open-ended** is where it's at, use **CHAT**



The image shows two screenshots of virtual training interfaces. The left screenshot is titled "1. What do you call what how we are learning today? (Multiple choice)" and lists various learning methods with progress indicators. The word "poll" is written in red over the screenshot. The right screenshot shows a chat interface with a question "What do we want to call how we are learning today?" and several responses from participants. The word "chat" is written in red over the screenshot.

Learning Method	Progress
Live Online	0/0 0%
Webinar	0/0 0%
Virtual Training	0/0 0%
Online Training	0/0 0%
Virtual Instructor Led Training (vILT)	0/0 0%
On-line Training	0/0 0%
eLearning	0/0 0%
Synchronous Training	0/0 0%
Blended	0/0 0%

From Me to Everyone: What do we want to call how we are learning today?
From 2-Kass2 to Everyone: vILT
From Me to Everyone: Virtual Training
From 2-Kass2 to Everyone: Live Online Training
From Me to Everyone: Synchronous Learning
From 2-Kass2 to Everyone: Live Virtual Learning
From Me to Everyone: Convenient Online Learning
From 2-Kass2 to Everyone: Maybe we need to ask more people?
From Me to Everyone: Great idea! Who else should we ask?

11:

KNOW WHO "SAID" WHAT BY USING NAMES, INITIALS, & POINTERS

It is quite uncomfortable for the trainer and all the participants when this happens in a virtual training:

- "Who added this idea....?"
- "Who just typed on the whiteboard...?"
- "Would anyone like to explain..."

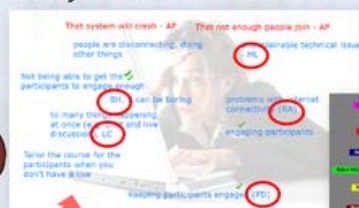
When using the annotation tools to ask participants to comment and add their ideas to the learning experience, ask them to first add their pointers, names, or initials. This will help organize the space as well as identify who typed what. Now you'll have no excuse to use their names, call on them, and ask them to explain, share, or discuss!

An alternative is to add their names to the prepared materials yourself, but you'll need to make sure they are all attending or last-minute changes will be needed.

VIRTUAL TRAINING HERO TIP #11

Know who "Said" what by
Using Names, Initials, & Pointers

Now I can
ask specific
people to
share!



Type, Add Initials
or Name

Place Pointers, Type

Pointers	Lara	It is easy to read files
Pointers	Tom	the polling was too late and the sharing was not the diff. btw meeting and training center!
Pointers	Warren	Sharing various file formats and using the Training Center
Pointers	Robert	sharing files, annotating, and the Q&A panel!
Pointers	Elden	sharing files, annotating, and the Q&A panel!
Pointers	Dean	Sometimes the whiteboard files take awhile to download :)
Pointers	Jeff	So many options and features technology wise since I get comfortable
Pointers	Michel	Sharing files was very interesting
Pointers	Shaouar	Feedback tool!

12:

CREATE AND ENCOURAGE CHATVERSATIONS

What is that, you ask? Why, it is a CONVERSATION using the CHAT.

Chat can be used for so much more than providing information, assisting with technical support, and sending questions and responses. Encourage participants to use chat to "talk" to the trainer and to one another. Participate in the dialogue yourself, verbally responding as if it was said out loud. Call on people to share more, to elaborate, to connect with each other.

Using the chat feature in this way turns the typed words into a conversation and creates a more comfortable learning environment.

There are 2 keys to successful chat management:

- Watch the chat more than reading your own slides. (Please don't read slides.)
- Have a Producer help, but make sure to watch the chat more than your own slides.



"Chatversation" BRILLIANT!!! This is one of the key aspects that make virtual even better than in-person and one of the reasons that I use web conferencing tools in live classrooms. Chatting that is well integrated into a class gives even introverts a safe way to participate.



13:

SET EXPECTATIONS BASED ON OBJECTIVES

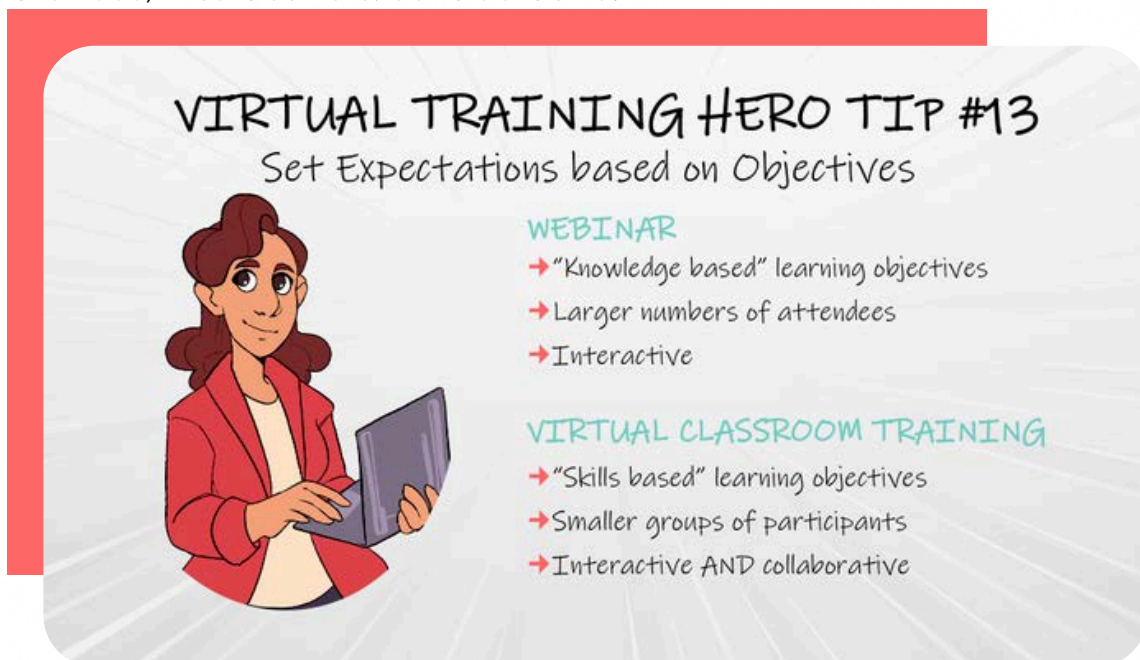
How do your participants know what to expect from your webinar?

What about your virtual instructor-led training? Or your live online meeting? Or are you calling it "live virtual training"? Or is it called "virtual classroom training"?

We are confused, aren't we? And to top it off, we learning and development professionals are not in alignment with our definitions and terminology.

Here's what has worked for my training over the past 20 years and it is based on what needs to be accomplished:

- Webinar: "lower" level, knowledge-based objectives, larger audiences, interactive.
- Virtual Classroom Training: "higher" level, skills based objectives, smaller audiences, interactive & collaborative.



VIRTUAL TRAINING HERO TIP #13
Set Expectations based on Objectives

WEBINAR

- "Knowledge based" learning objectives
- Larger numbers of attendees
- Interactive

VIRTUAL CLASSROOM TRAINING

- "Skills based" learning objectives
- Smaller groups of participants
- Interactive AND collaborative

"webinar" - one way, information dissemination
"virtual classroom training" - learning and application



14:

BREAKOUTS

CONFIRM PARTICIPANTS ARE READY USING REACTIONS

Last week when I was sending the participants into small groups to work together on a shared activity using the breakout room feature, I forgot to ask the designated leader to confirm they were actually sitting at their computers, ready to lead. Oops!

Sometimes participants step away, or "zone out," or have a technical issue that prevents them from responding to the trainer's requests. When it comes to working in breakout rooms, some platforms require one person to lead and be the first to click. Others do not require the click to start, but they all still need people to be there to start the conversation!

Ask participants to indicate, using their feedback/reaction tools, that they are ready to work in small groups. And it is also a good idea to confirm they understand the instructions before sending them off on their own as well!

VIRTUAL TRAINING HERO TIP # 14
BREAKOUTS
Confirm Participants Are Ready Using Feedback Tools

Participant	Reaction
Kassy LaBorie (Host, me)	Red Heart
Bella	Blue Hand-Raising Icon, Red Heart
Sam	Red Heart
Mike Morneau	Red Heart

I loved learning about your feedback tools! I think they are such a good way to encourage participation, especially when it is recognized by the host!



15:

BREAKOUTS

SEPARATE THE ACTIVITY INSTRUCTIONS FROM THE TECHNICAL DIRECTIONS

Here's the thing about learning in the virtual classroom - participants are confused and unable to pay full attention to all that is going on with the technology while also trying to learn something!

We can help them! Let's make activities less cumbersome and boring and instead more engaging, clear, and effective! Breakouts are an excellent feature to use for engagement and hands-on learning. When setting up your breakout sessions, separate what they are doing from how they are doing it.

- Trainer - explain the activity. Answer their questions about completing the task or assignment.
- Producer - explain where to click. Show them how they will use the live online training platform to work together.

VIRTUAL TRAINING HERO TIP #15
BREAKOUTS
Separate the Activity Instructions from the Technical Directions

TRAINER → ACTIVITY

- Discuss the case study on p. 10
- Determine the challenges
- Decide upon possible next actions to address the challenges
- Prepare to share

15 minutes to work!

PRODUCER → TECHNICAL

- Accept the invite to breakout
- Say hello to one another
- Leader: share your screen to the case study
- Use annotation to take notes
- Click "ask for help" if needed

We'll check in & send time alerts

With so many jobs/tasks containing technical pieces, this is applicable beyond virtual training and in the realm of everyday work!



16:

SELECT A TEAM LEADER TO GET THINGS STARTED

BREAKOUTS

"Wait, what did she say we were supposed to do?" - Breakout Participant
Some things do not change.

When facilitating a small group breakout activity, I have found it necessary to designate a team leader. I like to remind them that great leaders delegate, so if they don't want the role, then they have the power to appoint someone else!

The team leader gets things going: starts the conversation, reviews the assignment, shares their screen, and then makes the plan for the debrief.

Participants are more engaged when they know what to do to be successful.

NEW!

Ideas to identify leaders:

- Birthday is next
- Color of clothing
- Has vacationed somewhere specific
- Alphabetical
- Has not lead yet

VIRTUAL TRAINING HERO TIP # 16

BREAKOUTS: Select a Team Leader to Get Things Started

Designate a Team Leader for Each Group

Let them delegate their role!



→ The leader:

- Starts the conversation
- Shares their screen
- Leads the debrief

Let's get started!



Participants are more engaged when they know what to do to be successful.

It's always important to set people up for success. Great tip.



17:

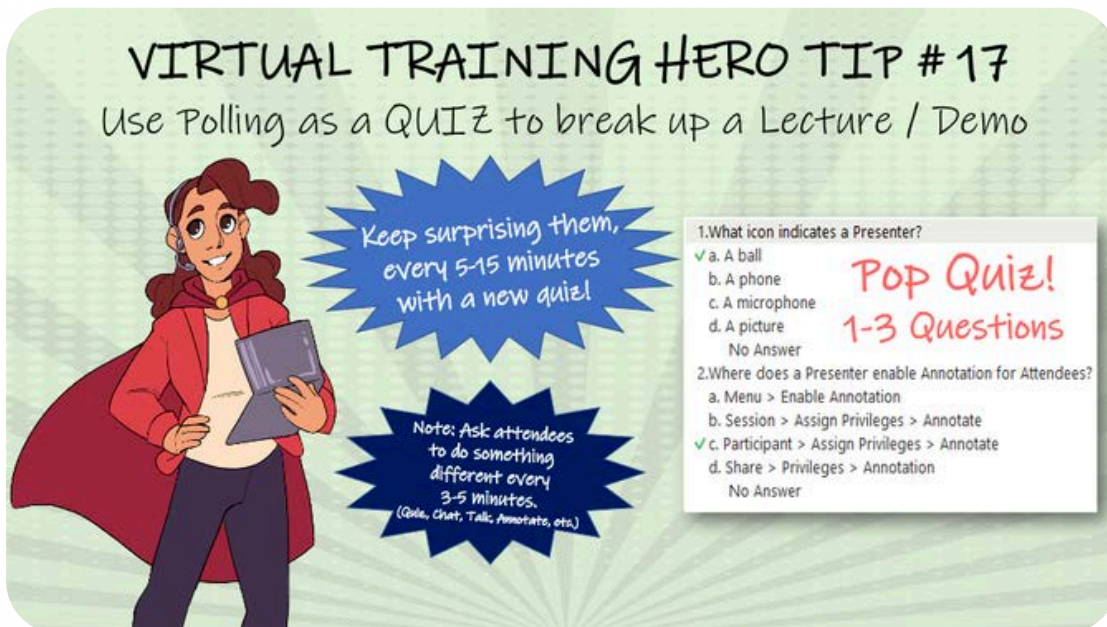
USE POLLING AS A QUIZ TO BREAK UP A LECTURE OR A DEMO

Those of you who know me likely also know that my 2 least favorite things to do in a virtual training are:

1. Ask (beg) for volunteers.
2. Use polling.

BUT WAIT! Recently, I was an attendee to another trainer's session where they walked us through a complex software demonstration. She "quizzed" us every few moments with a question or two, and I LOVED it! I'm a tad competitive and wanted to get them ALL CORRECT! So this made me listen more closely, knowing the quiz was coming!

Now I LOVE polling and am looking for ways to build quizzes into sections of my training where I know I will be talking a lot.



VIRTUAL TRAINING HERO TIP #17
Use Polling as a QUIZ to break up a Lecture / Demo

Keep surprising them, every 5-15 minutes with a new quiz!

Note: Ask attendees to do something different every 3-5 minutes. (Q&A, Chat, Talk, Annotate, etc.)

1. What icon indicates a Presenter?
✓ a. A ball
b. A phone
c. A microphone
d. A picture
No Answer

2. Where does a Presenter enable Annotation for Attendees?
a. Menu > Enable Annotation
b. Session > Assign Privileges > Annotate
✓ c. Participant > Assign Privileges > Annotate
d. Share > Privileges > Annotation
No Answer

Pop Quiz!
1-3 Questions

Once I showed a homepage in a usability test, and when the guy saw a points total, he was like "oh, you're going to ask me to show you what I know" and he LOVED that expectation. It feels more like a game.



18:

BREAKOUTS

USE THIS BREAKOUT CHECKLIST FOR SUCCESS

- Visit the rooms to confirm participants have connected.
- Load or help them share the files or their screens.
- Remind them they can ask for help.
- Send broadcast communication messages and time alerts.
- Welcome them back and debrief as appropriate.

Yep, you probably need a Producer!

Breakouts are one of the most engaging virtual classroom experiences when they are planned, meaningful, organized, and technically smooth.

Rehearse with a second computer and your squad to build skills and gain confidence.

You got this!


VIRTUAL TRAINING HERO TIP #18

BREAKOUTS

Use this checklist for success

BREAKOUT CHECKLIST	
✓	Visit the rooms to confirm they have connected
✓	Load or help them share files or screens
✓	Remind them they can ask for help
✓	Send broadcast communication messages and time alerts
✓	Welcome them back and debrief as appropriate

YEP, YOU PROBABLY NEED A PRODUCER!



Depending on how long the activity is - circulate around a few times to see if they are on track; you can do this without joining audio (just lurk). If using Adobe - you can see all the rooms at once and see if they are working on their whiteboards, and you don't have to go visit.



19:

PRODUCERS: CHOOSE THE BEST TYPE TO SUPPORT YOUR EVENT

Did you know there are different types of producers who can help you deliver incredible virtual training sessions and webinars?

In my second book with ATD Press, "Producing Virtual Training, Meetings, & Webinars," I outline 3 types of producers, all of which are there to assist with the technology, of course!

Here is a quick description of each:

~ **Technical Producers** ~

Producers whose primary focus is the technical and logistical success of the event. They are not experts on content, but rather experts on managing the session itself, no matter the presenter.

~ **Facilitative Producers** ~

Producers whose primary focus is the technical and logistical success of the training and may also be skilled to teach segments of the class if needed, but in a secondary role to the trainer.

~ **Start Time Producers** ~

People who assist online meetings, webinars, and virtual training sessions only in the beginning to help everyone connect and get the session off to a good start. They do not stay for the entire session but do often remain available to be called back in if assistance is needed.

VIRTUAL TRAINING HERO TIP #19

PRODUCERS → Choose the Best Type to Support Your Event



TECHNICAL PRODUCER

*Primary focus: The technical / logistical success of the event.
Experts on managing the session, not the content.*

FACILITATIVE PRODUCER

*Focused on BOTH the technical / logistical success of the training
AND skilled to teach segments of the content if needed.*

START-TIME PRODUCER

*Primary focus: Help everyone connect and get the session off
to a good start. They do not stay for the entire session.*



20:

BEGIN WITH ACTIVE PARTICIPATION

Let's lose the music hold, hidden attendee lists, and mute-upon-entry for our live virtual training sessions. We wouldn't do such things in an in-person training session, so why do them online? Teach everyone how to properly connect and participate, and then facilitate active learning rather than passive lectures.

Do the same types of things you would do in an in-person training session. Examples include:

- Greet people as soon as they join
- Use their names
- Ask them to unmute and say hello
- Wave on camera
- Participate in a warmup activity
- Start on time

VIRTUAL TRAINING HERO TIP # 20

Begin with ACTIVE Participation

Open early and as people join, get to know them. Do the same things you would in an in-person training!

- GREET PEOPLE AS SOON AS THEY JOIN
- USE THEIR NAMES
- ASK THEM TO UNMUTE AND SAY HELLO
- WAVE TO THEM ON CAMERA
- PARTICIPATE IN A WARMUP ACTIVITY
- START ON TIME!



Great list. Thanks, Kassy LaBorie. I think it is also important to make clear in advance that participation is encouraged. Too many people get used to being "passive knowledge recipients" rather than "active knowledge co-constructors."



21:

MAKE TIME TO DEBRIEF THE LEARNING

My son recently graduated from high school and as I reflect on all that he has accomplished, and how I feel about all of it (SO PROUD!), it makes me think of just how quickly time flies.

Isn't this also the case when we deliver our online training sessions? Time often seems to run out, leaving little to no room to debrief the learning.

Here are 4 ideas on ways we can help participants to consider what they have learned so that importantly, they may find ways to apply it:

- Conduct a group conversation over the Audio and with Chat where you encourage "chatversations."
- Make time for breakout groups to report back using Screen Share and Audio.
- Ask 2nd and 3rd level questions about impact and challenges using Chat and Annotation.
- Allow independent reflection time where participants make notes in their handouts.



22:

TAKE A BREAK

We're often quite focused on shorter sessions in virtual instructor-led training, but I find that my classes where we are focused on higher-level learning objectives need more time so that we can practice and apply the skills.

But, sitting in front of a computer on camera for hours is a big ask, so I am a firm believer in taking breaks! After approximately 60 to 90 minutes, give your live online participants & yourself a break! Take a moment to get away, stretch, refill your water, coffee, or tea and simply relax.

A few minutes is usually enough! For my 2-hour sessions, we take a 5-8 minute break. I play music and share my screen to www.online-stopwatch.com to count down our time, typically in the form of a race. And, I like to walk away, too!



VIRTUAL TRAINING HERO TIP #22
Take a BREAK!

Give participants & yourself a 5-10 minute break after ~60-90 minutes.

Share screen to a countdown timer like this one:



The graphic features a yellow background with a white coffee cup and a laptop on the left, and a cartoon woman with red hair on the right. The text is in a mix of bold black and red fonts. A dashed box highlights the Online Stopwatch website logo, which includes a green up arrow and a red down arrow.

Thank you for acknowledging that breaks are just as necessary for facilitators! I use pretty much the same standards, but use longer breaks challenging concepts—particularly with new hires. I've also used break activities, where we play a quick 90-second game/challenge about a topic completely unrelated to the lesson (usually food) to give a mental break. I think that helps the group to refocus.



23:

LOCK THE SPEAKER'S CAMERA IN PLACE

Whom do you need to focus on when participating in a live virtual training session? Well, it depends on what is happening. A collaborative discussion? It's effective to have the cameras spotlight the active speakers. But when would it be best to focus on just one camera?

Recently I was working with a technical trainer who needs to teach participants how to use diagnostic equipment. He uses the camera to zoom in on the different parts and details and wants people to ask questions as this occurs. We needed the camera to stay put and not move around to the people asking questions. We decided to pin the camera to him so it stayed focused on the equipment the entire time.

VIRTUAL TRAINING HERO TIP # 23
Lock the Speaker's Camera in Place

Click on the camera options/settings
Look for Pin, Spotlight, or Lock

Great tip! Being purposeful about when to use video is important, but I hadn't thought about this level of specificity!



24:

GIVE PARTICIPANTS THE FREEDOM TO CREATE THEIR OWN EXPERIENCE

Admit it, sometimes we trainers, facilitators, & presenters can be a bit controlling!

We mute everyone rather than ask them to quiet their space & contribute because it's easier. We don't pay attention to the feedback icons because we didn't realize they were there. Or, we don't conduct open discussions because it takes too long and plus - the mute problem.

Well, all of this is taking away from a collaborative and open environment. It places the responsibility of creating and maintaining the energy of the class all upon you.

Encourage the participants to create their own virtual classroom training experience!

- Make the chat and the attendee list public.
- Unmute the audio and have open discussions.
- Let them annotate.
- Collaborate in small groups.
- Laugh and enjoy!



I tell participants I'm gonna give them a super power to share their responses with me now - just when I'm about to allow participants to annotate...I remember as a trainee I loved to write on the trainers screen and feel they enjoy doing the same...the trainer can always guide the participants and encourage them to use annotation.



25:

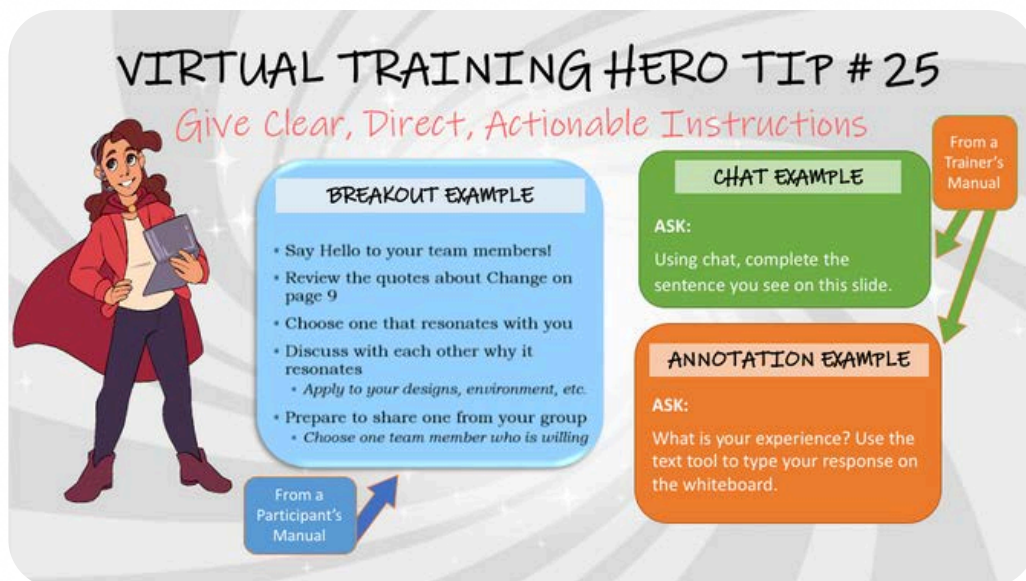
GIVE CLEAR, DIRECT, ACTIONABLE INSTRUCTIONS

Virtual classroom participants are not hanging on your every word. They just don't listen as much as we'd like to think, and I'm certain of it because when I'm an attendee, I struggle, too!

So when it comes to giving instructions, it is important for virtual trainers to be clear. I've also found that people respond best when I am concise... when I use fewer words and get to the point.

Think "at a glance" every time you deliver instructions. Participants are distracted, so here's what we can do:

- Be concise with our words.
- Begin with actions - on slides and in their handouts.
- Give time for questions and clarification.
- Don't forget to add the technical direction so they know HOW to respond: chat, raise hand, annotate, etc.



VIRTUAL TRAINING HERO TIP # 25
Give Clear, Direct, Actionable Instructions

BREAKOUT EXAMPLE

- Say Hello to your team members!
- Review the quotes about Change on page 9
- Choose one that resonates with you
- Discuss with each other why it resonates
 - Apply to your designs, environment, etc.
- Prepare to share one from your group
 - Choose one team member who is willing

CHAT EXAMPLE

ASK:
Using chat, complete the sentence you see on this slide.

ANNOTATION EXAMPLE

ASK:
What is your experience? Use the text tool to type your response on the whiteboard.

From a Participant's Manual

From a Trainer's Manual

Participants are not hanging onto the facilitator's every word??! Wait. What?? Lol. Great tips, Kassy! I like how your tips can be used even when the software might be of the more basic variety. Thank you.



26:

STRATEGICALLY MANAGE MUTING & UNMUTING

When we participate in an in-person training session, it's typically expected we'll be talking with one another.

When we attend a live online session, it's often expected we will be muted, not talking with one another. But is this the most effective experience for the online session? It depends on your learning objectives.

- Webinars: Larger audiences, shorter in duration, inspirational, & often for information sharing. It is likely best if muted.
- Virtual Training: Smaller groups, longer in duration, skills-based learning activities, group discussions, & sharing of experiences. The ability to unmute is necessary!

Sitting & listening the whole time is rarely engaging. Let them talk!

VIRTUAL TRAINING HERO TIP # 26
Strategically Manage Muting & Unmuting

WEBINAR
Larger audiences, information sharing, inspirational, interactive
→ Mute upon entry
→ Likely to remain muted
Think keynote style presentations & keep the audio quiet & clear so the recording is excellent tool

VIRTUAL TRAINING
Smaller groups, higher level learning, interactive + collaborative
→ Unmute & contribute right from the first hello
→ Teach them to mute & unmute themselves, as needed
Think skills-based learning & active sharing of experiences. Make the audio connection support this!

I like to talk about this at the start of the session. If it's a smaller group, I encourage them to ask questions and provide opinions and observations just as they would in an in-person classroom. If there is some type of visual signal, such as a raised hand, that helps. Or, if appropriate, just speak up. I also remind them that if there is background noise where they are, then stay on mute until they need to talk.



27:

BRIGHTEN UP THE CHAT USING THE WINDOWS EMOJI PICKER

It's often the simplest of things that make me smile.

Yesterday, while in a Zoom session with an ATD chapter, one of the participants was sending emojis in the chat and the entire group loved it! The energy that came through at that moment was incredible so we all stopped what we were doing to have a mini-lesson on how to send our own.

Today, I share it with you! The Windows Emoji Picker can be used in many places and in my screenshots below you can see how they look in Zoom. Simply press the Windows Key and then the semicolon (;) to get the menu, choose your emoji, and press send.

Try it on your platform and see how it works to brighten up your chat communications.

VIRTUAL TRAINING HERO TIP # 27
Brighten up Chat using the Windows Emoji Picker!

From Me to **Everyone**:
WELCOME!

Emoji - Keep typing to find an emoji

To access the emoji picker interface, press the following shortcut combinations:
Windows Key + Semicolon (;)
Mac: CTRL + CMD + Space

NEW!
Most of these emoji and .gif choices are built into the CHAT options nowadays, making it easier than ever to brighten up our text communications.

Who knew! This could be so fun especially for groups that meet for multiple sessions. A nice way to mix it up!



28: PLAY MUSIC AS PARTICIPANTS JOIN IN ZOOM

It's been the type of week where celebrations were a part of every online session I led and attended.

My son has graduated from high school, so we had a virtual open house, I met with like-minded master trainers to form a new mastermind group, I was a guest on Joel Silverstone's podcast, and I got to deliver the story of how virtual trainers are on a hero's journey in a webinar hosted by the Virtual Learning Collaborative!

We played music, we networked, and we shared experiences and it has made me appreciate how easy web conferencing platforms make it for us to connect.

Thank you, Zoom, for making it simple to share music without sharing my screen and without having to hold my mic up to my speakers for everyone to hear! I'm almost embarrassed to say that I just learned this because I had not yet clicked on the "Advanced" tab after clicking "Share Screen."

NEW!

Most platforms do this now, & if not from a menu option, you can do it from your own audio settings. Be sure to check your settings!



Kassy, you virtual training hero, I'm still dancing from the music you played on our call. You played it, and instantly we were moving our arms and smiling.



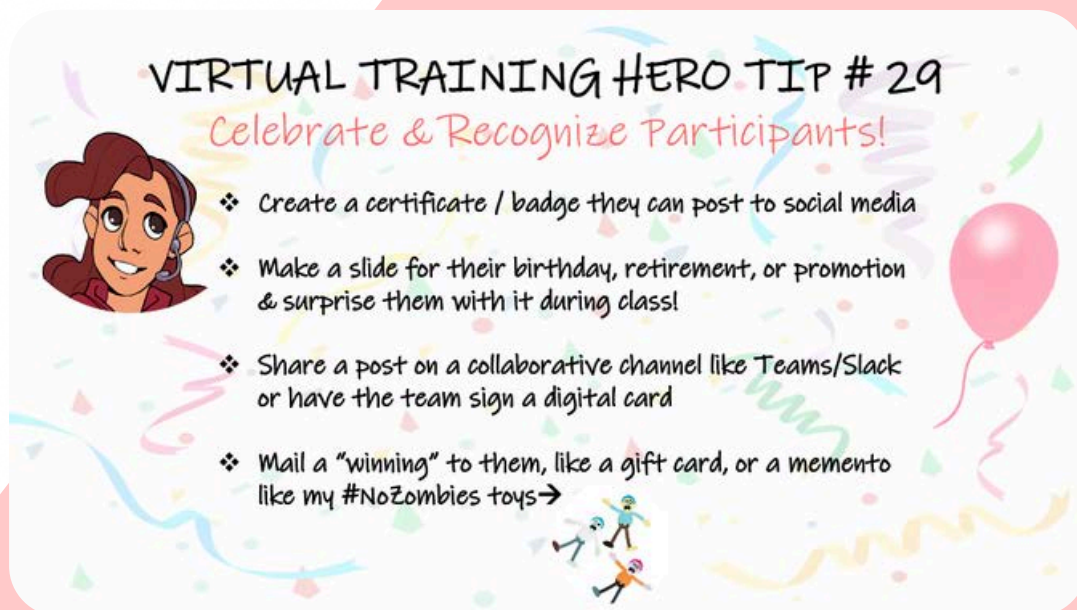
29: CELEBRATE & RECOGNIZE PARTICIPANTS

August 4 is the day I celebrate another trip around the sun, and it has me reflecting on the various ways we can celebrate the successes and accomplishments of our virtual participants.

I love to make special slides when I know that things are happening like birthdays, promotions, babies on the way, retirements, and weddings. I like to put them in the middle of the class activities as a surprise!

I make sure people can post certificates of achievement and completion on social media sites like LinkedIn so that they can proudly display their hard work.

I also enjoy putting cards, certificates, and other surprises in the mail, posting to collaborative channels on Teams or Slack, and even having the team sign a digital card that can be shared or posted.

A graphic titled "VIRTUAL TRAINING HERO TIP # 29 Celebrate & Recognize Participants!". It features a cartoon illustration of a woman's head on the left, a pink balloon on the right, and confetti scattered throughout. The text is in a mix of black and pink fonts. There are four bullet points with decorative icons. At the bottom right, there is a small illustration of three people running.

VIRTUAL TRAINING HERO TIP # 29
Celebrate & Recognize Participants!

- ❖ Create a certificate / badge they can post to social media
- ❖ Make a slide for their birthday, retirement, or promotion & surprise them with it during class!
- ❖ Share a post on a collaborative channel like Teams/Slack or have the team sign a digital card
- ❖ Mail a "winning" to them, like a gift card, or a memento like my #NoZombies toys→

Beautiful. What better way to make it personalized. Awesome, Kassy.



30:

USE A 2ND COMPUTER TO JOIN AS AN ATTENDEE

"Do you see my slides?"

"The chat should be showing on your screen too! (?)"

"The annotation toolbar is on the top of my screen. Isn't it in the same place as yours?"

When I first started delivering virtual training, I felt so confused about what it looked like for my participants. I couldn't see them, I barely understood what I was looking at, and I just wanted to know if it looked the same for me as it did for them.

As soon as I used another computer to join as an attendee, my virtual training world changed. I found another computer lying around the office and set it up on my desk so that I could see my main computer as I delivered, and this second one at the same time. I could look over to my left and experience attending my own session.

I could finally see their view and truly understand their experience plus...

- Give accurate technical support.
- Provide clear instructions.
- Present with confidence!

So simple yet so brilliant!



It's exactly like saying, "Put yourself in their shoes."



31:

ASK BEFORE TELL

We trainers have a lot to say. We can fall into lecture mode or "let me just tell you this real quick" quite easily.

Virtual trainers are no different, arguably even more guilty! We blame the technology or the lack of interaction and choose to tell the participants the details and then hope they have questions.

Stop it.

Ask before telling! Follow these 4 simple steps the next time you have to share content and enjoy how relatable, relevant, and lively your training becomes!

Love this, Kassy! Always, make it a conversation! Your learners bring so much experience to your sessions...make it an opportunity for them to connect their past experiences to your content.

ASK.
LISTEN.
RESPOND.
TELL.
REPEAT!

VIRTUAL TRAINING HERO TIP # 31

ASK Before TELL

1. ASK. What experience do you have using this process? What have you seen or done?

2. LISTEN. Have them use chat, or annotation, or unmuted audio to share their experiences, ideas, and challenges.



What is your experience?

3. RESPOND. Thoughtfully comment and encourage dialogue among them.

4. TELL. Reveal the steps, the points, the information, etc. AFTER asking the participants to share what they already know.

Make your learning content relatable, relevant, and lively!

This is a great tip - asking first highlights pre conceptions, helps you gauge existing knowledge, builds everyone's story bank and helps build the learning connections with their existing knowledge.



32:

OPEN EARLY, START ON TIME

Too many virtual training sessions and webinars start late! People have back-to-back meetings and then a long list of unexpected technical problems that prevent them from making it to their next online session on time.

And then trainers and presenters don't think to prepare welcoming activities, opting to open only a few minutes early and then placing participants on "music hold" until start time. This strategy passively opens a session, setting a tone that says, "sit and listen," rather than "participate and be actively involved."

Make a change!

Open your session early. My standard is 30 minutes, and I invite participants to join early so we can get the conversation going and deal with any problems - just like in person!

I then start on time because participants have already joined. Those who couldn't usually try to the next time because they realize I am being respectful of the time we have allotted for this session. I make sure to end on time, too.

Always start and finish on time. I think it adds to your credibility as a facilitator.



VIRTUAL TRAINING HERO TIP #32
Open Early, Start on Time!

1. Open 30 minutes before the scheduled start time
2. Test your audio with your Producer
3. Confirm all materials are uploaded / ready to be shared
4. Review your learning plans
5. Greet people with an opening activity
6. **START ON TIME**
7. **END ON TIME**

The graphic features a central illustration of a woman and a man on a video call. The woman says, "Audio sounds great!" and the man says, "Super! We begin at 12!". A smartphone in the foreground shows the time 11:38. The background is a light green grid pattern.

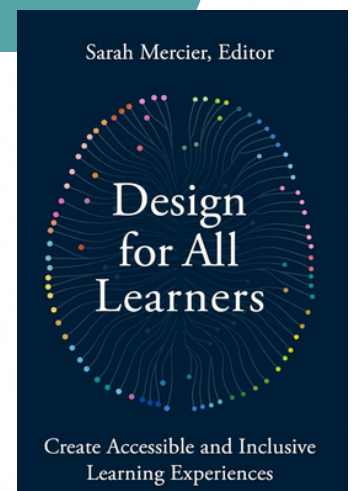
33: PRESENT USING SUBTITLES OR CAPTIONS

It's easier than ever to enable subtitles or captions for your virtual presentations! I've found this quite helpful when presenting to a global audience, and especially useful to change the language to match your audience. I have tested it live while presenting in Zoom & sharing my screen with my PowerPoint slides, and it works wonderfully.

- PowerPoint: Click on the Slide Show menu option, and then select Always Use Subtitles. Choose the language from Subtitle Settings.
- Teams & Zoom: Simply turn on Live Captions and it captions not only the presenter but others who speak too.
- Google Slides: Select the "CC" button from the toolbar at the bottom of your slides.

NEW!

I'm honored to have contributed a chapter to this book where we can learn SO MUCH more about Designing for ALL Learners!



VIRTUAL TRAINING HERO TIP #33
Present Using Subtitles or Captions!

POWERPOINT
Slide Show > Always Use Subtitles

MS TEAMS
Turn on Live Captions

GOOGLE SLIDES
Click the "CC" button

Thanks for the tip, just tried it and love it. We're going to enable this for our VLCs to help non native English speakers and our hearing impaired colleagues.

34:

TEST THE VIRTUAL TRAINING PLATFORM IN ADVANCE

For this technical tip, I am reminded of the phrase and title of Rick Page's book, "Hope is Not A Strategy." Take charge and do what your participants need: help them make the virtual training platform work, rather than hoping it will be okay when they click the link!

Send participants links so they can test their connections and systems. Most of the platforms have both a downloaded version and a web-based version that won't require a download. Either way, have them test to make sure they have all they need to actively participate in the training activities you have planned for them.

Note that most platforms require participants to download something in order to have full access to all the features. If using the web-based versions, be sure to inform yourself of the differences so you can plan your activities accordingly.

VIRTUAL TRAINING HERO TIP #34
TEST the Virtual Training Platform in ADVANCE

Rather than hoping it will work for your participants, send them to test their connections & systems at least 2 days BEFORE the session begins!

Here are a few I found by just typing "platform name test meeting" into a Google search!


Zoom:
<https://zoom.us/test>

WebEx:
<https://www.webex.com/test-meeting.html>

MS Teams:
<https://office365tips.com/2019/07/19/make-test-call-teams/>

GoToTraining:
<https://support.gotomeeting.com/help/learn-a-test-session-g2to60001>

Adobe Connect:
<https://helpx.adobe.com/adobe-connect/using/connection-test-connect-meeting.html>



This is a great reminder. No doubt, participants want to have the feeling of being ready too, and this gives them as well as the facilitator, some peace of mind.



35:

CLEARLY INDICATE HOW PARTICIPANTS SHOULD RESPOND

"Who has the first question?" -*Silence*

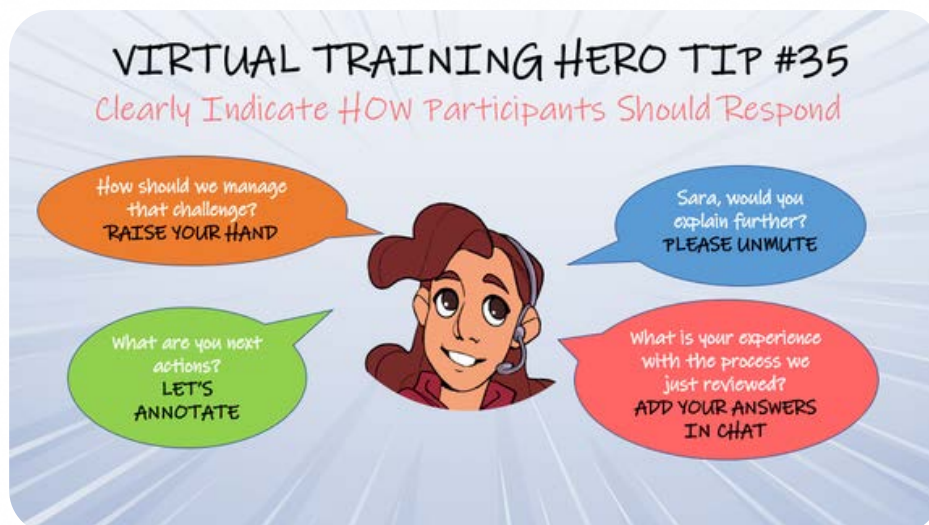
"What ideas would you like to share?" -*Nothing*

"How will you use these new ideas?" -*Is anyone here?*

Welcome to a day in the life of the virtual trainer. When delivered like above, it is not an engaging experience... for anyone! BUT, there is a solution to the dreaded silence we often face when delivering live online training in platforms like Zoom, WebEx, Adobe Connect, and Teams.

Tack on the technical direction! Clearly indicate HOW participants should respond, and you'll be stunned at the transformation of your classes from a one-person "show" to an interactive and dynamic group learning session!

Use the features of your platform to clearly indicate how you'd like participants to respond and don't forget to teach them how to use the features first!



Love your work, Kassy. I couldn't agree more. Using technology as part of your session helps everyone get involved.



36: FOCUS ON THE OBJECTIVES

Your virtual instructor-led training does not need to be an exact copy of the in-person version.

It needs to be aligned with the objectives.

When designing your virtual training (any training!), it is important to focus on what participants will be able to do once they leave the session. The exact way you may have arrived at this during an in-person training may or may not work live online.

Not to worry! Focus on the result and use the available strategies and tools you have in your virtual classroom technology.

VIRTUAL TRAINING HERO TIP # 36

Focus On the Objectives



Your virtual classroom version
does not need to be an exact copy
of the in-person training.

IT NEEDS TO BE ALIGNED
WITH THE OBJECTIVES!

37:

USE THE "NEVER FAIL" DEBRIEF PROCESS

"Great, thanks for that."

"I love your responses. Thanks."

"Thanks for your chats."

The above replies are not helpful and yet, they are commonly uttered by virtual trainers and presenters everywhere. They are disengaging our participants. I'd also argue that they are telling participants they should not bother responding next time!

After a chat brainstorm, or a collaboration using annotation tools, take the time to properly debrief the interactions. Here is my "never fail" process:

- Do not speak until approximately 75% of the participants have responded. (Note, I am not referring to webinars. My virtual training is collaborative smaller groups.)
- Do not re-read verbatim what was added.

And then follow these 3 steps:

- Summarize the key messages and themes.
- Spotlight, or focus in on several people (use their names) and ask them to explain, share, or comment.
- Transition with a thoughtful wrap-up, connecting responses to the learning and transitioning to what's next.



VIRTUAL TRAINING HERO TIP #37
Use my "Never Fail" Debrief Process!

After participants have responded using chat, polling, or annotation, follow these guidelines:

Do not speak until approximately 75% have responded
Do not RE-READ!

And follow these 3 steps →

- Summarize**
High level
Note themes
- Spotlight**
Choose one
Ask another
- Transition**
Wrap up
Connect

The graphic features a cartoon character of a woman with red hair and a yellow background with a sunburst pattern. It includes three small images: a group of people, a person speaking, and a landscape.

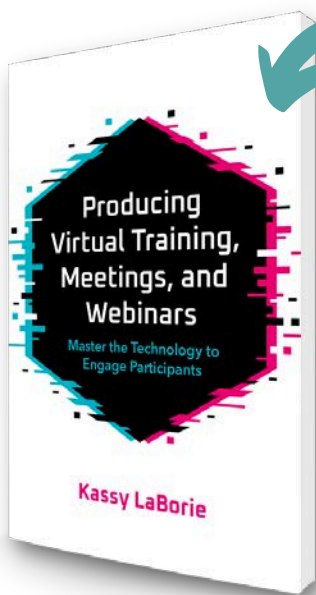
I love being able to take what my participants share and tie it back to connect other pieces of information that were discussed already. This helps to broaden thought processes when needed.





Also by
KASSY LABORIE

Virtual classroom training is here to stay, and web and video conferencing is ubiquitous. Interact and Engage! offers proven strategies for captivating your live online audience. With more than 75 activities ranging from openers and warmups to closers, virtual event and instructional design experts Kassy LaBorie and Tom Stone present a framework for igniting online training programs, meetings, and webinars.



Have you ever found yourself confidently delivering content for a virtual training session, webinar, or online meeting only to have a participant drop off? Or, have you bravely launched breakout sessions but found that participants got lost on where to go? These scenarios illustrate the convergence of virtual session facilitation and production. While attention is most often paid to the facilitation of virtual sessions, significantly less is devoted to producing them. Producing Virtual Training, Meetings, and Webinars rectifies this gap.



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LET'S TALK!



I'd love the opportunity to get to know you and learn more about your virtual training and remote working challenges and needs. Contact me directly to determine the best solution for you and your organization. Check out the different ways we could work together, online or in person, below.

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