

So you think you can WebEx?

A White Paper by Ian Savage
Sales Effectiveness Consultant



"We have to cut expenses.....all training and travel is on hold"

This White Paper highlights the "Top Ten" mistakes I made along the way while being forced to make the journey from designing, developing, and delivering traditional class-room learning events, to doing the same for on-line learning.

I remember the day only too well. I was facilitating a Workshop in Singapore for a global Technology client and we had stopped at lunchtime to listen to an internal Webcast. "We need to cut Operating Costs by \$1B over the next eight months.....No travel (or training) for any employees unless you are meeting with a customer". I can still feel the cold chills even now. As a Sales Effectiveness Consultant I had not practiced what I preach to my clients and had allowed this client to become my main source of income (and main source of frequent flyer points!). In fact the previous year I had achieved Platinum Medallion status three times over by the end of June, with just one airline.....all thanks to the volume of Workshops I was facilitating for this client around the world.

I managed to get through the rest of the day's teaching relatively unscathed, and sat in my hotel room that evening pondering the implications of the day's news. My healthy pipeline of business had just disappeared in a heartbeat! If I were to stand any chance of maintaining some kind of revenue stream from this client I had to do something, and do it quickly!

Since that day in Singapore my business, and my life for that matter, have changed dramatically. I have managed to re-build a significant revenue stream from the client, but no longer do I spend my life in Airline Club Lounges, in airplanes, or in hotel rooms across the world. A typical day for me now will be to facilitate several 1 to 2-hour virtual or on-line learning events, delivered via the Web to participants all over the world, all from my home office. Admittedly many of these sessions are at odd times during the night, but I figure that has to be better than the wear and tear of international travel! My clients are usually surprised when I show them just what can be done with the new synchronous software platforms, and yes, it took me a long time before I was able to take full advantage of their rich functionality, but now I regularly use Break-out sessions,

White-boarding, Polling, Pop-Quizzes, Annotation, and Chat, to make the sessions interactive and motivating for participants, and I regularly receive accolades for the way I facilitate them.

Although your Training Company may not be facing the same “compelling event” as I faced that day in Singapore, clients are forcing our industry down the path of change, and the faster you can respond, the more likely it is that you will not be left behind in the wake of the new technologies which are helping to accelerate this trend.

Mistake # 1 – Believing that the same set of rules that apply in a traditional classroom setting apply also in the synchronous classroom. Like it or not, it’s a completely different game, requiring different skills, a different approach, different processes, and even a different business model if you are a Training company.

Mistake # 2 – Believing that running an effective on-line learning session merely involves presenting a slide-deck using WebEx (or any other of the synchronous software platforms out there). Unfortunately when we ask most people what their expectations or experiences are from attending “WebEx” sessions or Webinars, they will tell you just that. The communication is one-way and, because they are not held accountable for what they learn, most participants zone-out very quickly and busy themselves with other things, until they hear a “trigger” word or phrase that leads them to zone back in again. This may happen many times during a session, and you have probably experienced such sessions yourself. However, the rich functionality offered these days by the various software platforms enables a much richer, more interesting, and more effective learning experience, provided of course that the functionality is fully and effectively utilized.

Mistake # 3 – Believing that this delivery medium is suitable only for “knowledge transfer” type learning. If I am honest (why would I not be?), I was saying the same thing for many years up until the technology finally caught up and began to provide the kind of features found today in most synchronous software platforms. Nowadays through the widespread use of web-cams these platforms provide just as good an environment for role-plays and role-play feedback as the traditional classroom.

Mistake # 4 – Believing that Break-out sessions are only possible in the traditional classroom. For me, the breakthrough came as soon as the software platforms provided the ability to break participants into teams during an on-line session, and allowed the facilitator to visit each team, and for each team to capture their work and share it with the large group.

Mistake # 5 – Believing you can take the design that works for a traditional classroom event, and apply it straight to the virtual classroom. Assuming you can just chop two days worth of content into several on-line sessions, without a serious re-design effort, was one of my first mistakes. For one, participants need to be involved in some kind of activity every 5-8 minutes of a synchronous learning event. Most of the good synchronous Software Platforms provide a variety of ways to do this, and these need to be designed-in throughout the session.

Mistake # 6 – Assuming the materials you developed for the traditional classroom, will do for the on-line session. The good news is that you will probably be able to re-use many of your PowerPoint slides and Participant materials. However, exercise

instructions will almost certainly need to be re-written because I quickly discovered that when you are not there in front of the classroom to explain and clarify tasks and activities, written instructions need to be painstakingly detailed. Break-out Instructions will need to be written and possibly instructions for the use of the particular synchronous software platform (if participants are not familiar with the functionality). You may also decide to move some of the previously in-class exercises or tasks to Pre-Course activities, or homework activities between on-line sessions. Once again, additional materials may need to be developed to support these activities. Finally, if you are going to use a Producer (sometimes called an “Assistant Trainer”), you will need to create specific instructions in your Facilitator’s Guide for that role.

Mistake # 7 – Assuming that delivering or facilitating an on-line learning session is the same as a traditional classroom event. This might seem like a fairly obvious statement, but it is not just a question of having to adjust your style of delivery for an on-line learning event. Working with my fellow facilitators, people I had known for years and could always trust to deliver a high-quality learning experience for participants, it was a shock to discover that some were unable to make a successful transition to facilitating on-line learning events. Some managed to transition relatively quickly, with others it took longer, and some were never able to adapt. Looking back, in some cases they were just not comfortable with using technology, and in other cases they enjoyed so much the physical presence and proximity of the traditional classroom that they felt somehow powerless when the only presence they could project was via their voice. You will therefore need to change your Instructor/Facilitator Profile, and the processes you use to certify your Facilitators.

Mistake # 8 – Assuming that the technology will work flawlessly. The other huge learning for me was that you must have a “Producer” (sometimes called an “Assistant Trainer”) whose role it is to manage the technology – to transfer participants in and out of break-out sessions, file transfer documents to participants during the session, keep an eye open for raised hands or questions/comments in the Chat panel, and to handle the technical glitches that are an inevitable part of an on-line session. That allows the main facilitator to focus on the content and participant interaction rather than have to worry about audio signal break-up or people getting disconnected from the Internet. This of course includes having a back-up plan if for some reason part of the technology decides it doesn’t want to work that day!

Mistake # 9 – Under-estimating the underlying costs in designing, developing, and delivering a successful on-line learning event. If your company has made any of the previous four mistakes, then you have probably made this one too! With frequent activities needing to be designed-in which keep the participants involved every few minutes, plus additional materials that need to be developed, it is easy to underestimate the time, and therefore the costs, of designing and developing an on-line learning session. On the delivery side too there is the incremental cost of an Assistant Trainer or Producer to factor in. If like many Training Companies your business model relies on independent (1099) Facilitators for your delivery capability, transitioning to this delivery medium lends itself to paying Facilitators not by the day, but by the hour. If that is your model, then be sure also to build in the cost of at least one additional hour of Instructor time for them to join the session at least 30 minutes ahead of time (to identify any technology difficulties) and to synch up with the Producer, and again at the end to debrief the session. Unfortunately my experience with many clients is that they either do not realize, or just assume, that these costs are significantly lower for on-line learning

events, and therefore expect this to be reflected in much lower prices! Educating the client on this has therefore become a critical early step in my Company's sales process!

Mistake # 10 – Under-estimating the timing to deliver an effective on-line learning session. I can guarantee that everything you plan to say or do will take longer than you think, probably by a factor of 1.5 if it is to a native English-speaking audience, a factor of up to 2.0 for non-English speaking participants. That is assuming of course you encourage students to ask questions and be generally interactive (why wouldn't you?). I have learned that it takes much longer to explain things clearly so that participants understand it first time around, which they need to because you don't have the benefit of seeing that puzzled look on a participant's face that indicates you need to go over it again, and students can't lean across the desk to ask their colleague what you meant! It will also take longer than you think to get students in and out of Break-out sessions, particularly if they are unfamiliar with the on-line software platform you are using. (Don't forget you may have to allow time during the session to explain and/or demo the use of the software before you get into the real content). Finally, if you plan on starting your session at 10.00am, either tell people to join at 9.45am, or plan your timing around a 10.15am start. People will ALWAYS show up late!

Some clients are going to force you to move to virtual training – there are a lot of mistakes to be made but if done properly this can grow both your top and your bottom line. Let me help you transition more profitably by helping you to avoid these mistakes and by sharing other best practices with your organization.

Ian Savage is a highly-experienced Sales Effectiveness Consultant and Facilitator, based in Atlanta, GA. He consults with Training Companies and Clients around how to drive revenue through Direct and Channel organizations. Ian has authored several White Papers and has domain expertise in the following diverse areas:

- Transitioning from selling Products to Solutions
- Account and Opportunity Management
- Sales Management
- Channel Management
- Change Management
- Sales Operations
- Curriculum design, development and delivery
- Consultative Selling

He can be reached at isavage@inertiaccg.com.