

Online Leading and Learning

How to engage people in the virtual space | October 29, 2020

1 I am leading an online TRAINING / MEETING. (Circle) It will be _____ (date).

2 I am going to consider these ASYNCHRONOUS tools or supports to achieve my goal:

- | | | |
|--|---|--|
| <input type="checkbox"/> Audio | <input type="checkbox"/> Learning platforms | <input type="checkbox"/> Discussion forums |
| <input type="checkbox"/> Video | <input type="checkbox"/> Web pages | <input type="checkbox"/> Q&A tools |
| <input type="checkbox"/> eBooks/guides | <input type="checkbox"/> Quiz tools | <input type="checkbox"/> Email |
| <input type="checkbox"/> PDFs | <input type="checkbox"/> Games | <input type="checkbox"/> Social tools |

3 These PEOPLE will be involved: _____.

It is NOT appropriate for these people: _____.

My intended audience members have these characteristics:

- | | | |
|---|--|--|
| <input type="checkbox"/> Limited attention span | <input type="checkbox"/> Possible privacy concerns | <input type="checkbox"/> Non-English language speaking |
| <input type="checkbox"/> Limited technology skill/comfort | <input type="checkbox"/> Physical disability | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> "Challenging" behavior | | |

Say more about them:

4 The PURPOSE of this event is: _____.

I have some OUTCOMES for this event (what will be different by the end):

1. _____
2. _____

5 To engage people in the conversation, I will use these ENGAGEMENT STRATEGIES:

- | | | |
|---|--|--|
| <input type="checkbox"/> Chat box | <input type="checkbox"/> Change names | <input type="checkbox"/> Mute on/off |
| <input type="checkbox"/> Breakout rooms | <input type="checkbox"/> Polls | <input type="checkbox"/> White board/on slide typing |
| <input type="checkbox"/> Annotation | <input type="checkbox"/> Camera on/off | |

Non-Zoom tools:

6 I will be intentional about SOCIAL PRESENCE by taking these actions: _____

7 I will deliver this session STANDING / SITTING (circle). I have these steps to make sure my online physical presence mirrors what I would do in-person.:

Other people supporting this event...

Moderator: _____

Producer: _____

Meeting Planner

This meeting agenda template is designed to yield an outcome-focused meeting that is tightly planned and engaging.

Mission		
What progress will be made at this meeting:		
Another way to think about this... what will you:		
<p style="text-align: center; margin: 0;">Discuss</p> <p style="font-size: small; margin: 0;">Topic introduced for the first time, or re-introduced for future deliberation</p>	<p style="text-align: center; margin: 0;">Deliberate</p> <p style="font-size: small; margin: 0;">Topic for which data or information has been provided with enough time to read and think about it</p>	<p style="text-align: center; margin: 0;">Decide</p> <p style="font-size: small; margin: 0;">Topic ready for a decision or vote</p>
Consent Agenda (topics for a singular vote)		
Topic 1 _____		Facilitator _____
Topic 2 _____		Facilitator _____
Topic 3 _____		Facilitator _____
Closure (Review progress, assign tasks, celebrate achievements)		

Meeting checklist:

- Social time for connection
- Small group/pair conversation to engage more voices
- Balance between past/present/future
- Time to celebrate

Rank this activity:

- 3= High brain power needed
- 2= Medium brain power
- 1= Little to no brain power

Make sure "3" activities come first.



Online Presentation Planner

This planner is designed to yield an outcome-focused training that is engaging and supports a change in behavior back in the workflow.

Learning Outcomes: By the end of this lesson, what will people be able to do?	
Opening introduction. How will you interest them in the topic from the start?	
Participant engagement. How will you get them talking or otherwise engaged within the first 10 minutes?	
Look at your Learning Outcomes. This section is to plan the lessons that lead to these outcomes.	
Lesson 1	Activity that tests for understanding
Lesson 2	Activity that tests for understanding
Lesson 3	Activity that tests for understanding
Closure How will participants bring this back?	

Download more instructions for this planner on nancybacon.com/resources.



Online Presentation Checklist

GET READY

- You have defined your focus audience.
- You have defined what they need to get out of this session.
- You have defined what actions you want them to be able to take after this session.

CONTENT

- You provide learning or meeting outcomes that are appropriate for this audience. These outcomes are something that you could see or hear (not “they will understand”).
- You have a powerful opening that engages people right away.
- You have chunked out content or agenda items in a way that is meaningful to participants and that supports your outcomes.
- You have edited down the content to just what they need to know/accomplish. This can be the hardest part!
- You have designed an activity for each chunk to give participants a chance to practice or engage, and to give you an opportunity for feedback.
- You have allowed for enough time for closure. During this time, participants will connect what they learned or experienced with ways to apply it within their own context and take next steps.

DELIVERY

- You conduct yourself as if you were delivering the session in-person. That may mean creating a standing desk so you can stand and deliver with your whole body.
- You build social connections with participants before and during the event. This might include calling people by name, referencing a challenge someone noted in the chat box, or reading body language.
- You use PowerPoint to support what is said, not capture all that is said. You do not read slides.
- You plan for the two roles (“hats” if same person) in teaching: facilitator where you draw out their knowledge and subject matter expert where you share your knowledge.

TECHNOLOGY

- You know how to use the technology and its engagement tools.
- You use the engagement tools available to you (chat, Q&A, polling, whiteboard...).
- You consider engagement tools outside of your technology platform to encourage collaboration and shared note-taking (Google docs, Padlet, Mural, Sli.do, Mentimeter...)
- You do a trial run to ensure the technology will work.
- You have aligned expectations with a producer ready to support the technology and be your “eyes and ears” through the presentation.
- You provide any orientation to these tools needed for your participants. This may mean introductory slides if the conference producer doesn’t provide these.

SUPPORTS

- You have provided any tools people might need to support reflection and learning transfer. This might include:
 - Slideshow in handout form
 - “Placemat” reflection tool or worksheet
 - Workbook
 - Templates or sample documents
 - Directory of resources



Bloom's Taxonomy: A source of good verbs

