Radically Remote VER.2

Be authentic, create connection, & take your live online learning from *basic* to **bold**.

By Joshua Davies

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*For my Mom & Dad. Because they're **awesome**.*

And to my jury-rigged learning set-up "Steve"–
so named as it was International Call Everyone Steve Day
when it was built... and because I want someone to blame
*when workshop tech goes wrong. **Dammit** Steve.* 🤖

Well hello there.

If you're reading this it means you're:

- **A human being** living through a particularly odd point in history,
- **A Learning & Development professional** who is wondering how to act, quickly and practically, to a completely changed way of being,
- **Generally awesome** since you're actively trying to figure this puzzle out. Social distancing fist bumps all around.👊

Thank you for being a part of this! **Like it? *Share it!***

Beyond the book: If you're not visiting our interaction toolkit at *knowmium.com/radical-toolkit*, you're missing more than half the tools and templates that will help get you going. Got an idea we should add? Let us know and we'll add it to version 2.0. Think of this book as beta. It is.

Want more hands on practice? We've also got a *free* self-paced class up at *radicallyremote.com* starting May 1. Think of it as the interactive video version of this book.

We're coming at this from the corporate training space–but whether you're an internal or external learning partner, a university teacher, a facilitator, or just a curious human, I hope this helps you more than finding a hidden stash of toilet paper.

Shall we begin?

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Part 2: Running Remote

Part 3: Reflecting on Remote

Intro:

Going Radical

1. It's a rad, rad world.

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It's possible that yesterday, more people used video conferencing in a single day than at any other time in history. It's equally likely that we'll break that record tomorrow. Last week a client emailed me to let me now that for the foreseeable future, all 20,000 employees of their Fortune 500 firm would be working remotely, and to ask: how can we help keep them learning online? They're not alone, not by a long shot and what is true in corporations is being mirrored in the switch to online work for schools and universities around the world. Last year around 10% of all training was live online.[1] This year the number will be... just a bit higher.

How ready are you for the switch, really?

[1] ATD State of the Industry Report, 2019: https://bit.ly/2RCIDXF

First things first— things that need to be said
Should we even be training now? Why don't we just push a big pause button and just wait till next year to train? Indeed some have. Most even (with 57% surveyed organizations postponing training for now).[2] But should they?

If training is done badly, then certainly yes: pause away. Throwing a bunch of people who are potentially quite stressed into a face-to-face class that has been poorly converted to online use is no use at all. Learning should never be paint by numbers, now even more so.

But many people do want to learn, and yes, *especially* now, with 60% indicating they are more likely to sign up for training than the prior year, and only 15% less likely.[3] Why? A mixture of extra time, desire to feel engaged, and concerns about job security. If now is not the time to reflect, learn, and grow, when is? Note: I'm *not* saying everyone has to. There is a wide spectrum of responses to this crisis from "I'm in my closet sipping bourbon and call me when its over," to "let me go out and solve all the problems of the world." You do you.

For me at least, I'm of the belief that organizations that choose not to provide meaningful learning to those who are hungry will find their organizations far behind those that do when we emerge from this time.

So where does that leave us facilitator folk?

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2 findcourses.com, March 2020 Survey: https://bit.ly/2RzcjoL
3 Ditto.

As Douglas Adams would have put it aptly, *"Don't Panic."*
It's a year of weird, but it's also a year of wild creativity. I've
seen more facilitators put themselves outside their
collective comfort zone in the last month than I have in my
entire career. It's both awesome, and humbling.

Whether face-to-face or virtual, conversations in education
truly matter, but too often the lively collaborative
interactions of a face-to-face classroom session are replaced
online with one-directional talking webcasts/webinars, with
delegates half asleep or drifting to other tasks. My virtual
mentor Cindy Huggett notes, *"When was the last time you
paid full attention to a lengthy lecture? Did that single lecture
increase your skill or make you an expert in that topic?"*[4]

The answer is, almost inevitably, **no**. 🙇‍♂️ We need to do
things differently than this, and convince our learners that
we have genuinely done so. If we do, it's possible to meet,
and potentially even exceed the face-to-face impact.[5] Really.

Some things are less rad
It's important to face the elephant in the virtual room
(thankfully it's a virtual room so we can make it as big as we
want)– some aspects of digital are much harder to get right,
especially when people are spending so much time online
in meetings, workshops, catchups with family/friends, etc.
We're getting tired, collectively.[6] When we do everything in
one space, rather than separate spaces for different
functions, the blurring of dimensions can be
claustrophobic.

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[4] Huggett: The Virtual Training Guidebook, 2014

[5] Broida, Shachar & Neumann: US Department of Education, 2010

[6] Jiang:BBC https://bbc.in/34WVnxZ, 2020

Good teaching does not spring naturally from a particular modality. A good course on campus is not good because of the location or traditional brick-and-mortar ambiance. Likewise, a weak online course is not weak because it is delivered via the internet. Good teaching in any learning environment requires careful attention to course design and facilitation.

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Shannon Riggs

"Being on a video call requires more focus than a face-to-face chat. Our minds are together when our bodies feel we're not. That dissonance, which causes people to have conflicting feelings, is exhausting." –Gianpiero Petriglieri

This sense of social unease is composed by the technology itself, where delays of even 1.2 seconds can make us appear "less friendly or focused."[7]

So how do we do it safely, and how do we do it well?
We need to create, what Nilson and Goodson label *"Teaching at its best, no matter what the environment.[8]"* In the last 10 years, I've run virtual and blended (with some delegates face-to-face) sessions on almost every system with groups ranging in size from 5 to 300. When done well, attention is baked in and engagement remains high, ensuring learning and follow-through.

To get to that point of engagement, we're standing on the shoulders of live online learning giants– whether you're reading this on a PDF or Kindle or other format, check the online resources page, follow the links, and start exploring. We've tried to keep this book as short and clear as possible, to get you out there teaching/training/facilitating today with a feeling that you're ready to play in the new world of tomorrow. The possibilities are awesome if a bit terrifying.

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[7] 7Jiang:BBC https://bbc.in/34WVnxZ, 2020
[8] Nilson & Goodson: Teaching at Its Best, 2014

TRY IT ON: Experiments in Brave Facilitation

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"Upgrading one's imagination about what is possible is always a leap of faith."— Clay Shirky

1. So, real talk: it's a weird year– how are you doing outside of teaching/facilitating?
2. What percentage of your sessions previously were delivered virtually?
3. What are your biggest concerns about moving into a digital space? What are you afraid will happen in the next year, if anything?
4. Beyond this book (and thanks for reading), what are you exploring, and whom are you talking to as you make the transition?
5. If you had to put it into a sentence, what goal would you like to reach in this space, 6 months from now? Try to be as specific as possible.

Let's help you get there.

Part 1:
Getting Ready for Remote

2. You're ready for this. Yes, *you.*

. . . .

Y ou may be thinking, that's easy for you to say Joshua, you get the tech. *Kind of?* I find what tech can enable when used well fascinating, but I'm actually a big believer in digital minimalism, not, as Newport writes, rejecting *"the innovations of the internet age, but instead reject(ing) the way so many people currently engage with these tools.[9]"*

This was supposed to be the year my company switched a majority of our classes off tech entirely: no more slide decks, fully analog workshops. Plans change, and I asked, what all of you are likely asking, *"how can we make this work?"*

So yes, I like what is *possible* with the tools, when the tools are used to create *possibilities*: to bring an analog brain into

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[9] Newport: Digital Minimalism, 2019

the digital space. If we make this tragically hard for you or our learners, that won't happen.

Whether it be through content, through exploration, through reflection, or through collaboration: if what I help learners discover is hard to do, it will be hardly done. I could give you an incredible research backed template for unpacking and analyzing your negotiations, but if it took 3 hours to fill out, even if those 3 hours were a tiny commitment compared to the massive gain created, very few would wade through it. Some, yes, for sure, and we'd write up brilliant bright spot case studies around them, but right here, right now, I'd rather help a larger group go from being uncertain about something, to being quite a lot more confident.

To do that means we need to shape the path for you (and you in turn for your learners), that stretches you, yes, but in a way that you believe is within your reach. What seems completely strange now will become second nature soon.

Give yourself permission to be in beta. Things are going to break. It's going to be a mess sometimes. There are lots of us out there who are doing this online for the very first time. Lean into your errors, as small goofs lead to greater gravitas. Wait, really? Indeed. **Authenticity≠perfection**; it means making your own human learning process visible in a way that is accessible to others.

"Class activities rarely go perfectly the first time you try them." – Darby & Lang

A group of my fellow facilitators have a meetup called *Bourbon* 🥃 *& Beta* (previously physical, now virtual) where we test out session ideas, knowing many will go wrong the first run through. Drinks are optional, but believing in beta is not. So do prepare, do practice, but don't *over*-practice. And do drop us a line if you'd like to join the next Bourbon & Beta.

From real, to robotic

Instead, learn to be both prepared, and flexible. We talk about being like a duck, calm and unruffled on the surface, and paddling like crazy underneath. And that is half true: like last week when I updated my computer but forgot to update my security settings, locking myself out of screensharing I would need later in the session. I could have restarted the session, kicked everyone out and asked them to rejoin, but instead I sent a backchannel message to my moderator, and had him screenshare on my behalf. The learners never knew anything was amiss.

Another week though, my whole system froze, for reasons known only to the digital demigods, and I had to calmly let the group know I'd be back after a reboot. As Huggett notes, "*Trying to conceal problems that will affect the whole group in a virtual session simply doesn't work.[10]*" Transparency buys time and trust. By clearly communicating what was up, rather than silently scrambling, it went from a session stopping moment, to a bump remembered only here in this paragraph now. **Remember this, always:** everything that made you a great facilitator face-to-face is still there– your energy, and

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[10] Huggett: The Virtual Training Guidebook, 2014

empathy, your humor and ability to think on your feet. We're just finding a way to let you shine, online. Basically, you've got this. It's not tools that will save us; it's you, and the trust you place in your learners. They will forgive you if it isn't perfect, especially if they can feel you're trying to take them beyond the boring barrage of webinar purgatory. *That being said: let's make the job easier, shall we?*

> *"When building online materials and dealing with technical issues, they tend to give more attention to getting the technology right than getting the teaching right, even overlooking the strategies they already use in their traditional courses." – Nilson & Goodson*

TRY IT ON: Experiments in Brave Facilitation

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"Experience is simply the name we give our mistakes."

– Oscar Wilde

1. Where are you comfortable being in beta? Whom do you genuinely get to *practice* with?
2. What is the biggest mistake you've ever made in a workshop? What did you learn from it? BONUS: Share it with a fellow facilitator next time you meet. Even virtually. Everyone needs a laugh.
3. Who do you have to give you feedback? Smile sheets don't count. Ever.
4. How comfortable are you being more conversational and authentic in the virtual space?

3. Grow trust through tech.

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Good ingredients lead to good sessions: Repeat after me, one more time for good measure, *"My tech is just tech, but if my tech is terrible, I'm toast."* Good tech doesn't save bad facilitation, but bad tech can make good facilitation next to impossible. You don't need to spend billions upgrading, but it helps to get the basics right.

I'd love to start by jumping in and talking about session engagements themselves, but it truly helps to understand the pieces that go into good cooking first. It's easier to follow a recipe if you understand what makes a quality ingredient/tool. Cheap knives , broken ovens, and old olive oil will not have you doing anything but burning dinner. So what do we need when we head into the virtual kitchen? It doesn't matter what platform you choose if the

ingredients going in are subpar. Your dial-up modem will not make for a good video connection. Yes, I get it that great chefs can turn junk food into four-star meals, but ideally, they won't have to. Authenticity, presence, and gravitas are hard face-to-face, but even harder remotely. This is important for participants, but even more critical for the facilitator.

I understand: everything has a cost, budgets are tight, and some areas have slow internet, but the better your basic tech is, the better chance you have of creating real engagement and flow. In other words, you want to look and sound like a human sitting next to them, and not a fuzzy shape in the distance shouting through a broken megaphone.

TRY IT ON: Experiments in Brave Facilitation

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What features do you need on the platform and outside the platform to give you the best chance of connecting and creating connections?

Platform features I need	Basic tech I need

Intentionality is satisfying. Digital minimalists derive significant satisfaction from their general commitment to being more intentional about how they engage with new technologies.

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Cal Newport

One note: just because it's there, don't feel the need to use all the tech on a platform. You don't cook with everything, every session. At the same time do understand all the ingredients and what you could use them for. Know your kitchen. The purpose chooses the technology, not vice versa. Yes tech can inspire new ideas, new modalities (buzzword alert), but underneath all, is purpose.

Our checklist: how many do you have?
(Try to) get yourself:

- **Fast internet:** Plug your laptop/desktop into ethernet/fiber rather than rely on wifi ideally. <u>Test your speed</u>. The global average is around 46 Mbps. You don't necessarily need that, but the faster you are, the easier it is to make interactions feel synchronous, rather than staggered.

- **Good webcam:** Your computer webcam is not enough, and usually sets up a terrible angle as well. Get a proper webcam for clarity and better angles to at least somewhat recreate eye contact. Logitech cameras are our go-to option (as they have downloadable software that allows good framing adjustment), but almost anything is better than your built-in webcam.

- **Lighting:** Be well lit. Not dramatically lit like some discount vampire movie. No offense to vampires. 🙆

- **Sound:** Get a good mic. I use my AirPod Pros, as they have noise cancellation (good in a busy city, or when others are at home) but any headset or podcasting mic will make your voice richer and clearer. Check it, record it, and make sure your voice is captured as

clearly as is possible. Want cleaner audio cheaply? Install Krisp, which helps to clean up both the sound coming to you (so you can hear participants better) and your sound to them. It's free up to 2 hours a month, and less than a cup of coffee a month for unlimited use beyond that.

- **Atmosphere:** I keep my living room nice and clean in the background (just don't ask me to face the camera the other way) when I'm doing sessions from home, as I think it humanizes the interaction more than a blank background, but I know others prefer virtual backdrops, or a simple plain background. We can all agree– think about what is on screen, and how it impacts attention.

- **Dual Monitors:** Optional but awesome. Having two screens (or using a program like Mac's built in Sidecar, or the app Duet to turn an iPad into a second screen) allows you to have videos on one screen and chat/slides, etc. on another, greatly easing resource management in session, especially if you're using more than just your main platform (Zoom, BlueJeans, etc.).

- **Tablet:** Again, optional but awesome. To annotate slides, draw on a virtual whiteboard, unless you're using a touch screen computer, it is great to have a digital drawing tablet to increase accuracy and avoid recreating the art my 4-year-old nephew creates.

One caution: don't build classes that require the level of tech you're bringing to function well. Learners will often/ usually not have the same level of gear, just as home cooks don't often work with thousand dollar chef's knives.

Platform panic: what system should I choose?

As with the basics above, we want a platform that maximizes the possibility of creating authentic engagement and learning. To do so, we want a platform with:

- **Screen sharing:** of slides and ideally more (apps, second cameras, audio, files, as well as the ability to let learners share): All the major systems have this, to a varying degree. Basically we want to make it easy for us to share with learners, and for them to share with us.

- **Chat bar:** for backchannel questions to the facilitator, or to get a pulse of the room, like – "How much can you use this in your job– type 1-10 in the chat window?" Easy, quick, and interactive, allowing people to participate without coming off mute.

- **Virtual breakout rooms:** real talk– if you're not using these, you're letting participants down. Using breakout rooms allows participant-to-participant pair or small group interaction and collaboration, and also allows the trainer to move room to room engaging in small group work. These are critical for turning a lecture into a collaborative learning experience. Combined with an external virtual canvas (Miro/ Mural, discussed later), they're unstoppable.

- **Shared whiteboards:** for group work, as well as available in breakout rooms, whiteboards are great for visualizing ideas, brainstorming, diagramming possibilities, and plotting world domination. With camels 🐪🐪. Quick tip: the annotation available with whiteboards usually works overlaid on other images. I like using Keynote/PowerPoint to pre-build

a bunch of discussion templates which I can then screenshare for annotation.

- **Polling/surveys:** for capturing group opinions and getting feedback.
- **Participant visibility:** is the platform interface set up in a way that makes it easier to see and interact with delegates? Features like gallery and speaker view (so you can see everyone all at once, or just the main speaker of the moment) are hugely helpful when managing and running activities.

We're rolling the dice

Quick quiz: which platform has had critical security vulnerabilities in the last 2 years?

    A. BlueJeans
    B. Zoom
    C. Adobe Connect
    D. WebEx
    E. GoToTraining

Most of you chose B, I am guessing. Trick question, it's all of them, except for A, BlueJeans. Before we all switch to using BlueJeans, let's take a quick look at the pros and cons of various platforms.

"I'd rather have a great team with bad tools, than a bad team with great tools."
– Scott Berkun

Check yourself before you wreck yourself

Platform	Pros	Cons
Zoom	Our number one pick: good pricing, great interface, and video breakout rooms. Strong app marketplace for connecting with other programs.	Security concerns. More on this later. We promise. Also sub-par polling features.
BlueJeans	A great second choice: similar pricing, easy to use, and has video breakout rooms. Very few security issues. This is our backup to Zoom for clients that worry about security.	Occasionally crashes, less intuitive that Zoom, fewer options for sharing, less degree of setting control. Client reports of larger tech issues (which I have yet to experience– we'd love to hear your own reports).
WebEx Training	Not WebEx Meeting, which has no breakout rooms. This is the third service we have a full-time subscription to, for one main reason only– a few of our clients will only approve its usage, as Cisco works well with all their IT/security settings.	Security concerns. Yes them too. While Cisco's WebEx Meeting software boasts a clean interface, the training version still will give you flashbacks to the early 2000s. The onboarding process to get the training version of the software (4x the cost of Zoom) takes multiple phone calls (really), signed contracts, and more. Breakouts are audio-only and setup is non-intuitive.

Worried still? The Electronic Frontier Foundation has a great set of security tune-ups at: bit.ly/EFFZoom

Platform	Pros	Cons
GoToTraining	Not GoToMeeting (which has no breakout rooms). Good software, one feature I'd love to steal from this to others– good organization of frequently used training materials.	Security concerns. Audio only breakout rooms, a slightly dated interface, costs 8X what Zoom/ BlueJeans does without really offering much more. If participants don't have the program, getting the browser only interface to work is hit or miss.
Adobe Connect	Reliable, and in some ways feature rich (if a bit dated), good control of layouts for lots of customization. Breakout rooms have a unique feature in Adobe– customization and persistency. As a result, you can design breakout spaces to the needs of specific groups. With all others breakout rooms disappear each time.	Cost 25X Zoom/BlueJeans (yes, really), steep learning curve. Audio only breakout rooms, security concerns.
Remo	Our wildcard new player in the game, Remo is more for conferences, but boasts some truly unique features: an overhead view of a "conference space" where participants can freely move table to table for video engagements. Basically breakout rooms controlled by the learners.	Very new entrant, browser only, not cheap, features overall lacking.

The choice is yours…and L&C and ITs

At the very least, choose one with breakout rooms (any of the 6 above), and not MS Teams, Skype for Business (soon to be swallowed by Teams), Google Duo, FaceTime, etc. They're not bad platforms for meetings (Teams has a really fun blur background feature), but without breakouts, they tie your hands behind your back as facilitators.

If your organization is very security oriented, your best bet is BlueJeans, followed by Adobe Connect. BlueJeans if you want video breakout rooms (I do), and Adobe Connect if you have a higher budget and want persistent breakout rooms set to different functions (later we'll discuss a workaround for this very useful Connect feature that works with all platforms).

Recent news has highlighted some issues with Zoom's security (which they are largely working on and have much improved in the latest rollouts). Some of these issues are human error (how many Zoom links have you seen publicly posted to Facebook?), the equivalent of leaving everyone the keys to your home in a pile in the center of town and being surprised when someone unexpected walks through the door. Others are more concerning, but in this Zoom is far from alone. With the exception of BlueJeans, try Googling any platform and the phrase "security vulnerabilities" to see many recent examples.

Side note: I am amused that some clients default back to WebEx as the "safe" choice when just this April it was patching critical vulnerabilities 🤦. I'm not saying don't use WebEx– just be real about how safe your choices are: like when my friend who was smoking kindly remarked to me

that is was unhealthy for me to drink the Coke Zero in my hand. He wasn't wrong, but he wasn't making a very powerful case for overall well-being.

We're not here to indulge in "*Whataboutism*" (where the errors of others are used to excuse the errors of your preferred platform), but to say that we're much more interested in:

- *Are these issues ones that get in the way of what I or the learners I work with need to do with the platform?*
- *How are these issues being dealt with?*

If you're doing anything involving deep corporate secrets, honestly none of the platforms are likely 100% safe, but the chances are, especially in the training space, you'll be just fine (though you may not be able to convince L&C and IT of that). In terms of how they are dealing with it? Depending on your lens, with their large new security initiative Zoom is either proactively or reactively dealing with their security issues. Either way, they are doing so (hard not to when the world is watching), as are the rest of the platforms. Ask a security researcher (not a Facebook post): none of the platforms are stealing documents from your learner.[11]

Short answer: we'd stick with Zoom, given our choice. BlueJeans second (with some reservations). Adobe Connect third... if someone else is paying for it. 💰

As facilitators we adapt learning experiences to best leverage the environments we find ourselves in. Any trainer who has found themselves in a dilapidated hotel ballroom

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[11] Trollope: https://bit.ly/2K5ChMr & Serper: https://bit.ly/2RG8IoC, 2020

with stained tables, flickering fluorescent lighting, and screen projectors that barely give off a glimmer knows that we don't always lead workshops in the best of circumstances. Darwin never actually said it, but let's give it to him anyway– *"It is not the strongest of the species that survives, but rather, that which is most adaptable to change.*[12]*"* I've run live online learning sessions with a client whom only relied on Skype for Business. No breakouts, mediocre audio. We made it work. Focus on humans and so can you.

So what should we do if our organization only gives us sub-par ingredients (platforms without even breakout rooms)? Yes, adapt, but the short answer? Push back. What worked in the past won't suffice in the *"world's largest work from home experiment in history."* If not now, when? Send them this book. Your learners need to be able to truly connect, and the need to continue to grow and adapt is never more vital than now.

TRY IT ON: Experiments in Brave Facilitation

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"Never trust a computer you can't throw out a window."
– Steve Wozniak

1. What's your favorite platform? Why?
2. What's one feature you wish platforms would add?
3. How are you ensuring that you and your learners' experience is safe?

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[12] Quote Investigator, 2014: https://bit.ly/2K4K3Gf

4. Explore the edge of possible.

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No matter which platform you choose, there are limits to what can be done to interact with learners (I've even had a client pick Zoom, and then disable half the features for security reasons– at least they left us with breakouts). To fully engage requires us to look at how we can extend beyond the platform before, during, between, and after the session.

This isn't always easy: any extra piece of tech added on increases complexity greatly, and gives clients one more thing to approve. Beyond that, simply adding more software won't guarantee success, and it can very easily lead to confusion for you and for learners. For this reason, we often suggest that those brand new to live online learning first focus on what they can flexibly do with just the ingredients in platform. At this point, if you have our basic tech list checked off, along with a well-chosen

platform that you have tested, you're ahead of the game. Soon though you'll find yourself searching for new flavors: not for novelty's sake, but because you can feel what is possible if only a few more elements were brought in.

One core principle we follow: no more logins, meaning there needs to be a way to (somewhat) seamlessly move participants from the platform to the external tool and back without requiring extra logins. Lower the tech burden and it becomes much, much easier to get people engaged.

**The top 6 ways to extend your platform**

1. Overlays: Built-in slide sharing features are fine, but tend to shrink the speaker down to a bare minimum, making it all about the slide. By using a software such as ManyCam

Prezi Video Overlay, and my own dramatic hand gestures

or Prezi Video, we can create live overlays on our video feed: picture news-style graphics on top of your talking self

and you can remove much of the need for slides entirely, keeping the human conversation front and center. No overlays? If your platform has virtual backdrops (or you use a virtual camera) you can also turn slides with carefully positioned text into information centers behind you.
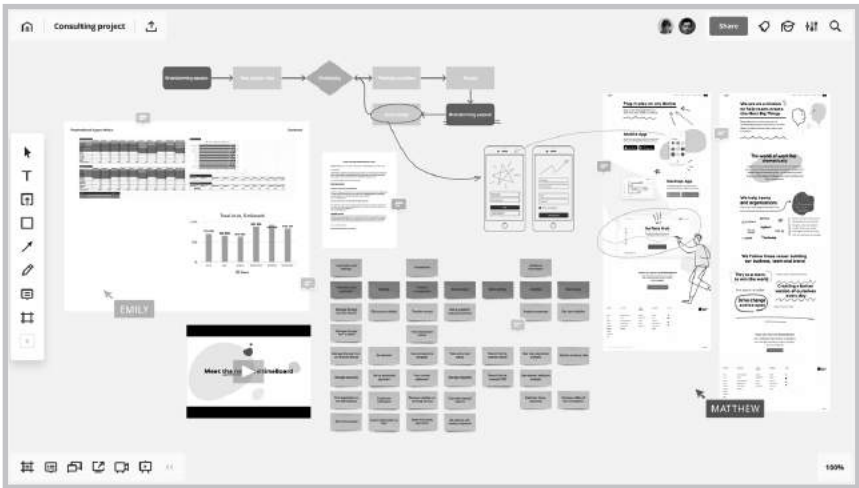
Miro Canvas, shaper of conversations

2. Open canvas: Yes, most platforms have whiteboards built-in, but except for quick activities/simple tasks, I think they're largely a waste. Limited space and functionality means it mostly ends up being a novelty that when tossed out to the crowd quick resembles a Jackson Pollock. External whiteboards/infinite canvases, like Mural/Miro (the top two providers), are one of the single most powerful tools for making a conversation visible and getting everyone involved. We'll examine this more in Part 2, Running Remote, but for now I'll say this– if I had to
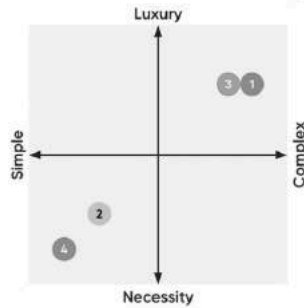
Mentimeter, Long live 2x2 grids

choose only one tool from the platform, and one external, it would be breakouts from the platform, and a Mural/Miro canvas from external. Just need text? Try collaborative documents like Google Docs or Notion.

3. Interactive polling with slides: apps that let you display and control your slides (if you have any) on participant phones/tablets/computers along with integrated quizzing/surveys. These include Mentimeter (our favorite). Why does this matter? Real estate and functionality. By pushing slides to second screens, the main real estate is reserved for humans. Beyond that, the polling of all the platforms is quite limited, whereas with Mentimeter (and others) we can visualize much more idea sharing and interesting conversations around choices, and even make competitive quizzes.

4. Interactive forms: yes, most webinar platforms have surveys and polls in some form, but as noted they are quite

basic. Services like Google Forms (free but blocked by some corporates) or <u>Typeform</u> allow you to drop a link in the chat bar and have participants quickly do deeper surveys for instant brainstorming/feedback. For example: we have learners doing a discussion simulation in virtual breakout rooms, with two role-players and two observers. The observers are providing feedback via a Typeform rubric, which allows them to have a copy to debrief discussions, as well as sending a central copy to us so we know how all groups are performing and what key issues have come up.

5. Niche interactions: my next bucket could be labeled miscellaneous. While the above 4 categories can be used in a myriad of interaction scenarios, other tools are more limited in use, but so immensely powerful (or just plain fun) in creating conversations we'll share them here:

- **Transcription:** services like <u>Otter</u> (our favorite) provide fast transcription of session recordings. Why would you want this? Sharing collaborations is one reason, but for us we primarily use snippets of our sessions to highlight particular communication points, for example, questioning strategies used in a negotiation simulation.
- **Visual toys:** digital spinners, card decks, and game boards, great for gamification, and helping to bring the physical into the digital.
- **Simulations:** online usually licensed simulations– these have been around for years, but now is a good time to give a revisit them as a way to rethink how we might transfer our face-to-face simulations online.

6. Pen & paper: really high-tech no? But some of the best extensions I have seen for live online learning use just that–

brain dumps and 1-minute journaling, templates sent to delegates in advance, storyboards held up to screens or taken pictures of and screenshared. Low-tech in a high-tech space is one of the most human things of all.

Want more? We have an active and growing categorized list of tools at: *knowmium.com/radical-toolkit*. Demos of all the tools are also on our site. Did we miss one of your favorites? Send us a message and we'll add it.

TRY IT ON: Experiments in Brave Facilitation

"We have to stop optimizing for programmers and start optimizing for users." – Jeff Atwood

1. What's your favorite external tool? Why?
2. Think analog: How can you bring low-tech to high-tech?
3. How might you use one of our suggested tools in a session?

Spin, spin, spin: wheelofnames.com

People often tout interactivity as the great benefit offered by eLearning, yet most interactivity does nothing to either engage or instruct.

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Ethan Edwards

5. Take the pedagogy plunge.

B ack to our mantra, *"my tech is just tech,"* and it's true. I can have a lot of good ingredients in my kitchen and know how to use my tools 🔧, but it only becomes a restaurant when I start to think about my customers and the experience I create for them.

The analogy breaks down somewhat there though doesn't it? As with learners we want to be co-creating the path forward with them, and Gordon Ramsay sure as hell doesn't want me coming in back and poking around his kitchen giving my contribution. As the chef he's thought of me, sure (well...maybe), and thought of the experience he wants to give, but it is delivered rather than co-created. This is the divide between being a charismatic presenter, and one who is actually facilitating/teaching: what Alison King labeled the transition from *"sage on the sage to guide on the side."*

"Imagine you are planning a road trip for your summer vacation. Do you hop in the car one day and mindlessly drive wherever the road leads? Very few of us begin journeys without thinking about where we are going, how we will get there, and what we will need on the way."
– Darby

I mean, yes I have taken drives without a clear path, but for class, maybe not the best idea. This is why for me the guide analogy, no matter how oft said, still resonates. This seems obvious, but too often it is not– the training becomes a checkbox.

We need:
- A destination,
- A reason why we *all (you, the learners, the organization)* want to go there,
- A map showing us potential stops on the way (both to guide us, to show us how far we have come),
- Weather reports 🌦 to provide feedback along the way (are learners' brains getting stormy or is the sun still out?),
- Ways to keep us engaged so we don't constantly ask are we there yet, were we there yet– so that the journey itself is meaningful and enjoyable,
- And a way to know when we have reached the destination (and where we might want to go next).

Tech doesn't change any of this, it just gives new tools for getting there. Many making the switch forget that.

The digital difference: experience roadmapping
With so many facilitators moving sessions online for the first time perhaps it is no surprise that we've lost our way. With learners surrounding us in face-to-face sessions the landscape shapes us towards interaction, but online the environment often nudges towards webinar mode. What we somehow forget when go online, as Biech gently reminds us:

> *"Trainers do not deliver knowledge and skills; they facilitate learners to acquire them."*
> *–Elaine Biech*

This is why we must remind ourselves, step back and remember, that we are guides: a definition I hold onto for the same reason I like the term facilitator more than trainer. A trainer *trains*, and it is too easy to provide a singular direction on that engagement, to deliver a webcast, whereas a facilitator *facilitates*: built into the word itself is the requisite balance of engagement and ownership of the process, while at the same time holding back and not giving it all the shape it takes. A guide helps you get there, but you go together, or not at all.

It's not enough to just make your content online clear and simple. Learners, of all ages, want to understand how what they are learning matters to them. They need the opportunity to try on and reflect on new concepts, as well as connecting them both to existing knowledge they have and their personal/professional lives. Ideally, learning is social, in that the learners can build off and share ideas with one another. A diversity of perspectives in the

classroom allows for better perspective-taking and assumption checking. We'll be applying all of these guidelines through a virtual lens below.

Need a bit more help with establishing a sage-like self before heading into the virtual space? Four of my favorite primers are:

1. **Telling Ain't Training:** A classic work that does a spot-on job explaining why bite-sized learning matters (and how to do it).
2. **Design for How People Learn:** Gets into motivations and how we can align with them.
3. **The Art and Science of Training:** Elaine Biech is a legend in learning, and this is her best work.
4. **Caffeinated Learning:** How best to design for short attention spans and interactivity. Plus... caffeine.

Helping to answer: why are we here?

In the Art of Gathering (go <u>buy it</u>, seriously), Priya Parker notes that *"When we gather, we often make the mistake of conflating category with purpose."* In other words, we train... to train. Whereas what we really need to do is *"Reverse engineer an outcome: Think of what you want to be different because you gathered, and work backward from that outcome."* L. Dee Fink's book, Creating Significant Learning Experiences, takes it one step further, and asks us to project into the future– what would we like learners to be doing differently because of what happens here? Then ask yourself, as suggested by the Heath brothers, how much of what you are planning to do in your webinar *"will advance your students toward the dreams you have for them?"* Cut everything that doesn't create momentum toward that aim.

If we want a real chance to create meaningful online learning we need to consider:

- the overall goal (why we are gathering, really),
- organizational context (why they want this),
- the individual drive (what is in it for your learners)?

Begin with a clear end in mind

As Huggett writes, *"Even if you have a situation in which knowledge is the outcome, there is usually some way that learners need to act upon that knowledge.[13]"* So what is your specific objective? Which would you prefer:

A. By the end of this workshop, a learner will know three methods for handling difficult conversations.

B. Or, by the end of this workshop, a learner will be able to:
- Recognize the difference between online and offline difficult conversations,
- Apply deescalation strategies to turn conflicts into conversations,
- Prevent conversations from escalating through perspective taking.

Your turn. *What's your clear objective?*

> *"Placing student learning outcomes in the context of real-world problems gives purpose and meaning to knowledge and skills."*
> *—Gagné & Merrill[14]*

[13]Huggett: The Virtual Training Guidebook, 2014

[14] Gagné & Merrill: Integrative Goals for Instructional Design, 2000

Align with organizational context

If you're running a public program, or an open course where people have self selected you may be able to skip this one, but if not, we need to understand the larger landscape into which our program fits. Nothing exists in a vacuum, and all our good deeds come undone when an organization does not support them.

I remember training a group on better meeting structures, with a focus on action oriented agendas, and meaningful conversations. At the end, a participant opined, *"I really wish my boss had to go through this."*

The pain of perspective: Like knowing what a Michelin star meal tastes like and being only allowed to eat microwave meals from then on. 🍔 🍟 Knowing what a meeting could be made knowing what their systems allowed... painful.

To avoid this, we need to speak to program organizers, stakeholders, and ideally representative target audience members to find out:

1. Why does the organization want this? What's the big goal for our program?
2. Why this topic now now? Always critical, but especially during the challenges of 2020, why do we want this session now?
3. What is the challenge this program addresses?
4. What happens if we don't do it (what is the cost of doing nothing, or of doing something else)?
5. Who is invested in its success? Sponsors, senior leaders, etc. Talk to them. Get them involved. "The more variety of perspective, the more likely the

training will be to address not just the explicit needs but also the 'implicit' ones of various stakeholder groups, with a considerable positive effect on the impact the training can then deliver."

6. What holds the status quo in place: how has it been dealt with before (were previous programs successful), and if it has not been addressed before, why not? For every problem there is someone who benefits from keeping things the way they are. Every change, no matter how positive, makes it harder for someone to do their job "the same old way," whether directly or indirectly.

7. What will success look like? How will it be measured? What else contributes to the measurements (other factors beyond training)?

8. How will change be rewarded and supported? We need to make sure this is not just another checkbox for the client.

Ultimately the goal of this alignment is to make sure that what you're doing is making a difference. The deeper that meaning is embedded within the objectives, the more likely learners will have emotional engagement with the content.

The digital difference: organizational alignment
Budgets are tighter, so one would think that this would lead to greater scrutiny, but with so many other moving pieces there is often the tendency to treat online learning as just another checkbox webinar. At the same time there is also greater opportunity to get leaders involved– when everyone is remote they can be anywhere. Get sponsors more deeply involved.

Always ask: why digital?

Every step of this process we need to be asking the organization, and ourselves– why is this being done live online? Our basic principle is summed up by Huggett who notes, *"Do not try and do synchronously - in session - what you can do asynchronously - out of session."* Attention spans in session are short, so we need to know, is there a genuine purpose for learners to be together for this moment in time? Is the act of them discussing and practicing it what will make the critical difference, or would they be better off just reading a PDF or watching a video? Every moment of your session that cannot be answered with a resounding yes, is a moment where drift begins.

Get to know your learners' needs. Of course.

We get it, although we sometimes forget it– humans learn better when they care about the topic. When you're hungry you're more likely to want to eat. My goal is always to create a course that they would be willing to choose to take and pay for on their own if they were given budget control by their organizations. The key to that is the same question Fink asks, *"What is worth caring about in the course?"*

> *Participants need to know how this information or content is going to affect them, why they should care, and how it will make a difference.*
> *–Elaine Biech*

Knowing what is worth caring about is made much easier the more you know them. *Warning, slightly longish bulleted list on the next page.* Ask them, or at least ask yourself:

- Who are they? Learn their names and history if possible.
- What brings them here today? What challenges do they have, what do they hope to get out of this... or are they just required to be there?
- What do they carry with them? Experiences, potential biases to the topic, key questions. Every question is a potential stop sign on that roadmap, but a stop sign is also a place where we pause and take the opportunity to choose where we go next.
- What have they already done on this journey? Talked to a supervisor, taken other classes, etc.
- How well do they know each other? New groups require more collaborative scaffolding, especially online.
- What will make it hard for them to carry this back to their work? Sometimes we make it too easy in the class kitchen– easy cooking under the controlled environment of a guiding chef, but out there in the real world the meal burns.
- How comfortable are they with tech? For all of us, day by day, the answer is more and more comfortable, but with that comfort also can come assumptions that lead them to believe you're delivering just another webinar/webcast.
- What do you expect them to bring to the table? It isn't just what you bring that matters. A good education is at least partially co-created, so it's great to think about what exactly you'd like your participants to bring, experiences you'd like to have them share, and how you'd like them to support each other.

Many virtual training programs fall prey to must include all this content in an hour syndrome. This leads to trainers who lecture, slides full of too many words, and a lack of meaningful activity to assist in the learning process.

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Cindy Huggett

The digital difference: learner analysis

I remember years ago, sitting down for a drink with a fellow trainer who was visiting Seoul🇰🇷, who turned to me mid-glass to lament, *"I love coming over here, but I wish the audiences weren't so damn quiet."* And the voice inside my head tilted to one side and asked, "Are they *really*?" I hadn't found it to be the case, at all. How could he and I perceive the situation so differently?

To me it seemed, engagement with ideas in a well-managed training was nearly universal: it was only after pausing for a deeper bite of that ponderous *how* that it became clearer: while engagement and active discussion were almost always possible, the approach needed to create an environment conducive to that sharing varied significantly from group to group. Yes, all sorts of obvious.

Why do we care? A virtual environment, coupled with an uncertain learning landscape filled with change, magnifies both our need to create a place where learners feel psychologically safe, as well as the challenge of creating one. We present, we teach, we train, we debate too often as though the others in the virtual room were a mirror of ourselves. As Roger Fisher, a former trial attorney and professor at Harvard exclaimed, *"I often failed to convince the jury that I was right, but I never failed to convince myself."* To paraphrase: I often convinced myself tech would be easy for learners to use and all would flow smoothly. If only.

The need to bake in both an awareness of different perspectives, and a method that allows those perspectives to come to the surface, is what separates good training from "I wish the audiences weren't so damn quiet." It

doesn't matter how teched-out your platform is, or how interesting your content is, or how clever your interactions are if learners are not invited into a place they feel ready, welcomed, and able to learn in. Without better frameworks for deeper conversation, we are only reaching a fraction of our audience.

At a minimum, know where the gap is for your learners, why that gap matters, and how you hope to get across it, or at least get them heading and reflecting in the right direction. In short, everything should be learner-centered rather than information-sharing centered. Who will show up for you, if you don't first show up for them?

> *"The who is often tied to the what. Specificity sharpens the gathering because people can see themselves in it."*
> *—Priya Parker*

Size matters: can & should are rarely the same
How many should be in your workshops?

Fewer. Is. Better. There is a temptation that just because virtual platforms can support 100 people dialing in, it means that they should. Virtual training mirrors face-to-face limitations, in the sense that interaction, reflection, and feedback levels can be fairly well predicted in a well run course by looking at the numbers.

My favorite session ever had 8 people, deeply engrossed in conversation, over a number of modules stretched over

days: enough to get good group dynamics and conversation going, but not so many anyone got lost. We don't always have the time or budget to go Michelin star: there is a balance between brevity, depth, and attendance levels. If you want to really engage with a single facilitator, aim for 8-12 delegates. Push back at any over 16, or at least recognize the tradeoffs. You can have a great energizing session with 40 people, but it won't have the same transformative effect as it would if the audience was smaller. Without asking, big groups subconsciously give themselves permission to disengage: a vibe not true with 12 or less.

Keep it short, but not that short

Everything takes at least 15% longer online, and often more. Don't rush it or expect it to move with the same precision and pace as face-to-face, and you'll create a more comfortable pace for learners. This is not an excuse to get sloppy, just an admonition to avoid trying to directly transfer a 90-minute classroom session to a 90-minute online one. There is no copy-paste.

How long do we suggest? Shanks' research found 51 percent of live online classes are 30-60 minutes long, and 41 percent are 60 to 120 minutes[15]. Personally I think less than 60 is not ideal, as it does not create enough breaking room for reflection and application, but does encourage learners to schedule another meeting back to back.

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[15] Shank: Getting Started with Synchronous e-Learning, 2010 (via Huggett)

You *CAN* do this all day, and do it well. But let's focus on 90-120 minute blocks for now. Either way, take a break every 60 minutes, or learners will take one for you.

Leave room for humans: conversation and change
In a 90-minute time slot I will usually have 75 minutes planned. Not 75 minutes of me talking mind you, but a 75-minute blend, with 15 minutes of flex time for what arises from the dialogue in session.

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"Connection over content. Online participants are still HUMAN." – Jimbo Clark

Hardest one so far, go back through this chapter and give your own answers to our three key levels:
1. What is the organization landscape and direction (which way is the world spinning)?
2. What are the individual learner needs within that landscape?
3. What objective can you set that helps get your learners closer to where they need to be?

In order to be meaningful, objectives must exist fully in service to helping learners meet their very real needs.

6. Welcome them to the party.

The two most recent memorable welcoming experiences I've had are from the Airbnb I stayed at when I was last in Seattle and the onboarding letter for the coaching software I use. In Seattle, what could have been a pleasant and perfunctory sharing of information, was instead a genuine and conversational welcome letter. I'm sure they had sent similar (or even identical) ones countless times before, but the document served its purpose— it connected me in a way that went beyond *"just the facts."*

"The way we gather matters."– Priya Parker

Likewise the software intro email was warm and conversational, genuinely speaking to me as though they were in my shoes.

When were you last welcomed in a way that matters?
Hospitality is not just for the hotel industry or for formal employee onboarding– it is a crucial piece to building your own meaningful training moments.

As, Michael Stanier writes in *The Coaching Habit,*

> *"Five times a second, at an unconscious level, your brain is scanning the environment around you and asking itself: Is it safe here? Or is it dangerous?... When your brain feels safe, it can operate at its most sophisticated level."*

Learning environments, being places of potential change, are already a space of vulnerability where we try to craft safety. Learning in a live online tech space, during a difficult time for many, magnifies that challenge. How can we set learners up in a way that they feel welcomed in a place that is safe to stretch and explore?

Ask yourself:
- What form should it take?
- How do you start the conversation?
- What is your ritual of welcome?

We can draw a lot from coaching
Turning to coaching provides a strong nudge into how we can welcome well– focusing not on imposing our view, but on understanding well, and demonstrating we are there to listen and help. At the same time the coaching mindset sets the right tone for learner involvement: we expect them to

show up as well and be fully present. We're not handing them something pre-set and external– we're helping them take steps forward with their own challenges. In my own facilitation, the more I remember to behave like a coach, rather than like a manager, the more sessions flow. Going digital requires a reemphasis on this mindset of placing listening and ownership transfer first, or else you'll end up with just another webinar, telling potentially interesting stories to an audience that is vaguely amused, but rarely moved to change.

Whatever you do, don't call it pre-work

Huggett writes, *"The term pre-work implies that it's not important because it comes before the learning event,"* and suggest calling it Part 1, or "action assignment". For me I prefer to call what we do before a *conversation starter*, because really for me that is its purpose. Regardless of how you do it, use it as an opportunity to mirror the kind of engagement you want to have face-to-face. Think of how you want them to interact with you in session, and lead the way through what you send.

Get physical: consider your kit

Tiny moves matter. You don't need to go as fancy as mailing an actual kit (although imagine if you *did,* how would a participant feel), but a well-crafted PDF/email is a great way to get participants ready by both breaking and setting expectations early. Rather than merely scanning yet another screen, what can you have do offline to get ready? Worksheets to fill out, mental exercises to try, tools to prepare, conversations to have.

Begin before you begin: sent 'em with momentum
Whatever form it takes, your welcome kit serves 4
purposes: *technical, humanizing, expectation setting,
and motivational.*

1. Technical onboarding:
This is the more informative part, but clears the hurdle of
wasting the first 20 minutes of a workshop dealing with
tech and bad audio/video. Our welcome email includes a
Zoom test to check their system (audio and video) and also
has them do a speed test to make sure they are dialing in
from a good spot. If we're using a whiteboard platform like
Miro, we'll create one that learners can access in advance
to try the tech, as well as to do early self paced exercise.
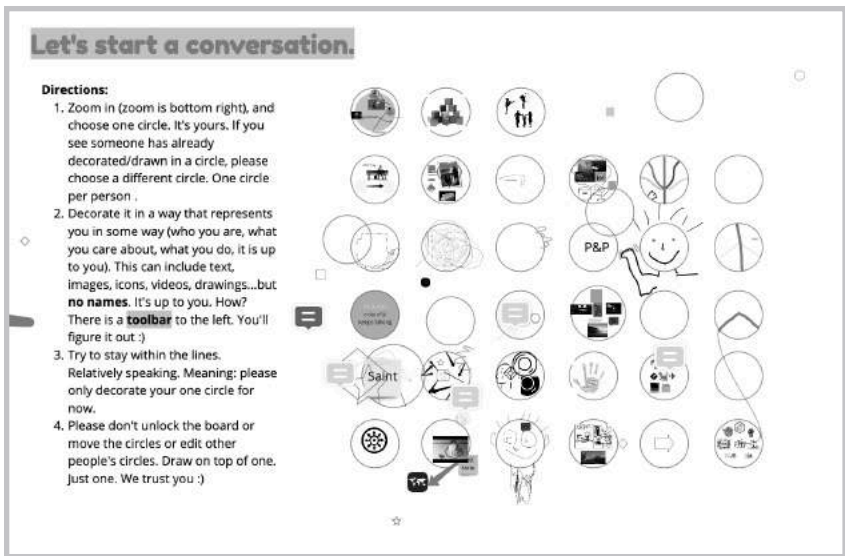
Miro Canvas pre-session prep (artists one & all)

Want to take it one step further? Many platforms have free
versions: have learners do self organized pre-session calls
to start forming community early (as well as continue these

calls between and after sessions). What are the perils of not checking tech? On one call I had last week with my friend, her son, on homeschool lockdown, froze our video every time he got into a particularly intense Fornite encounter. If you're using *any* features in your platform or external to it (even something as simple as how to take a screenshot) have them try them on before. Whatever your chosen tools and platform, if the first time they touch them is in session...be ready for snafus. Giving time to test early builds muscle memory so that tech can disappear into the background and conversation can come to the foreground. If tech is a barrier, the session becomes about the tech. People often feel shame which turns to blaming tech if put on the spot, but if you let them try the tech on beforehand those same people will turn that panic into pride.

2. Humanization:
Introduce yourself, consider including a short video welcome to create authenticity, and then ask them questions. Yes, it's good to include questions on what challenges they have in the topic area, but try to go beyond that: better non-generic questions lead to deeper pre-session engagement. Your goal is to both pique their curiosity and gain valuable insights into their motivations. What else? Use their questions and their answers to adapt your content. Ask yourself with every module and minute of your session: how is this answering their key questions, and how is it serving to help them change...something– be that an action/perspective/or direction? What does not create momentum does not serve the cause. Cut anything that isn't interesting or surprising in some way.

Consider looping in manager conversations as well (as many of you already do). When managers make learning matter, learning matters more.

3. Expectation setting:

On the more logistical side, share guidelines regarding multitasking, participation (we want participants, not passengers), and punctuality (we actually have people wait in the virtual lobby until a break if they are late– there is nothing more distracting than people coming into a movie and shouting "what did I miss?"). Get this permission to engage early: let them know you'll be asking them to answer questions, and check that they are on board with that. If you ask, they usually will be, as long as the request is phrased as positive, not punitive. We have a link in our welcome email that says clearly *"only click on this link if you are thinking about multitasking."* It leads to a picture of a kitten who is very sad the learners are multitasking. Really: knowmium.com/really. Sharing of expectations isn't one way– ask them what guidelines they agree/disagree with, and what they suggest.

Think, ink, & link

Directly incorporate and link ***all*** pre-session conversations, readings, actions, etc. to in-session discussions. Failure to do this leads learners feeling both a disconnect between the materials, and a sense that you've given them busy work (a capital offense in work from home times). Incorporating doesn't mean duplicating, mind you, as that also wastes their time. Ideally pre-session actions provide the spark for session fires. 🔥

People don't want to learn from software. They want to learn from people aided by software.

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Dan Heffernan

Camera on, selfie off

Would you check or write an email mid conversation? Would you turn your chair around away from the group? Would you look repeatedly in a mirror? Likely not, but online we do all three. Being online, especially with a lack of video lowers accountability and greatly decreases trust. Research by UCLA[16] (among many others) provides ample clues to the decrease in our sense of collective humanity digitally: how we switch off when we switch on. But it doesn't have to be, and even *"textual affiliation cues like emoticons and typed laughter,"* help to bring us back to life.
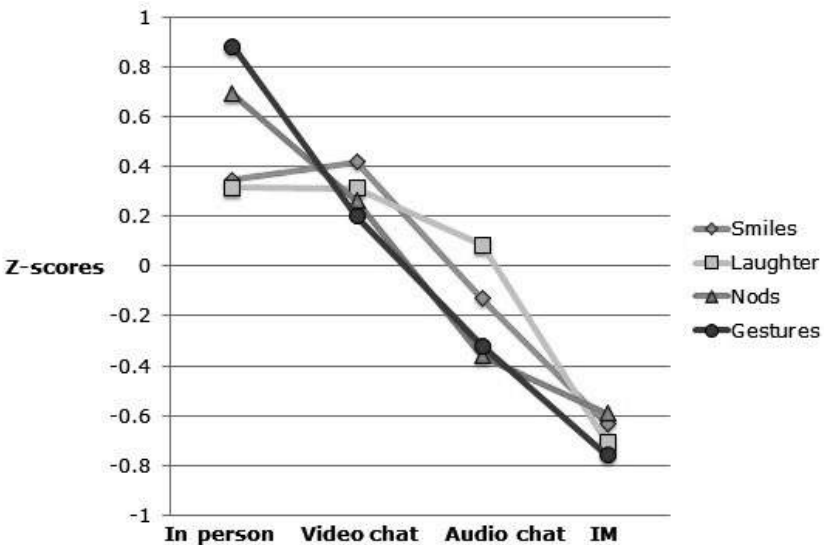
UCLA findings. Don't ask me to explain a Z-score.
TL;DR: video matters.

"But I just want to listen to the class, and I'm on a call so I don't want to be rude." Alas, no. You can't do both. If

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[16] Sherman, Michkiyan, & Greenfield: , https://bit.ly/2XNiskP, 2013

someone just wants to listen, then they don't really want to change, at least not now. Someone who just wants to hear about cooking, and watch cooking shows, wants to fantasize about being good at a skill rather than actually becoming good at a skill. We don't need any couch cooks in class. No one said you have to be awesome, but you do have to be trying.

Expectation set: Turn those videos on, and get emoting. The video downside? We focus on our own face far too often, causing cognitive stress. An easy fix from Daniel Stillman: turn selfie mode off. Instantly others become your focus. Trust me, you won't miss it. Mostly.

> *"Justin Patton… begins building rapport even before the class begins. He will send a message to participants in advance of the class, asking them to briefly respond with a short answer… "Tell me one word that defines your coaching style" For those who respond, Justin incorporates their answers into the class."*
> *– Cindy Huggett*

4. Motivational:
Build buy-in & bust boredom: even if they like the session topic, many are coming in expecting a standard talk to the slide webinar: how can you show your excitement and convince them it is so much more? A few short articles/ videos matching the session context are a good and standard start at building credibility, but a personal share

from you as to why you feel it matters, along with a few survey questions related to core challenges you see in the topic that help connect it to the learners' lives can make a huge difference. Simon Sinek talks about <u>starting with why</u>... let's start with why before we even start.

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"Your opening needs to be a kind of pleasant shock therapy."
– Priya Parker

1. What goes in your welcome kit currently? What could you add?
2. How could you break and exceed expectations with how you welcome?
3. How can you lower the bar for entry to make it easier for learners to join the workshop already running? Which of these ideas are realistic and manageable?

The last one is key– I recall a sales bootcamp where one internal manager I was collaborating with believed that learners would be ok reading and working through a veritable MBA's worth of case studies prior to the session.

Fun fact: they weren't.

"Virtual training must be more interesting and engaging than whatever distractions surround the participant." – Cindy Huggett

7. Get your game face on.

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This one's for you— test your tech, yes, but also get yourself mentally ready to be in the virtual space. Facilitating online often takes more energy than off, especially if you're new to it, even if you're wearing your lucky pajama pants (or mermaid costume or whatever) beneath the camera frame. Your experience bounds their experience: what you bring sets the limits of what they bring. The more you bring a sense of energy, collaborative curiosity and play the more they will as well. How do we go from *good* to *gravitas*?

Get ready:
- Send day of *"just in time"* reminders out to learners designed to nudge them towards preparing for the upcoming session. I like to include one or two quick fun quiz questions in them, with answers given in session.

- Check your tech. Yes, again. Close any apps you don't need. Video is bandwidth and processor greedy. Plus you don't want to have any distractions.
- Do any last run through with your moderator (if you have one, and if at all possible, do): they encourage participation, they model good interactive behavior, they monitor the chat, and many times... they save you from disaster.
- Clear your space, mental and physical. Get learners to do the same (one of the favorite warmers I have seen is giving everyone 30 seconds to do a distraction detox– clean their space and brain of all that is getting in the way of being present).

"Take a moment to mentally arrive where we physically are." –Daniel Stillman

- Warm up that voice– even with video, the power of voice online is central. Take yours from basic to broadcast.
- In many sessions, we build 10-15 minutes of mingle time into the official schedule before the content starts. This is not wasted time, but time spent removing the mental miles traveled to get there, and checking for any last tech hurdles. Have a *"start before the start"* activity on the screen that serves to guide people around the space and also humanizes them to others. Easy examples:
  A) Change your name in the participant list (possible in most platforms) to be: Name– Location– Favorite food/movie/etc.
  B) Complete a sentence starter in the chat.

- Mark the transition to another place: show up early, welcome everyone (let them in from the waiting room...and yes do make sure you have turned on the waiting room), ask them a question based on what you recall from their pre-work. Show them you remember, and care.

The more effortless and seamless you make it for delegates, the better they will trust in your process, and the faster the virtual barriers will disappear. A good video chat with an old friend can feel like conversations at coffee shops long ago: both intimate and authentic. It's a high bar, but that's the level of warmth and safety we are trying to create because that is the level of warmth and security it is possible to create.

TRY IT ON: Experiments in Brave Facilitation
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"Welcome! We'll be starting in a few minutes. A few people are just stuck in some traffic between the bedroom and the living room." – James Bishop

1. What do you do to put your game face on?
2. How do you help learners "start before the start"?
3. What behaviors do you have that you might need to consider changing to make your beginnings better?

"The secret to sustained, session-long participant engagement is early engagement. While that may seem less than profound or an unsurprising 'secret' technique, it is one that really does work!" – Christopher & Hyder[17]

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[17] Christopher & Hyder: The Successful Virtual Classroom, 2014

Part 2:
Running Remote

8. **Be better than ever.**

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Answer honestly: how many times have you been distracted in the last hour? Linda Stone calls the state many of us, and our learners, have "*continuous partial attention.*" People check their phones, on average, 47 time a day (track yourself, be surprised).[18]

It's hard enough when we're face-to-face (we use a phone oasis at the back of the room during face-to-face sessions– learners are welcome to "rescue" their phone on breaks… most don't), but when doing sessions online, where the main source is right at our fingertips (and just out of camera range), the temptation is often overwhelming.

It doesn't have to be. 🧨

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[18] Deloitte 2017, Global Mobile Consumer Survey

At the end of a 2-hour session it is fully possible to have people exclaim, *"Wow– I didn't even realize how the time passed,"* but to get there we need to be much more deliberate in shaping conscious conversations.

Either you are the distraction (in a positive way, carefully shaping the river of attention from one passage to the next through well placed rocks and thoughts), or they will find another one.

> *"We live in an age of information overload, where attention has become the most valuable business currency." – Davenport & Beck*

So, what transforms an underwhelming distracted workshop into something where participants speak freely, collaborate, focus, and learn? In discussing high school education, the Heath brothers noted that *"Even though high school students log more time in the classroom than anywhere else, their most memorable experiences rarely take place there,"* and shared one powerful follow-up question educators asked, *"What if we could design an academic experience that was as memorable as prom?"*[19] This is the questions we ask ourselves (albeit minus prom): how can we design live virtual sessions that are not only as effective as face-to-face, but truly memorable experiences?

Relying on the sheer force of facilitator energy coupled with good luck won't cut it. What follows is not meant to be an exhaustive spin on how to structure your session, but to get us to simply step back and ask: how can we best

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[19]Heath brothers: the Power of Moments, 2015

For people to learn something well, they must hear it, see it, question it, discuss it, and do it. They may even teach it to someone else to solidify their understanding of the information or skill. An active approach to training requires a variety of strategies that promote all six processes— hearing, seeing, questioning, discussing, doing, and teaching.

Elaine Biech

translate or even improve on classroom techniques in the virtual space, what tools can we use, and how can we lower the barrier to using them?

> *"We are smart people; we have, let's say, this much |_____| bandwidth; listening takes up this much |_____| bandwidth; something is going to sneak in and use the remaining brain space."*
> *–Heather Ordover*

How can we create moments that matter?
We can't lecture, that much is certain. A study by the UBC compared lectures to interactive sessions, concluding that learning only happens *"when you have...intense engagement."*[20]

To engage we need to ask ourselves, in our workshops:
- *What helps people care?* If they don't care, you can bet they'll drift.
- *What helps people remember?* If they care but don't remember, you've got edutainment.
- *What helps people apply?* If they remember but don't apply we're still sitting in the wrong side of that knowing-doing gap chasm.

We'll be thinking of how we can create learning connections virtually, between the learners and:

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[20]Huggett citing Mervis: The Virtual Training Guidebook, 2011

- you (the exceptional facilitator),
- each other,
- technology (ideally to make it seem to disappear),
- the content/topic,
- the task which flows from that content,
- the outside world, their life, and job (to make that follow through happen).

Our approach is to look:

1. **On a structural level** of how we can create motivation by making material approachable while increasing the challenge and ownership transfer the further we go, and,
2. **On a flow level** of how we can get people trying, and applying so we make learning stick.

> ### *Enough preamble: let's do that shall we?*

TRY IT ON: Experiments in Brave Facilitation

"It has become appallingly obvious that our technology has exceeded our humanity." – Albert Einstein[21]

1. What is the most memorable virtual session you have attended? What made it so?
2. Outside virtual or face-to-face learning, what have been your most memorable experiences? What made them memorable?
3. What elements of those experiences could we leverage to bring more humanity, curiosity, and meaning online?

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[21] Facilitators are legally required to quote Einstein at least once in every book/session.

9. Build a scaffolding to awesome.

Let's get this out the way: a lot of what we cover in the next two chapters aligns with best practices for face-to-face. If you've studied education theory in some form, you've seen a lot of this. But you should read this anyways.

Why?

They'll each take around 7 minutes to digest for an average reader: to me 15 minutes revisiting and reflecting on how this all works through a digital lens is an exceptionally worthwhile excursion. I've learned more in the last month about what I *"thought I knew"* about teaching than I care to admit. After this we'll jump into applying these two chapters to a real workshop flow on page 97.

I challenge you to really do this, step by step. There are no shortcuts to becoming Radically Remote, but that doesn't mean you won't get there. It's just that in online learning the bar has been set far too low by an endless stream of free webinars.

I say raise it to the roof, and let's go for it.

"The technology itself is not transformative. It's… the pedagogy, that is transformative."
— Tanya Byron

In this chapter we're looking at creating motivation and momentum through:
- **Chunks:** ways of breaking up content to make it more engaging and memorable,
- **Builds:** ways to sequence those chunks to make flow from one to the next.

Look at all of our lovely chunks
- **Simple chunks:** Fancy virtual interactions and tech tools are great when running smoothly, but a lot can be done with the simple use of the chat bar, whiteboard, polling, and breakouts. Practice being able to quickly use those tools you have flexibly and you'll be set up to make changes on the fly. Really, tech is just tech– what matters is what is underneath. The content, and the methods by which it is engaged with. As Peter Singer wrote, *"Whatever cannot be said clearly is probably not being thought clearly either."*

- **Bite-sized chunks:** This is true face-to-face, but even more so virtually. The research is incredibly clear, as Biech writes, *"students learn new material most easily when the instruction is designed to minimize cognitive load."*[22] Too much and we just can't process and take mental breaks... to our phone, internet, anything. Change it up every 4-6 minutes or so *max* (meaning switch to reflection or an activity, or another way of sharing/questioning). The vast majority of live online learning gurus line up firmly behind the 4 minute mark. I get it, attention spans can be quite a bit longer if the material is really interesting. We don't yawn often during our favorite shows, but it is best to err on the side of engagement– not for novelty, but because we want to know how the learners apply information, not just absorb it and go *"wow."*

"Always include a 5-minute break in a 2-hour session. You will find people return with more energy and so you can make maximum use of the time available in the second half of your session."– Cindy Huggett[23]

- **Overall less chunks:** Less is more, especially if you go deeper on fewer chunks. As James Lang echos, *"You will be doing your students a much greater service by reducing the amount of material that you are covering and actually ensuring that students are*

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[22] Biech: The Art and Science of Learning, 2019

[23] After how much I quote her, you all really ought to check out her website: cindyhuggett.com. So many resources. And buy *The Virtual Training Guidebook*.

learning it, rather than making sure that you are ticking off everyone checkpoint in your ideal syllabus."[24] Save room around the chunks to be flexible– plan at least 10-15% flex time. That means for 2-hour workshop, nearly 30 minutes is built in as flex.

- **Anchored chunks ⚓:** Every activity switch creates danger of confusion and attentional drift as we close one box, move to, and then open another. So give an assignment that creates an anchor in the next location.[25] Basically– be clear on what the move will look like (going to breakouts, taking a quiz, doing a brain dump writing, etc.), what to take with them from the box being closed, and how to easily get going once they have gotten to the new space.

- **Gamified chunks:** The good news? Every adult is a grown-up kid and reacts as kids do to competitive timers, jeopardy boards, and the like. The bad? Gamification is largely an external motivator and doesn't drive deep follow-through. If you only get people to act by giving them candy, then they probably won't act in the absence of it. Still– it's fun in virtual, wakes people up, and is good for basic memory retention checking. Gamification can go deeper as well, creating business simulations that learners work through in groups. I wanted to dislike things like Lego Serious Play, but, when done well, it works. Making conversations physical and visible leads to surprising insights. Easy tip to up your gamification and make it more meaningful: have learners create the questions others will have to

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[24] Lang & Darby: Small Teaching Online, 2019
[25] Wright & Ward: Orienting of Attention, 2008

answer to double up on retention. Balance gamification with...*thinkification* (not a real word).

- **Surprising chunks🦄:** The unexpected often wins in training, and the more virtual becomes our work pattern, the more we need variety and a bit of the unexpected to get people to turn off their autopilot. The brain gets bored if everything is the same, even if it was awesome at first taste.

"Our brain is actually quite fickle; it quickly begins to recognize that the stimulus is not new and, through a process called habituation, the idea becomes less exciting." – Elaine Biech

Not weirdness for weirdness sake, but weirdness with a purpose. Just a little bit. Such as:

- Have a guest speaker dial-in (Elliot Masie had a guest singer from American Idol pop up mid-session for a song on a call I was on early April at 4:30 am...very memorable). Or hire a farm animal for your next Zoom: dangrooster.com
- Get physical– have people stand up and find something that represents an analogy of what was just covered (weird but good). In a session I was in recently the facilitator had us close with virtual high fives to both sides of the screen; cheesy but funny with the grid layout of Zoom. I had learners who were able stand up in response to questions, rather than simply giving chat feedback. Even something

If you're trapped in a room of fifty people and the organizer says, *"let's go around the room and have everyone introduce themselves,"* you know you're in for an hour of unhappiness. That's because no one is listening and everyone is nervously waiting for their turn to talk.
....

Seth Godin

as simple as having people respond 1-10 with fingers rather than a poll is a start. Get the body moving and the brain follows. Want to choose a volunteer? Rock paper scissors always gets a laugh in the grid.

- Use the fact your webcam creates a frame and use props or even puppets from the sides. You heard me, puppets. No one ever complained about compliance training having too many puppets. Ok, maybe not puppets. But did you know you can use SnapCamera filters in most platforms? Today I was a pineapple, ever so briefly I'm originally from Hawaii so that is my terrible excuse.

Not a suggested best practice. 🍍

- Slides can be nice, but they're static. Use your whiteboard (and ideally a tablet for better accuracy) and make notes, chart conversational connections. Generative

visualization is often more engaging and meaningful than preprogrammed ones.

Build it up, fire it up

Now that we have the basic chunks, it's critical to think of how we can sequence them. We'll look at more complex interactions in the next chapter, but the basics for getting virtual sequencing right are:

- **Ease in:** Fires start with first sparks. Warm people up not only through pre-session conversation, but at the start of the session as well. This is a great time for using initial virtual breakouts to get to know each other, share why the session topic matters to them, test the tech, and try on expectations. My goal is to get people in a breakout within the first 5 minutes, as that clearly establishes that this is different and they will need to engage. Get them connected to each other, and to the content/buy in around the content, fast. We're trying to warm up the brain, as well as the human side, and get them to realize the role they will play in the success of the workshop. An easy one– have people give their partner(s) a brief webcam tour of where they are dialing in from– it helps to understand others and expands the sense of space we are in.

  Don't wait until 10 minutes in to get people active. You've already lost them by then. Remember the Dewey rule: *the person doing the most talking is doing the most learning.*[26]*"* The worst possible version of this, which I've experienced, is a trainer who starts

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[26] Who actually said "*Give the pupils something to do, not something to learn; and the doing is of such a nature as to demand thinking; learning naturally results.*" Thanks Jaqueline!

by stating how interactive they want the session to be... and then proceeds to lecture for 45 minutes with maybe the occasional *"does everyone understand?"* tossed in.

The first few minutes is also a great time for making sure everyone is not just physically present, but mentally as well: a quick go round and agreement on virtual etiquette is well placed. Karen Hyder has the right idea:

"Hyder... posts a poll at the beginning of her virtual classes. The poll question asks participants to rate themselves on how engaged they plan to be." – Cindy Huggett[27]

- **Transfer ownership:** Did you ever read *Choose Your Own Adventure* books as a kid? I did, and cheated relentlessly by marking pages. While structured, the format creates curiosity and a sense of control. Good virtual learning involves the flexibility to include choose your adventure elements, where the learners have a voice in the next direction. If you're talking more than half the time, then you're the main one learning. Have them present (and let them take over and use screen-share/annotation), and see what they think– how does what you're sharing impact them, and what will it mean to them going forward? Use teach-backs as a way to help them connect, plan, monitor, and evaluate their own learning and modify

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[27] Huggett citing Hyder: The Virtual Training Guidebook, 2011

strategies. Balance task with relationships: we learn together.

"When participants in an online course help establish a community of learning by projecting their personal characteristics into the discussion – they present themselves as real people." – Michael Spector

- **Raise the level of challenge:** There is a time to keep it easy, and a time to bring on challenges. There are *"significant cognitive benefits from trying learning tasks before they are ready."*[28] The *"aha...I don't get this yet,"*

High Performance
Yerkes-Dodson law

Low stress   Moderate   High
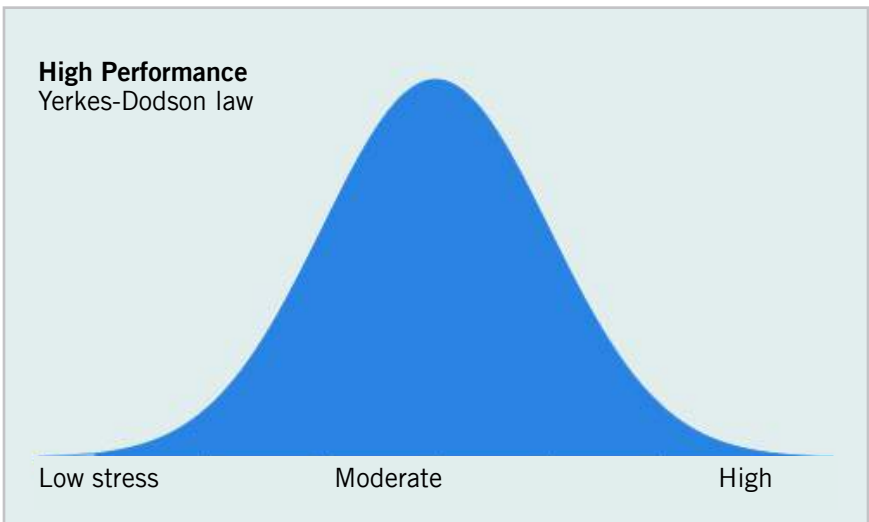
Not a Covid-19 graph. No need to flatten this curve.

28 Lang & Darby: Small Teaching Online, 2019

increases subsequent focus. If we only spoon feed learners content, then they won't have the sense of positive struggle and accomplishment that results in lasting learning. Poke the hornet's nest. Just a bit. As the authors of Make It Stick write, *"unsuccessful attempts to solve a problem encourage deep processing of the answer when it is later supplied."*[29] When we know how much we don't know we pay way more attention as long as we believe there is a path to change, what Lang labels *"desirable difficulties."* When we face a moderate (not high) amount of stress in our learning it causes our performance to rise in response.[30] Keeping things in the Goldilocks zone, and being aware of how learners are doing online on the fly is the key to adapting well.

The forest & the trees

Step back from the building blocks– how does the overall session flow? Good sessions have a story to them, a musicality. We co-create a narrative with the learners where some pieces we know, some we ask them to add in, and some we discover together. But beneath all this is a map of the energy we want them to feel and experiences we want them to have throughout. This is what differentiates a movie that has good scenes, with a masterpiece that becomes real theatre. The pieces may stand on their own, but the collective whole has a grander sense of intention. Create an experience they'll remember,

[29] Brown, Roediger, & McDaniel: Make it Stick, 2014
[30] Lang & Darby: Small Teaching Online, 2019

watch how the larger story stands, and you'll have them applying lessons far longer than if done without.

TRY IT ON: Experiments in Brave Facilitation

"You will either step forward into growth, or you will step backward into safety." –Abraham Maslow

1. How do you chunk your material?
2. How well do you transfer ownership and raise the level of challenge?
3. What tools can you leverage to make sure learning online stays in the Goldilocks zone? How do you stretch your learners in a way that keeps them feeling safe and willing to grow?
4. How do you foster collaborative communities online?

10. **Make it stick.**

⬤ ⬤

T he awesome team of cognitive psychological scientists at _learningscientists.org_ have a good handle on retention, looking at six easy to incorporate strategies:

1. **Elaboration:** connect and explain how ideas and concepts relate to what you knew, and where you are headed next (core to good session reflection),

2. **Retrieval practice:** having to bring to mind previous concepts– think assessments and hands on practice,

3. **Spaced practice: s**pread it out to avoid overload– another reason why splitting sessions into 90-minute chunks may increase learning over crowding it all in a day,

4. **Dual coding:** mix up the mediums you get information by,

5. **Interleaving:** mix up the topics themselves. These last two basically are aligned to our note on creating "surprising chunks." The brain gets bored if not,
6. **Concrete examples:** show don't tell (and get learners sharing stories as well).

You'll see these six woven through this chapter on becoming sticky, where we focus on: *interaction, deliberate practice, check-ins, feedback, and reflection.*

Patterns of interaction

If people don't need to be present...they won't be. We need to make their presence matter in every element of the session. Cal Newport makes the point that small sips do not make a real drink in terms of communication, that the:

> *"Small boosts you receive from posting on a friend's wall or liking their latest Instagram photo can't come close to compensating for the large loss experienced by no longer spending real-world time with that same friend.*[31]*"*

The same can be said for session interaction. Busy≠good. Moving quickly from dynamic chunk to dynamic chunk, even when well executed, can have the same impact of too many car chases and explosions in an overblown Hollywood blockbuster: all splash, no substance. They're the virtual training equivalent of small boosts, but no real learning. Newport also cites Turkle, who:

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[31] Newport: Digital Minimalism, 2019

"Draws a distinction between connection, her word for the low-bandwidth interactions that define our online social lives, and conversation, the much richer, high-bandwidth communication that defines real-world encounters between humans.[32]"

I firmly believe that when structured well, our interactions online can achieve that richer level of discourse. This is why we're not talking about, or simply calling them *"activities"* here– they are patterns of opening the mind. People will get bored of polls and bad whiteboard sketches, but they'll never bore of good conversation, especially in a time of physical disconnect.

"It seems an obvious point, but pointless polling is an all too common practice, and it may have a negative impact on learner engagement."
– Christopher & Hyder

Even great chefs sample other chefs' cooking, and likewise even if you have great interaction patterns you rely on in session, exploring what others have done is well worth a taste. We don't want to fall prey to the trap of letting training devolve into webinar territory, where the only interaction is questions shot from facilitator to learner and vice versa. We've shared our favorites at *knowmium.com/ radical-toolkit*– a mixture of patterns we most use, along

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[32]Turkle via Newport again

with links to other great sources, from Liberating Structures, to Harvard's Project Zero, to Session Lab among others. No matter which one you choose, a few reminders come to be aware of:

- **Keep purpose top of mind**– what do you want the interaction to accomplish? Warming them up, connecting them, shifting their energy/mood, reviewing, or closing; whatever the purpose be clear to avoid just being a shiny distraction.

- **Careful on your duration and repetition**– the best interaction can become the worst when done too many times or for too long. Listen to where your learners' reactions go.

- **Consider groupings**–Mix pairs and small group interactions. Usually start with pairs- as that increases responsibility early on.

- **Watch those handovers**– One interaction should seed the next *(see anchored chunks, previous chapter),* with clear guides between, and a visible rationale.

- **Drop-in on breakout rooms** to help deliver small group coaching and feedback.

- **Engage everyone**– It's easy to be swept along by the illusion that things are going well when really just a few very vocal people are. Get everyone involved: leadership, not *loudership*. Raise up quiet voices.

- **Consider pacing**– Yes we want to change things up frequently in a virtual space, but that is *not* the same as rushing. Slow things down for reflection, journaling, etc. Strategic use of silence in session reenergizes the room.

- **Producer power** – Get your producer modeling interactions with you. Producer-facilitator banter is brilliant, as long as it still takes a fraction of the time.
- **Go beyond Think-Pair-Share** if you dare. Sorry. Had to rhyme one more time.
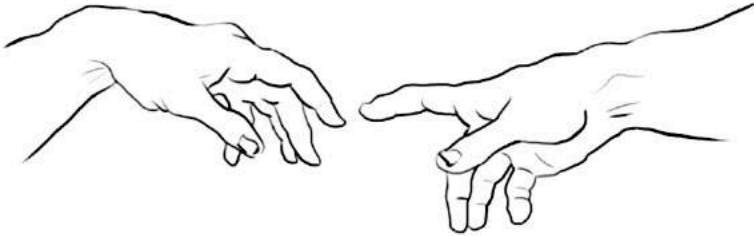
Drawing on deliberate practice

Too often our interaction practice guidelines look like this:

Step 1
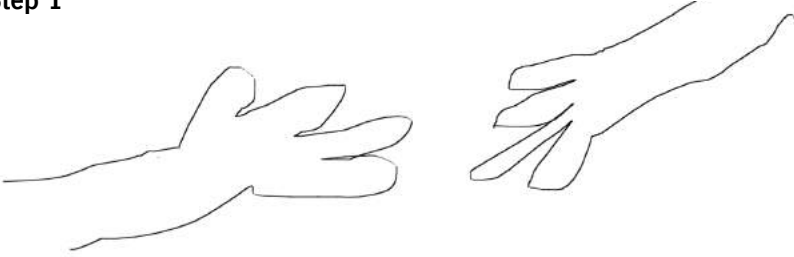
Step 2

Step 3

It's easy...really. 🤷

Yes, we want to put learners "in the path of inevitable learning." Yes, we learn by doing, not only observing, but only if that practice is meaningful and well structured.

Just as in our our pre-session prep we asked ourself: should I be doing this synchronously, or asynchronously, ask yourself in the topics shared in session: *is there a way to learn this through doing rather than hearing? Do I want to build in "desirable difficulties?"*

Our goal is two-fold: practice the thing itself, and be able to step back and assess/comment on the thing just done. Practice without awareness is practice without purpose.
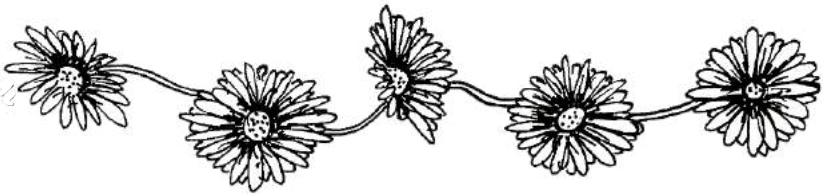
Like this, but with interactions & tools.

By daisy-chaining various interactions much more is possible that we often imagine. Trust your learners? In Zoom if you make them all co-hosts then they can freely move from breakout room to breakout room with no help from you. Recreating face-to-face practice is only the first step: its our challenge then to think how we can use the resources at our fingertips to go beyond, asking "*Can I take this further virtually than I would have face-to-face, creating deeper layers of reflection?*" In our next chapter, *Physical Places in Digital Spaces,* we'll explore one example of this chain of thought played out.

The most powerful virtual training involves at least two people - the presenter and the producer. The producer takes care of all of the "behind the scenes" things. – Bob Pike

Are we there yet? Progress markers & check-ins
Don't just ask *"do you understand?"* every few minutes and carry on. Trust me, many don't. Validate understanding with the tools in the platform– surveys, quizzes quick questions to be answered in the chat bar *(how clear is this between 1-10, followed by, how useful is it... if you're feeling brave)*. Go beyond an understanding check-in by asking follow up questions to take material deeper: your goal is to see how the material has resonated and then to link that to what comes next in a way that builds on that awareness.

My personal favorite check-in method is to pop up a review slide listing concepts covered and have learners use the shared annotation tools to mark it up with questions and comments. Remember that checking is also about more than knowledge: check for mood and energy as well. Do you need to shift plans to reenergize the room?

Check in by weaving in chat responses/questions periodically, but don't constantly respond. Master virtual facilitator Karen Hyder suggests adding placeholders within our slides or agenda where we will consciously pause and dive into the chat– so that it doesn't break flow, but also doesn't go so long the point of the comment/question is lost.

"(People) learn new material better and can remember it longer when they have to produce answers and not just recognize correct ones– that is, when they expect to have to free-recall material for short answer or essay questions."
– Nilson & Goodson

Check-ins are about more than just understanding. They also:

- *Check* **motivation:** is this engaging learners, do they care? Either way– why?

- *Create* **understanding:** showing how far we have come helps construct a stronger mental model, as well as points to gaps in understanding.

- *Create* **motivation:** we need to feel a sense of progress and possibility in session to keep focusing. Early assessments build confidence to stretch more. Assess them in a way that looks back and then tosses it forward.

Knew & Do 🏄	New & Woo 👍
Knew & Don't 🥴	New & Boo 👎

Categorize what we covered: My favorite knowledge check 2x2, usually done with virtual stickies in Miro

Feedback, feed forward, & reflections
No matter how engaging a module in your session is, no matter how memorable your overall training is, nothing sticks, builds, and carries into the workplace without reflection and practice. Too often there's a tendency to rush between modules or to cut time at the end from reflection when our schedules are running over.

Don't.

Think we don't have time to go deep? If we want to bridge that knowing-doing gap, we don't have time to *not* go deep. Closing off a module with meaningful reflection, and closing off the session likewise, is the only way to ensure the many interesting pieces glue together into something more than edutainment. Reflection is the moment where it stops being your story, and begins to become theirs, something true about who they could be, rather than just something they tried on and briefly experienced. There's a narrative imperative: when it becomes my story, it becomes what I do next.

It's easy to go to a cooking class once and make something tasty under close supervision and laboratory conditions. Projecting out and practicing on their own? That's harder cooking.

> *"(People) learn from their mistakes more effectively when they receive immediate feedback." – Nilson & Goodson*

Help them get there, not only by providing timely feedback, but also building on bright spots and sharing feed forward–how to grow what they know to what is next. Shape a visible path to success. Hint: If they can't see it, *and* share what it looks like verbally in a way that make sense, they aren't really on it. Substitute real progress for the illusion of progress: getting a gold star no matter what doesn't mean we have gotten anywhere other than 90 minutes older.

Get participants to consider and verbalize how the learning applies, and to map out: what matters, why it matters, how it will look to change, and when they will get the chance to do it. Reflection doesn't have to be high tech: break the expected flow and ask delegates to step away from the desk, go for a 5-minute walk around their room, and find something that represents to them a metaphor of what they have learned. Bring it back and share it with the group. Sounds weird? As we noted above, weird works.

A quick note: consider how you give feedback in virtual–public helps everyone (as we learn from each other), but for some learners private nudges are better. Use breakout rooms and private chat to minimize open feedback for those who prefer it. Give people the choice and explain the whys of each.

The forest & the trees redux
Let's turn to the chunks again, step back, and really see what we have to work with in an actual 90-minute session. Each block is 5 minutes (with a few doubled-up to 10), giving us 75 minutes in session, 5 minutes "start before the start" (as people arrive), and 15 minutes of flex time.

Start before the start: learners arrive	Check in/ ground setting	First quick breakout	Interactive lecture
Activity set up	Activity		Debrief
Debrief continued & transition	Interactive lecture	Activity prep	Activity
Activity continued	Debrief	Reflective close	

90 minutes in a blink

Each time we transition reorienting takes at least 2 or 3 minutes, and with questions and reflection the time vanishes before you know it. When you're doing a real interactive session it is amazing how little room there is. What this means to us? Time box everything, cut it down, and don't rush. Simpler and deeper is better than faster and more. Map at your own session and really step back and try to see the flow. What journey are you going together on, and where do you end up?

"(We) learn and store new material–that is, move it from working memory into long-term memory– through elaborative rehearsal, which means thinking about the meaning and importance of the new material and connecting it to... prior knowledge, beliefs, and mental models." – Nilson & Goodson

TRY IT ON: Experiments in Brave Facilitation

• •

"It's play that makes people unafraid to fail and confident to try new things. It's play that helps us do serious things better because we enjoy them and feel a sense of joy in our achievements." – Jake Orlowitz

1. How do you balance gamification with *thinkification (still not a real word)*?
2. What are your go-to patterns of interaction?
3. How do you incorporate meaningful feedback and reflection?
4. How do you mark, celebrate, and measure progress?

11. Physical places in digital spaces.

I love the app <u>Super Cook</u>. Input the ingredients you actually have in your refrigerator, and it suggests recipes that you can make with what you have. We have a similar philosophy for remote workshop design– we look at what the activity was in a face-to-face setting, and then look at the ingredients (tools, patterns of interaction) we have available and see what kind of mischief we can bake up. But replication is just the beginning. Steve Glaveski, in his model of remote work[33] classifies replication as level 2, and it's the equivalent of traveling to a new country and placing yourself entirely in an expat enclave: only eating the food from where you came from, only speaking to people from where you came from, and never going out and seeing what new wonders exist, what new potential

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[33] Glaveski: <u>https://bit.ly/2RWQak6</u>, 2020

collaborations and experiences can be cooked up in this entirely new landscape.

What's this?
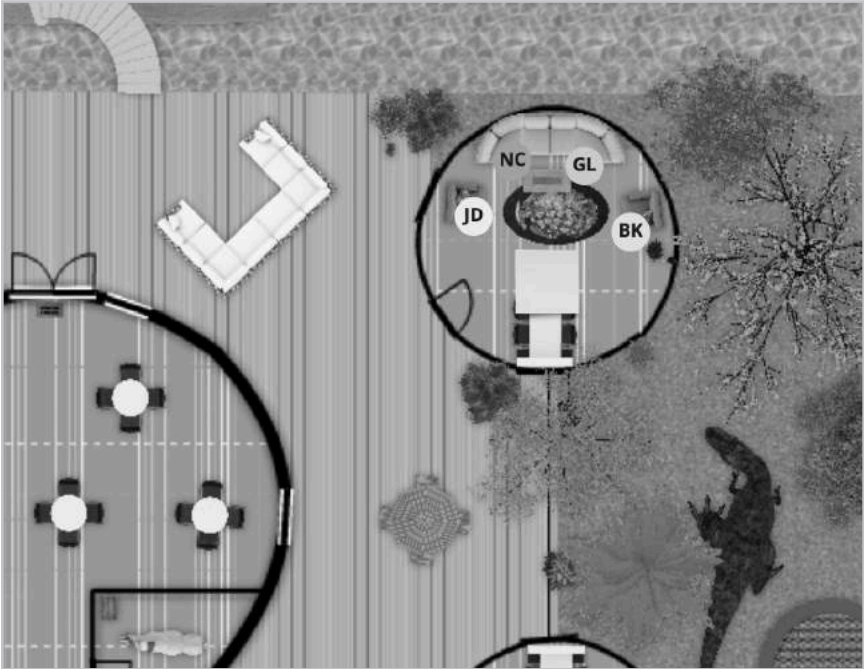
And a unicorn in the main room. Built with FloorPlanner.

If you answered: it looks like the overview of a yurt with a few learner avatars inside and for reasons unknown a T-rex lurking in the bushes...you'd be right. 🦖 It's a snapshot of small slice of a larger landscape embedded in a Miro canvas, where learners move between rooms and then back to the main room for larger discussions. In each room they have access to all the Miro tools (virtual stickie notes, flip charts, imager, videos, etc.) for capturing discussions. A Typeform survey embedded in each room captures key

conclusions to centralize data between spaces. Each room is also a breakout room in Zoom (although one could also use Jitsi easily), and all learners can move easily between rooms. This was inspired through a mixture of looking at the fascinating ways Remo *(image below)* allows for free movement in an overhead schematic space, and Nenad Maljković's article on bringing open space methodologies to remote learning through *"Fearless Experimentation"* with Zoom,[34] which introduced me to the much needed hack of elevating all learners to a co-host role, thus allowing them to shift freely between breakouts. Discussions are incredibly active, conversations are well structured, and the session moves smoothly from piece to piece. One could also embed links to multiple Zoom rooms in a shared document or spaced in areas of a Miro canvas.
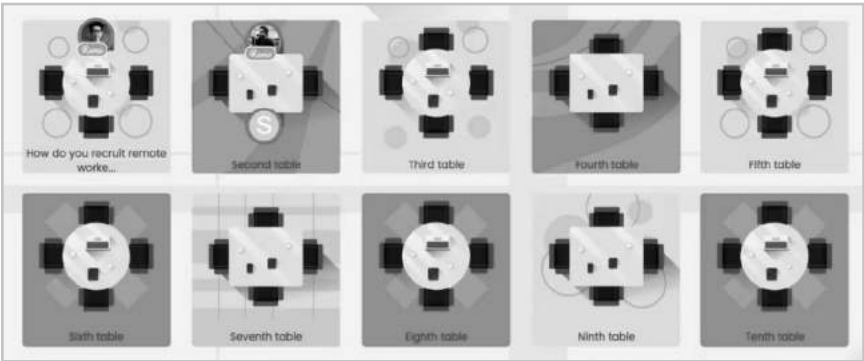
Remo's networking tables. Double-click to join any table or move between them for a breakout room style.

What is the purpose of sharing this? I'm not suggesting this as the *only* way forward, not even close, but trying to put forward an example of how much is possible when we

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[34] Maljković: https://bit.ly/2XSZeua, 2020

really think about the potential of our virtual ingredients to create a very different, and altogether deeper, remote experience. I have no rationale for the tyrannosaurus.

Oh no, not skeuomorphism again

Remember when the first iPhone came out how all the apps looked like virtual versions of physical things? That's skeuomorphism, and the bane of many designers' existence. It served a purpose for a while, and then did not. As Klaus Göttling writes[35],

> *"Skeuomorphism helped a generation through the learning curve of coming to grips with a digital era. But, it also began to hold us back. We became familiar with the concepts and they entered the language and our day-to-day lives but skeuomorphic design led to huge amounts of clutter on the desktop."*

So I'm not suggesting you suddenly try to make your remote environment directly resemble analog counterparts: but perhaps in some ways it can serve as a bridge, just as it did with our last big transition. We're in strange times, and many facilitators and learners are experiencing remote virtual workshops for the first time. Creating a sense of the familiar can help to speed that transition. If Prezi can have a resurgence (with it's awesome video overlays for meeting screens), then perhaps a revisit to skeuomorphism or even a second look at Second Life (although I must admit I am still quite a bit more skeptical

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[35] Göttling: https://bit.ly/3btoYRZ, 2017

*Second Life will definitely make for **interesting** meetings.*

of the latter, despite having seen educators make great use of it the first time around) are in order?

Or even if one does not fully invest in direct skeuomorphism, considering how we can bring elements of the physical and the digital to enrich workshops and take them beyond basic Zoom/BlueJeans platforms is helpful. For example, these *"physical"* discussion cards that small groups flip over in breakouts using Miro:
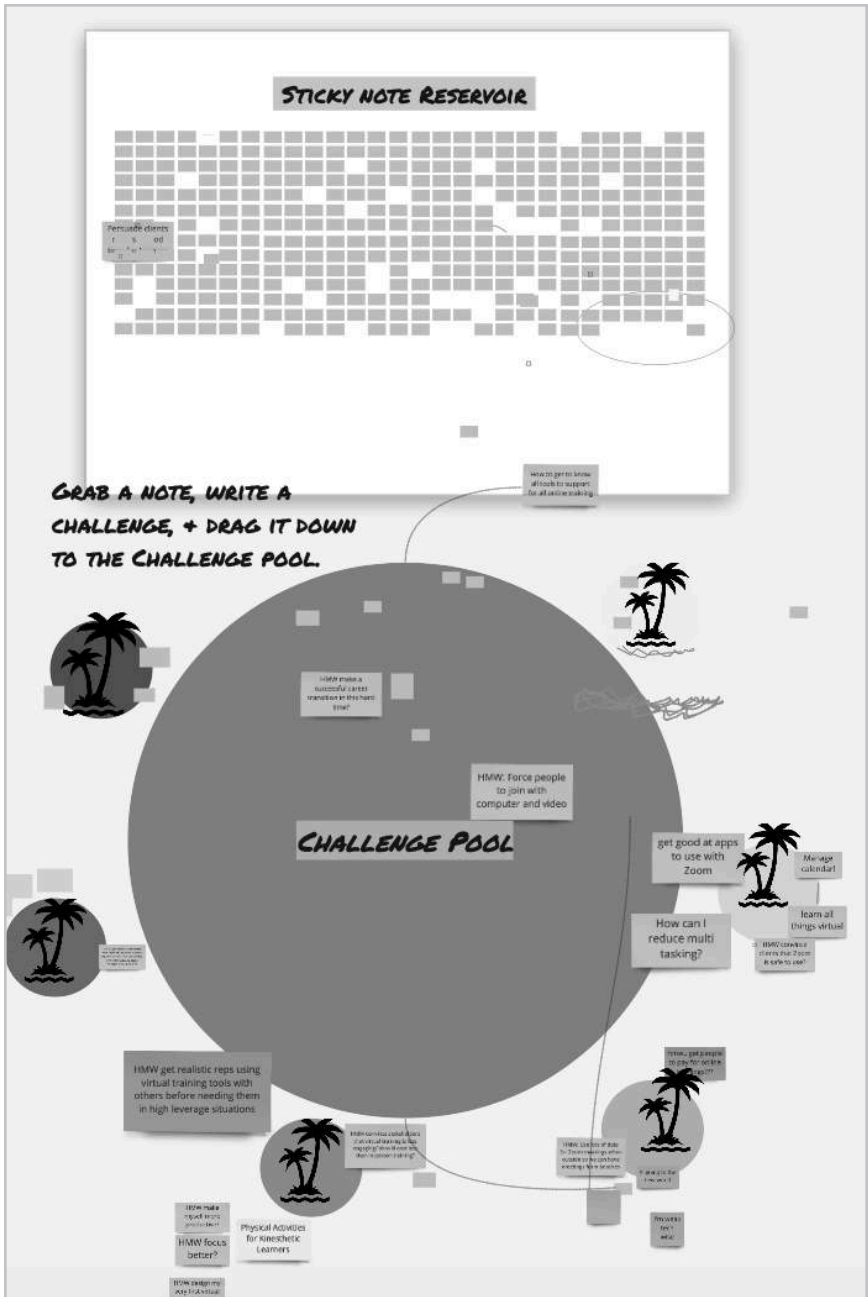
A less skeuomorphic virtual space, but still allowing learner movement in groups to "islands" in discussion phases.

Thinking about chunks

There is a musicality to session builds. We don't want to have the same note, same duration, for anything. So let's take all these ideas and bring them together, considering potential ways we could apply them to a real session on a given topic, in this case a series of three 90-minute sessions on *"upward influence,"* with stretch assignments and peer work in-between. Without diving into the minutia of an outline I hope this shows a few ways we could approach taking concepts from the classroom online, and even in some ways going beyond what is capable face-to-face. Here are just a few ways we could experiment with our 90 minutes:

- Pre-session small group conversations via Miro/Zoom, with learners posting profiles, and having initial discussions with white-boarding.
- Simulation briefing documents shared via platform chat to learners, with discussions before simulation in breakout groups.
- Role-play in rotated self-recorded breakouts, with some learners as observers providing feedback using Typeform to aggregate results.
- Fishbowl role-play in plenary follows, with Otter used for transcription (see next image). Transcription is screenshared with learners marking pivot points where the conversation could have gone in different directions, mapping subtext and then jumping in for action replays to demo what that could have looked like.
- Learners do a reflection journal unpacking their own recordings listening for pivot points before meeting with their partners again in breakouts to debrief.

*Sample Otter transcription. 95% accurate... I promise at no point did learners really debate **snowboarding**.*

- Core challenges are shared and roles are changed to co-host mode so that rotate learners can rotate World Café style around discussing and working on overcoming key issues.

- Impact vs. Effort stick-note notation is done with key next steps in Miro, and lessons are collated in *"Future Me"* message that allows learners to take away action plans that they'll work on between sessions and after with accountability partners via our mobile app.

Is this the only way to run this? Not at all. But I hope it has shown some of the ways we can play with tools and spaces to create learning experiences that are very human focused with minimal teacher talk and maximum feedback,

reflection, and application in a meaningful and scaffolded way. People are getting virtual meeting overload. Be better.
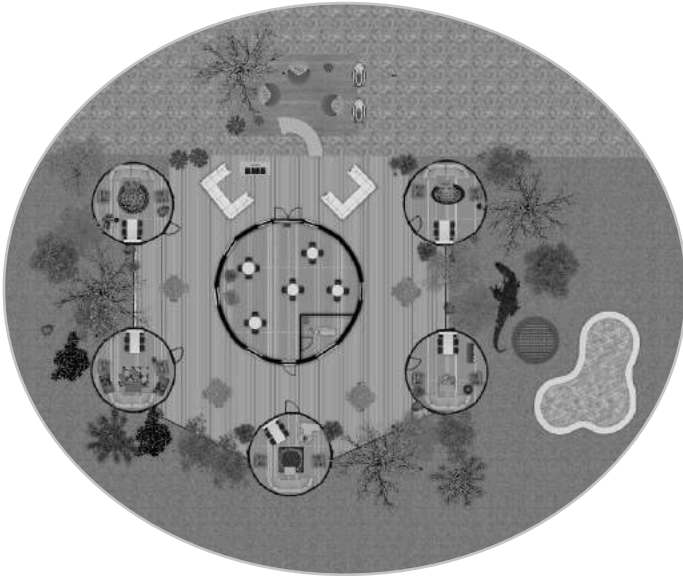
The whole space. With jet-skis and a pool. But no restrooms.

TRY IT ON: Experiments in Brave Facilitation

"Skeuomorphism is dead, long live skeuomorphism."

— Klaus Göttling

1. Get out sticky notes and a pen/pencil Go analog. Map out your chunks, 5 minutes per note.
2. How do you want learners to feel in each chunk? Map out mood or energy level for finer tuning. How do you transition between chunks?
3. Observe a webinar/workshop and map its chunks. What rocks? What would you change?
4. How can you create a greater sense of a learning space in your remote workshops?

Part 3:
Reflecting on Remote

12. Recipes for change.

Remember not to shut the door: *the end is the beginning.* How will you help delegates track and continue progress when they step away from the virtual session? In these strange times (and let's be honest, even before), many of us don't and didn't. I'd argue though that now is the ideal time to start.

What a difference a day makes
Let's begin by unpacking: what should you do with a day long session (or any longer duration)? Lots of options exist, but two we obviously don't choose are:

- Move it all to virtual as is (same duration and flow),
- Cram school– try to condense it all into a mere 90 minutes.

Both of these are recipes for discord and disaster, not change. Regardless of which way we go we need to start by

asking again, what elements should I do synchronously and what asynchronously? For those familiar with a flipped classroom, that should be our first thought, with the caveat again, keep pre-session (Chapter 6) conversations powerful, but succinct. No one wants homework dumped on them in stressful times, especially before they are even sure it will be worth their while. Great sessions earn permission to give deeper post-session or between session tasks.

From there, what if instead we:
- Break it into a series of sessions of 90-120 minutes. I mean, of course. But this is not just a good idea from a practical/logistical level– it also has the potential to be even stronger than the original day. According to the Journal of Applied Psychology, *"a distributed approach to learning, where training is delivered as a series of shorter events with time in between, increases learning transfer by 17 percent over a single event.*[36]*"* Spacing learning is awesome. Combine this with between session interactions (with peers, your LMS, managers, etc) and stretch assignments, and the impact is greater indeed.
- If the desire is still to keep the session in a shorter time frame for scheduling or other reasons, another very successful approach is to use a mixed intensive– have learners meet together for 2 hours in the morning, followed by small group afternoon sessions: 12 people, for example, divided into 3 groups of 4 in the afternoon each meeting for 60-90 minutes. In this way the balance between learning through larger group dynamics as well as small group coaching helps

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36 Cited by Hyder & Christopher: The Successful Virtual Classroom, 2015

to counteract some of the loss of overall time on target.

One piece of the puzzle

We're not all that. Literally. As we're well aware, a lot of learning happens outside the workshop, virtual or otherwise. How much do learners get from the training itself? Estimates vary (as they should given different work and individual circumstances), with the low end being around 10% of learning from training in the new classic 70-20-10 model which Biech labels experience, exposure (learning from others)[37], and education (what we do), up to a max of around 33%. In any case, our question becomes, how do we get involved in the remaining piece?

"Trainers are experts in the 10 percent domain– delivering training or programs–but what's our role beyond instructor-led training? Can you support social learning? What is your role in influencing interaction between employees and supervisors? Can you stimulate informal learning?" –Elaine Biech

Helping the companies/groups we collaborate with (whether as an internal facilitator or external partner) become deliberately developmental organizations, requires we become ourselves more deliberate in how we view and leverage between and post session interactions.

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[37] Biech: Art of Teaching, 2019

Hello again daisy chains

It would be a pity to let all the good work building trust and a space where learners can experiment drift away– we need to think of ways to create a continued home for that learning. Whether you've got a <u>Zapier</u> action (online software that can be easily programmed to do or connect... almost anything) set to trigger a follow-up email they write and send to their future selves, or further peer video accountability sessions, or a flow that leads them into your LMS: consider really how to keep the momentum going.

What we know for certain? It doesn't happen by accident. We need to connect learners to learners, learners to content, learners to a support network of mentors/ managers, and learners to places of practice (when will they get to try on the skills they have practiced in session?).

Consider every possible option for how to bridge, and whom to include (such as their managers)– remembering that "homework" created by learners is more likely to be done, especially if attention is made in session to keeping it measurable, relevant, and within the zone of their ability to stretch.

Accountability is built when we take ownership of next steps, take pride in where that change will take us, and have been shown that we are capable of doing it. The key is how we link each piece to the next so that they naturally flow, one into the other and build that momentum into the next session or workplace. You need to get people excited not just by where they have been in session, not just by the potential destination, but by the reflective journey itself.

Continuous improvement is better than delayed perfection.

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Mark Twain

I can't speak for you, but when we partner with organizations, we craft follow through:

- at the individual level through our self-access mobile learning app (micro learning nudges) with its lessons, community areas, and trainer advice access,
- at the peer-to-peer level through accountability partners/groups (small group internally managed follow-up sessions, with each session guided by provided framing documents),
- at the manager level through guided coaching conversations to lower the bar for helping their learners continue to learn and helping place them in the path of practice along with spaced pulse feedback (checking in to see how progress is going),
- in addition to seeding their internal systems with resources (give them things to share).

Here's the kicker: virtual makes all of the above, *more* accessible and *more* manageable. What are we waiting for?

Check your own pulse
Just as we ask our learners to do, without after action review, we don't iterate and improve. Get feedback from yourself, your producer/co-facilitator, and the learners. Give it a go:

- Use the platform to your advantage– record and time yourself. Did learners really spend more time doing than receiving? How smoothly did interactions flow from one to the next? How well did you engage, encourage, and expand possibilities with learners? What worked and would did not?
- Got a co-facilitator? Schedule time post-session to debrief soon after (ideally right away while the

memory and feeling are fresh– reheated feedback never tastes the same).

- We're big fans of getting learner feedback that goes beyond smile sheets (which tends to evaluate the wedding and not the marriage– the edutainment value, rather than how much your session has really moved and changed them), and Thalheimer's LTEM (Learning-Transfer Evaluation Model) framework would be our top pick for getting more meaningful feedback. Measure what has changed and what is being done differently, not just how much they liked it.

> *"People are measuring all the wrong things. They are measuring what is easy to measure in learning, but not what is important."*
> *–Will Thalheimer*

However, you do it though– seek real feedback, and use it to get better. In all the years of training, I have not once walked away from a session without thinking of some other spin I could have done, a different course we could have charted. And relax. We're in this together. You don't need to check off this whole list or reinvent the universe to make virtual training work. But every step you take to be more reflective, more learner-focused, and more engaging, builds momentum towards making moments that matter.

TRY IT ON: Experiments in Brave Facilitation

"Nobody is good at predicting the future, so I will share the vision I hope for. I hope we in learning and development continue to be passionate about helping other people learn and perform at their best." –Will Thalheimer

1. How do you build bridges between sessions?
2. It's easy to say, harder to do: to what degree are your bridges successful? What could improve them?
3. How do you measure yourself, and your learners' success?
4. What changes have you made in your session (beyond going remote) in the last 6 months?

13. Inviting everyone to the table.

Where do we go from here? I'm asking, genuinely. When things go back to *"normal,"* is that really what we want in learning or in our lives? I'll echo Sonya Taylor that, *"We are being give the opportunity to stitch a new garment."*

We may be in the midst of a giant educational experiment, but this is also the opportunity to change the way we do things forever. Let's try what works, now. And then let's take what works, and bring it back to work rather than leave it on the experiment bench. The difference between a prototype and a standard practice is the collective belief that holds each in place. I want to challenge us as learning professionals to step up:

- designing for everyone,
- and taking conversations deeper more generative places.

"We can make it better. You have a chance to reinvent the default, to make it better. Or we can maintain the status quo. Which way will you contribute? Rather than doing what we've always done in real-life (but online, and not as well), what if we did something better instead?"
– Seth Godin

Designing for everyone

Who do you include, and who do exclude? Virtual spaces have the potential to be massively inclusive, or to cut off voices, depending on how we use them. The same freedom that lets someone be rude anonymously in a forum, is what allows positive latent communities to find each other[38], and allowed, in one session I recently joined, a self described introvert to actively participate in the Miro board in ways she had not felt comfortable doing in a face-to-face group.

The question is, how can we encourage the latter, and douse the former? Although if Conan O'Brien wants to crash any of our workshops he is welcome to (this is something he really did). Which is awesome. And yes I realize the irony of referencing a national talk host in a chapter that discusses cross culturally including a global audience. Still. It was **awesome**.

Deborah Tannen wrote, *"We all know we are unique individuals, but we tend to see others as representatives of groups.[39]"* Finding ways to see how others see opens the

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38 Shirky: Here Comes Everybody, 2008
39 Tannen: You Just Don't Understand, 1990

possibility that we can design for more than our own minds.

Ways of seeing the world

There are many lenses to approach how differently we see and interact with the world, as George Box noted, *"All models are wrong, but some are useful.[40]"* One useful trio of these which is a helpful frame to unpack how we communicate, looks at 1. **culture** (what culture we identify with), 2. **context** (what is the situation– virtual/face-to-face new group/old group), and 3. **character** (individual preferences). Erin Meyer's book, <u>The Culture Map</u>, does a fantastic job exploring aspects of this.

> *"The cultural dimensions, for example the ones defined by Hofstede or Trompenaars and Hampden-Turner, are not necessarily proving to be relevant in virtual space. Different dimensions seem to become more relevant: the use of silence or the different ways in which 'trust' can be generated."– Caulat[41]*

Like Hofstede or Lewis, or Trompenaars before hers, no model is perfect, but in particular, I like the dimensions Myers has selected for analysis because they do a great job of helping us anticipate where many virtual communication breakdowns are likely to occur, aligning more closely with the interactions Caulat highlights above. These are the

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[40] And all quotes are wrong, but some are useful. There is still debate if Box said exactly this. See: https://bit.ly/2xQOcLl

[41] Caulat: Virtual Leadership, 2012. Cited in Fogelberg & Tavanyar: Live Connections 2015

places in the remote workshop where we and learners start to point fingers and place blame. If my friend Robert falls down the stairs I might say, *"He's clumsy,"* but if I fall down the same stairs 20 minutes later would I say the same? Unlikely. *"The stairs are slippery."* We see a shift from a blame to a situational orientation. So where are we most likely to take up this blame orientation? Here are Meyer's dimensions of difference with the US, Thailand, and France plotted:
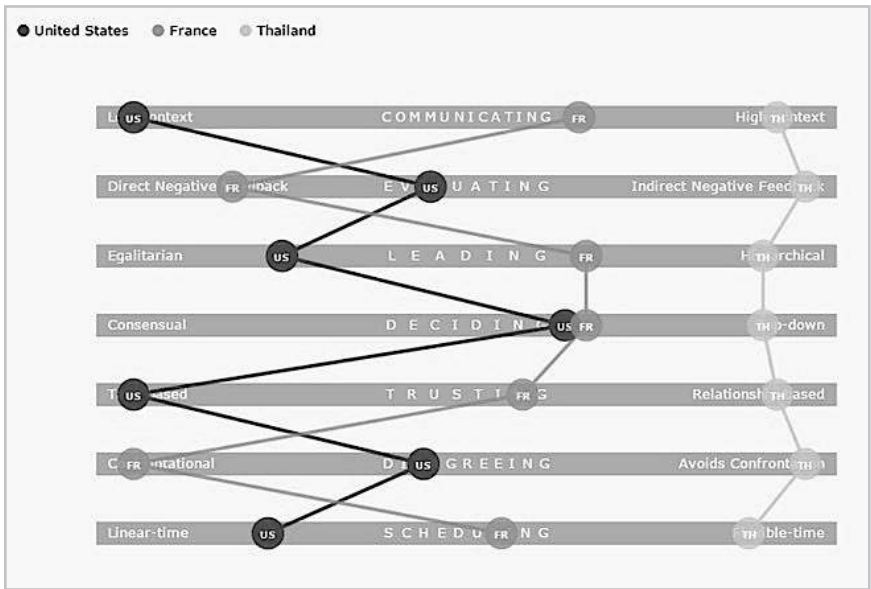
Where would you sit? Individual variation is larger than cultural variation.

A quick exercise: choose a spot in any category. Where are you on the line? How would you make sure to include a learner on the opposite side? Just look at how varied the spectrum on such things as ways of disagreeing (to name just one) can be. It's not my purpose to do a deep dive here (do give her article on Harvard Business Review a read at

the very least)[42] but I do want to highlight something Meyer raises in one example in her book: she shares how an American firm with a Thai subsidiary, who believed the Thai team didn't have a lot to contribute in virtual regional team meetings. As it turns out, it had more to do with when the agenda was sent– previously it had been sent by the American team right before the meeting, or not at all, which left the Thai team to have to improv: a task made difficult by language and decision-making dynamics. As soon as the American team started sending the agenda in advance the supposedly "quiet" Thai brand suddenly had more than enough to say and contribute. Changing the shape of the path allowed more people to join it. This is not to imply that all Thai teams or American teams behave or interact in this way, but to ask: *how do you shape the path for participation in your virtual sessions?*

Most critically in my mind (and it is a self-biased mind after all), Meyer's shares the view that while we should be aware of possible cultural interpersonal flash-points, ultimately it is the person across from us, whether face-to-face or virtual, whom we need to listen to: character plays a huge role, and the most assertive person you meet in your life may self-identify with a background that tends to be less direct. We are not, or at least not entirely, where we came from: it's but one small piece in the diversity puzzle which points us toward our next section– how do we get people to better listen, discuss, and collaborate?

Note: We've focused on culture here, but I strongly suggest you audit your program for inclusivity on more facets than

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[42] Meyer: Navigating the Cultural Minefield, 2014, https://bit.ly/34UsZwe

this. For example, running a Functional Accessibility Evaluation to check for visual accessibility as just one idea.

Sharing is wayfaring: tools for charting new paths
Work to improve virtual discussions can happen in two places, labeled by Dan Heath as upstream (before the discussion happens), and downstream (during the discussion). What does this look like in practice?

1. Upstream maneuvers
The more we do upstream, the less trouble we have in session: fire prevention vs. firefighting (always good to mix your water and fire analogies, no?). In her book, *We Need to Talk: How to Have Conversations That Matter*, Celeste Headlee (TL;DR? go watch her TED talk) shares a study from the Journal of Personality and Social Psychology:[43]

"In half of the rooms, a cell phone was placed on a nearby table; in the other half, no phone was present. After the conversations had ended, the researchers asked study participants what they thought of each other. Here's what they learned: when a cell phone was present in the room, the participants reported that the quality of their relationship was worse than those who'd talked in a cell phone-free room."

As Headlee put it aptly, *"Be present or be gone."* This goes beyond our edict on wanting participants, not passengers.

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[43] Dunning & Kruger: Journal of Personality and Social Psychology, 1999

Think about the last time you changed your own mind about something: did you do a complete 180, or was it more of a gradual shift? A mind is more like a pile of millions of little rocks than a single big boulder. To change a mind, we need to carry thousands of little rocks from one pile to another, one at a time.

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—Buster Benson

So how do we do this when our learners are just that: distracted, potentially stressed, and with a myriad of matters on their minds? How do we stop Zoom from giving rise to Zoombies (my colleague has told me I am legally required to apologize for this pun)? In short, we need to focus upstream on 5 interventions: *trust building, expectation setting, permission seeking, prediction making,* and *real learning leadership.*

- **Trust-building:** if we've done our welcoming well (including pre-session connections ideally), and kicked off with exercises that get people talking to one another (beyond basic warmers). The point of this– get people working remotely to see each other as more than just an image on a screen. My personal favorite way is still a bit of show-and-tell: having learners share (either in plenary or breakout if the group is large) one meaningful object they have in their house while they work from home.

- **Expectation-setting:** we've discussed sharing expectations in pre-session messaging (Chapter 6), and that continues into the sharing of the session's communication charter–guidelines for how we'll run the session. What goes on it? That depends on your group, but the Downstream section below points to a few we feel are worth highlighting. One note: charters work much better when co-created with the learners. There's not always time for that (although consider sourcing ideas in your pre-session communications), but at the very least get them on board with our next bullet point...

- **Permission-seeking:** if I straight up give you negative feedback, you might be ok with it, or you

might just think I'm rude (depending on a mix of culture, context, and character). But if instead, I ask if I can give you feedback, and you say yes (and people usually do), the way it is received changes completely (well not completely– if you are just being intentionally rude this doesn't work). I can tell someone they misunderstood me, or I can ask if I may explain myself better. The point being: how we frame conversations matters, greatly.

When I tag the perspective I am coming from before I come from it, it helps others to receive it with a more open mind, and frame it in a better light. If I ask learners whether they agree to our communication charter, it is very different from simply telling them it. We need to be invited, and at the same time create a shared sense of ownership and accountability, since we have all agreed (rather than them just being the "trainer's rules").

We can also give permission through the strategic use of roles in activities: learners reluctant to voice contrary positions, when given the formal role of devil's advocate in a discussion will suddenly come to life with ideas. The role gives them the freedom to speak and think from a new place.

- **Prediction making:** get them to predict– Why will they care about your topic/challenge? WIIFM? What is the cost of doing nothing/inaction? What questions will they want answered?

- **Learning leadership:** practice leadership, not *loudership*– meaning your role again is to make sure every voice is heard, not just your own and those of the loudest learners. We share ideas, yes, but then we must move from storytelling to story-listening, stepping aside to let learners digest and share their own interpretations, assumptions, and meanings. While these steps alone don't guarantee a good virtual training, they can lead to dramatically different conversations. Minds don't change just because you put a great idea out there: they need to make and filter that idea through minds of their own. What questions and activities do you have set up to transfer the ownership of ideas?

2. Downstream interventions
What practices do we want to encourage/discourage in the moment?

A. Observation & feedback: beyond the devil's advocate role discussed above, assigning breakouts to have rotating observers who provide rubric driven feedback is a great way to keep teams on track. What goes into our rubric? The same sort of practices we champion on our communication charters, which leads us to...

B. Charter behaviors: in short, don't drop the ball. We've seen conversations where learners spend the entire time in parallel monologues, with no meeting of the minds– no real dialogue. We want to encourage a practice that allows learners to understand, explore, build on, and respectfully challenge the ideas of others, such as:

- *Favoring follow up:* what Michael Stanier the AWE question (And What Else)– different questions lead to vastly different outcomes. The goal with initial powerful questions and follow-ups is to truly understand where others are coming from, rather than just returning to our own perspectives. There is a big difference between me boldly claiming "I understand you" (usually followed with an immediate pivot back to my own position with an emphatic "but"), and you actually verifying to me *"You understand me."*

- *Summarize/paraphrase:* as Headlee notes, *"Listening to someone doesn't mean agreeing with them. The purpose of listening is to understand, not to endorse.*[44]*"* Understanding is first but serves little use if kept inside. By checking that understanding the other learner can either validate that we have understood (and it is profoundly trust-building to be genuinely heard), or correct our assumptions with further information. Either way, we create positive forward momentum.

- *Surface subtext:* when we see red lights or green lights behind others' words, say it. State your impression: "it sounds as if... you're excited/frustrated by...." To understand and recognize the feeling behind the position both unpacks possibilities, and helps us see what obstacles hold current differences in place. There is a physics to groups: small sequence changes matter. Ask everyone a question and let people respond and the loudest, fastest voices rise. Ask everyone and have them work silently and post

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[44] Headlee: We Need to Talk: How to Have Conversations That Matter, 2019

before we dive deeper, and the whole engagement changes. Mind the small things online.

"You can't tell the difference in a brain scan between somebody having an opinion and somebody remembering a fact. Our brains think they're the same." – Jennifer Berger

- *Focus on interests over positions:* take a criteria-based approach. When we lead with positions, it often causes others to take up positions, whereas when we try to come up with criteria it changes the direction of the conversation we create. We lead to our ideas, rather than with them, and also remain open to the possibility of change. When we hear a position, we don't immediately stomp out that spark if we disagree. Instead, we explore the journey that leads them there, rather than the destination of the position itself. How did they come to see it that way? As Buster Benson shares in the excellent Why Are We Yelling?, *"Instead of saying, "I know I'm right!" say, "I'm not seeing what you're seeing. Can you help me get there?"*

- *Build bridges:* encourage learners to use what others have said to build connections to their own ideas, as well as the ideas of others. Be generous and think about what you can give to the conversation, rather than what you can get from it.

- *Balance appreciative inquiry and problem-oriented inquiry:* problem-solving is well and good, but it's critical we also step back and seek bright spots– what

works, and how can we scale and expand on what is already working?

C. Set them up for success and build triggers

The easiest way to set learners up for success is to give them activities that allow them to succeed (tautologically redundant, I know). For example, if I ask an open question to some learning audiences I will get silence, whereas if instead I present an activity that begins with structured statement stems (i.e. The biggest concern I have about this is....), that same "quiet audience" will respond with a plethora of ideas.

Have them set their own "when/then" triggers based around the charter behaviors they have the hardest time remembering to do in the session, such as: when I ask a question, then I will remember to ask at least two follow-ups rather than jumping in first with my own opinion. Try the tool yourself: *what triggers do you need to set for your teaching?*

Sharing the air: diving deeper together

We're getting more comfortable being uncomfortable. Which is good, because the vast majority of us our not as aware of our behaviors as learners and leaders as we believe we are.[45] We know good training comes from stretching ourselves to that edge, and yet a lot of training in the virtual space seems to have the goal of simply getting from point A to point B in the digital deck, with few questions, and a few activities that barely try on the concepts within. We favor style over substance and fear any

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45 Eurich: HBR, 2018 https://bit.ly/3bxUQVA

sort of intellectual discomfort. But finishing the training is not the goal of good training. Bowling with bumpers is fun for a bit, but it's not really bowling is it? Nor does a strike there give a real sense of accomplishment. Just as Bloom developed a taxonomy of educational objectives, we need to develop a taxonomy of inquiry, an art and science of the ask.

Learning needs to keep pace with change, or even leap ahead of it, and to do so we need to create sessions that take us to the edge of that envelope and peer over it to see what is next. To decide what choices, actions, and behaviors we want to carry into tomorrow, and how we are going to do it. Constructive struggle is a sign of growth in training, not bad design: I don't mean pure confusion, activities so lax they lack any sense of progress, but we don't need to spoon-feed every next step. Figuring out the how and the why together is part of a good facilitation process, and part of building a resilient mindset. If we trust our learners, we will give them the space, and the tools to do so. Two of my favorites, which we take from improv and design thinking are: associative thinking and future hopping.

1.Associative thinking: *finding connections and leaning into them*
In improv, there is the classic "Yes..and" rule, by which no ideas are denied, and everyone builds on what is given them. Associative thinking, as defined in the book/article, the Innovator's DNA, is along these lines, "Associating, or the ability to successfully connect seemingly unrelated questions, problems, or ideas from different fields, is central to the innovator's DNA." The same book shares how

many organizations tend to focus more on delivery, than discovery: not that delivery is bad, but that if we really want to generate ideas for change we need to encourage both, and enabling the core skill of associative think is key to that. What does this look like in the session? It varies, but for mine, we start with activities centered around building quick connections between random things (see the picture below, choose 3 items, not combine them into a product and pitch it– good luck!), and then apply the techniques to real cases (how is our challenge like XYZ?). Once people are given permission to see connections everywhere the masks come off (although please do leave yours on when outside), and the ideas proliferate, building off each other and their own minds.

2. Future-hopping: *Jumping ahead to see what we need to do now to get there*
Lastly, *what if?* What if you had an unlimited budget? What if you had no budget? Future hopping involves adding and removing constraints from tomorrow, to see what that means for our actions today. Why do we do this? People tend to look under the same rocks when approaching

challenges. They're not bad rocks, but they are the same ones we looked under last time and we won't find anything new there. Powerful what-if questions lead to powerful conversations– just as associative thinking frees us to see more connections, future hopping frees us to answer questions we had not even thought of. As the Board of Innovation notes *"It's not our job to predict– we just need to ask better what-if questions."* Our job as good facilitators is to help learners by giving them good questions, and helping them craft their own. These are just a few approaches to depth: there are many more. If we can get everyone to perspective take, and then possibility take, we will be in a much better place in our workshops, in terms of how we engage with ideas, and with each other. As Brené Brown writes, *"Connection is why we're here; it is what gives purpose and meaning to our lives."* It is entirely possible to surprise and amaze in virtual sessions, to create spaces for reflection, learning, and wonder.

TRY IT ON: Experiments in Brave Facilitation

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"The biggest mistake is believing there is one right way to listen, to talk, to have a conversation." — Deborah Tannen

1. Go to erinmeyer.com and do your Culture Map profile. It cost 9.95 USD. Totally worth it. We'll wait for you.
2. How do you include everyone?
3. How do you shape deeper conversations in your sessions?

14. **Breathe.**

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Above all else, remember to breathe. 🚀 Everyone, everywhere, is going through a lot, and every time we hold session we're asking them to invite us into that oasis they're tending, and from our side offering the same. If we do this well, we come in as welcomed guests.

The fact that we're here, exploring this conversation, places us in rarified air: we're luckier than many to be able to focus on learning now, as important as it may be for coping with the changes all round. From that luck, we owe it to those we help to make remote better than basic.

All change belongs to us: so choose wisely what you choose next. Experiment. Play. Share this book (*please*). Explore our free toolkit. Contribute. You've got this.

Stay healthy, stay awesome, but most of all:

Be Radical.

Who's responsible for this?

Looking dramatically off into the future... of learning.

Let's talk in the third person, shall we? Originally from Honolulu🌋, Joshua Davies has spent the last 20 years working internationally, with the last 15 based in Asia. He heads up the firm Knowmium, serving as lead Conversation Architect. In his spare time, he enjoys running (slowly) on Hong Kong's trails, photography (less slowly), and reading more books than all the time left in the universe will allow.

He can be reached at **joshua@knowmium**.com or on LinkedIn at linkedin.com/in/joshuadavies. *Say hello maybe?*

"Don't try to win over the haters; you are not a jackass whisperer." – Brené Brown

What we do

Conversations matter. If we are what we say, what do your interactions say about you? Whether presenting to a meeting or conference, negotiating a new contract face-to-face or via video conference, or moving minds within your organization: the way we wield words is constantly opening and closing possibilities around us. When a door shuts, we have this sense that the encounter has led almost inevitably to that moment– but every conversation is multiple possible conversations. Small framing pivots, tiny perspective choices that demonstrate true engagement, can shape entirely new avenues for growth.

At Knowmium, we study the "how" of deeper talk– unpacking fossilized speech patterns and crafting new habits that build trust and collaboratively solve problems.

Who we work with

Last year we collaborated with Fortune 100s and non-profits in 24 countries face-to-face (and 12 more virtually) worldwide to help their interactions become more meaningful.

How can we help *you*?
Say hello at **knowmium.com**.

A huge & humble thanks!

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