

VIRTUAL TRAINING GUIDELINES

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1-710 Westminster Ave, Winnipeg, MB ▪ R3G 1E6 ▪ 877.353.3205

www.ctrinstitute.com ▪ www.achievecentre.com

info@ctrinstitute.com ▪ info@achievecentre.com

FIRST VIRTUAL TRAINING

Before your first virtual workshop, please go through the following steps to better understand the medium and improve the quality of your training:

- 01 | Review this document in addition to the [Zoom Tutorial Video](#) on the trainer website
- 02 | Set up a Zoom meeting with either ACHIEVE Managing Director [Wendy Loewen](#), CTRI Clinical Director [Joddie Walker](#), or CTRI Managing Director [Nathan Gerbrandt](#) for further orientation.
- 03 | Practice! Make sure you are comfortable with screen sharing, audio sharing, creating breakout rooms, and using the broadcast function and polls.

Contact [Jenna Smallbone](#) for any tech issues/Zoom support.

PHYSICAL DESK SETUP AND MONITOR

- Be intentional and think ahead to all you'll need as you arrange your screens and personal desk area (from PowerPoint, manual, notebook, drinks, etc.)
- Use two screens if at all possible. This allows you to see your PowerPoint and the participants/chat simultaneously. If this isn't possible, one screen still works, but note that you can purchase a small additional screen for minimal cost.
- Raise your device's camera to eye level. This will improve the quality of your image (and help you avoid a crick in your neck from staring down all day). You can also suggest that participants do the same.
- Consider your room background – Is it organized? Not visually distracting? Make sure you are not back- or front-lit too brightly.
- Clean up your computer desktop. If by accident you share the wrong screen, you want it to look presentable (TIP: You can move everything into one folder on your desktop and call it "Everything").

ADMINISTRATION FOR THE VIRTUAL TRAINING DAY

- **For public live virtual workshops**, our Client Services team will send you a link the afternoon before the workshop. If you do not receive your link, please contact client services at 877-353-3205 or training@ctrinstitute.com. Participants will receive their login details email four calendar days prior to the workshop, along with a PDF of the workshop manual.
- **Tech support will be available during your workshops.** Trainers are responsible for opening the Zoom workshop and navigating all internal Zoom interactive elements, including breakout rooms, screen sharing, polls, etc.
- **For private trainings**, your Private Training Coordinator will send you the link approximately two weeks in advance of the date.
- **Welcome your participants.** We suggest that you send a short welcome message in the chat before the training begins, including a short question. For example: “Welcome here, we will be starting in just a few minutes. I am in my home office. Where are you joining from?” You can do this with your video and microphone off.
- **Give a brief intro to Zoom.** Keep this concise (no longer than 3–4 minutes). Most people are comfortable using Zoom at this point, so it doesn’t need to take up too much time.
 - o **Cameras:** Invite participants to turn their cameras on if they are comfortable doing so. Explain how to “Hide Self View” by clicking on the three dots in their picture so that they don’t have to look at themselves all day.
 - o **Microphone muted:** Request that the default position is to have microphones muted to eliminate distracting audio. Note that they can unmute temporarily by holding down their spacebar.
 - o **Tech problems:** Explain that if people have issues or lose their connection (i.e., get kicked out of the Zoom meeting), they can go click the original link they were sent to login and reconnect.
 - o **Communication options:** Decide this based on your comfort level and the size of the group. People can signal you through the chat that they wish to speak, then acknowledge them and have them turn on their mic at that point. Or for smaller groups, it can be fine for people to unmute themselves to interject and speak.

Participants can type in their questions through the chat function. Then you can monitor and answer at appropriate times.

- **Encourage participants to use of the chat function** to share ideas, thoughts, resources, or “whisper” a comment to their virtual table partner throughout the presentation.

ENHANCING YOUR VIRTUAL TRAINING STYLE

Use activities to develop group zoom familiarity:

- **Incorporate activities** early on that require people to write in the chat, mute/unmute themselves, and respond with “Reactions” to help people become familiar with Zoom functions. This will enhance participation and engagement later in the training.
- **Use breakout rooms!** It is beneficial for participants AND gives you a chance to be “off” for a few minutes and reset. Put any reflection questions on the PowerPoint slides. Use the “Broadcast a Message” option when participants are in their breakout rooms to send out a summary of the directions for their activity.
- **Ask questions**, and pause for longer than you would if you were training in person.
- **Use the polling function** at least once – this adds another form of engagement and participation.
- **Give participants the opportunity to speak**, even in larger groups. This does not have to take up a lot of presentation time. Have breakout rooms allocate a reporter to give a one-minute summary/highlight after a breakout activity. You can call on just a few groups at a time, and then do alternate groups the next time.

Managing and adding energy to your training:

- **Intentionally consider the participant experience.** Your job is to engage them and make them feel emotionally and psychologically connected in the training. Without participation, they are not emotionally present. Switch passive participation to active every 15 minutes with polls, breakout rooms, reflection questions, etc.
- **Plan more regular physical breaks.** Consider taking a 5- to 10-minute break every hour. Take a full lunch hour and encourage everyone to stand up and stretch and take intentional screen breaks throughout the day.

- **Hide self view (optional):** Watching yourself can be a distraction and constantly viewing our own images is fatiguing for our minds.
- **Be a 3D speaker.** Be sure to vary your delivery throughout the workshop:
 - o Be dynamic with your tone and volume.
 - o Compliment your tone by using body language and matching facial expressions.
 - o Push your chair back when emphasizing, use circular, open palm gestures to finish a point, and take significant pauses to indicate transition points.