



How to Adapt In-Person Training for Online Settings

Tips for virtual meetings and webinars

A Preparation

1. Adapt your learning objectives to the virtual learning environment.

When identifying learning objectives with your team, reflect on your audiences and the context of virtual learning:

- Who are your audiences?
- How does the virtual environment affect their learning?
- How might we adapt our training design to encourage better learning virtually?



2. Determine how your training will be delivered.

Use this table to guide your selection of an appropriate virtual format:

Virtual format	Description	Group size	Level of interaction
WEBINAR 	The equivalent of an in-person presentation. Presenters speak to an audience and may share slides. Generally, audience participation features (video and audio) are restricted, but chat and Q&A functions are maintained.	Large (30+ participants)	Minimal interaction between participants
TRAINING 	Used for hosting interactive sessions and facilitating conversation between participants.	Small to medium-sized (<30 participants)	High interaction between participants

Video conferencing services like Zoom, Microsoft Teams, Adobe Connect or Google Meet allow users to deliver content and facilitate interaction virtually in webinars or meetings. Select the tool appropriate for your context, but note that this guide focuses on capabilities found in the Zoom application.

3. Develop engaging training content by using multimedia materials and virtual tools.

- Materials and tools outlined in this section can be used to optimize attention and participation in audiences.
- When using these for your training, remember to be aware of technological requirements. For example, sharing videos, animated PowerPoints, or other large files during the training may slow down your Internet connection and impair learning. Instead, share them with participants in advance.

Multimedia materials

Material	Description and purpose	Software recommendations
PRE-SESSION READING MATERIALS 	Reading materials sent out prior to the session, for participants to familiarize with key topics to be discussed in the training.	For file-sharing, use email, Google Drive, WeTransfer, or Box.
PRE-SESSION VIDEO 	Audio-visual summary of concepts, for participants to familiarize themselves with key topics to be discussed in the training.	Link to videos from YouTube. Create your own video using phone or computer camera apps, and with animation tools like PowToon or Canva.
SLIDESHOW PRESENTATIONS 	Slides that consolidate key points and guide presentation.	To create your slideshow, use PowerPoint, Google Slides, or Keynote.

Virtual learning tools

Tool	Description and purpose	Software recommendations
CHAT 	Chat allows participants to engage in group conversation, such as conveying thoughts, feedback or questions to the group and facilitators.	Available in Zoom, Microsoft Teams, Google Meet.
Q&A 	Q&A allows participants to ask questions and elicit a response from the group and facilitators.	Available in Zoom, Microsoft Teams, Google Meet.

BREAKOUT ROOMS	Breakout rooms allow facilitators to segment the larger group into smaller groups, for sub-group activities and more focused discussions.	Available in Zoom, Microsoft Teams, Google Meet.
POLLS	Polls assess audience learning, opinions, and more by recording audience responses and visualizing trends.	Available in Zoom, Microsoft Teams, Google Meet. Available external to video conferencing apps through Slido, Polley and Kahoot.
QUIZZES	Quizzes test participants' knowledge or learning. They can be done before, during and after the training.	Available external to video conferencing apps through Google Forms, SurveyMonkey and Kahoot.

4. Schedule your training.

Find a balance between the duration and frequency of your sessions:

- Virtual sessions can be tiring for participants. One-hour sessions are recommended for webinars, while 1h to 90-minute virtual sessions are optimal for trainings.
- Take care to be consistent with your schedule, and allow reasonable time to meet your learning objectives. Multi-part trainings are commonly scheduled at the same time each week, but can be scheduled in longer intervals or with several intensive sessions scheduled in a shorter period.
- Choose dates and times that will encourage attendance (for example, Tuesday to Thursday, and time around lunch, or based on their availability) through the duration of the course. For larger groups, consider dividing the participants into different schedules.

5. Communicate with participants and promote engagement.

- When inviting participants to the training, include a compelling pitch about the purpose of the training and the benefits of attending.
- Before your first session, share pre-session materials to brief your participants on the topic as well as clear instructions on how to log into and use the video conferencing service. When using Zoom, participants can be advised to [launch a test session](#) to test their connection, audio, and video.
- A week before each session, send a calendar invite through email, and follow-up with reminders two days and two hours before the sessions.
- Create a messaging group using an app, such as WhatsApp or Slack, to relay announcements and encourage discussion outside formal training sessions.

6. Test, test, test in advance.

- Invite participants to practice the technology ahead of the first session, testing functions like chat, and using audio and video.
- In facilitator training, test features such as breakout rooms and screen sharing.

B Facilitation

1. Consider a range of participatory methods based on audiences, objectives, time available, and audiences.

These resources assemble facilitation activities to enhance engagement and collaboration in your virtual training:



- [Remote Workshop Activities](#), Session Lab
- [Hyper Island Toolbox](#), Hyper Island
- [Simple Group Exercises for Zoom](#), Rick Andrews

C Feedback and Follow-up

1. Provide participants with opportunities to give feedback, then adjust.

- Share a link to an online survey or poll using the chat feature just before closing a session, or immediately following a session via email or messaging.
- Elicit feedback on areas such as quality of training, how much participants learned, and their comfort with the virtual format and scheduling.
- Based on feedback, consider adjusting the content or delivery of the training upcoming sessions to better meet the participants' needs.



2. Learn from Zoom reporting.

- Enable auto-saving of in-meeting chat to identify feedback or questions, and to inform follow-up responses to participants through email or the next session.
- Generate attendance reports to see which participants were present and to check attendance rates. For smaller groups, reach out and offer support to those who were unable to attend and complete the sessions. For larger groups, use these insights to inform adjustments to the delivery of the training.



For additional guidance on this topic, see [How to Efficiently Lead Groups Online](#) and [How to Train the Trainers](#).