

# **THE ONLINE SHIFT**

**101 PRO TIPS  
FOR VIRTUAL FACILITATORS**

**PATRICIA REGIER**

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## CONTENTS

Dedication Page.....	v
Introduction.....	vii
Who I Am .....	ix
How To Use This Book.....	xi
Chapter 1 Promo: How To Promote Your Event Or Workshop.....	1
Chapter 2 Preparedness: What You And Your Participants Need Before They Arrive .....	8
Chapter 3 Prelude: What To Do At The Beginning Of Your Event To Get Participants Excited.....	24
Chapter 4 Presence: Turn Audiences Into Participants .	36
Chapter 5 Promise: Your Goals Moving Forward .....	47
Chapter 6 Your Call to Action .....	59
101 Quick Pro Tips.....	63
Acknowledgments.....	69

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## DEDICATION PAGE

This book is sincerely dedicated to all my clients and colleagues, who have asked for my advice and trusted me to support them these past couple of years! *You* shifted to the online context with courage and make me proud! Some of you shifted to this new virtual world with hesitation, but you did it and *are* doing a great job! Thank you to all of you who said that you couldn't wait to read this book.

I also dedicate this book to my husband and daughters, who encouraged me and are just as thrilled as I am to be publishing my first book. Thank you to all my family and friends who are celebrating this with me.

*The lines can blur between the following sections, but if you consider these quick pro tips when planning your learning experience, you are then designing for the best results for the online shift. For your ease, you can see the checklist of all 101 quick pro tips used throughout at the end of this book.*

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## INTRODUCTION

Facilitating workshops and learning experiences online can be fantastic, but it is ever-changing and requires a virtual approach. I planned to publish this book as everyone was experiencing The Online Shift, during the year of the great pivot. I was perfectly positioned to share my knowledge about online facilitation, but became very busy helping speakers, leaders and facilitators to embrace the new virtual context. And I am glad that I waited to share these quick pro tips with the world.

I have had the privilege to work with hundreds of amazing clients who had to move their in-person workshops to the digital space. The quick tips list grew as I saw what the needs were, including the missteps fantastic facilitators were making. The online context is different. I am very impressed with how facilitators embraced the learning curve and have had confidence to embrace the online shift.

Walking alongside facilitators, speakers and organizations as they had to quickly change or shift the way they shared content. Equipping facilitators to feel great about

their new online training space is very rewarding! This book is dedicated to all of you! You are brave, you are talented, and you have done a fantastic job shifting your content online. Here are quick pro tips, so that you can facilitate engaging virtual learning experiences!

**This book is for:** Online facilitators, workplace trainers, and speakers who already have or will shift workshops and training online. Maybe you are thinking of expanding your virtual or digital training options, or you had to move online but want to improve the experience for yourself and your participants. If you want to turn your online presentation audience into participants, then this book is for you.





## WHO I AM

My name is Patricia Regier, and I am passionate about creating online learning experiences that aren't boring for the participants and are enriching for the facilitator. My qualifications include a Master of Adult Education and over twenty years of experience creating and facilitating learning experiences in the workplace, academic settings and in the community. I have over ten years of experience leading and participating in online learning. I also truly get excited when there is a new update in Zoom, or when I have learned a new multimedia application tool that I can apply to facilitation.

My mission is to help learning and development professionals, speakers and facilitators feel confident in the online, virtual, and digital training space. Since technology keeps shifting, it brings facilitators opportunities to enhance great content and lead engaging learning. My vision is to turn audiences into participants by facilitating meaningful online learning experiences.

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## HOW TO USE THIS BOOK

Do you buy books and feel almost like you are collecting them; planning to read them on a day that you are less busy? You are buying the book because you need help with the topic, but you don't always get around to reading it. Well, this book is designed to be an easy, on-the-go book. You can read one section or skip ahead, choosing your own adventure, depending on what quick pro tips you need at the moment. Continue to use this book as your *just-in-time* resource, as you **shift** workshops and facilitation **online**. Go back to a section to see what you have checked off, and what you have not read or tried yet.

This book is divided into five chapters: Promo, Preparedness, Prelude, Presence, and Promise.

[These five elements of facilitating engaging online learning experiences are also part of a self-directed online micro-course, which includes videos and downloadable resources. You'll have access to this course as a special package with this book, or you can just access one or the other.]

If you are feeling stuck about one aspect of your online learning events or don't know what is missing, this book can help. There may be aspects you had not considered, in regards to the stages of: *before* your learning event, *during* the training or *after* the experience.

This book is for online facilitators. If you lead online trainings, workshops, presentations or meetings, you can check off the steps you already take, and feel great about that! You can also see what you have yet to check off. Just pick one or two items to begin with, and you can come back to the book when you want to add another element.

My hope for you is to enjoy facilitating online and to feel confident that you are creating engaging learning experiences. The goal is for your participants to remember how great they felt when attending your event and remember your content. These quick tips will help prevent the no-shows, or drop-offs, when facilitating or shifting online. **You can do this!** And you can keep doing this (if you want or need to). Being able to thrive while facilitating online is always a great back-up option, step-in option, or intentional 'this fits my life' option.

Enjoy diving into these quick pro tips!





## CHAPTER ONE

# Promo: How To Promote Your Event Or Workshop

This promo, or promotion, chapter is *not* about marketing, but is instead a starting place for the learning experience journey and considering your participants. These tips include aspects of communication and are the foundation that you provide before the actual event.



### Promo In Practice - Jumping In

One way to build excitement and knowledge about an upcoming online workshop is to 'Go Live.' Getting on camera can feel weird, but it's a great way to record something for people to watch later—or join you live, in real time. Sometimes, when you hit that 'Go Live' button, there isn't

anyone watching. One day, I found out about a new option in Zoom and I was thrilled. I hit 'Go Live' on Instagram and shared my excitement. This promoted that I was going to create a video tutorial about the new update soon and told people to stay tuned. Then, I couldn't find the 'End Live' button when I was finished, but this just added some humor and vulnerability. It's part of the magic when you are 'live' and are demonstrating the shift to online.

We don't need to be perfect. We just need to do something that we have never done before. This ongoing learning can inform how we engage our participants and it helps us understand their perspective when trying something new. The promotion of your event or the thing you are working on can build participants' readiness and learning. One person who watched that live told me later that my excitement got her excited to try out the new feature on Zoom the next time she facilitated. 'Jumping in' to share your enthusiasm, in the moment, whether you go live, press record, or write a social media post or blog, can engage your participants before they decide to sign up for your workshop.



## How To Build Promotion

### □ Bring People Into A Safe, Authentic Space

Bringing people into a safe, authentic space helps them be present and ready for deeper learning. We can't always pack in as much content into an online event, but it can be meaningful and memorable. Facilitators make an impact with learning experiences designed for intentional connections. Create safe spaces that are authentic, fun and responsive to your participants' needs. Becoming a flexible facilitator, speaker and educator requires planning, knowledge and a bit of courage. You can include information in your promotion that sets the stage for the atmosphere participants can expect. Promotion communications are an important part of the learning experience journey. How people enter a learning experience, and how they join, sets them up for success. If someone does not have the event link, then they don't show up and they can't learn. If someone does not feel welcome or safe, then they won't be confident to be vulnerable and share what they don't know. These aspects can impact an openness to learning. Feeling safe also includes feeling prepared and comfortable. This is why it's important to include learning materials for how to navigate a learning platform and what to expect.

## ❑ **Incorporate Breaks & Snacks**

Help people through those longer online learning days or sessions by incorporating breaks and snack times. Make sure people know the timeline for the whole event, especially online. Providing this information ahead of time can help participants plan their day. For example, think about how much time it takes to make a lunch, or if people are sharing the internet at home, and how long do they want to ask their family to not stream movies.

## ❑ **Be Aware Of How Engagement Impacts Learning**

Do you lead meetings with your camera on or off? Do you turn on your mic to participate, when you attend an event? Do you type in the chat? We all have different ways we like to communicate and engage online. But it's important to note that engagement does impact our learning. What can also be expected, when people shift to the online context, is that they are experiencing a learning curve. Another consideration is that people may be a bit tired of the virtual context. Make decisions ahead of time and then communicate expectations. Or if you are leading a regular meeting, or learning series, create the expectations together as a group.



### ❑ **Add A Time Zone To Your Promo Information**

Don't forget to include the time zone details in your promotional materials and calendar invites. The shift to online learning experiences, events and meetings have the benefit of bringing people from across the country or around the world. Clear communication can avoid frustrations or embarrassment if people don't realize the correct time.

### ❑ **Make An Introduction Or Welcome Video**

A short introduction or welcome video can increase excitement and helps people to show up for the meeting or training. It also allows the participants to get to know you a little bit beforehand and breaks the ice. Get creative and have fun with this!

### ❑ **Find Out What Your Participants' Needs Are**

Ask before the event if anyone needs closed captions or other learning or accommodations.

**❑ Share Necessary Links And Have Your Participants Test Them Beforehand**

Send a link to your participants to download the platform application or test it on their computer. This is best to be completed before the learning event or workshop.

**❑ Get Creative**

Get creative with your pre-event promotion and information. Set the stage that your participants are going to enjoy the learning!

**❑ Create A Pre-Survey**

Do you need a learning needs or gaps assessment for your group? This is not a test, but can instead enable you to customize the content for your participants. A pre-survey can also help your group know if this training is the right fit and gets them interested in the content.

**❑ Share Bite Size Tips**

Sharing bite size tips online via social media can help grow your group and get people excited. You can share videos to LinkedIn, post on Instagram, go live on Facebook, or post something to your organization's private intranet/sharepoint.

❑ **Remember Promotion Is More Than Marketing**

Promotion is not just marketing. Think about promotion as the beginning of the learning experience. What will get your participants excited to participate when they arrive?



**HOT BONUS TIP**

Online experts will often talk about the 'Know, Like & Trust' factor. Going LIVE or creating short videos on the platforms where your participants are gives them a chance to get to know you, your personality, and your speciality.

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