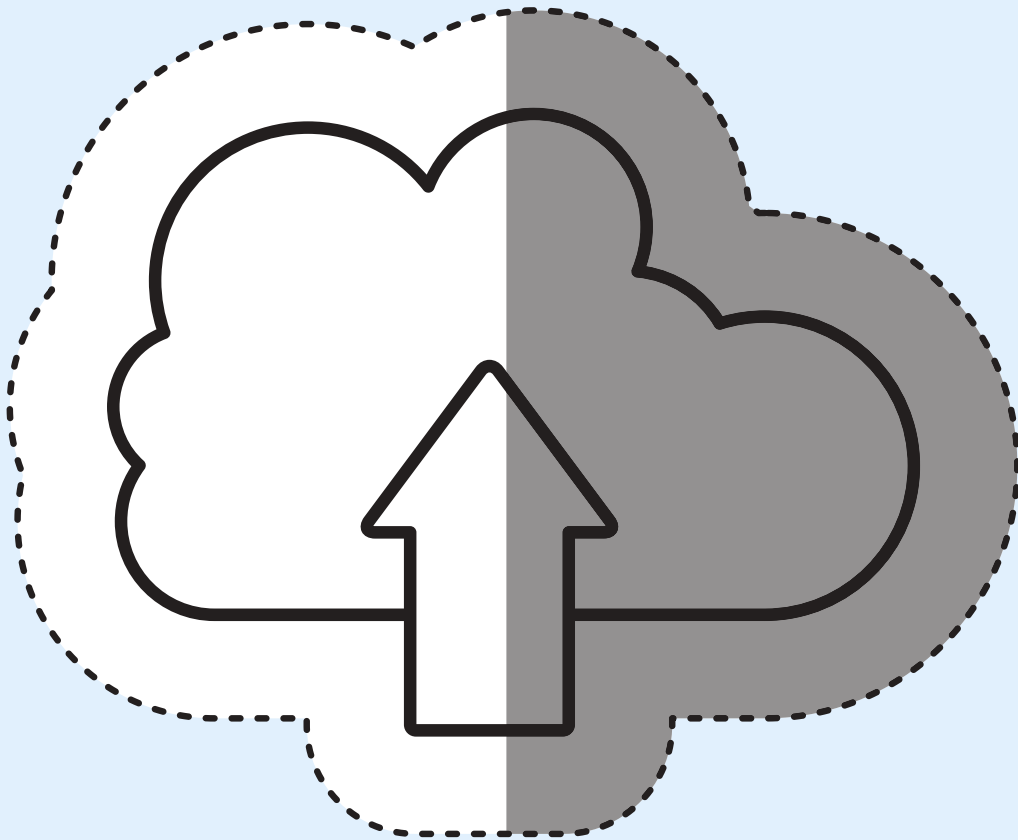


HOW TO CONVERT EXISTING TRAINING

Your step-by-step guide to transforming slides
and PDFs into online (and virtual) learning



Tribal Habits

Hello and thank-you for downloading this guidebook. We've designed this guidebook to help you build the case for compliance training in your organisation. You'll review compliance risks and costs to organisations which do not approach compliance with a plan, followed by the benefits and steps involved in implementing an online compliance training platform.

As we begin, let's start by setting the scene. At Tribal Habits we divide the journey organisations take in managing learning and training into three phases.

Phase 1 – Induction & Compliance

In this phase, organisations are focused on establishing a solid foundation for learning. This phase often also includes the initial implementation of a modern learning platform to reduce the effort of managing training and ensure a single-source-of-truth for learning data. The two key activities in this phase are:

- Being proactive in with compliance to protect staff and boost the bottom line.
- Improving induction to reduce churn, engage staff, reduce rework and accelerate productivity.

Phase 2 – Processes & Skills

In this phase, organisations can move onto more aspirational learning objectives. With employees well versed in compliance procedures and initial tasks, the organisation can now use training as a strategic advantage: to help employees acquire the skills and knowledge to achieve organisational goals.

- Capture internal processes to ensure internal consistency and efficiency in all teams.
- Share internal expertise – skills, knowledge, tips – to make 'best practice, common practice'.

Phase 3 – Customers & Stakeholders

In this phase, organisations can expand their training horizons beyond employees. For some organisations, this phase may be less relevant. However, for many organisations, this is the aspirational goal – providing training for customers, volunteers, contractors, board members or supporters.

- Providing training for both internal (employee) and external (other stakeholders).
- Sharing (or selling) training content to customers –product support or valuable knowledge.

In this guidebook, we are going to **cut across all three phases** – since it is possible your organisation has existing training content in compliance training, internal processes or customer support! As such, this guidebook is about transforming passive or paper-based training content into online learning.

This might include training conducted in workshops, PDF or electronic documents, informal coaching sessions or other non-digital training content.

- You might need to convert existing training from within your organisation as part of digitising your training processes.
- Alternatively, you may be a consultant or training supplier who has relied on face-to-face workshops and now needs to move to online training delivery.

Of course, I believe the solution these challenges is Tribal Habits – a unique online learning platform which allows anyone to create customised and interactive online training through the

combination of an intuitive building-block editor, guided processes, real-time content analysis and personalised video reviews.

However, let's not jump to conclusions just yet. For now, I invite you to enjoy our guidebook!

David King

Founder | Tribal Habits

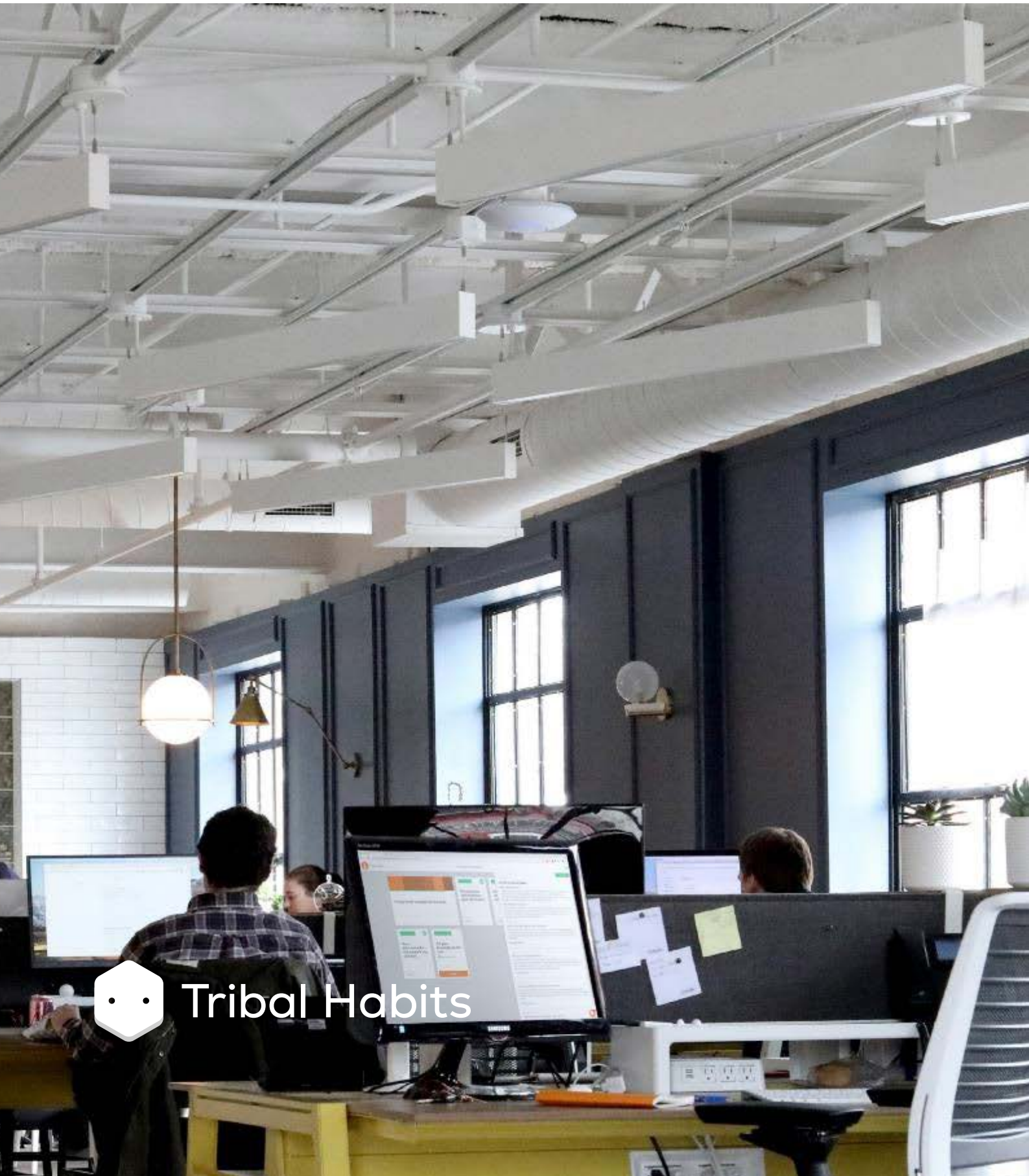
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Part 1 – Why convert to online training?

Let's begin with the business case – why should you be considering online training? We review the pros and cons of different training delivery methods and the benefits of moving to online training. We also compare and contrast online and virtual learning, which can also be combined into a blended learning experience.



Tribal Habits

What are the pros and cons of online training?

When thinking about training delivery methods, you will no doubt encounter the various debates about which method is best. This debate has raged among training professionals for many years as technology continually opens up new methods beyond face-to-face training.

THE SIMPLE ANSWER IS: THERE IS NO 'BEST' TRAINING DELIVERY METHOD. EVERY TRAINING DELIVERY METHOD HAS ITS USES, AND A MODERN TRAINING MANAGER WILL EMBRACE EVERY POSSIBLE OPTION.

Let's review the three most common methods to deliver training content – face-to-face workshops, small group webinars and online learning modules.

Training delivery method: Face-to-face

Let's start with face-to-face training. It has been the bedrock of training for decades and will no doubt remain an important training delivery method going forward (although its appeal in a post-COVID19 world is likely to be reduced). It has many strengths when it comes to learning, but also many weaknesses which become more apparent as other training delivery methods arise.

- **Face-to-face training: Strengths**

- Takes participants away from their jobs, potentially reducing distractions and improving focus.
- Allows body language to play a part in the training, which can be important for certain topics.
- Provides opportunities for group discussion in a way that everyone can understand and (potentially) contribute to.
- Can be easy to organise as it only requires a suitable location and little or no technology.
- The physical interaction can boost teamwork and make internal connections.
- Can provide some excitement or 'event' status which may boost morale or help engage participants.
- Can, in theory, handle large volumes of information and long programmes (half day or full day). However, this must be balanced against the overall success of the experience; more is not always better.

- **Face-to-face training: Weaknesses**

- Takes participants away from their jobs, which can be distracting for many participants who feel the need to stay connected with stakeholders. Workshops tend to last longer than other types of training delivery, so this can exacerbate the problem and cause worry and disengagement.
- While group discussion can be easy, it can also be difficult. It is common for participants to feel anxious about public discussion and strong personalities can dominate discussions.
- Requires a physical location. It can be restrictive or difficult to organise for distributed teams and expensive to bring participants together.

- Is typically the most inefficient training delivery method, particularly if participants have to travel to the event and external venue hire is required. A large portion of cost is spent on expenses which do not impact the training result.
- If external facilitators are used, it can require long sessions to justify the cost. Long workshops are even harder to coordinate, and participants become anxious about being away from work for too long.
- Is at risk of being viewed as an ‘event’ – an activity which is fun but not effective. Requires careful preparation and, particularly, good follow-up to ensure learning is embedded.
- Requires a certain number of participants to be effective. Small group workshops of 2-3 people do not work – it is commercially inefficient and the benefits of workshops are lost. This can mean delays or postponements in running workshops if suitable numbers cannot be found.
- Workshops can be very inconsistent and highly depend on the facilitator. Even with facilitator guides, there can be big variations in how content is delivered or explained between facilitators (or even by the same facilitator). The participants themselves can also greatly impact the effectiveness of the training via their comments (or lack of involvement).
- Workshops represent a moment in time. It can be very difficult for participants to revisit workshop material later. Workbooks are often not written as ‘stand-alone’ training content and workshops are rarely recorded for playback.
- Face-to-face training is subject to the availability of all stakeholders. Anything preventing this availability can derail the training – illness, travel delays, travel restrictions, urgent or unexpected events, power outages, noise from construction and so on.

Training delivery method: Small group webinars

Small group webinars are limited to 10-25 participants. These are more like face-to-face workshops than large group webinars, which tend to resemble keynote presentations rather than genuine learning experiences. Small group webinars offer a high degree of interaction, and the facilitator would typically know each of the participants. Among many modern organisations, small group webinars are a popular method for delivering training. Think of Zoom, GoToMeeting, Webex or Adobe Connect as platforms for this style of learning.

- **Small group webinars: Strengths**

- Efficient training delivery method. Costs to run webinars are low so the majority of funds are spent directly on learning.
- Can be extremely engaging and may offer as much as (or even more than) face-to-face training in the hands of a skilled facilitator.
- Can involve 1:1 live chat, breakouts for small groups, document edits, screen shares and more.
- Can support ‘soft’ skills topics, including role-plays, by using webcams for displaying body language and interaction.
- Group discussion can rival face-to-face workshops, or even exceed them. Some participants may feel more comfortable contributing via keyboard discussions than speaking in public at face-to-face workshops.

- Excellent at gathering group input. Everyone can contribute, and it is harder for an individual to dominate the discussion.
 - Can efficiently run short sessions or a series of sessions over weeks or months, as the cost to organise and effort to join each session is so low.
 - Suits participants located in widespread geographic locations, within or outside the corporate office.
 - Easily recorded for playback in the future or those unable to attend the live event.
 - Easy to track and report on attendance and, with the right software, some degree of engagement.
 - Easy to refine and re-use, so sessions can improve over time.
- **Small group webinars: Weaknesses**
 - Can be a passive experience unless the webinar facilitators are skilled at using the delivery platform.
 - Can turn into ‘death by PowerPoint via the internet’ in unskilled hands.
 - Participant numbers need to be limited in the same way as face-to-face training. Beyond 10-20 participants the webinar becomes a ‘large group’ and engagement falls. That being said, because the costs of delivery are lower, it is possible to run webinars with 5-10 participants which would be impractical to run as a face-to-face workshop.
 - While it is easier to monitor each participant for engagement in a small group webinar the facilitator still needs to be active in this monitoring.
 - Potential technology issues, but most modern webinar platforms are stable and optimised (even for low bandwidth environments like mobile).
 - Can be hard to run for more than 60-90 minutes per session. Large topics may require multiple sessions, in comparison to what can be achieved in a single four-hour face-to-face workshop. That being said, a four hour face-to-face workshop may create its own problems with engagement.

Training delivery method: Online learning

The next choice for training delivery method is online learning. This means prepared learning modules delivered via an online platform. Participants work through modules at their own pace by reading content, watching videos and completing online activities.

- **Online learning: Strengths**
 - Can be extremely cheap to create, with the right platform and toolset. Cost to create can be the same as the cost to prepare a set of Power Point slides for a workshop (but with a much higher return).
 - Extremely efficient training delivery method. Almost all costs are spent directly on learning outcomes.
 - Content is presented consistently to every participant, every time.
 - Content is available for participants at any location and any time.
 - Most subject matter experts can be guided to create interactive online learning more easily than asking them to stand-up and present to a group. The information captured in online training is also permanent and re-usable (whereas a workshop or webinar is a one-off event).

- Participants explore content at their own pace, and have the option to repeat parts of the training if desired.
- Participants can return to the training in the future to reinforce key points or revisit important content.
- The experience can be highly engaging when developed with modern tools. For younger generations, online training can be more engaging than face-to-face training.
- Training can be more self-directed, with self-enrolment or auto-enrolment options into training libraries (reducing admin burdens).
- Participants have flexibility to complete the content at a time that is convenient. Participants can schedule in training at times which suit them, rather than having training forced upon them at a time they may regret.
- Training activity is easy to track and it is simple to report on completion.
- Significantly more training data is typically available for online learning than workshops or webinars. The responses from every single participant can be tracked and measured (with the right platform).
- **Online learning: Weaknesses**
 - Can be extremely expensive to create, if expensive or complex eLearning Authoring software is used. Equally, updating online learning content created by ELearning Authoring software can be difficult and expensive. These costs can be avoided with a learning creation platform.
 - While the experience can be engaging, it can also be disengaging if poorly created. If the online learning is nothing more than Power Point slides with audio commentary, or just a one hour video (or series of small videos), the experience may be passive for the participant.
 - If the online learning is purchased from an external library, it can be disengaging. The content may be generic and may not appear in the learners branding. Once again, a learning creation platform can avoid these issues.
 - Some online learning can lack any social aspect. This is particularly true with traditional learning management systems and older eLearning modules. Participants can feel 'alone'. More modern learning creation platforms can include social learning opportunities, to allow participants to learn from each other or reflect on thoughts from other participants.

Result: The case for blended learning is strong

As technology advances, so much our approach to all aspects of business – training included. While face-to-face training has been the foundation of corporate learning, and will remain important going forward, the case for webinars and online learning is overwhelming.

A blended approach to learning, which uses the strengths of type of training delivery to avoid the weakness of each type of training delivery is key.

And at the heart of blended learning is online learning. Online learning is the most efficient form of training delivery, offering consistent training at any time and in any location at a low cost. It excel at teaching organisational knowledge – compliance, induction, product or technical knowledge, policies, processes, documentation. With the right platform, it can also share many



‘softer’ skills via videos, role-plays, scenarios and interactions – leadership, sales, service, management, teamwork.

Important, online learning makes your face-to-face learning better. It allows workshops and webinars to have more prepared participants, to spend more time on discussions, to focus on application and to be shorter (thereby saving time and money).

How do I build a business case for online learning?

Is training an investment or an expense?

This classic question continues to challenge all modern organisations as they seek ways to grow and innovate. Training can appear to be an expense because it registers as money out the door. Yet the signs that training might actually be an investment - by providing a return - are harder to see. Staff go to training, but the benefits are not immediately apparent.

Many traditional forms of training don't help the situation because there is often little to show at the end of the training event. Training usually feels like a one-off 'event' with no or little follow-up, no chance to refine and improve it, no ability to re-use the content (without considerably more expenses) and no tracking of change to measure the return.

As we have discussed, face-to-face or instructor-led training also often involves several very real expenses - room hire, travel costs, food and beverages, printing workbooks. These are sunk costs with absolutely no return, and are often taken out of a training budget, while not directly contributing to staff learning.

Online learning as an investment

In summary, with traditional training we have a single 'event', with no permanence or re-use value, attached to several expenses which do not directly result in any training benefit. No wonder most training looks like an expense. However, that's where employee training software can turn an expense into an investment.

AN ONLINE TRAINING PLATFORM ADDRESSES SEVERAL OF THESE EXPENSE ISSUES. IT PRESENTS A MUCH STRONGER CASE FOR TREATING TRAINING AS AN INVESTMENT AND AS A WAY TO MAXIMISE YOUR TRAINING BUDGET.

Let's consider how employee training software can benefit your organisation.

Online learning creates a journey of learning, not an event

An online training platform changes learning from a 'big bang event' to an ongoing journey of learning that offers:

- **Smaller and more frequent training.** Staff who spend even a half-day at a training workshop make an investment of 4-5 hours of their time. Chances are, they forget a lot of the early content by the end of the session. Time is wasted with breaks, ice-breaking activities and setting up physical elements. Online training focuses purely on training - there is almost no time wasted on travel, set-up, breaks or anything else. An online training platform can take that same 4 hours of workshop content and distribute it via smaller 20-40 minute modules over a series of weeks.
- **Automated training reinforcement and social learning** via email summaries, online journals, peer sharing and on-the-job activities. At literally no cost at all, this automation can reinforce key content to staff and encourage long-term change in their behaviours.

Together, these features allow an online training platform to dramatically boost learning retention and behavioural change, which results in a better training return.

Online learning makes self-paced learning available 24/7

When they explore an online training course, staff can more easily manage training needs with their immediate work-in-progress. This allows them to reduce the expense of training and accelerate the returns.

- **Improves learning outcomes.** From a learning perspective, an online training platform provides far greater control to each staff member. If staff don't fully understand the material, they can repeat content to clarify issues. If everything is making perfect sense, they can move at a more rapid pace through the course. This simple ability immediately makes better use of your staff's investment of time.
- **Reduces delays or restrictions in learning.** An online learning platform makes cloud-based learning available 24/7. New staff can start induction programs on day one, without having to wait 6 months for the next set of workshops. Existing staff can address development areas immediately after a performance review. New processes, product knowledge, compliance issues or service standards can be shared with your business in days, not months. An online training platform reduces the 'time to productivity' for any staff member.

Online learning eliminates wasted learning expenses

Finally, having improved the speed and size of the return on a training investment, an online training platform can also reduce the size of the training investment. Instructor-led training or physical workshops have a huge inefficiency in training expenses. An online training platform allows you to:

- **Eliminate expenses without a direct impact on training returns.** With an online training platform, you remove any travel expenses, food and beverages, printing expenses and training room hire.
- **Reduce or eliminate expenses for the creation of training content.** While there is a cost in developing or buying training content for your online training platform, that same cost exists with any form of training. However, those costs are also directly correlated with training returns. With a great knowledge sharing platform, you can even eliminate many of those costs too as you tap into internal expertise within your business.
- **Share training expenses over a wider group of staff.** An online training platform also provides better scale in training. The training content you develop can be utilised with 5, 50, 500 or 5,000 staff with little extra cost for each additional staff member. As a result, the average cost to train each employee falls as the investment is shared over more staff.
- **Share training expenses over a longer time period.** There is also a far higher degree of permanence with an online training platform. Training content can be reused over years as it is not dependent on any single facilitator or person to deliver it. Employee training software can also quickly update training content, to help maintain its usefulness for years. This allows the training investment to be spread out over years, instead of a single day.

Better and faster training returns, with a reduced training investment

Once we start to think about making training an investment, we can see that online learning becomes a viable solution. Online learning platform can...

- **Improve training return** by increasing knowledge retention via smaller, more frequent training, as well as driving behavioural change through automated follow-up.
- **Accelerate training return** by allowing staff to align training requirements with their work-in-progress, and complete training immediately, at a pace which suits them.
- **Reduce training costs** by eliminating expenses without a direct correlation to training, as well as reducing content creation costs (especially via a knowledge sharing platform) and sharing expenses with more staff over a longer time period.

Result: Better, faster and cheaper training via online learning

The result is a higher return, delivered faster and with less cost. That's the power of online learning. When that online learning is created and delivered by a learning creation platform, like Tribal Habits, then the return increases and the expenses reduce even further.

With Tribal Habits, you can develop engaging training content by tapping into the proven expertise in your own organisation. Transform your organisation by capturing all your top ideas and best practices, and use that knowledge to power online learning. Your staff can engage with content that is proven to already work in their business. This involves ideas, case studies and examples which are 100% relevant to their roles.

WHAT'S MORE, WITH TRIBAL HABITS YOUR TRAINING NEEDS CAN BE
CREATED AND MANAGED BY ANYONE - YOU DON'T EVEN NEED A
TRAINING MANAGER!

YOUR TRAINING BECOMES AVAILABLE 24/7, IN A SECURE CLOUD PORTAL,
BRANDED TO YOUR ORGANISATION, FOR JUST A FEW DOLLARS PER
PERSON PER MONTH.

THAT'S NO EXPENSE. IT'S A SMALL INVESTMENT WITH A MASSIVE RETURN,
WAITING TO HELP YOUR ORGANISATION ACHIEVE ITS STRATEGIC GOALS.

Six reasons to rapidly switch to online training right now!

Over the last decade, many organisations have thought about the switch to online training. As we discussed in the previous article, perhaps it is to reduce training expenses, deliver training in a way which resonates with a modern workforce or improve learning outcomes through more consistent, slower-paced learning.

Sometimes, however, you might need to accelerate decisions and make a rapid switch to online training. Reasons for this could be to quickly deliver critical content, respond to changes in your business environment or immediately overcome hurdles in face-to-face training.

In this article, let's consider six reasons why you might need to rapidly switch to online training – and how you can support your business case and inform your decision-makers during this process.

1 - Organisational change needs timely online training

A common reason to rapidly switch to online training is in response to change. When something important changes in your organisation, you can't expect your employees to 'keep doing what they were doing'. Typically a change in your organisation, or operating environment, requires a change in your organisation's process in order to achieve the same outcome.

Training is a critical component of change management. Unfortunately, it is often an after-thought. Training occurs days, weeks or months after the change event. Employees are left struggling through the changes on their own.

This delay is worse if your organisation relies on face-to-face workshops. Successful organisations have a sense of urgency in ensuring that appropriate training accompanies change events in a timely manner. This is when organisations 'bite the bullet' and rapidly switch to online training.

With the right platform, online training can be quick to develop, consistent in its delivery, easy to distribute and track, and available 24/7 in any location.

2 - Online training creates critical feedback loops

Continuing with this theme of change management, quickly establishing online training around a change event creates a valuable feedback loop for the organisation.

THE FASTER TRAINING IS PROVIDED, THE SOONER THE ORGANISATION LEARNS ABOUT CHANGE MANAGEMENT ISSUES. PROBLEMS IN PROCESSES ARE IDENTIFIED, EMPLOYEE MORALE IS QUICKLY MEASURED, AND SUCCESSES CAN BE CAPTURED AND SHARED TO HELP BUILD MOMENTUM IN THE CHANGE PROCESS.

Once again, organisations need to rapidly switch to online training to build this feedback loop faster. The need to quickly switch to online training is intensified by more significant changes, more expensive changes or changes which have short implementation periods (the change needs to occur NOW!).

3 - Online training helps maintain morale

Face-to-face training takes a long time to set up, book, organise and conduct. Think about a new employee waiting months for the next induction session, or an existing employee now working in a remote location (or working at home). For employees in those situations, face-to-face training may seem far away.

Access to training and personal development is a huge part of employee engagement. The further employees feel removed from training opportunities, the greater the negative impact on their engagement and morale.

Online training, meanwhile, is available all the time, in any location. It's a perfect way to allow employees to feel supported. Even if an employee is temporarily busy and unable to stop for training, the knowledge that training will be available as soon as they are ready is critical for morale.

Unlike face-to-face workshops which have an 'event' feeling to them – a large, sudden sugar hit of engagement – online training can be accessed in smaller, bite-sized pieces and in a way which more easily fits into the schedule of a modern worker.

Online training offers constant positive engagement for employees in any location.

4 - Online training supports continuous improvement

Another key advantage of online training is its ability to manage smaller pieces of knowledge.

Consider a small change to your sales process. Perhaps 30-45 minutes of required training to update your sales teams on new product knowledge and sales methods you have introduced.

Face-to-face training for such small updates like these is difficult. The effort involved in preparing the session, organising a location and getting everyone to attend the training generates a poor RoI for training when the content only requires 30-45 minutes. At the very least, virtual training via a webinar would be more appropriate.

Rapidly created online training, through a learning creation platform like Tribal Habits, allows that knowledge to be captured in less time and distributed without delay to any employee in any location (as well as future employees or those who otherwise miss a face-to-face workshop).

With less effort to create and share online training, it becomes easier to provide more training and more often. Smaller, more frequent learning promotes continuous improvement. It allows the organisation to iterate change and avoid 'big bang' announcements.

It also encourages teams to review critical processes regularly. Managers can focus employees on specific issues each week, rather than trying to fix everything at once in a single day workshop.

5 - Organisations need experience with online training (to maximise outcomes)

If your organisation doesn't have much experience with online training, then it needs to rapidly switch to online training right now for one very simple reason: it takes time to obtain organisational skill.

As you introduce online training into your organisation, not only is there a small adjustment for employees (although often much more modest than management thinks), there is also an adjustment for the organisation.

Managers, HR and training staff need to learn how to use their online training platform, how to best manage and distribute online learning, how to drive accountability for online training outcomes and how to create customised online training on critical topics.

The sooner this process of organisational learning begins, the faster the organisation will uncover more valuable ways of using online training (within that particular organisational culture). Like many digitisation processes, the snowball effect rewards organisations who move sooner.

Result: There's no reason not to rapidly switch to online training

A SIXTH AND FINAL THOUGHT IS 'WHY NOT?'. AT THIS POINT, ONLINE TRAINING PLATFORMS ARE LOW COST AND EASY TO USE. THE BENEFITS ARE TANGIBLE AND SIGNIFICANT – WITH NO DOWNSIDES.

If your organisation continues to run face-to-face workshops, an online learning platform can only enhance them. It can make the workshops shorter, more focused, or provide pre or post workshop content. It is quite possible that your net training costs even decrease with an online training platform as you can reduce the most inefficient of training costs (room hire, catering costs, travel expenses).

'Times are a-changing'. The number of organisations not yet using online training continues to fall every day. Successful organisations are using rapid, online delivery to accelerate knowledge through teams – quickly eliminate mistakes, promote best practices, boost employee engagement, ensure operational compliance. In any location, for every employee, at all times.

Online learning vs virtual learning vs blending learning?

As you think about converting existing offline or paper-based training to online training, you largely have three choices.

1. Online learning. As we have discussed above, this means creating online learning modules which learners can complete on their own in a self-paced environment. Online learning can be delivered repeatably at any time and in any location, but is undertaken asynchronously – one learner at a time.
2. Virtual learning. As we have also discussed above, this means the delivery of live training to a small group via webinar software. This is a ‘virtual’ workshop experience, which delivers synchronous learning – learners and the facilitator are interacting at the same time. This learning can be delivered in any location, but only at scheduled times. If virtual learning sessions are recorded for playback, then the learning becomes online (asynchronous) learning instead.
3. Blended learning. This style of learning combines online and virtual into a ‘blended’ learning experience. It attempts to take the strengths of each type of learning and use them to avoid the weaknesses of each type of learning.

So one of the first things to consider when converting existing training is what you are going to convert to – online learning, virtual learning or blended learning.

When should I use online learning?

Online learning brings consistency, scale, a self-paced experience, rapid delivery, easy updates and easy creation. As a result, it excels in learning...

- When sharing theory. Online learning is consistent and self-paced. This makes it perfect for teaching theory. Learners can move faster or slower as it suits them, return to the learning to use as reference material and receive the exact same content every time. Online learning can also very easily integrate online assessments both as a learning process (to help learners calibrate their understanding) as well as a training effectiveness process (for learners to demonstrate retention or application).
- When consistency is critical. Online learning gives the exact same experience to every learner without variation or interpretation. When the knowledge being presented cannot have any variation, then online learning is the go-to tool. Once again, online learning with online assessments is also a perfect combination.
- When standards are important. Similar to consistency in delivery, online learning can also be used to share standard knowledge across locations. If you need different teams in different locations using the same process, then online learning is an obvious choice. It provides a single source of truth – the *one way* to implement that process.
- When quick roll-out is required. Online learning is (with the right tools and platform) very fast to create and distribute. There’s no workbooks to print, no meeting rooms, no waiting for everyone’s schedule to suit a webinar and no travel required. Rapid online learning can get training delivered within hours of an announcement.

- When content frequently changes. Online learning is (with the right tools and platform) very easy to update. Unlike workbooks, slide decks or recorded webinars, you can keep updating your single online training module and be certain that learners are always directed to the latest version.
- When capturing expertise. If your organisation has proven processes and expert knowledge, then converting that valuable information into online training ensures that content stays with your organisation forever. Otherwise, when your experts leave or retire, that information goes with them. Furthermore, it captures their knowledge in a way which is transferrable to others – which PDF documents often do not help with.

When should I use virtual learning?

Virtual learning brings participant interaction, opportunities for discussion, wide availability and opportunities for displays of body language. As a result, it excels in learning...

- When body language is important. Online learning can actually do a lot with body language via images and videos. Sometimes, online learning can be even better than virtual learning, as it can present high-quality videos which are prepared to specifically demonstrate physical actions from perfect (or multiple angles) and with the ability to watch again. However, sometimes you need a 'live performance' of a physical action or emotional reaction. That's where a webcam and virtual session can be important.
- When learning has many variations or scenarios. Some training is straight-forward. Internal processes, for example, may be simple step-by-step processes with little variation. If there are exceptions, they can often be covered in online learning modules. However, some learning content has a lot of variation. Some topics in sales training, for example, may need to address many subtle changes or responses. In this case, virtual learning can be very useful to allow participants to raise specific scenarios and get very specific feedback and ideas. Virtual training particularly excels when you have subject matter experts in the session who can share first-hand experience and answer live questions.
- When content is emotional or needs discussion. Online training is often useful for discussing emotional content as it allows learners to undertake the training in private and at the own pace. Sometimes, however, a more human touch is required. This is where virtual training can be important. A skilled virtual facilitator can help a group approach an emotional topic, or content which needs group discussion to overcome barriers or resistance to learning.
- When teamwork is important. Good online training can promote social and peer-to-peer learning, but the experience remains asynchronous (one at a time). Sometimes, you just need to get the team together! This is where a virtual learning session can also excel – allowing participants to share their experiences, successes and hurdles. Group discussion via live chat (typed or spoken) can be very powerful in a virtual session.

When should I use blended learning?

Combining online and virtual learning to create a blended learning experience can give you the best of both worlds. It's not always required, however – it does create extra work and complexity in the learning process.

Blended learning works best when each delivery methods plays to its strengths.

- Use online learning to delivery theory, knowledge and content. Instead of delivering a theory in your virtual sessions, deliver that theory in a pre-session module. Avoid making your virtual sessions ‘death by Power Point via the internet’! Talking through a set of slides is the worst way to run a virtual session. So use online training to get your theory and knowledge across to participants in advance, allowing your virtual sessions to focus on more group discussion and interactions.
- Use online learning to better prepare participants for virtual sessions. By moving your theory and knowledge into online learning *in advance* of your virtual sessions, you also end up with better prepared participants. Participants can enter your virtual session with some existing knowledge and, ideally, with questions or scenarios to ask. It allows your virtual sessions to become more interactive.
- Use virtual sessions to focus on application and discussion. Indeed, with the content out of the way and your participants better prepared, you can use your virtual sessions to examine complex ideas, discuss scenarios, run Q&A sessions, hold group discussions and more. This is far more engaging for all participants!
- Use online learning to reinforce virtual content. After your virtual session, you can use online learning to reinforce key ideas. This may include distributing a recording of your virtual session as well as providing templates or downloads from your session. You may also create online content which discusses key points you raised in the session, helping highlight that information (especially if your virtual session is 60 minutes long!).
- Use online learning to drive implementation from virtual sessions. Finally, online learning can be used to push and track learning outcomes. You can have participants join a post-session online module to obtain on-the-job tasks or complete online assessments.

Result: Online learning and virtual learning are both excellent training methods

As you can see, both online and virtual learning can create effective training outcomes. Online learning remains the fastest and easiest way to distribute most training to most people, most of the time.

Virtual learning, when done correctly, is also a powerful tool for training and change. However, if virtual learning is simply presenting content – its just slides and someone speaking, with limited interaction – then online learning will usually cover that same material better for everyone.

When combined, online learning can prepare and manage participants before and after your virtual learning sessions. In this respect, online learning improves your virtual sessions by allowing them to be more interactive.

THIS BLENDED COMBINATION IS A FANTASTIC REPLACEMENT FOR FACE-TO-FACE WORKSHOPS TOO. TAKE YOUR FULL DAY FACE-TO-FACE WORKSHOP AND TRANSFORM IT INTO, SAY, THREE VIRTUAL LEARNING SESSIONS, EACH ACCOMPANIED BY PRE AND POST ONLINE LEARNING.

In combination, you can retain the group discussions in your virtual sessions, improve the knowledge transfer via online learning and slow down the entire learning experience – from

overloading participants in one day, to taking them on a measured journey over a month. Better learning, with better outcomes, at a lower cost. What's not to like about that?

Part 2 – Getting started with online learning

In this part, we explore online learning in more detail. We consider some of the issues in converting workshops into online learning including several step-by-step guides. We also take an initial look at different online learning platforms you could use for this conversion process.



When should I covert face-to-face Workshops to online training modules?

Despite the internet existing for over 25 years, many organisations are still highly reliant on face-to-face workshops. Indeed, there are times when face-to-face workshops are valuable. However, it can be a mistake to apply the same solution to every problem, particularly when there are many reasons to consider new solutions.

In this article, let's consider when you may want to move workshops to online training, and then look at a series of steps to guide you through the process to move workshops to online training both efficiently and effectively.

When should organisations covert workshops to online training?

For many organisations which have relied on workshops, it may be time to reconsider that reliance right now.

- Workshops are expensive. The cost of a two-day workshop can easily exceed the cost of an entire annual subscription to a learning platform. That's two days of learning vs 365 days of learning for the same monetary investment.
- Workshops are inefficient. Much time is lost in organisation and travel, not to mention time in attendance. A high proportion of overall costs are spent on items which do not impact the training outcome (room hire, travel, food, printed workbooks).
- Workshops are often ineffective. Delivering theory via a workshop is not only the single most inefficient way to deliver theory, it is also ineffective. It can be inconsistently delivered, boring for participants and offer no ability to skip or repeat content.

UNLESS YOUR WORKSHOPS ARE 100% FOCUSED ON GROUP INTERACTION, THEN IT'S TIME TO MOVE WORKSHOPS TO ONLINE TRAINING. YOU WILL ONLY GET OUTPERFORMANCE FROM A WORKSHOP WHEN IT IS FOCUSED ON TEAMWORK, FULL GROUP DISCUSSION OR APPLICATION OF IDEAS. EVEN THEN, SMALL GROUP VIRTUAL WORKSHOPS CAN REPLICATE MANY OF THOSE OUTCOMES AT A MUCH LOWER INVESTMENT TOO.

Another time to reconsider your workshops is then they are causing delays in training. If your workshops need 5-10 or more employees to justify running, then you are creating bottlenecks in training. New employees might need to wait 2-6 months for a workshop, by which time they have been forced to learn on-the-job, often picking up bad habits. Online training removes that bottleneck immediately, allowing learning to be accessed 24/7.

If your organisation needs to reduce training costs or travel, online learning is a powerful solution too. This is particularly true when online training is blended with small group workshops. This can give you the best of both worlds at a significantly reduced cost – and often with much better training outcomes!

When should training providers convert workshops to online training?

Let's now consider the case of training providers – organisations which sell or provide training to third-parties. Historically, the external training industry has relied on face-to-face workshops. They sell 'seats' at these workshops, either to the general public or as private training experiences for organisations.

Either way, the experience is often driven by an 'event'. Participants travel to the face-to-face workshop to attend the event – externally or in a training room in their own organisation. Training providers most likely have slide decks and workbooks of training content, along with possible facilitators guides.

Let's consider why and when training providers might want to move on from face-to-face workshop delivery of their training content.

- Improve training outcomes. For most training, a blended learning experience (a series of shorter online modules and virtual training sessions over several weeks or months) will lead to better training outcomes than a single day of training. A single day workshop can be overwhelming for many participants, with a significant amount of content forgotten. It can just be too much to take in. In other aspects of life, we learn 'a little knowledge more frequently'. Think of weekly piano or tennis lessons. Yet at work we are sent to a full-day workshop. However, it is too expensive to run face-to-face workshops every week – so a full-day workshop was the only option. With the internet, however, it is easy to deliver 30-60 minute learning experiences every week at a very low cost. For this reason alone, face-to-face workshops are largely obsolete.
- Reduce time burdens on participants. Modern employees don't like to be away from their jobs for an entire day. Even for a half-day. They feel disconnected and worry. They start to think about all the emails which await them. Face-to-face workshops are now fighting this modern employee who isn't used to spending days out of the office. Online training allows employees to undertake training at times which suit them – when they are fully engaged and ready to learn, without worry or distraction.
- Reduce costs to deliver. Online learning eliminates travel costs, room hire, facilitator fees, food and beverage costs, workbook printing and more. While it is true that online training has its own costs, they are far, far, far less than face-to-face workshops. This can either mean a higher margin for the training provider, or a reduce in the pricing of training for the customer (or both).
- Make it easy to meet minimum numbers. Face-to-face workshops need a minimum number of participants in the same location. Online training (or virtual sessions) don't. You can be far more flexible with participant numbers and where participants are located. It is much easier to find 20 participants across the country, than 20 participants in a single city.
- Appeal to a wider range of organisations. Not every organisation wants a workshop. By having online versions of your content, you give organisations options to suit their budget, location, employees and learning styles. It gives your organisation more ways to package its training content and generate a return.
- Offer flexibility to suit different learners. Not every learner enjoys a face-to-face workshop. It can be intimidating for some, time-consuming for others and simply boring for some. Modern employees are used to online interaction.

Ultimately, this is about future proofing your businesses. If your organisation wants to keep monetising its training content, then it needs to present it in a way which appeals to the widest range of customers – both now, and in the future.

How can I convert workshops into online training?

One of the reasons many organisations continue to stick with face-to-face workshops is that they feel the effort to transfer workshops into online training is too hard.

Until recently, this was probably correct. If you had to use complex eLearning Authoring tools, like Captivate or Storyline, to create online training, that was a long process with a steep learning curve (or an expensive process completed by external consultants or training designers you would have to add to your employee list!).

WITH MODERN CLOUD-BASED LEARNING CREATION TOOLS, THE PROCESS OF TRANSFERRING PAPER BASED TRAINING INTO ONLINE LEARNING CAN BE A LOT EASIER. WITH A PLATFORM LIKE TRIBAL HABITS, IT IS SO EASY TO TAKE YOUR TRAINING ONLINE THAT ANYONE IN YOUR TEAM COULD DO IT.

At a high level, here's a seven step process to transfer workshops into online training.

Step 1 - Decide what to include

Start by defining the scope of content and what delivery method would best suit that content.

1. If your workshop is largely theory, then you may transform the entire workshop into online training.
2. If your workshop has some implementation activities, often at the end of the workshop, then you may still use online training and combine it with automated offline tasks.
3. If your workshop has detailed implementation or requires a substantial discussion about the application, then you may transfer initial (more theoretical) content into online training and then run a virtual or face-to-face workshop afterwards. The workshop can be significantly shorter in time and focus on issues of application. This also makes the workshop itself more effective since participants attend having already completed the online training and prepared some materials.

As an example, modules in Tribal Habits can include triggered on-the-job activities, with their own due dates and notifications, including reminders. These activities can be used to step learners through implementation, set-up and submit workshop preparation materials, download templates or case studies for offline assessments (and then upload results) and more.

Step 2 - Break your existing content into chunks

Having defined what will go into the online training, start with your existing workshop content and break it into chunks. Each chunk should end up representing around 5-15 minutes of content. If you have a workshop presentation or workbook, this can be as simple as defining which slides/pages should be grouped together into chunks.

Think of chunks as a table of contents. You are seeking well-defined pauses in your workshop content – moments when it is good for a learner to pause, reflect on what they have covered and then move onto the next chunk.

Step 3 – Add detail to your workshop materials

The chances are that most of your workshop materials will lack sufficient detail. For example, you may have a set of workshop slides, but the delivery notes for those slides are missing – they are simply 'in the mind' of the facilitator.

As a result, many workshop materials do not make sense on their own. They need someone explaining them. In this step, you need to add sufficient detail to make those materials stand-alone. This is the largest step, but since you have broken your materials into chunks, it can be addressed in stages.

- With a modern online learning creation platform, there are also many ways to prepare – and then capture – this detail.
- Add notes to the slides in your presentation. Essentially, write the speakers notes as used by your facilitators.
- Record your facilitator explaining slides and content. A modern mobile phone camera, in a well lit, quiet and distraction-free room can be enough to capture an interview with your facilitator.
- Update slides with additional detail. If a slide shows five steps in a process, but only the names of the steps, then add in the missing detail.

In all cases, the simple test is to ask: could someone understand this content if I was not here to explain it to them.

Step 4 – Identify opportunities for online activities

Now look at your workshop and highlight all the activities which the facilitator runs. Chances are, many workshop activities can be replicated in online training.

- Review quizzes are the easiest to transform into online quizzes. Indeed, they often work much better online! You might just need to add explanations for the correct/incorrect answers.
- Scenarios or case studies are also easy to replicate. You can present the scenario and then ask the learner how they should respond, either via a quiz or an open answer poll.
- Polls can be used to ask learners how they already deal with the content, what experience they already have, what common problems they face or what issues they want to solve. This can replicate any activity which begins with 'Raise your hand if...'. Unlike a workshop, online training also remembers the answers to polls (whereas no-one remembers who raised their hand...).
- Open answer questions can be used to capture thoughts from learners. If you ask a learner what steps they want to take after the workshop, you can ask the very same thing in online learning.

IDEALLY, YOU WANT TO REPLICATE AS MANY OF YOUR WORKSHOP
ACTIVITIES AS POSSIBLE. HOWEVER, AS YOU GAIN MORE CONFIDENCE

WITH ONLINE LEARNING, THEY ARE ALSO ACTIVITIES YOU CAN ADD WHICH ARE NOT POSSIBLE IN WORKSHOPS. MATCHING, SORTING, OR RANKING EXERCISES ARE A GOOD EXAMPLE.

Step 5 – Transfer your workshop into online training

At this point, you now have your workshop content with sufficient detail and a series of activities to encourage interaction. Now it is little effort to transfer workshops into online training modules.

Once again, if you are using a modern online training creation platform, this is now a simple matter. Let's use Tribal Habits as an example.

In Tribal Habits, you use a building block editor to add content.

- If you have text to add, just click the text icon to add a text element and then copy/paste your text. Alternatively, click hotspot to add an image which you can annotate with interactive text, or click Narration to build a simple narrated slideshow with your text.
- If you need to add media, then click the icons for videos, images, audio or files and then upload as needed.
- To add your interactive elements, just click on the icon and then fill in the blanks. If you add a quiz, you just need to copy/paste your question and answers, select the right answer(s) and copy/paste your feedback.

The process becomes one of simply selecting the appropriate building block and then copying/pasting the content you have prepared. Tribal Habits will automatically format and brand your content to your organisation standards. It will manage all navigation, estimate time for learners to complete each section, handle online assessment marking and more.

Step 6 – Get some feedback on your first draft

Once your first draft is finished, its time to get some feedback.

This can be as easy as asking a few colleagues to complete your module. In particular, ask them if the content was able to be understood on its own. This is often the main issue when you transform face-to-face workshops into online training – you just don't provide enough detail. If not, go back and add additional content.

Then ask them if there was enough interaction. If not, then look at perhaps changing some of your text content into more interactive elements, or add in some additional online activities.

In Tribal Habits, you can obtain two additional forms of help.

First, built-in to Tribal Habits is a digital training designer called Sage. Sage provides real-time feedback on your training module. She can give you a checklist of ideas, provide tips on creating better content and even give you a quality score for your module!

SECOND, EVERY MODULE YOU CREATE IN TRIBAL HABITS ALSO QUALIFIES FOR A FREE REVIEW BY ONE OF OUR EXPERT TRAINING DESIGNERS. WHEN YOUR MODULE IS IN GOOD SHAPE, JUST HIT THE REVIEW BUTTON AND YOU RECEIVE A PERSONALISED 10-MINUTE VIDEO REVIEW OF YOUR

MODULE. OUR EXPERTS WILL HELP YOU SOLVE ISSUES OF 'TOO MUCH TEXT', 'NEEDS MORE INTERACTION', OR 'ITS TOO LONG' WITH EASE.

Step 7 – Remember that training is never really finished

At this point, its time to pilot your module with your first learners. Be sure to get feedback from them (you can automatically enable feedback questions in Tribal Habits modules too). No training module is ever really finished!

That's the beauty of online training. You can easily take learner feedback and tweak the module – every new learner will immediately benefit from this. Fixing things in a workshop often requires far more work and won't have any impact until the next time the workshop is run.

Now you are up and running. You can now deliver the same content as your workshop...

- At any time
- In any location
- In the same way
- With full tracking completion
- With full tracking of dates and versions
- With simple updates to content
- With a detailed recording of learning data

Plus, you can now do this with no additional time effort and minor costs to deliver per learner. If you are then continuing with your workshops, you can now reduce their length and improve their effectiveness by having learners who are prepared and ready to engage!

How do I prepare Power Point slides for conversion into online training?

If you have existing content in Power Point (or similar) slides, you have a few ways to get that information into online training in Tribal Habits.

1. First, you can upload your slides into an online slide presentation website like Slide Share. You can then use the Embed element in a Tribal Habits module to embed those slides via the Slide Share link. Your slides will then appear in your Tribal Habits module using the Slide Share player.
2. Second, you can create a video of your slide deck, typically with your voice over. Power Point has a built-in recording process which allows you to narrate a voiceover as you present your slides on screen. Everything is then exported – slides plus voiceover – into a video file which you can upload using the Video element in Tribal Habits. Video in Tribal Habits is exceptional – we automatically convert your video into 20 different formats and then live stream the best format for each learner based on their device and bandwidth.

If you use either of these options, limit yourself to 5-10 slides per element. This breaks up your content into more manageable amounts. Don't record a non-stop 60 minute video of your slides and expect learners to be actively engaged for the entire time!

3. Third, you can recreate your slides using the Narration element in Tribal Habits. Narration allows you to create up to 10 slides of content (text or images) and to add a script for each slide. The script can be dynamically read aloud by our digital learning coach, Sage, or you can upload your own voiceovers. Narration is a great tool to rapidly transform text into narrated slideshows.
4. Fourth, you can take your slide content and recreate it as online training. In this case, we will leave the 'slide' format behind and use the full range of online creation tools.

For example, if you have a 60 page slide deck, then this is usually the best option. You might keep 5-15 slides to present as actual slides using options 1-3 above. For the rest of the content, however, you could quickly convert it to native online learning.

We can speed up this process if you prepare your slides in a way which makes them more compatible with online learning. So in the rest of this article, let's review a step-by-step process to prepare Power Point slides for rapid conversion to online learning in Tribal Habits.

Step 1 - Overview

Topics in Tribal Habits are broken into 'chunks'.

First, there are points, which represent the biggest chunks – the broad table of contents headings for your topic. Each point is then broken into sections – the sub-headings within that point.

Ideally, each topic should be 15-45 minutes in length. This means that each point should be 5-10 minutes in length to improve the experience for people exploring that topic.

We strongly recommend that each point should have at least three sections, once again to make each point easy to digest.

So in summary...

- Topics are typically 15-45 minutes.
- Each topic consists of a series of large points, each of which are 5-10 minutes.
- Each point should consist of 3-6 sections.

If you can think of your slides as being sections (or several slides per section), then you can group your slides into points with your entire presentation representing the grouping of all your points into one topic.

Note that each topic has a maximum of 12 points (with each point containing 3-6 sections). That should be plenty of structure for each topic.

Step 2 - Structure

We also recommend adopting a point structure to give consistency and make the content easy to group. We typically use one of these structures in Tribal Habits topics.

- Ideas – This is like a ‘best of’ list and is the default choice if none of the others fit. Usually each point represents one major idea with the sections providing details. A common section breakdown is (a) Describe the idea in detail, (b) Summarise tips/tricks/mistakes, (c) Give a working example. However, sometimes each point can be a collection of ideas on a theme with each section representing a smaller idea in that theme.
- Rules – A do/do not structure. Usually each point is one rule. Then your sections are (a) Here’s the rule and how to follow it, (b) What happens when you don’t follow the rule, (c) 2-3 Examples of the rule in application to clarify understanding and (d) Highlight any exceptions when you might want to break the rule.
- Steps – A step-by-step process. Usually each point is a major step. Then your sections are sub-steps or tasks within that step. Alternatively, each point is a step and the sections are (a) How to do that step, (b) Tips/Tricks/FAQs/Mistakes about that step, (c) examples of that step in action.
- Facts – Similar to ideas but now its purely facts (product knowledge, technical knowledge). This is basically a text book. So points are major headings and sections are sub-headings.
- Parts – Like an instruction manual for a tool. Each point refers to a part of the tool – like menu items in software or pages in a client document. Your sections might then be sub-choices within that point (various items within a menu; various parts of the page). Or your sections become (a) Introduce the part and its function, (b) tips/tricks/mistakes in using it and (c) examples of it in action or when to use it.

Step 3 - Slides

With all of the above in mind, we recommend your slides follow this flow to make it very easy to transfer into Tribal Habits.

- 1 slide - Topic title
- 1 slide - Topic overview with three parts.
 - What is the topic about?
 - What is this topic important?
 - Who is this topic for?

- 1 slide - Topic agenda. List your big points (usually 3-6, but between 1-12). This list will name your points in Tribal Habits so use short titles in keeping with your structure (e.g. Step 1...).
- Then for each of your big points...
 - 1 slide - Point title page with 1 introductory paragraph about relevance or key themes in that point.
 - 1+ slide(s) for each section. On the first slide for a new section, give it a title to form the section heading. Then outline your content on the slide(s) and the notes pages of those slides. Images, quizzes, slides with scripts, text, videos, questions for explorers or whatever you need.
 - Aim for 3-6 sections per point. Only use slide titles to indicate the start of a new section.

Provide as much detail as possible. If you have bullet points on the slide, be sure to include far more explanation and detail in the notes of that slide. Provide enough detail so that someone can completely understand your content without you having to be there to explain any of it. Your presentation needs to be entirely stand-alone.

Step 4 - Activities

Your topics in Tribal Habits can also have optional on-the-job activities for explorers to complete after they have examined the content.

To make these activities easy to create in Tribal Habits, you should use 1 slide per activity as follows.

- Instructions. Provide clear and detailed instructions on what you want the explorer to do (at least a paragraph).
- Deadline. Outline the maximum number of days given to complete this activity (which will then trigger reminders).
- Question. Write an open question you would like explorers to answer after they complete the activity. The default question is 'What did you discover as you completed this activity?'. Try to avoid simple closed questions. Seek open questions to draw out lessons or useful data about the activity.
- Notifications. Outline who should be notified (and when) about the activity. Managers and/or key stakeholders in that activity or topic might be appropriate. Or perhaps an assessor if the activity requires explorers to prepare, complete or demonstrate something?
- Materials. Is there a template or file which explorers will need to complete this activity? Will explorers be expected to upload something as part of completing the activity?

Result: Slides into online training is now a snap!

In the end, you should have a presentation which uses slides and title pages to easily split your content into appropriate 'chunks'. It will be quick to transform that content into a draft Tribal Habits topic via a simple copy-and-paste exercise of your slide content into Tribal Habits elements.

SUDDENLY YOUR STATIC, PASSIVE SLIDE CONTENT BECOMES DYNAMIC, INTERACTIVE ONLINE TRAINING. PLUS, ONCE YOUR TRIBAL HABITS TOPIC IS IN DRAFT FORM, YOU CAN THEN REQUEST A FREE REVIEW BY ONE OF OUR EXPERT ONLINE TRAINING DESIGNERS!

What are the different types of learning platforms?

At this point, we need a little education about the online learning platform industry. Let's start at the very beginning. The learning and training industry has evolved to offer many different online learning platforms, each offering different feature sets for different types of organisations and their learning goals. LMS? LXP? LCP? DLP? LRS? Let's review your options now.

What is a digital learning platform (DLP)?

Let's start at the top - a digital learning platform (DLP). A DLP is an overarching term for all online learning platforms. It's essentially a generic label. Chances are that your organisation has, or should have, at least one DLP. Larger organisations may end up with 2-3 DLPs fulfilling different functions.

What is a learning record store (LRS)?

Next, a learning record store (LRS). An LRS is a new type of platform. While unknown to many organisations, it aims to become the centre of any DLP strategy in the future. An LRS stores learning data. It is a platform designed to store centralised learning data across platforms and experiences. Ideally, all other DLPs (as well as external learning and instructor-led training (ILT)) would connect into your LRS allowing you to utilise a 'best of breed' approach to sourcing training content while maintaining a single source of training data.

What is a learning management system (LMS)?

Now for the most common DLP - a learning management system (LMS). Learning management systems were the first DLP, coming into popularity 15-20 years ago. These platforms focus on the management of learning. They store user data and manage learning enrolments and reporting. These platforms were originally designed to manage workshops and other instructor-led training, as well as provide a hosting platform for eLearning modules.

As you can probably already tell, many of the functions of an LMS are now provided in a LRS. LRS tend to integrate with a wide variety of training sources since they did not host any content themselves. LMSes, which are trying to provide an all-in-one solution, tend not to integrate with any other platform as they attempt to provide everything in the one platform.

LMSes also struggle with training content. They are a 'hosting' platform not a 'creation' platform. They are empty vessels which can only create users, not content. 10-15 years ago this made sense as eLearning modules were created in complicated desktop software. Today, learning creation platforms have made the creation of online learning much easier and well beyond the limitations of older eLearning formats. As a result, LMSes have attempted to also allow for online training creation by adding in some simple creation tools. Unfortunately for most LMSes, they are simply not designed for content creation.

Nevertheless, LMSes excel at managing training and can simplify the administration of training enrolments and reporting. LMSes tend to be used by large and enterprise level companies managing a wide variety of training content and locations.

What is a learning experience platform?

A learning experience platform (LXP) is almost the opposite of an LMS. An LXP contains ready-made training content, often created with very high production standards (videos, animations, games). It is a plug-and-play solution providing a large volume of prepared training content.

An LXP is typically not unique to your organisation. It is a shared platform used by many organisations. While user data can be segregated by organisation, the training content is shared. It's like a 'Netflix of learning' with hundreds or thousands of prepared training modules. An LXP therefore focuses on training on content which can fit many industries - leadership and management, sales skills, popular software, teamwork and so on.

LXPs solve part of the content problem by providing high-quality ready-made learning on a wide range of topics. Depending on the LXP, this content may or may not be branded to your organisation and may or may not report back to an LRS or LMS. Some LXPs can be quite niche too, which can help provide valuable training content for some roles.

What is a learning creation platform?

Our final DLP is a learning creation platform (LCP). Learning creation platforms are the new breed of LMS. Unlike an LMS, LCPs start with the creation of online training content - without training content, there is no training! An LCP is designed to make the creation of custom training content easy. Organisations should be able to use intuitive tools, guided processes, template modules and building-block editors to create interactive, branded online training modules.

With an LCP, an organisation can solve issues which cannot be solved by an LXP such as employee induction. An employee induction program requires custom content about your organisation and its teams, tools, values, processes and standards. This content is unique to your organisation. An LMS cannot help with this problem as it cannot create quality online training. An LXP cannot help with this problem as its content is not unique to your organisation.

An LCP typically also provides a hosting function for its online modules in a similar way as an LMS. For many organisations, an LCP can replace an aging LMS by providing a complete solution to training content and training distribution. Some LCPs also include ready-made content libraries - so they are also a small LXP.

Result: A learning creation platform helps *create* online training

When it comes to converting existing training materials, a learning creation platform is the best – and only – choice. Other DLPs will only provide you with hosting of online learning. You will need to use a separate eLearning Authoring tool (complex and expensive) to convert your existing training materials into a format which those DLPs can host.

How do I compare different learning platforms?

For many organisations, the key decision is comparison between an LMS vs LXP vs LCP. So let's break down these digital learning platforms (DLPs) by examining their features across the four most common learning requirements for most organisations.

Comparison 1: Training management

In this first comparison, let's consider the support each DLP has for managing the most common types of training content. In this comparison, organisations should consider what the majority of their training content will be (e.g. if your organisation has instructional designers, a significant existing eLearning module library or large training budget, then an LMS may be suitable).

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Self authoring training	Very limited with basic tools and no guided process or templates	None	Comprehensive with many tools, full guided process and templates
Ready-made training	No Support	Massive library not in organisation branding and not editable	Substantial library in organisation branding and editable
External eLearning training	Yes can host all forms of external eLearning packages	No Support	No support
Instructor-led training	Varies but usually supports calendar and scheduling	No support	Varies but usually supports calendar and scheduling

WHEN IT COMES TO CONVERTING EXISTING TRAINING MATERIALS, THEN THE OPTION TO 'SELF AUTHOR TRAINING' IS CRITICAL. THIS IS WHERE LEARNING MANAGEMENT SYSTEMS FAIL TO HELP. A TYPICAL LMS HAS ONLY BASIC TOOLS TO CREATE ONLINE TRAINING, LEAVING YOU WITH SIMPLE, PASSIVE ONLINE EXPERIENCES.

Comparison 2: Training users

In this second comparison, we consider who the typical users of each DLP. Organisations should consider how they will implement training and what roles will be required to both create, complete and managing learning.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Who can create training?	L&D professionals with external eLearning authoring tool	No support	Anyone using built-in tools
What content is covered?	Anything (with appropriate software, resources and budget)	Popular and generic topics with cross-industry appeal	Anything
Who can use the platform?	Staff, contractors, clients, e-store customers	Staff	Staff, contractors, clients, e-store customers
Typical organisation size?	Mid-sized to enterprise	Any size	Small to large

Comparison 3: Platform costs

In this comparison, let's consider the key costs in managing each DLP.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Set-up cost	0 to \$\$\$\$	0 to \$\$\$	0 to \$
Subscription cost	\$ to \$\$\$\$	\$\$\$ to \$\$\$\$	\$ to \$\$\$
Operating cost	\$\$\$ to \$\$\$\$	0	\$ to \$
Operating effort	Highly customisable so high complexity. Needs separate content solution. Built for L&D professionals.	Usually not customisable. Pay for access to their content. Easy to manage with limited options.	All-in-on solution with extensive automation. Anyone can administer. Easy DIY training content creation.

Comparison 4: Training data

For this comparison, we are ignoring LRS. All three platforms store learning data. In this comparison, we want to consider the quality of that data. What data is easily available for both users and the organisation. LMSs and LXPs tend to use older learning data standards (typically SCORM) which limits their data recording options. We also consider the different levels of Kirkpatrick training effectiveness and if each platform can assist in those measurements.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Level of data captured	Completion, Score	Completion, Score	Completion, Score, Polls/Surveys, Open Text, Learning Objectives, On-the-job Outcomes, Relevance, Content Feedback, Next Steps, Social Learning Results
Satisfaction data <i>Kirkpatrick Level 1</i>	Yes, if custom created (time and cost)	Yes, built-in	Yes, built-in
Understanding data <i>Kirkpatrick Level 2</i>	Yes, if custom created (time and cost)	Topic dependent	Yes, easy to create
Behavioural data <i>Kirkpatrick Level 3</i>	Rarely, if custom created (time and cost)	No	Yes, easy to create
Outcomes data <i>Kirkpatrick Level 4</i>	Very rarely, if custom created (time and cost)	No	Yes, easy to create

What are the total costs of online learning?

As a final step in understanding online learning platforms, let's return to the issue of cost. What does online learning cost?

If your organisation hasn't already made a move to online learning, you might be uncertain about the costs associated with such a move. In this article, we'll examine all the potential online learning costs as well as ways to eliminate or minimise them.

As we review the various costs in online learning, we'll need to consider two parts of the process.

- Online learning platform costs. These are the costs in providing a platform to host and distribute online learning. It should be noted that many online learning platforms also provide other benefits, from the administration of instructor-led training to acting as a video-hosting environment.
- Online learning content costs. An online learning platform cannot function on its own – it also needs online learning content. These costs may include access to ready-made online learning libraries as well as the cost of developing new, customised, online learning content.

Set-up costs

Set-up costs are a one-off online learning cost to establish your cloud-based learning platform.

Setting up a domain for a new organisation in a modern online learning platform should require just minutes of effort. There are no provisioning costs in establishing a new organisation in a modern cloud-based infrastructure.

AS A RESULT, AT TRIBAL HABITS, WE BELIEVE SET-UP COSTS FOR ONLINE LEARNING PLATFORMS SHOULD BE FREE.

That being said, some older learning platforms can require considerable effort to provision a new organisation portal while some online learning vendors use set-up costs as a way to improve margins (particularly as a way to coerce organisations into longer contracts to 'spread set-up costs over many years'). Set-up costs for these learning platforms can range from \$500-\$25,000 or more.

Implementation costs

Implementation costs are a one-off online learning cost involved in establishing the initial settings and processes in your learning platform.

These costs are typically human-capital costs. They involve one-off initial implementation activities, such as defining custom fields in user profiles, setting up initial categories, activating single-sign-on protocols and establishing branding on the platform.

For most modern online learning platforms, these activities should be simple and straight-forward. Organisations should be able to quickly establish these settings themselves during a standard implementation process, while platform providers may help with decisions around some of these settings during an initial training process for new platform admins.

AS A RESULT, AT TRIBAL HABITS, WE BELIEVE IMPLEMENTATION COSTS FOR ONLINE LEARNING PLATFORMS SHOULD BE FREE. THE EFFORT IS MINIMAL AND SHOULD BE ABSORBED BY BOTH OUR CUSTOMER SUCCESS STAFF DURING THE FREE INITIAL ADMIN TRAINING WE PROVIDE.

However, many complicated online learning platforms may require an implementation fee. This may include costs for upfront training of staff, help from the platform provider in setting up parts of the platform or 'consulting' services which are required to otherwise use the platform. Implementation costs for these learning platforms can range from \$500-50,000 or more.

Package costs

Package costs are on-going online learning costs associated with the features of your learning platform. Package costs are the first component in determining your on-going usage subscription.

Some online learning platforms have one package – you receive all features, all the time. Indeed, this may make sense for some platforms which have a defined (limited) feature set.

Alternatively, some online learning platforms allow you to select only the features you need. For platforms with more extensive feature sets, that can help make your online learning costs more efficient.

AT TRIBAL HABITS, YOU CAN SELECT FROM SEVERAL DIFFERENT PACKAGES DEPENDING ON THE PARTICULAR FEATURES YOUR ORGANISATION REQUIRES. MANY OTHER MODERN ONLINE LEARNING PLATFORMS OFFER SIMILAR PACKAGE STRUCTURES. IT IS CERTAINLY WORTH INVESTIGATING WHICH PACKAGES YOUR ORGANISATION DEFINITELY REQUIRES.

Plan costs

Plan costs are on-going online learning costs associated with the volume of activity in your learning platform. Essentially, plan costs are the second component in your on-going subscription – they are the 'multiplier' of your package costs. The most common plan cost is 'per user per month' charge.

In a simplified case, let's say your package costs are \$10 per user for the features you have selected. Your plan costs will then adjust the \$10 per user amount up or down. For example, larger organisations may receive a discounted per-user rate for high volumes – it may reduce the per-user cost to, say \$7.50 per user, for the same set of features.

Similarly, paying monthly or annually may adjust the plan cost – annual plans (paying for 12 months of use in advance) typically result in a lower per-user fee. The trade-off here is that you commit to a particular volume of usage, which may not suit seasonal or irregular usage or small to medium organisations who do not need regular monthly usage.

A more important distinction in the plan cost is how a user is counted.

- **Stored users.** Many online learning platforms use 'stored' users (or total users). They count every user in your portal regardless of whether that user is active in the portal (logging in to

use the portal). This method is simple but can be very inefficient if your users are not using your portal every month.

- Active users. Some online learning platforms use 'active' users (or actual users). In this case, only users who log into the portal are counted. This method most closely aligns the value you receive from the online portal with the costs you are paying. If users are not using the portal, your costs should fall.

AT TRIBAL HABITS, WE USE AN ACTIVE USER PRICING MODEL. YOU ONLY PAY FOR USERS WHO ARE ACTIVELY GAINING VALUE FROM YOUR LEARNING PORTAL. THIS IS A VERY EFFICIENT COST MODEL. ORGANISATIONS WITH, SAY, 300 EMPLOYEES MAY ONLY NEED A 150 ACTIVE USER PLAN – THIS WOULD ALLOW 150 DIFFERENT USERS TO LOG IN EACH MONTH. IF YOU HAVE MORE USERS IN A MONTH THAN YOUR PLAN, YOU ARE SIMPLY CHARGED FOR THE EXCESS USERS FOR THAT SINGLE MONTH (AT THE SAME PER-USER RATE).

AT TRIBAL HABITS, YOU CAN ALSO ELECT TO PAY MONTHLY ('PAY AS YOU GO' WITH NO CONTRACT) OR ANNUALLY (STARTING FROM 100 ACTIVE USERS PER MONTH WITH INCREASING PER USER DISCOUNTS FOR LARGER PLANS).

Storage costs

Storage costs are on-going online learning costs associated with the amount of content stored in your online learning portal.

This is often a hidden and unexpected cost, typically associated with older online learning platforms. Organisations may find that a certain amount of storage is initially free on these platforms. However, as usage grows and more content is added to the platform, a storage fee can suddenly be charged.

FOR MODERN CLOUD-BASED LEARNING PLATFORMS, THE COST OF STORAGE IS EXTREMELY LOW. AS A RESULT, AT TRIBAL HABITS, WE HAVE NO STORAGE FEES AT ALL. 'COSTS OF STORAGE' ARE BUILT INTO THE PLAN COSTS.

Support costs

Support costs are on-going online learning costs associated with receiving support for your online learning platform.

For most online learning platforms, there are no additional support costs – support is included in your package and/or plan costs.

However, some online learning platforms charge extra for certain levels of service. For example, they may provide email support (which can take 2-3 days to respond) for all packages, but more

responsive live chat support may be an additional on-going cost (typically a per cent of your overall subscription cost).

AT TRIBAL HABITS, WE OFFER THE SAME LEVEL OF SUPPORT FOR ALL PACKAGES WITH NO ADDITIONAL FEES.

Content Creation costs

NOW FOR THE SINGLE BIGGEST HIDDEN COST IN ONLINE LEARNING PLATFORMS – CREATING ONLINE TRAINING CONTENT.

Almost all online learning platforms are designed only to host online learning content. That means you need to find your online learning modules somewhere else...at an additional cost. Some of these online learning platforms will claim to have the ability for you to create online learning modules, but the tools are simple. They are often nothing more than some basic text, a few images and simple quizzes.

The sources for online learning modules really come down to two options.

- Ready-made online training modules. These modules provide training on common topics. Some online learning platforms now include access to libraries of online training modules – perhaps has an additional package subscription. If not, then you may need to track down ready-made external training and integrate that into your online learning platform (at a cost, and with some effort).
- Online training creation software. Alternatively, you can use dedicated online training creation software (eLearning Authoring tools) like Storyline or Captivate. These tools are expensive (\$500-2,000 per creator per year) and have steep learning curves. If you would like 4-5 of your staff to be able to create training, you need to factor this cost into your planning.

AT TRIBAL HABITS, WE HAVE SEVERAL LIBRARIES OF READY-MADE TRAINING WHICH CAN BE INCLUDED AS A PACKAGE IN YOUR SUBSCRIPTION. UNLIKE OTHER LEARNING PLATFORMS, THIS TRAINING APPEARS IN YOUR ORGANISATION'S BRANDING AND CAN EVEN BE EDITED BY YOUR ORGANISATION.

IN ADDITION, TRIBAL HABITS HAS INTEGRATED ONLINE TRAINING CREATION FEATURES. IN FACT, TRIBAL HABITS WAS DESIGNED AS AN ONLINE TRAINING CREATION PLATFORM FROM THE GROUND UP. THE ABILITY TO CREATE FULLY INTERACTIVE ONLINE TRAINING IS INCLUDED IN YOUR PACKAGES.

Part 3 – Getting started with virtual training

As a final part in this guidebook, let's consider virtual training – small group webinars for live, facilitator led training. Virtual training can be an excellent partner to online training and, for some types of content, it can be a better alternative than online training. However, virtual training is more complex to run and organise, and it is all too easy for virtual training to become nothing more than 'slides on a screen'. It requires careful thought and preparation to be effective.



Tribal Habits



What are general best practices for virtual training?

Let's begin this part of the guidebook with a step-by-step approach to creating great virtual training outcomes. In the sections that follow, we can then dive into some specific tips and tricks for the virtual classroom.

Use reliable virtual technology

Probably the most important consideration when adopting virtual training is using a reliable and robust platform. One of the common mistakes you can make is to start playing with virtual training as a small side project that's not allocated enough time or resources.

If you are going to take advantage of the capability, convenience and cost effectiveness of virtual training, it only makes sense to invest in a reliable and versatile virtual platform. This is particularly true for full-fledged courses that require classroom tools such as whiteboards, breakout rooms and polling systems.

When reviewing potential virtual training platforms, consider...

- Whether the session is for a small group or large audience.
- Whether the session requires live demonstrations or will it be mostly prerecorded content.
- Are there multiple ways to access the webinar (mobile, streaming, download, etc.) and not just via a PC?
- Whether the platform is specifically designed to support learning delivery. Some platforms are really just for team meetings or passive presentations to large audiences.
- Whether the platform allows the facilitator to upload hosted, shareable content to a secure location.
- Whether the platform allows users to share files securely.
- The availability of tools that allow all participants to send messages, answer questions on their screen or address their instructor about their lessons.

Prepare for technical difficulties

Technical difficulties are almost impossible to entirely eliminate. Still, careful planning can go a long way in reducing the likelihood of such problems arising during the session.

- Rehearsals: Ensure the presenter has time to rehearse and is familiar with the webinar software and training platform. This doesn't need to be long and laborious. A quick 15–30 minute walkthrough can ensure that the webinar goes off without delays.
- Prepare participants: Participants should know how to set up their systems and have the appropriate software installed beforehand. As an example, some webinar systems require users to download their software before the event. You don't want a situation in which people are frantically downloading the software just before the event starts. Most platforms offer YouTube videos on how to use their software, which participants can watch before the event.
- Have a plan: Think about the most likely technical problems you may encounter as a presenter and work through how to handle them in advance. What if your computer

freezes during the presentation? What if you hang up on your audio while talking? What if your internet fails during the presentation?

- Allow time for participants to settle in: Most technical problems for participants will arise at the start. Allow five minutes at the start of every session to run a few activities with participants which allow them to test they can hear you, type into chat, see your screen and so on...and get help then if they need it.

Use interesting and relevant content

If you bring your learners into a virtual environment and then talk at them with a bland PowerPoint deck for an hour, everyone will leave feeling cheated.

Instead, talk with your participants and bring them into the conversation by devising a simulation, doing some role playing or collaborative learning, taking a live poll of the audience...just something interesting.

- Create interactive learning activities: Active employee participation is key to a successful virtual classroom training experience. Consider creating immersive activities such as scenarios and games.
- Rich elearning Presentations: Bland slides are outdated. Instead, use interactive and versatile presentation software that offer rich learning features such as animation and special effects. Prezi and Emaze are good examples.
- Select relevant content: Engage the audience by challenging them to become active participants and learners by prompting them to think about how the subject matter relates to them, either personally or professionally. Lack of relevance will put them off and fail to hold their attention.
- Leverage outside resources: Enhance employee engagement by downloading external resources and easily, instantly sharing your screen with participants so that everyone can see the same thing at the same time. Make it easy for your audience to collaborate on and appreciate the content.

Keep your virtual sessions to an appropriate length

Let's face it – virtual learning means sitting at a computer and staring at a screen. Even the best of learners can only do this for a short period. As a rule of thumb, aim for virtual sessions which are 30-90 minutes.

- 30 minutes - Shorter sessions are great for quick catch-ups or check-ins. That's about it. If you allow five minutes at the start and end of the session for people to settle in or to summarise next steps, you really only have 20 minutes for content.
- 45-60 minutes – This is a great length for a session with genuine learning. It allows you to have enough time to present content and discuss it.
- 75-90 minutes – This is also a very good length for more detailed training with small (10-20 people) groups. It has enough time to run scenarios, group discussions, break-outs and more. Stop at 90 minutes - beyond that and you will start to lose engagement.

Design virtual sessions to be fast moving

Once again – we are staring at a computer screen. So you need to keep things moving to keep the eyeballs on the screen! As you plan a virtual learning session, think in 5-15 minute increments. Break your session into activities which last 5, 10, 15 or 20 minutes.

If you are presenting content or speaking yourself (or interviewing a guest), ensure that you are stopping every 5-10 minutes for some level of participant interaction.

Frequent interactions with students during presentations (polls, status checks using emoticons, directed and overhead questions that require typing into chat pods to answer) maintain their involvement with the training content. Passive learners who are not required to respond will retain much less of the training content.

Virtual training requires a fast pace of slide changes, animations, and annotations—with something happening on the screen constantly. Slide changes every one to three minutes is a best practice for virtual learning.

Ideally, aim for an interaction with participants every five minutes (so 5-6 interactions in a 30 minute session, 10-12 interactions in a 60 minute session).

Keep your participants engaged

Keeping participants engaged is the first rule of thumb for virtual events. You've probably participated in webinars that were dreary and boring; and those that were fascinating and buzzing with activity.

What was the difference?

It's all about creating engagement and being interactive — capturing and keeping attendees' attention. You want people to learn something important, something they will appreciate. You want them to be eager to apply what they've learned after completing the session.

There are several steps you can take to engage participants:

- Ask interesting and thought-provoking questions: Get to the heart of the matter by asking the questions that get people talking. Think of questions that will encourage participants to chime in with answers casually and frequently, questions that bring out some really funny answers, and others that are just enjoyable to discuss. Good examples are questions that encourage people to share their experiences and opinions. On the other hand, try to avoid philosophical questions that require extensive discussion.
- Limit chat moderation and encourage collaborative learning: The whole purpose of asking questions is to encourage participants to respond in the chat. It can be frustrating for many people when presenters turn off the chat function or only allow questions to be posed to them. While you do want to limit cross-talk during your presentation, open the 'chat floor' and allow people to talk to each other during breakout sessions. If there is going to be a series of sessions with the same participants, this will encourage collaborative learning.
- Hold think-pair-shares with breakout groups: Just because the facilitator is in a remote location doesn't mean the floor shouldn't be opened for conversation. Sometimes giving learners ample time to consider deeper questions is necessary. Good virtual learning platforms will have breakout group options, allowing you to form small groups for online discussion (just like breaking up a face-to-face workshop into small group discussions).
- Use a whiteboard: Educating your attendees through illustration will only bring good results; especially if you are trying to convey specific concepts. Whiteboards are a fantastic teaching tool because they are fun and make it easy to consume content. Engage your attendees by:
 - Use a handy set of tools such as text boxes, highlighters and shapes.

- Encourage collaboration by asking participants to draw with you.
 - Analyse an image or graphic as a discussion point.
 - Make special notes and hand them out with a follow-up email after the webinar.
- Include mini-activities: If all you are doing is talking through majority of your slides, then you might as well just email the information. Refrain from simply dumping information on your participants and instead spark interest with exciting mini activities. Since the event is driven virtually, it would be useful to include activities that allow participants to use the internet to find information or use their device to complete the task.
- Show a simulation or animation: Depending on the complexity of the topic, an animation or full blown simulation that explains the concept might be a good idea.
- Conduct a live interview with a Guest Expert: Enthusiastic learners will always appreciate the chance to listen to and/or correspond with an expert in the field. This is especially true if the expert is sought after. The interview can be live or prerecorded, as long as it offers substantial value. This is just the tip of the engagement iceberg, there are several other ways to spark interaction and create engagement such as telling stories and offering perks for participation.

How can I best use webcams and video?

One of the top questions asked by virtual presenters is about webcams – how, why and when to use them. I have a pretty simple formula to follow.

All the time – too hot!

Option One is to use the webcam all the time. But this use of a webcam is "too hot".

One of the requirements of great virtual facilitation is focusing the attention of your participants, not just away from distractions, but to specific areas of the screen. Look at these slides, now type into chat, now listen to this role-play, now answer this poll.

The moving image of a webcam can be quite a distraction for participants, making it hard for them to focus on where you need them to focus.

Never use – too cold!

Option Two is never to use the webcam. I understand the reasons why – bandwidth, distracting, means you and your location need to "look the part". But this use of a webcam is "too cold".

Making a human connection remains an integral part of training and as much as your voice does that, seeing a moving image of you does it better. It builds a stronger bond between participant and facilitator and makes you human, which in turn, makes participants much more likely to share and actively participate.

Project emotion – just right!

Option Three is to use the webcam at certain times. This is "just right".

If you think about the unique purpose of the webcam, it becomes easier to determine when to use it – a webcam gives a moving visual of the facilitator. So it's the perfect tool when you need to show body language or emotion. This means I only turn on my webcam when I want to:

- Welcome or farewell participants
- Emphasise an emotive point
- Inject energy into a topic
- Project warmth or humour to participants
- Share an emotional story
- Provide body language in my response
- Role-play with a participant

This might be just for 30 seconds or for a few minutes. As soon as I feel that the "emotion" is no longer required, the webcam goes off. In some sessions, this means my webcam might be on and off 4-5 times over 60-90 minutes. But each time it has a dramatic impact. Then I move the focus of participants elsewhere.

Like all tools, you need to know when to pick them up and put them down. It's the same with each of our tools in a virtual classroom.

How can I run activities in a virtual training session?

Be it a Flipped Classroom, training games and activities or learning by doing, you should be aiming to have your virtual participants just as active as participants in a traditional classroom.

As a starting point, and before we consider many of the activities you can use in a virtual environment to achieve these outcomes, let's begin with the core topic of directing participant activities in a virtual classroom.

I often observe virtual facilitators reluctant to ask too much of their participants as they feel they can't effectively instruct lengthy or involved activities in a virtual classroom. As a result, these virtual facilitators "lose their mojo" in the virtual classroom and go back to safe and boring lectures (things they would never do in a physical classroom!).

What a shame! The virtual classroom is ripe for lots of engaging and involved training activities if we can just have confidence that our activity instructions are clear.

You can't see them!

The first thing I think of is that when I give activity instructions in a physical workshop, I can observe participants – are they watching me, does their body language indicate understanding, are they already moving to begin the activity, when they begin the activity are they doing it as I expected and so on. It is relatively easy to see if participants understood and are following the activity instructions.

In a virtual classroom, however, I do not receive these natural cues. As a result, you can end up giving activity instructions but then finding participants don't do what you expected (or anything at all!). So, let's look at key tips to ensure the activity directions you are giving participants are "as clear as day".

Six tips for extra clear activity instructions

Now, I am not necessarily going to do all six of these steps with every activity. Simple activities might just need 1-2 of these steps, but more involved or lengthy activities may require all six. You should use enough to ensure the instructions are clear and that participants will achieve the desired outcomes from the activity.

1. Give visual instructions. We don't use much PowerPoint in our virtual training, but I do use it for summarising activity directions. When I begin an activity, I will often bring up a slide outlining the activity directions while I verbally explain them (using a mouse/marker to highlight the activity steps as I discuss them).
2. Do a dress rehearsal. After explaining the activity, I usually then do the activity quickly myself and show participants the results/steps. I often see facilitators do this in a workshop, but they forget to do this in a virtual environment.
3. Check understanding. At this point, I may ask participants to raise their hands or "select agree" if they feel they understand the activity and are ready to go. If not "they should ask a question in chat" to allow me to clarify something.
4. Ask for understanding. Alternatively, I may unmute a participant and ask them to "Have the incredible honour of representing all other participants". I may get them to explain the

activity directions back to me and/or ask them if they have any questions or to check key parts of the activity.

5. Create some energy. Right before we start the activity, I might switch on my webcam and explain the purpose of the activity one last time and give them a little energy to get started with. This sudden window to the facilitator often sparks them up and boosts their emotional buy-in to the activity.
6. Leave visual instructions. During the activity, I then have a couple of PowerPoint slides which I slowly step through as participants work through the activity. Slide One might say "Over the next 10 minutes, you need to....". Slide Two might then say "You have 5 minutes to go, so make sure you are..." while Slide Three says "There are just two minutes to go, so please ensure you...".

Clear instructions bring confident activities

Facilitators who are new to virtual training are often uncertain how far they can take their participants in an activity compared to a workshop. The answer is that you can take them just as far! Activities which take 30-45 minutes are easily achievable in a virtual environment, but you need to ensure your activity directions are extremely clear (plus design activities with checkpoints so you can monitor how they are going).

Hopefully, these quick tips will give you the confidence to shed the PowerPoint lecture and run more engaging and involved activities in your next virtual session.

How can I keep the attention of virtual learners?

Now there are lots of differences between physical workshops vs virtual training, but in this article, I want to focus on one in particular when it comes to virtual training: Your participants are staring at a computer screen.

Unlike a live facilitator in a physical classroom, the computer screen has no personality and doesn't move. It's a static environment. Often this computer screen is also full of information – PowerPoints, polls, chat, audio details, icons, videos – often all on the same page.

So, we have a static environment that is perhaps a bit cluttered. It's no wonder participant's eyes may stop moving and glaze over a little!

[Look here.](#) [Now here.](#) [Now over here](#)

Yet the participant's eyes should not be steady and bored. They should be looking where you want them to look. You need to help them focus on the most important part of the screen.

If you use a static virtual layout – always chat on the right, PowerPoint in the middle, polls on the left – the lack of movement on the screen results in attention drift in the audience.

Think about interviews on television – they don't just leave a static picture of the person being interviewed. They cut from the interviewer, to the interviewee, to a different angle on the interviewee, to a picture of something, then overlay a subtitle, then back to the interviewer etc...

If we want to capture your participant's attention and guide their eyes, you need to "cut" to different things on the screen. Each time you "cut" – change something on the screen – you help guide the participant's eyes – their focus – to the relevant point. It's hard to look away when things keep happening! For example...

- If you just want to talk through two pages of a document, remove everything else from the screen and just have the document.
- When you want participants to comment on a PowerPoint slide, activate the Chat feature for a few minutes and then take it away when finished.
- Swap between open chat (everyone can see what everyone is typing) and private Q&A (only you can see what participants are typing).
- Remove the Chat feature while you are running a Poll or Survey, so it's clear where participants should be placing their answers.
- Want to make an emotional point? Turn on your webcam, grab their attention with your sudden appearance and a compelling narration for a few minutes and then switch the webcam off.

In other words, only make visible the items you want the participants to use or focus on and cut to different items (hiding some, revealing others) to help guide the eyes – and focus – of participants.

Now, like in all things, some balance is required. You don't want participants struggling to catch-up with the constant movements! But these movements help maintain participant focus and when

combined with interactions, create an active, visual medium which captures the participant's attention.

You are a Director, not just a Designer

Some virtual/webinar software is better (easier) to organise this "on/off" or "hide/visible" functionality than others, but most webinar software will give you some sort of control about the screen layout. Being a virtual facilitator has many roles, and one of them is as a "Director".

So as you develop your instructional design process, allow a bit of time to consider how to direct your participant's eyes – not just their minds!

How can I improve my communication with virtual learners?

This article is on a simple topic, but one worth repeating – slow down when presenting virtually. I will fess up that this is one of the hardest aspects of virtual presenting for me, so I am going to share a few tactics I use to help me be better understood in a virtual room.

You see, I have a naturally quick and emotive cadence to my speech, which is fine when I am in person speaking at a conference or running a training session. This is because participants can see me – they can follow my lips, gestures and movements to help them catch-up with what I am discussing. Also, they can usually hear me very well – not through headphones or a speakerphone, but in clear, live audio.

In a virtual classroom, however, my fast rate of speech can be a problem if I am not careful. Not just for me, but for many presenters – even those who don't think they speak particularly fast!

Listen to yourself

All virtual classroom software has a built-in recording function. So as a first step, I highly recommend you record a 5-10 minute session of yourself speaking. Then go back and listen. Perhaps you are also like me in that you don't like listening to your recorded voice! However, grit your teeth and really listen. Are words dropping out or running together? How quickly are sentences coming onto participants? How clear is your diction? While you know what you said, is it as clear to others who are hearing it for the first time?

Alas, most virtual presenters are not trained radio broadcasters, and while presentation skills are useful in a virtual environment, there is a unique skill in presenting over the radio or via podcast. Most virtual presenters could afford to really slow down their speech patterns and give participants a better chance of understanding.

Make yourself heard

So let's review a few tips to improve your verbal presentation skills in a virtual environment.

- Use a headset. If you are even remotely serious about virtual presentation, then you have to have a headset. Invest in the best headsets you can as it makes a difference. Especially for phones, do not use a hands-free conference function – get a proper phone headset.
- Speak slowly. Slow down your speaking rate by 20%. This seems like a big number, but in reality, if you aim for 20% you will probably only slow down by 5-10%. So let's aim high.
- Get a buddy. Have someone on the session be responsible for sending you a private message to alert you when you are going too fast. A co-presenter, session host or trusted participant can send you a private message.
- Use reminders. Put a sign on your desk saying "Slow Down" which you can glance at during the session. In your speaker's notes put "SLOW DOWN" in large red letters every few pages to keep a brake on your pace.
- Pause and repeat yourself. Don't overdo it, but on key points stop and repeat yourself – repeat the exact same sentence again. Or use a pause to allow participants to absorb what you said. Pauses also help participants stop any self-talk they are doing and refocus on you (the silence makes participants think "Wait, why have they stopped speaking?").

- Be aware. Presenters often speed up when they are on a particularly emotive topic – a key point or something close to their hearts. So you can often foresee when you are likely to speed up. At these known points, ensure that your speaker's notes have a reminder to "SLOW DOWN".
- Turn on the webcam. In other articles on webcams, we recommend you use them with discretion, but if you need to make a point and are worried you will talk too fast, then turn on your webcam to help participants follow what you are saying. Then turn it off!
- Use a slide. We aren't big fans of slides in Virtual Classrooms, but they have a place if you need to make a key point and are worried you might talk through it a bit quicker. Use a single slide to repeat the key point(s) – just a few words or a key picture.
- Get some training. Consider getting some radio broadcast or vocal training. Or google tips for podcasters (who face the same problem). Presenting without being seen is a skill, so treat it as such and get some help.

How can I use a lobby in virtual training?

Let's now focus on something simple and practical – the first five minutes of a virtual training event. These first few minutes can address some critical issues which prevent problems later in the session. So let's review my own personal kick-off checklist.

Welcome to the Lobby

We begin our virtual training session in the virtual "lobby" – the place where participants are first entering, sorting out their audio and waiting for the session to begin.

Depending on your software, this might be an actual "lobby" – a separate, specially designed layout/room – or just an initial holding slide or mini-presentation. Perhaps there is some music playing or a rolling slideshow of information. Perhaps you are welcoming participants via chat (or audio) as they arrive. Eventually, it's time to kick-off.

Virtual Classroom Lobby Checklist

1. Welcome everyone and ensure you are broadcasting. I verbally ask participants to do something to ensure they can hear me – I might suggest they "raise their hands" or "select the Agree button" or "type their home city into chat".
2. I remind them that the best way to ensure a great virtual experience is to ensure they have lots of bandwidth. So, I remind them to take a moment to close their emails, pause other downloads, close any other internet software and stop any updates. Then I say I will pause for 10-20 seconds while they do that. It's funny how by pausing, those few who didn't do it earlier feel like they now should.
3. I mention that every now and then a participant might get an audio drop out (assuming they are on VOIP). If that happens, it's almost always because of congestion in their bandwidth. Often, it's because they left their email running, which suddenly starts downloading a large, new email. Sometimes it's because someone else on their shared internet starts a large download (often happens in offices). Sometimes it's just their Internet Service Provider (ISP) which has a moment of congestion. In any event, it is best to wait 20-40 seconds and it normally passes. They should only alert us after waiting for a bit and ensuring they have closed all their other software.
4. I point out where the audio controls are, so they can also adjust their volume and check their connection.
5. I then get them to use another piece of interaction, different from what I did in step 1. So if I had them use chat in step 1, I now point out the yes/no (or agree/disagree) icons and get them to use that in response to some question ("Have you closed your email software" or something like that).
6. Since we are talking about virtual training (not huge webinars), I then remind the group to ensure they focus fully on the session. I let them know that I can randomly ask any participant a question – to either reply in chat or via audio. And then I do just that – I ask one participant a question and get them to answer via chat or via their audio. Once they have answered, I ask them to nominate another random participant, who has to answer the same question. And then I repeat a couple of times, demonstrating that everyone needs to be on their toes.

7. If your virtual software can monitor participant engagement (e.g. tracking if the virtual classroom is the active window, monitoring mouse movement, checking chat/poll participation and so on...) then I also let participants know that "big brother is watching" and participants whose name gets flagged for low engagement are 100% guaranteed to get the next question!
8. Finally, I direct participants to a third and final interaction, different again from steps 1 and 5. Perhaps I get them to use the emoticons and give me a round of applause, or I put up a simple poll asking a basic question.

At this point, we are ready to go. I have confirmed, on several occasions, my own audio is broadcasting clearly and have given participants time to adjust their volume. Participants now know how to use at least three types of interactions. Participants have also had ample time to shake off their previous tasks and get focused on the session. Finally, participants know they need to focus and are ready to do so.

It only takes five minutes, but it creates a great, energetic and focused atmosphere and prevents a few little issues from cropping up later. As you can tell, you can also put a lot of this information into a few slides and loop those slides for participants to review while they wait in the "lobby". Then you run through those slides one last time...and off you go.

How many participants should I have in a virtual learning event?

I am often asked “How many participants can we have in a virtual classroom?”. Technically, we can have 100’s of participants in a single live virtual event. But that’s no different to saying we could cram a 100 people into a boardroom for a lunchtime speaking event, as long as we had people standing and no room to move.

While virtual classrooms don’t require participants to stand or squeeze in, as the number of virtual participants increases, the nature of the event starts to change. We go from an intimate learning event to an interactive presentation, just as we would in a physical scenario.

In this article, I thought I would, therefore, consider some of the differences in large and small virtual events, as you perhaps consider how many participants to let into your next virtual event.

Small, medium and large

To begin, I tend to think of three sizes of virtual events.

- Small. 8-20 participants.
- Medium. 20-50 participants.
- Large. Anything over 50 participants.

That means I treat 55 participants the same way I treat 500 participants. This might seem like a large difference, but from a virtual design point of view, once we cross a threshold of around 50 participants, it doesn’t really matter how many more participants we have. You will see why as I discuss what is possible with each of these groups.

Small – 8-20 participants – Intimate learning

These small events represent typical virtual learning sessions. They replicate training workshops, which have the same numbers. It means these events can allow for two-way audio discussions, analysis of individual problems (and still allow many individuals to present and discuss their problems), lots of written and verbal chat, breakout rooms/groups to allow teamwork in groups of 3-4 participants and personal attention for every participant. We can use every tool and activity available to us.

In these small sessions, the biggest difference is in the time we can spend on individual issues AND the quality of feedback we can seek from participants (since the host and other participants can absorb detailed audio or written feedback from 8-20 people relatively easily).

Medium – 20-50 participants – Interactive discussions

Once we get over 20 participants, managing two-way audio can become a problem. It opens up the risk of too many IT/audio issues and managing participant microphones. So immediately, we tend to drop two-way audio and participants are back to communicating via keyboard or mouse.

We can, however, still keep things like chat boxes, short-answer polls and other high quality (long written answer) feedback. So the level of interaction can remain relatively high. The host may not be able to manage answers for every single participant question or issue but will be able to respond to many and maintain the feel of a personal session. Participants can still contribute in very individual ways, and other participants can have the time and ability to review many comments.



Large – Over 50 participants – Interactive presentations

With over 50 participants, two-way audio is definitely out. Participants will be in listen-only mode.

However, detailed text-based interaction becomes harder to manage too. For example, if you have an open chat and you ask 15 people to type in their response to something, it's relatively easy to review the responses from all 15 participants – both as a host and as a participant. But if you try the same thing with 70 participants, the chat box becomes a blur – a mess of input which no-one can keep up with. It devalues individual input and results in an interaction that doesn't respect the contribution and effort participants made in that activity. There is no point asking people to type detailed answers when you don't have the time to review them appropriately.

As a result, these larger sessions tend to use interactions which make it easier to absorb group feedback. So we tend to use more multiple-choice polls, thumbs/hands up or emoticons - feedback which quickly summarises consensus or trends.

Written communication with participants also needs to be managed differently – perhaps a closed/private Q&A style process rather than open chat (where participants can type questions which the hosts can see, but can't have a general stream of chat comments for all participants to see).

It's a trade-off

Just because we can do something, doesn't mean we should. When selecting the number of participants for your virtual events, consider the level of involvement, you need to achieve your goals. Large events, run well with frequent and inventive group interaction, can be very engaging and highly suitable for certain topics.

However, if you need to ensure participants understand something or to cover very specific knowledge or scenarios, small scale events, with two-way audio and high-quality text feedback, may be required.

How can I replicate workshop activities in a virtual classroom?

One issue many virtual facilitators face is that they feel the need to “entertain” participants for the entire virtual session. They worry that if they are not keeping participants entertained, they may get bored and start checking their emails and so on. As a result, these facilitators may forget some of the best practices they use in a physical classroom and instead feel the need to become the all-singing, all-dancing “look at me, look at me” facilitator. They start to tell, rather than teach.

But the virtual classroom isn’t a prison. Even in a 60-minute virtual session, it’s OK for the facilitator to “let go” and let the participants do some of the work – perhaps even outside the virtual classroom.

What is engagement?

It is true that we want to keep participants engaged. But this is not the primary goal of virtual learning (or any learning). The primary goal of virtual learning is to give participants the opportunity to *learn*. Keeping them engaged helps participants learn, but engagement isn’t the end goal itself. Learning is our end goal.

Most participants learn best by doing – by getting involved, applying new ideas and testing concepts. In a workshop, most facilitators will ensure this happens in small team activities or individual time. The same things need to happen in a virtual classroom – we need to let the participants out of the strict environment of the monitor and keyboard so they can apply new ideas and test concepts.

Engagement isn’t about participants focusing on chat and voice of the facilitator. It’s about having the participant’s *mind* actively engaged with the concepts and content. Don’t confuse the two.

How do you leave the virtual classroom?

With that in mind, here are three examples of how to keep participants engaged, allow them to leave the virtual room to better learn and give the facilitator some time away from being the centre of attention during a virtual session.

- Agree a challenging scenario with the group about the topic you are learning. Give every participant 10-15 minutes to go around their office interviewing at least three of their peers for how they would respond to this scenario. After 10-15 minutes, ask participants to report back (in chat, in a poll, over the audio, via email). Debrief on their responses and draw conclusions. Optionally, also ask participants to email their summary thoughts to someone (you, a manager, a designated participant) who will combine them into a list of best practices to be discussed at the next session.
- Pose three questions about a related topic and give participants 10-15 minutes to devise their answers from a combination of their own experience and searching the internet. Use three short answer polls (polls which allow the participant to write 2-3 sentences as their response) to capture each response, but don’t open the polls for at least five minutes (forcing participants to go searching first, rather than just entering the first thing they thoughts of). After five minutes, open the three polls and allow participants to slowly enter their answers. When time is up, review the answers to each poll one-by-one, perhaps

talking via audio with several participants as you do this. Optionally, send participants a copy of all the poll results as follow-up reading.

- Set four scenarios around a given topic and break your participants into four teams. Assign one topic to each team. Select one person from each team via audio and ask them to ask you any clarifying questions about their given scenario before the activity begins (everyone else can ask you any questions via chat). If your virtual software has break-out rooms, send each team to their break-out rooms for 10 minutes to discuss the scenario and agree their response(s). Give each team virtual butchers paper to write/bullet point their ideas as they talk. If you don't have break-out rooms, set-up four chat boxes – clearly labelled for each team – and let the teams use their designated chat box to thrash out their scenarios for 5-7 minutes. In both cases, regroup all participants and discuss each team's results. Optionally, have each team finish their analysis offline and then email you their final outcomes for discussion at the next session.

There are three easy methods to keep participants active and engaged, but not feeling stuck in the same chat box for the entire time.

If your session starts with 15 minutes of content, followed by one of these 15-minute activities and then 30 minutes of debrief...well, there's your 60-minute session, and it will be more engaging to participants than listening to you for 60 minutes straight.

Case Study: Mercer and a small team delivering huge results

Challenge	Approach	Outcome
To share the extensive internal knowledge that exists within its operations, Mercer needed to create customised training and role-based learning for its employees in a short time frame and at a minimal cost.	Using Tribal Habit's drag-and-drop editor, Mercer's team of four Learning & Development professionals created more than 80 modules of training in the Jan-Oct period of 2019.	Mercer's ability to rapidly create training allows it to respond to change more quickly. It has developed an environment where training is created once, modified as needed and delivered often.

Mercer is one of the world's leading firms for superannuation, investments, health and human resources consulting and products. Across the globe, organisations look to Mercer's 30,000+ colleagues for global insights, thought leadership, and product innovation to help transform and grow their businesses.

The nature of Mercer's work requires a high level of emotional intelligence and a commitment to process and detail. To continue to offer the exceptional level of service its customers have come to expect, Mercer knows a dedication to lifelong learning, training and continuous improvement is a must.

Increasing capacity and complexity

In 2017, Mercer's Learning and Development team were working tirelessly with its Customer Experience and Platforms teams to create training which supported the organisation's strategy. A need arose when the small team identified a requirement for a purpose-built, yet complex training program. This situation uncovered the legacy tools the team were using were clearly out of date and cumbersome – the team faced barriers in creating role-based learning which in turn, did not actively engage learners or monitor their experience and performance. The team started to look at how it could deliver better outcomes with the same resources.

“WE NEEDED TO INCREASE BOTH THE CAPACITY, COMPLEXITY AND RELEVANCE OF OUR TRAINING AT THAT POINT – IN ORDER TO ADDRESS BOTH OUR ORGANISATIONAL GOALS AS WELL AS INDUSTRY AND FUTURE OF WORK REQUIREMENTS.” MERCER'S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

Tapping into organisational knowledge

It was well known that colleagues within Mercer (from outside of the learning and development function) held an incredible level of experience and expertise. If the team could find a simple method to capture and share this knowledge, its learning and development efforts and outputs would increase by orders of magnitude. But how could it capture and transfer this unique knowledge without disrupting the day-to-day productivity of its workforce? The key, according to the team, was to empower and compel non-L&D colleagues to create content using a cost-effective and intuitive platform.

Leveraging Tribal Habits for rapid content creation

This was when the team started using Tribal Habits for rapid training content creation. The platform's intuitive drag-and-drop editor meant that staff members could create engaging training modules with little or no technical training required. By engaging subject matter experts to share their knowledge, Mercer would build a broadly accessible suite of customised training around approaches that were proven to work within its unique business landscape.

Mercer saw two distinct benefits at play here:

1. The first was that the new system would allow current members of the L&D team to create learning experiences that were engaging, structured and repeatable in a fraction of the time it took them to build in traditional tools.
2. Secondly, Tribal Habits was so easy to use that the L&D team could directly engage with subject matters experts by bringing them onto the platform to create training modules based on their unique knowledge and skill set.

“BY ENGAGING OUR SUBJECT MATTER EXPERTS, THE NUMBER OF PEOPLE CREATING TRAINING CONTENT AT MERCER EXPLODED. INITIALLY, IT WAS JUST THE FOUR PEOPLE IN THE L&D TEAM, AND TODAY WE HAVE OVER 30 CONTRIBUTORS, AND THAT NUMBER IS GROWING EVERY WEEK.”
MERCER'S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

The evolution

Once the product was rolled out, it was quickly identified that the majority of the organisation's training fell into a handful of categories. Templates around how to create training for each of these categories were rapidly spun up. Now when a colleague's knowledge is tapped into, they are provided with a detailed template and instructed to 'fill in the blanks', even further reducing the friction to create training. This information is then passed back to the L&D team, who assisted by Sage (the Tribal Habits Training AI) review and polish the program with a learning, engagement and interaction lens.

“TRIBAL HABITS IS INTUITIVE AND SIMPLE TO USE, YET HAS INCREDIBLE FUNCTIONALITY THAT IS REGULARLY ADVANCED UPON. THE FACT THAT ANYONE AT MERCER CAN NOW CREATE TRAINING HAS REMOVED THE BOTTLENECKS THAT USED TO BE PRESENT IN OUR TRAINING CREATION. THIS HAS ALLOWED US TO ACCESS AND MAXIMISE THE INCREDIBLE DEPTH OF KNOWLEDGE AND EXPERTISE WITHIN OUR ORGANISATION.” MERCER'S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

Tribal Habits has allowed the L&D team to focus solely on the learning experience. By engaging subject matter experts to assist in the creation of training, the L&D team no longer needs to develop an understanding of each training topic. Using the processes now in place allows each contributor to do what they do best and saves time and effort in the process.

“TRIBAL HABITS HAS ALLOWED US TO STICK TO WHAT WE’RE GOOD AT. THE EXPERTS PROVIDE TECHNICAL KNOWLEDGE, AND WE CAN MAKE SURE IT WORKS FROM A LEARNING AND ENGAGEMENT POINT OF VIEW. THEY DON’T WASTE TIME WORKING OUT HOW BEST TO PRESENT THEIR KNOWLEDGE, AND WE DON’T WASTE TIME TRYING TO DEVELOP A DETAILED KNOWLEDGE OF COMPLEX CONCEPTS.” MERCER’S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

Same resource. Greater output. Transparent results

From a sheer content creation point of view, Mercer’s team of four L&D professionals created more than 80 modules of training in the Jan-Oct period of 2019, with 2625 separate learning experiences and a Net Promoter Score for this mode of delivery of +27.

“EVEN THOUGH OUR TEAM IS THE SAME SIZE, WE’RE PRODUCING LEARNING OPPORTUNITIES LIKE NEVER BEFORE. THERE IS SIMPLY NO WAY WE COULD HAVE CREATED THIS CULTURE AROUND LEARNING IN OUR PART OF THE BUSINESS WITHOUT TRIBAL HABITS.” MERCER’S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

The team has created role-based, behavioural and even client-specific training, which is providing a level of detail and guidance not seen before at Mercer. Some of the client-specific training has been shared directly with the client, greatly increasing engagement and understanding and going a long way to strengthening these vital relationships.

Mercer is also able to respond to changes much more quickly. Recent shifts in superannuation legislation, for example, required training to be delivered to 150 consultants in a short time frame. Within a week of the new legislation being released, Mercer was able to create an online learning experience and roll it out to over 150 consultants, informing them of the changes and their new responsibilities and tracked their understanding and adherence.

Tribal Habits has enabled Mercer to move training from a passive requirement to an active engagement. By leveraging, audio, video and interactive elements like quizzes and on-the-job training, Mercer is now capturing two-way feedback from learners and has a real understanding whether the training it has delivered has been effective or not. The team is constantly reviewing this feedback to optimise its current training modules and to identify where further training is required.

“THE TWO-WAY FEEDBACK IN TRIBAL HABITS HELPS GUIDE OUR TRAINING EFFORTS. IF WE IDENTIFY GAPS, WE CAN QUICKLY MODIFY THE DELIVERY OR EXPLANATION – JUST AS YOU WOULD IN A FACE TO FACE ENVIRONMENT. OUR TRAINING IS NOW SUSTAINABLE, REPEATABLE AND EFFICIENT— WE HAVE A SYSTEM WHERE WE CAN CREATE ONCE, MODIFY AS NEEDED AND DELIVER OFTEN.” MERCER’S CUSTOMER EXPERIENCE AND PLATFORMS LEARNING LEADER, MELISSA HALEY

What is Tribal Habits?

Tribal Habits is the all-in-one learning platform for modern organisations. We provide online training that's easy to create, engaging to learn and simple to manage.

- **Easy to create.** Allow your staff to share what they know. If you can create a PowerPoint presentation, you can create interactive online training in Tribal Habits.
- **Engaging to learn.** Training your team will love. Tribal Habits leverages video, social learning and interactive elements to inspire employees to make real change.
- **Simple to manage.** Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

What types of organisations use Tribal Habits?

- **5-500 employees**, which may not have any dedicated training resources or existing online learning platform. In these organisations, it is often the business managers or human resources team who looks after training. For these organisations, we offer 'enterprise-level' outcomes but at a far more affordable cost and with a simpler process.
- **500-50,000+ employees**, which may or may not have a learning and development team, but are struggling to keep up with training requests. In these organisations, there is often a huge demand for training but traditional eLearning authoring tools are too slow. For these organisations, we leverage existing resources and supercharge learning output.

Tribal Habits gives us more control over our content in terms of developing and editing it. It's much more responsive than other learning platforms we have used before, where you request changes and it takes a long time to be done. We can just make changes instantly now.



Tribal Habits is unique in the market as it allowed us to rapidly capture and transfer organisational knowledge via text, imagery, video and interactive elements. It also shares tips from participants, meaning the knowledge captured increases as users complete topics!



Content creation is easy and fun on Tribal Habits; the system's built-in structure ensures that content is organised in a manner that enables the final output to be exactly what's needed. This gives me great confidence that my training will hit the mark.



It would have taken us up to a year to create the topics using a traditional e-learning authoring tool. With Tribal Habits we were delivering amazing training in three months, and we've estimated the cost has been about 25% of what it would have been had we gone with a traditional solution.



Tribal Habits' online compliance library has been a game-changer for us. We now have total peace of mind that our people are safe and our brand and organisational reputation is protected. Delivering compliance training online has also saved us a significant amount of time, money and hassle.



Tribal Habits' video feedback on the topics we created is amazing - really useful suggestions and so easy to follow. People are already loving the training! The system is so easy to use, and the interactive elements have allowed us to make training a lot more engaging. We couldn't ask for anything more.



What are the top features of Tribal Habits?

Rapidly create online training on any topic

Learners crave relevant training. Tribal Habits allows anyone to build relevant, engaging online training. The content you create will speak to your learners and appear in your branding.

- ✓ Intuitive, fast and powerful building block elearning authoring process
- ✓ Built-in image library (2 million+ images), image editor and video hosting
- ✓ Real-time feedback of your modules from Sage, our digital learning designer
- ✓ Free video analysis of your modules from our expert learning designers
- ✓ Version control, wide range of interactions, uploads/downloads, embeds and more

Modules are responsive to any device, can support WCAG 2.1 accessibility to a Level AA standard, are streamed on-demand in a lightweight environment and allow for social learning opportunities between users.

Tap into ready-made modules – branded and editable!

Access 100's of fully editable online courses from Australian compliance topics to personal development courses.

Our training library is more than just a random assortment of videos and articles. Every module is professionally designed, appears in your organisation's branding and is 100% editable by you at no extra cost. Import and immediately use, or create a copy and fine-tune as needed.

Automate training management for online and offline learning

Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. A range of automations and rules make it easy for anyone to manage users and enrolments.

- ✓ Automate due dates, notifications, certified dates and certification
- ✓ Enrol via 10 different methods – spreadsheets, groups, managers, links and more
- ✓ Dedicated manager's view, including enrolments, reminders and emailed reports
- ✓ Dynamic training catalogue, which adjusts available modules to suit the learner's role
- ✓ Integrate with 3,000+ other platforms to reduce effort and ensure data consistency

Add online or offline events to any module, with calendar bookings, roll-calls, locations or more. Record external knowledge, such as licences, accreditations and qualifications for a complete view of all completed learning.

Go deep with learning data and detailed reporting

Tribal Habits tracks far more than just training completion. You can report on all learning contributions, outcomes and activities.

- ✓ Training completion data for every part of every module
- ✓ Compliance completion and expiry (past and future)
- ✓ Job role tracking for required competencies and skills
- ✓ External training – licences, accreditations, qualifications
- ✓ Continuing education reports by time or points, with custom categories
- ✓ Filter by any user data field and download all data into spreadsheets

What problems can Tribal Habits help solve?

Tribal Habits offers complete online training solutions for your organisation on any stage of the journey. We typically help organisations with five key solutions through the learning journey.

Manage training online

Organisations waste a great deal of time delivering the same training over and over. Offline management of training is time-consuming and frustrating, and issues with version control mean your staff could be accessing information that is no longer accurate.

Tribal Habits remedies these challenges by providing a 'single source of training truth'. Reporting is simple and powerful, while automation and reminders drastically reduce the administrative burden associated with managing training.

Meet compliance needs

Compliance training is a vital part of your organisation's strategy, protecting your staff and boosting the bottom line. From building a culture of safety to helping managers develop strong and inclusive teams, compliance training is a critical part of your reputation.

Tribal Habits' library of engaging, interactive compliance training is fully approved by Australian lawyers. Our library can be supplemented by self-created compliance topics using a simple drag and drop editor, providing you with a comprehensive online compliance training solution.

Convert existing training

If you're already running face-to-face training and workshops with PowerPoint presentations and facilitator-led engagements, you've done the hard work. Moving your training content online is a breeze with Tribal Habits.

Open up a world of new learning opportunities by moving away presentations and documents, and away from the logistical challenges of face-to-face training. Unlike a traditional learning management system, Tribal Habits has a completely integrated online training creation toolset.

Optimise employee induction

How new employees are brought into an organisation matters. Optimising employee induction reduces employee churn, engages staff, reduces rework and makes new starters productive in far less time.

Tribal Habits optimises employee induction by delivering induction learning pathways that align new starters to organisational culture and processes, while bringing them up to speed as quickly as possible with consistent, repeatable training.

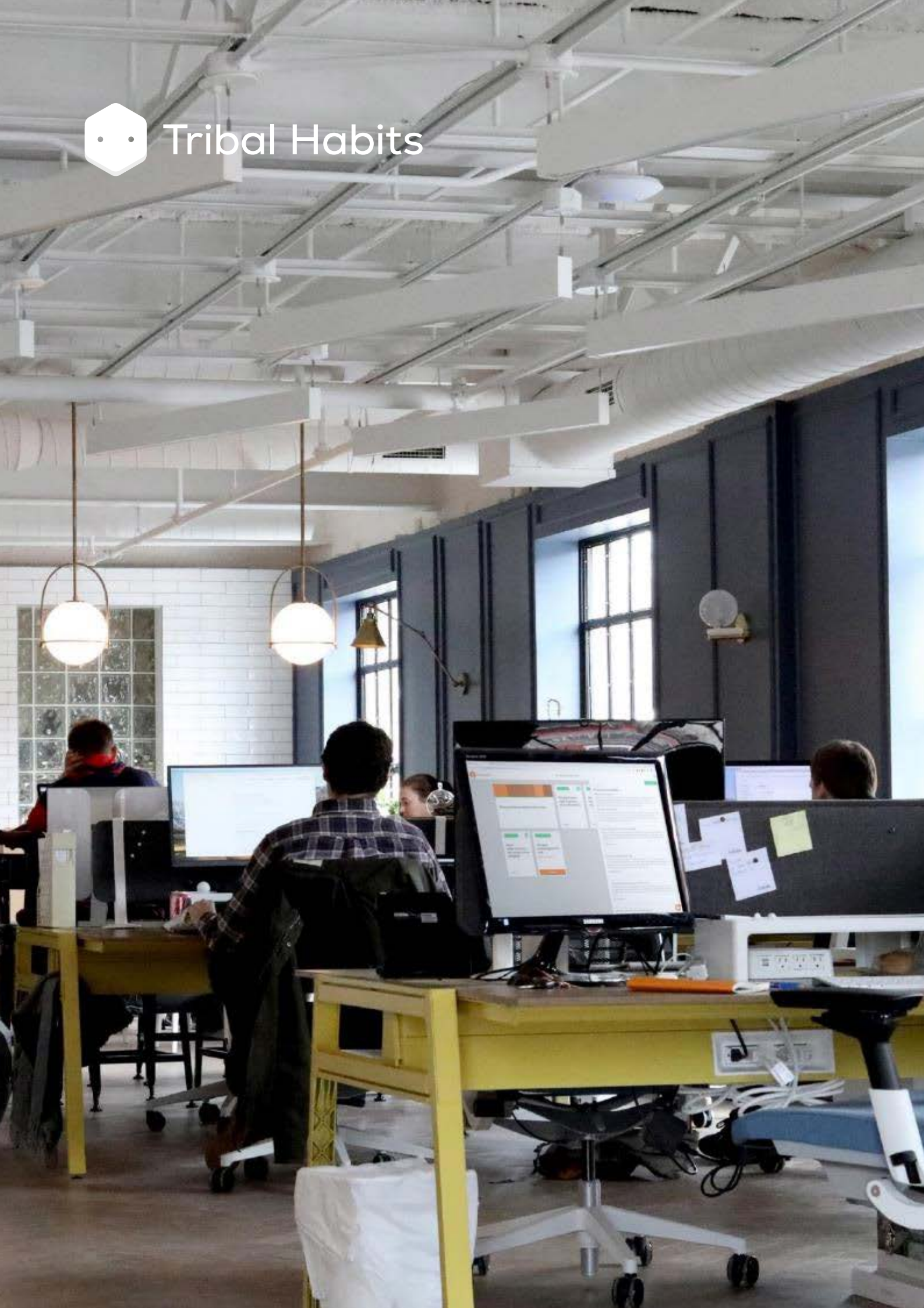
Share best practices

Over time, your top-performing employees have developed unique skills and approaches. Successful organisations capture and transfer this knowledge increasing the capability of their workforce and protecting against the loss of critical knowledge as staff move on.

Tribal Habits' simple drag and drop editor allows anyone in your organisation to create learning experiences based on their unique knowledge. These experiences can be shared across your team, broadening the organisation's knowledge base and turning best practice into everyday practice.



Tribal Habits



How does Tribal Habits boost online training?

How does Tribal Habits make training easy to create?

If you can create a PowerPoint presentation, you can create online training in Tribal Habits.

1. **Start by importing from a library.** Tribal Habits has two libraries of world-class training content ready to be imported into your portal. From Australian online compliance training to personal development training, we have you covered. Our library topics appear in your branding and seamlessly plug-and-play with any training modules of your own. Access instant training content or complement internal knowledge.
2. **Start from a training template.** Creating your own training in Tribal Habits is simple. Start from one of our commonly used online training templates, or simply begin from scratch. Our building block editor makes capturing knowledge as easy as creating a PowerPoint presentation. Except now you have interactive online learning, complete with tracking and reporting! You can also upload existing elearning from legacy formats including SCORM, xAPI, AICC and cmi5.
3. **Start by following a guided process.** Tribal Habits provides a fully guided process to create online training that ensures you capture the information that is most pertinent to your organisation. Our online training building block editor allows Tribal Habits to automatically format all your training content. You can also tap into free advice from our experts to ensure your training is on point.
4. **Allow us to lend a hand.** Call on the experience and expertise of the Tribal Habits team to get the job done for you. Whether it be updating and transferring old material or starting from scratch, we're here to help. We can provide advice on training curriculums, transfer existing training content or run briefing sessions with your internal experts to motivate and inspire their efforts.

How does Tribal Habits make training engaging to learn?

Tribal Habits' modern interface leverages video, social learning and interactive elements to inspire employees to make real change.

- **A modern learning experience.** Today's organisation is mobile, agile and responsive. That's why Tribal Habits is available 24/7 and performs on any device. It's like using a modern website, not an old-fashioned slide show. Tribal Habits user interface is sleek, intuitive and requires no training. We automatic adapt content to your brand standards, including modules from our ready-made libraries.
- **Social sharing and peer learning.** Reflection questions encourage learners to periodically share thoughts with other learners to improve knowledge retention and foster a feeling of social learning. Tribal Habits can share insights that other users have gleaned through their learning journey. These connections enhance the learning experience by providing context and social proof.
- **Move from theory to practice.** To facilitate the flow of information from theory to practice, Tribal Habits actively prompts users to implement what they learn into their day-to-day jobs (and feedback about outcomes achieved). The best performing teams are those that continuously practice and reinforce what they learn in training. Tribal Habits understands this and includes built-in features to support implementation.

How does Tribal Habits make training simple to manage?

Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

- **Automate the mundane.** Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. Simply enrol staff in pathways, and our set-and-forget admin panel automatically sends training prompts to users and tracks training progress and knowledge transfer throughout your organisation.
- **A single view of training.** Tribal Habits is your repeatable, foolproof approach to training. Do away with spreadsheets, folders, emails, PDFs and slides, all containing different information and no completion data. Online training provides the same experience to every employee, every time, in any location. Tribal Habits' version control ensures staff access only the latest information at all times.
- **Detailed reporting and analytics.** Tribal Habits reporting goes way beyond simple topic completion tracking. Two-way communication and feedback loops allow staff to comment on what they've learnt and the effectiveness of training. Reporting shows how new skills have been implemented in day-to-day work and highlights the requirement for further training—filter training data online with interactive graphs or offline via CSV.



What ready-made training can we access?

Here's a **sample** of the 100s of modules in our library – all in your branding and fully editable.

Communication and Personal Development

- An introduction to emotional intelligence
- An introduction to negotiation skills
- Best practice listening skills
- Building your influencing skills
- Coming back from a big mistake
- Communicating effectively in the workplace
- Communicating with management and stakeholders
- Designing presentations that engage
- Introduction to effective decision-making skills
- Managing and resolving conflict
- Overcoming imposter syndrome
- Overcoming the fear of failure
- Problem solving and creativity
- Professional business writing skills
- Staying productive: Managing internal meetings
- Staying productive: Managing your emails
- Staying productive: Managing your priorities
- Verbal communication: Advanced skills
- Verbal communication: Essential skills

Equal Employment Opportunity (EEO)

- Anti-bullying and anti-harassment for employees
- Anti-bullying and anti-harassment for managers
- Equal employment opportunity for employees
- Equal employment opportunity for managers
- Overcoming unconscious bias
- Sexual harassment awareness

Finance and Regulation

- Anti-money laundering
- Competition/Consumer law: Conduct and Statements
- Competition/Consumer law: Introduction
- Competition/Consumer law: Safety and Warranties
- Fraud and corruption awareness and prevention
- Modern slavery awareness
- Privacy in the workplace
- Whistleblowing awareness for employees

Health and Safety

- Alcohol and drugs in the workplace
- Colds, flu and COVID-19 prevention
- Driver safety
- Duty of care for employees / managers
- Information Security: Employee awareness
- Information Security: Phishing awareness
- Information Security: Social Media
- Injury management for employees / managers
- Managing mental health in the workplace
- Managing slip and trip hazards
- Manual handling safety
- Mental health awareness for employees
- Office and workspace ergonomics
- Risk management for managers
- Risk management for workers
- Safety for children and vulnerable people

- Warden Training
- Workplace health and safety fundamentals
- Workplace incident investigation

Leadership and Management

- Delegating as a manager or leader
- Five successful leadership styles
- Holding productive 1-on-1 meetings with your team
- Managing teams for better performance
- Motivating your staff and teams
- Setting expectations with staff and teams
- The five core skills for leadership
- Transition from employee to manager

Project Management

- Project Management: Overview
- Project Management: Practical ideas
- Project Management: Selecting a framework
- Project Management: Scheduling and deliverables
- Project Management: Tasks, time and resources
- Project Management: Managing communication
- Project Management: Project meetings
- Project Management: Reporting and KPIs
- Project Management: Costs, risks and quality
- Project Management: Scope management
- Project Management: Change management

Remote working

- Interviewing skills: Remote hires
- IT security while working from home
- Managing remote and virtual teams
- Running successful virtual team meetings
- Staying productive: Working at home

Sales and Service

- Best practices in client service
- Building trust in the sales process
- Conducting effective client review meetings
- Confident and effective business networking
- Creating sales momentum and closing more deals
- Defining your ideal client
- Developing a compelling value proposition
- Generating upselling and cross-selling opportunities
- Marketing tactics to help client referrals
- Obtaining client referrals and references
- Sales proposals and engaging writing skills
- Sales proposals and managing the process
- Sales proposals and pitching for success
- Strategies to boost repeat business
- Successfully helping upset clients
- Successfully responding to client objections
- Understanding and managing client expectations
- Understanding the client buying cycle

Talent Management

- Coaching and developing staff
- Creating a personal training plan
- Discussing performance with staff
- Interviewing skills: Advance techniques
- Interviewing skills: Essential skills
- Managing staff training for success
- Managing staff underperformance
- Mentoring: An introduction to being a mentee
- Mentoring: An introduction to being a mentor

- Recognising and rewarding staff performance
- Writing effective position descriptions

How affordable is Tribal Habits?

1 – No upfront fees

It's so easy to get started with Tribal Habits - there are no upfront costs!

- ✓ No set-up fees. All plans have no set-up or implementation fees.
- ✓ No storage fees. All plans have unlimited stored users and training content.
- ✓ No support fees. All plans, including admin training and passionate support.
- ✓ No branding fees. All plans include a private, branded online training portal.

2 – Select your packages

Choose from one of two packages.

Creator

In this package, you gain access to our complete creator toolset. You can create unlimited online training (topics, articles and pathways) on any knowledge important to your organisation.

Creator + Library (Most popular and best value)

In this package, you can not only create your own training, but you gain access to our entire library of ready-made training. Our ready-made training modules are complete online learning experiences, with interactions, media, assessments, templates and more. Library modules appear in your branding and are interchangeable with training you create. With the Creator + Library package you can also edit our library content to rapidly develop custom training for your organisation. It's the best of both worlds – create your own, use our modules or seamlessly customise and combine.

3 – Only pay for actual use

Unlike most learning platforms, we do not charge based on stored users. Our plans are based on 'active users'. An active user is a user in your portal who logs in during a calendar month. Active users are counted on their first log in each calendar month and can then login as much as they like, to create or complete as much training as they like.

For example, if your organisation has 500 employees, but only 200 tend to login in each month, you only need a 200 monthly active user plan. Don't worry if you overrun your plan either – you are simply charged for the incremental extra users for that one month at the same monthly rate. **Active user plans can cut your training costs by 30-50% (compared to stored user plans).**

4 – Select a monthly or annual subscription

Then just select a payment plan to suit your needs.

- Monthly plans suit organisations with less than 75 active users per month. You pay for actual use each month, which keeps costs flexible and aligned with your value. Monthly plans start from \$7.50 per active user per month.
- Annual plans offer discounted, and predictable, annual costs. You pay for 12 months of active users in advance. Annual plans start from 100 active users per month (\$5.50 per active user per month) and increase in multiples of 50 users.

How secure is Tribal Habits?

We take security seriously at Tribal Habits. We want you to feel Tribal Habits is a safe and trustworthy portal for your staff, clients and prospects to build a community of knowledge.

- Constant vulnerability testing, including during code development and from third party security firms (including annual penetration and vulnerability testing by external firms).
- We are hosted by Amazon Web Servers and take full advantage of their security and infrastructure capabilities (including DDOS protection, IAM monitoring and full backups).
- All data is encrypted in transit and at rest using industry standard encryption. Geographic filtering is available to restrict user access from specified countries.
- Our Security Policy, Security Practices, Incident Response and Acceptable IT Use documentation are available for review – just contact us for a copy.
- Tribal Habits is fully SAML 2.0 compliant and integrates with compatible Single-Sign-On platforms (Azure AD, Okta, OneLogin and more) for additional user security.

A good starting point for a security review is our [online Security FAQs](#).

How easy is it to implement Tribal Habits?

Very easy.

1. First, your trial portal will become your live portal. This means most of the initial set-up for your portal is already complete during the trial. In fact, the workload to implement Tribal Habits is far less than other online platforms and can be measured in minutes.
2. Second, you can import (and update) users and existing training records via spreadsheet or enable single-sign-on to auto-create new users. In either case, establishing your initial users takes minutes. Most of the work will be in preparing a spreadsheet of your users to upload.
3. Third, importing topics from our libraries and establishing initial pathways or enrolments takes minutes. Topics are imported in seconds, and it takes less than a minute to activate some due dates, notifications and reminders of each topic. Similarly, you can upload existing training content in SCORM (or similar format) in minutes.
4. Fourth, when it comes to creating your own online training, Tribal Habits will be faster than any other alternatives. We have template topics, guided processes, pre-formatted content, built-in feedback and free human reviews. We'll shortcut you from paper-training to interactive online modules in hours or days - not weeks or months.
5. Fifth, you receive private Zoom training sessions on both creating training content and managing your training processes. We have an extensive knowledge base of support articles, built-in modules on using the platform, live admin chat (during Australian business hours) and regular Town Hall webinars with the Tribal Habits community.

You can continue reading about [on-going support after your initial implementation online](#).

How can I get started with Tribal Habits?

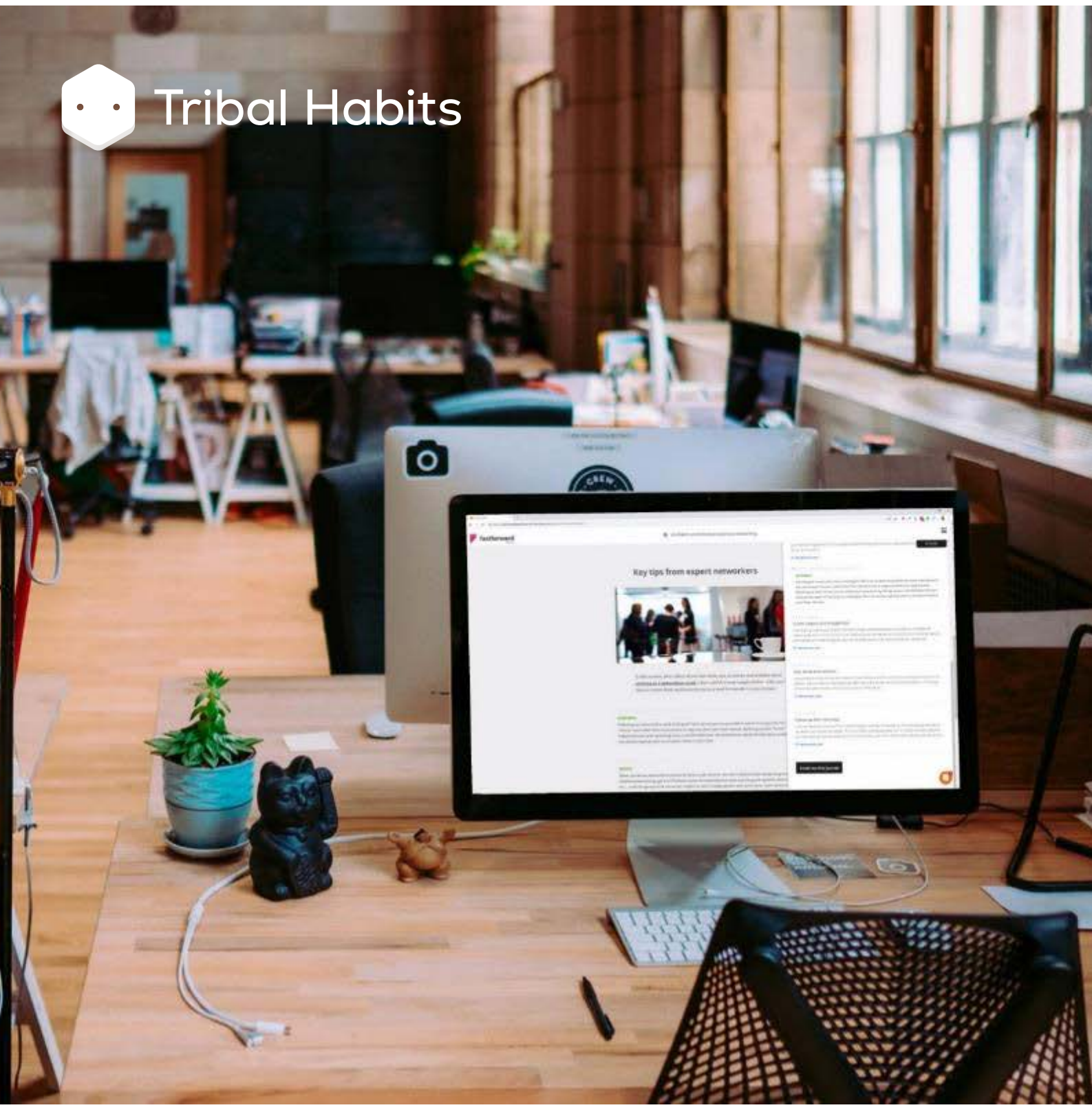
A quick demo will give you everything you need to know about Tribal Habits and how to make it a success within your organisation. After the demo, you'll have access to a free, full-featured trial portal to you get started.

There's no catch. You're not signing up for pushy sales calls and endless emails. There's no obligation or credit card required. Your trial is hosted on Amazon servers. We really just want to show you how Tribal Habits works. We think you're going to love it.

Go to <https://tribalhabits.com/get-started/> to organise your demo.



Tribal Habits



Other Tribal Habits Guidebooks

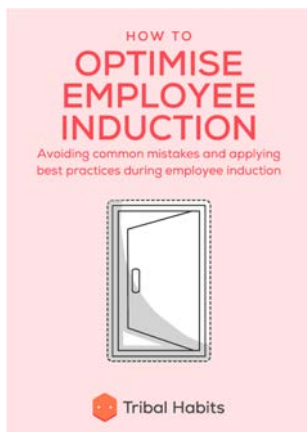


Manage Training Online

[Examine a step-by-step guide to saving time, money and hassle with an online learning platform in this 60-page guidebook.](#)

Spread over three parts, you'll learn:

1. Why you should manage training online
2. Which online learning platform suits your organisation
3. How to implement a learning platform



Optimise Employee Induction

[In this guidebook, we review how to avoid common mistakes and apply best practices during employee induction.](#)

Split into two parts, you can learn:

1. Why your organisation needs induction training and how to build the business case
2. How to optimise employee induction training with both online and offline strategies



Deliver Compliance Training

[This guidebook outlines the steps to build an easy, affordable and effective online compliance training strategy.](#)

Over two details sections, you'll learn:

1. Why you need compliance training, including key reasons to support your business case
2. How to implement an online compliance training strategy, including detailed topic checklists



Share Best Practices

[This guidebook examines a step-by-step guide to turning best practice into common practice with online training.](#)

Across six key articles, you'll learn how to identify and work with your subject matter experts and help build a culture of collaboration and knowledge sharing in your organisation.



Reduce Training Costs

[In this guidebook, you can review tips and tricks to set a training budget and maximise your training expenditure.](#)

Over seven detailed articles, we examine how to set a training budget, the most common costs of training (and how to reduce or eliminate them) and examine more cost-effective ways to deliver training than expensive traditional methods.



Tribal Habits Success Stories

[In this guidebook, get inspired by real-life success stories from leading organisations across Australia as they use Tribal Habits to improve their learning.](#)

There are detailed examples of real implementation in compliance, induction, best practices and converting existing training materials.



Tribal Habits Training Libraries

[In this guidebook, you can review the entire range of ready-made training modules in the Tribal Habits Foundation, Development, Compliance and Template libraries.](#)

See how quickly you can be activating our ready-made training modules in your organisation's branding.