

Going virtual: Top tips for trainers and facilitators

This is the start of a series of blogs written by Bootcamp lead trainer Nim Ralph to advise trainers and facilitators on how to run effective online trainings in the midst of the COVID-19 crisis. This blog introduces the topic and Nim's top 10 tips. Scroll down to see the other 5 blogs in the series.

Trainers and facilitators, while facing a huge amount of precarity in our work right now, are needed more than ever in these unfolding times. But many trainers and facilitators aren't experienced in holding engaging online meetings. There are a whole new set of challenges with online meetings that manifest differently than in real life, for example:

- People get restless
- It's hard to read people's faces/body language
- People have more distractions
- People can find tech overwhelming
- It's harder to engage all the learning styles; especially kinesthetic and emotional
- It's harder to observe and deal with conflict and difficult dynamics

Luckily lots of great tips and resources have been popping up on the internet this week. I wanted to ensure that our Bootcamp community have access to some of these tips too, in a way that speaks to our activism and values.

But first, the biggest thing I want you to know is that this is new to so many of us, and your biggest weapon as a trainer and facilitator is your truest self --- play to your strengths and be open and honest -- it's how you build trust. Therefore, if you are feeling nervous about moving your session(s) online don't be scared to tell the folks participating -- there is a lot of compassion and generosity right now for folks as we adjust to this new COVID-19 online world. Be honest with them that you're feeling nervous about the tech and/or format, and they won't misread it as nervousness about knowing your shit!

When hosting real-life trainings and meetings there are 5 core components (listed below) that we tend to think about. I've broken these down into separate blogs to consider what they mean when applied to running an online training, workshop or meeting:

- 1. Finding a venue: Part 1: What to consider when picking your tech
- 2. Prepping your session: Part 2: Prepping an online session
- 3. Building the container: Part 3: Building trust in a group online
- 4. Including engaging design elements: Part 4: Thinking about learning styles and needs online
- 5. Post-training application and follow-up: Part 5: Post-training application and follow up online

As a quick summary, here are my online training 10 top tips:

1. Know what tech your participants have

Tailor what you are using for the session to what the people you want to reach have available. Use the most interactive combination of tools you can.

2. Practice

It's nerve wracking taking our work to a new space, and things like energy and timings for activities are different online than offline. If possible practice with other trainers/facilitators or on your friends before going live.

3. Prep is key

This is a big one -- a lot more prep is required for online training then for offline. You need to ensure all the different tech and tools you are using work, and are up to date at the point you run the session. It's harder to make a whole new slide deck mid-training than it is to write up some flipcharts.

4. Accessibility

Don't overlook this -- much online space is inaccessible, think about what platforms you're using and how they leave some people out.

5. Breaks, breaks, breaks

It's much harder to look at a screen and stay engaged than to be in the natural energy of in real life trainings -- don't over-estimate how long you can run a session for and give lots of breaks for people to rest their eyes and move their bodies. If possible have some of the session run offline (have participants do an activity off the call).

6. Ask people to put away phones and other distractions - no multi-tasking!

It's easy to get distracted by incoming notifications and the soup you forgot to add to your online shopping order. Ask participants to put those things aside, close tabs and turn their phone off for the session

7. Have support folks if you can

Co-facilitator: It's hard to keep our energy up too - have a co-facilitator if possible

Tech support: Some people find tech overwhelming - have someone support the call who can help individuals with tech so that the session can keep moving.

Remote participant support: if someone wants to join but doesn't have access to tech/their wifi fails at the last minute you might want to have someone who can "buddy" them for the session and help them still participate

8. Appoint participant roles (note taker, time keeper etc.)

This isn't ideal if you are running a webinar/training but if it's a workshop or meeting it can really help people keep engaged and build a sense of collectivity in the group. It also takes some weight off your shoulders!

9. Interactivity - bring in other skills/tools! Include learning styles!

Don't get stuck thinking you have to stick to a powerpoint and video call -- think outside the box. What are some of your favourite websites, apps or games? Can you bring those into your session somehow? You could include some drawing or movement activities, or sing a song together.

And definitely have people collaborating on interactive slide decks and documents so they are typing and participating, not just listening.

10. Record so other people can attend!

Most online platforms have this function -- it helps archive the session, and also widens potential participation. Now jump to the other 5 blogs in the series below:

- Part 1: What to consider when picking your tech
- Part 2: Prepping an online session
- Part 3: Building trust in a group online
- Part 4: Thinking about learning styles and needs online
- Part 5: Post-training application and follow up online
- Part 6: Further reading and resources

Picking your tech for online trainings: Top tips

This blog is part of a <u>wider-series</u> written by Bootcamp's lead trainer, Nim Ralph, focused on how to run engaging online trainings in the midst of the Covid-19 crisis. To see the other blogs in the series, scroll to the end of this post.

In this first blog in my series on online trainings, I look at the considerations you should make when picking which technology to use when running your virtual training. The next blog will cover how to prepare for the actual training.

When holding a meeting, there's usually a few key things I consider when finding a venue:

- Can I afford it?
- Does it inspire and support learning, e.g. does it have daylight, and spaces for flipchart paper and enough space for everyone?
- Can everyone access it?

These are the 3 questions that should also guide you when you are thinking about where to host a meeting or training online --- and ideally you put as much thought into these as you would your venue.

Can I afford it?

There's a lot of free to use online platforms that you can use for meetings right now; Skype, Zoom, Google Hangouts, Microsoft Teams... here's a collaborative spreadsheet of many of the online platforms out there including whether they are free or not.

Some people really enjoy exploring new online platforms, but it's very stressful for many of us. If you're feeling overwhelmed by all the options, a way to consider what to use is think about:

- 1. What you feel comfortable with. While the Bootcamp motto is always stay in your discomfort, because it's where you learn best, if online training is totally new to you then it's okay to use a comfortable tool while you are figuring out what online training looks like. You can then maybe try new tech down the line.
- 2. What people around you know how to use. If you think you might need support getting to grips with a new tool, knowing that there's people around you who can help you when you have questions is always a good shout --- remember we are part of a community, even when we can't be in the same room together.

As always in the world we live in, access to money makes our lives easier and there are features that exist on some of the paid for platforms that will enhance your experience if you can afford them like break out rooms. But you can also make work arounds on that if you

can't afford them. E.g. you can have your whole group meeting on Skype and have people use free zoom accounts to have break out chats.

Does it inspire and support learning?

Like I said, initially you might want to start with a platform that is familiar to you. Sometimes we do this in real life too --- because it gives us confidence, or because it's a space we know our participants know and trust so they will be more likely to come along and/or be present.

There's a lot of pluses to this online too --- it might enable you to feel more confident focussing on delivering your new online content and building up your experience there before moving on to expanding your tech knowledge. It might also support your participants to be on a platform they feel safer on initially. But there's also a whole host of features that you can use to help with online meetings that you might be missing out on, like:

- Breakout groups
- Being able to mute and unmute participants (like calling on hands in a real life training)
- A virtual "hands up" tool
- Polls and temperature check features
- Question and Answer functions

That said you can also use <u>lots of combinations of different programmes</u> to help with this if you can't get your head around the detailed features of one platform.

Another option is the potential for creating some tech cooperation - perhaps your group can't afford it's own zoom pro account, but what if you joined together with some other groups and shared the monthly fee. You could create a shared calendar to "book" out the room like in a community centre, and make an agreement about a "fair use" of time each group can book out.

Can everyone access it?

The online world is not devoid of the social injustices of the real life world, and it embodies many of the social exclusions that exist in real life too.

3 key aspects of this to be especially aware of when hosting online meetings and facilitations are:

Who has access to technology, the internet, wifi and data

Not everyone has access to a computer or to high speed internet. Many people top up their data allowances and can't afford the level of data required for moving all of our campaigning into the virtual world. Ensure that you are clear who you want at your meetings and what

tech they have available to join --- it might be that a phone call is the best option. There are online platforms that allow you to call people directly so that it doesn't use their minutes too.

Who has access to online literacy

Lots of folks don't have access to the internet, and/or haven't grown up in an environment where learning how to use the internet now comes as second nature. This could be for many reasons including age, culture and education. You might need to run some sessions on-line training them in the tech itself (even the easiest of platforms) or send out some very simple "tech how to" sheets before you can start hosting your training or meetings.

What the literal access requirements a platform supports for different impairments and impairment aids

Much of the training world has gotten much better at thinking about physical accessibility when booking training spaces - considering things like wheelchair access, large print formats, fidget toys and other forms of aids and requirements so that everyone can access. But online many people have forgotten to pause and consider access requirements in the same way. You will want to consider things like:

- Closed captioning
- Automatic transcripts
- Keyboard accessibility
- Screen reader support
- Video relaying/audio description

To recap on all these considerations here's a <u>really great spreadsheet that the amazing</u> <u>Campaign Bootcamp Programmes team have been compiling</u> on the accessibility of different online web platforms.

Check out the other blogs in this series on running online training here:

- Part 2: Prepping an online session
- Part 3: Building trust in a group online
- Part 4: Thinking about learning styles and needs online
- Part 5: Post-training application and follow up online
- Part 6: Further reading and resources

Prepping your online training: Top tips

This blog is part of a <u>wider-series</u> written by Bootcamp's lead trainer, Nim Ralph, focused on how to run engaging online trainings in the midst of the Covid-19 crisis. To see the other blogs in the series, scroll to the end of this post.

In my <u>last blog</u>, I looked at the different options and considerations you should make when picking which technology to use for your online training, with a focus on accessibility, affordability and product features. In this blog, I look at the preparation you should make before you start your online training - for yourself, your team and your participants.

In my experience prepping for online sessions takes a lot longer than in real life ones (read through the <u>Building a container</u> and <u>Running an engaging training</u> blogs for more information). Also if many of you are moving to online for the first time just the learning curve will take some time, so make sure you factor this in.

Here's a <u>handy meeting prep checklist</u> which I made for Campaign Bootcamp that you can make a copy of and use for your own sessions.

Outside, of the venue and physical set up there are 3 main things to think about when prepping in real life:

- 1. Participants have the information they need to attend
- 2. Your team is prepped, read and aware of its roles
- 3. The practicalities of the training delivery are all ready; flipcharts written up, coffee break scheduled and so on

Here I've broken that down into the online equivalents:

1. Info for participants

- Make sure they are emailed in advance (and called if necessary) to check in if they
 are attending, what tech they have available and what online access requirements
 they might have
- One of the biggest things to remember about good accessibility practice is that
 people feeling prepared for knowing what will happen is a significant portion of
 enabling different types of people to attend. Ensure they have been given all the
 following information ahead of time, and in good time:
 - What to expect
 - All the links and info they need to join the session
 - How you are meeting their access requirements if they've flagged them
 - Details of any prep or pre-work they should do
- Give them tips on how to maximise their participation on the call:
 - Find a quiet spot
 - o Minimise distractions

- Check your equipment is working ahead of time
- Be on time
- Give them any 'how to' briefing sheets they might need for the tech you are using
- Depending on how unfamiliar they are with the tech, you might also want to offer a one-to-one phone call, or pre-session training on how to use the tech so that you can focus on the session content for the actual meeting/training/workshop

2. Your Team

If you are the only person on your team take a moment to check in that you are prepared:

What can you do to keep you focussed and happy --- stretch before the call, re-read your notes, singalong to your favourite Disney tune, meditate...?

Find a spot you'll be comfortable in for the call

Make sure you have plenty of fluids and snacks to hand

If you have the luxury - having a second screen with notes can be a really helpful tool --- you can use it to keep your session plan on while you have the call going on the other screen, or to prevent you having to constantly switch between tabs of the different programmes running.

Make sure it's quiet and calm where you are

Ensure that you are confident with the tech/platforms you are using --- practice ahead of time

Check all your tech is working before the call start

If you have other folks working with you there's a number of roles in an online training that will make your life a lot easier, and ask them to do the above checklist too!

Co-facilitator: to host some of the session so you can give each other a break. One of you could also be focussing on group dynamics while the other delivers contents. Tech support: a person specifically appointed to resolve any tech issues that occur and/or support a participant one-on-one if they are having tech issues so that you can focus on the training

Remote participant support: if someone doesn't have a laptop, or can't access the google doc this person can help them still access the content by being on a call with them and "representing" them online

Note taker

Time keeper

3. Prepping the session resources

This takes a lot longer than in real life, read through the 3. Building the Container and 4. Running an engaging training blogs for more details and help on this, but here are some of the key considerations:

- Depending on what you are running you will need slides, shared documents with correct permissions, session notes, spare slides to copy and paste quickly in case you change things as you go through
- Some things online go much faster than irl (in real life), and some slower --- you will learn this through practice, but try to take stock after each training or meeting you run and plan this into the next session.
- Think about the 5 learning styles: how might you engage them all in your training?
 Drawing, stretching, dancing, music, film, typing, sharing photos and images. If you want to include things that people need materials to partake in, make sure you've notified them in advance.
- People lose focus online and fast --- how do you structure enough breaks (at least one every 90 mins!) and think about building off line work into the training
- If online training is totally new to you, you might want to find friends or other trainers and facilitators who are happy to run practice sessions together so that you have a go before the meeting itself!

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Building trust in online trainings: Top tips

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In the <u>previous blog</u>, I looked at the ways you can prepare effectively for your online training session. In this blog, I look at how you can build trust and strong group dynamics virtually, once your training has begun.

In person, we often spend a lot of time in a training, workshop or meetings considering how we "build the container" - that is; develop trust between individuals, support people to feel comfortable in learning and trusting of the trainer/facilitator.

It is definitely true that it's harder to build real meaningful connections quickly online than it is in real life. But there are things you can do to still build connections online.

Depending on whether you're maintaining an existing group, or bringing folks together who haven't met before - it's really important to take some time on container building.

Group Agreements:

Like in real life you might want to start with thinking about the group agreements the folks online want to make. If it's a training or webinar you might want to pre-prepare these and just tell the group, with a workshop or meeting you might want to create them collectively. Here's a great post on thinking about group norms. Some specific things to think about online are:

- Be present: remove distractions like phones, other tabs open etc.
- No online back chatting: instant messaging other participants to support engagement is great, but we need to trust each other not to be taking conflict, bitching and gossip into back channels through the meeting
- Do not multi-task while on the call don't try and get other work or your online shopping done at the same time
- Have an agreement for signalling a "hand up" to talk
- Mute when you aren't talking to minimise background noise and interference (If it's a small group you might not want to do this one, as having mute on stultifies the conversation)
- Turn on your video as much as possible

Roles:

As outlined in the prep section there are a number of roles that will really help you if you have other people around to help resource the call. That's often a luxury though. A different solution is to ask participants to take on some of those roles.

Roles that you could ask participants to take:

- Note taker: live record the key learnings, outcomes or action points of the session
- Time keeper: help you stay on track!
- Tech support: if you have someone who knows the platforms you're using well
- Remote support: if there's a participant who can only join by phone, this person can
 act as a "buddy" to still keep them involved and engaged with what's going on in the
 video/shared docs.

Pros:

- Helps to keep people engaged
- Takes the huge load of your shoulders
- People can play to their strengths
- It helps create a sense of community

Cons:

- It's not ideal if this is a training as people will not be fully focused on their own learning
- Not everyone is great at what they think they are great at --- if someone who doesn't
 understand the tech well volunteers for that role, it could make your life harder. If
 someone offers to be the remote supporter and they aren't a good communicator it
 could make the remote participant feel excluded.

Icebreakers:

The more creative you get here the better --- really try and think outside the box! Here's some ideas:

- Have a list of fun and engaging go-round questions not just "how are you?" or "favourite colour" but start branching out, some of my faves are:
 - O What's your favourite potato dish?
 - Who's the most famous person you've met
 - o If you could be a spice girl for a day which one and why?
- Have folks bring a photo (even better if they've added it to a file in advance so that you don't lose time with people faffing about copying and pasting) and have them share it. Best if you give people a theme:

- A photo of your workspace
- o A photo of someone who really matters to you
- o A gif that represents how you feel today
- Use a meme maker and have people "caption" each others photos
- Have a table in a document and in the first column have everyone right one fact about themselves no-one knows. Create a column for every participant and have them fill in whose fact they think it is in each row.

There's more tips on virtual icebreakers here.

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Running an engaging online training: Top tips

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In the <u>previous blog</u>, I looked at how you can build trust and strong group dynamics within your virtual training. This blog builds on that topic, looking at how you can use different participatory techniques and manage evolving group dynamics throughout your training to create the most engaging atmosphere online.

The two biggest challenges of moving trainings online are how to still read the group and respond to group dynamics, and how to hold sessions that are engaging and dynamic.

Group Dynamics:

One of the things that is most challenging in an online session versus real life is *reading the room*. Often in a training space group dynamics are as important to supporting people's learning as the content itself. If the dynamics are bad then people can check out, start messaging each other outside the call and start limiting their and other participant's engagement. If you don't catch it then you not only miss the opportunity to have them learn the most from your session, but you also miss an opportunity to potentially have them learn about group work, culture and anti-oppression by leaning into the tensions, conflicts or ways people are feeling outside the group.

As a trainer I depend heavily on all sorts of communication from participants to understand what is going on between them:

- Facial expressions
- Body language
- What they say to the group
- What they say to each other
- Noises and breath they make (or don't make) when others are speaking
- Outputs of personal work or small group work

Online, with everyone on mute, the only direct sources of information from this list are often facial expressions and what they say to the group.

Facial expressions in real life trainings are a limited source of information because a lot of people have facial expressions that we read based on our own biases because of things like culture, class background and gender. This is why the other communication channels are so important. Someone who looks really bored or pissed off on your call might actually just be concentrating. I find this especially hard online because there is *so much* of everyone's

face on a screen --- the message you think is being sent can feel more amplified than if they were pulling that face in the real life room!

There's no easy answers here, but there are some tips to make it easier:

- Remember that people's faces aren't always conveying what they feel --- perhaps stick a post it note next to your screen to remind yourself
- Have lots of interactive activities that allow people to feedback their thoughts and feelings so that you can assess what's really going on:
 - Type ideas or thoughts in response to a question into a sheet
 - Have people select a gif or emoji that shows their feelings right now for a quick temperature check
 - o Build in small group, pair and solo work with feedback
 - If it's a small group have them come off mute
- If it is clear there is conflict, tension or boredom arising don't ignore it. Lean into it --ask what's going on but make a call about whether it's best to do that one-on-one or
 in the whole group. It's harder then when you are face to face because you can't pull
 someone off to one side but you could give the group a 20 minute break and have a
 check in with someone for 10.
- If it's a group you are working with in an ongoing sense you could think about bringing in a virtual mediator or even running a facilitated conversation or training addressing the issues coming up.
- It's easier for us as trainers to avoid conflicts when we are online and sometimes that means that we don't address it for want of an easier life --- if we really want to keep building the world of social justice that we have spent all our time working for in real life, we will need to challenge ourselves to also lean into these conversations online.

Here's <u>some more advice from Training for Change</u> on "reading" the group in different virtual settings.

Dynamic engagement:

One of the big challenges in moving to online training is thinking about how we keep the magic of the training alive in a virtual setting. Very quickly online we can default to talking at people a lot and losing engagement and learning styles. As anyone who has been to one of my trainings knows, I strongly believe in experiential and participatory trainings that bring all sorts of unexpected elements into the training room; from deep emotional content through to lip syncing.

There's a lot of tips and tricks for more participatory meetings flying around at the moment - the fundamental trick is to avoid having people just listening at all costs.

 Minimise the number of go-rounds you do as people won't stay focussed for long if your group is more than 4 people. But find fun ways to alternate who speaks when you do e.g. go alphabetically, by age, by star sign or use this free online wheel of names (thanks to Matthew Armstead for sharing that with me!)

- Use google docs (or a collaborative doc site) for everyone to type notes into at the same time. You could have tables of questions or ask people to write what they're learning as you move through. Engaging people through typing keeps them more engaged
- Use google slides (or a collaborative online slide tool) to create online versions of some of the great participatory tools you would use in a real life training like <u>spectrum</u> <u>lines/spectograms</u>
- Here's a google slides deck from Training for Change that you can download for free to create virtual post it notes, lists, and go round tables

But you can also think outside the box. When I am training other trainers up one of the key aspects of what I think makes a trainer great is when they bring themselves into the room including skills they have that they don't think of as "training" skills:

- Can you bring your favourite online game into the session
- Have people draw things in real life or offline
- Find ways to encourage people to move --- maybe a shared stretch part way through, or an activity where one person does and action and everyone else copies it
- Why not have a 5 minute lip sync battle?
- What other things bring you joy in life?

In my experience, you also need to structure in a lot more breaks online than in real life. The fatigue of sitting still looking at a screen sets in fast.

- Don't go for longer than 90 minutes max without giving people a break
- Try to schedule shorter recurring sessions instead of a whole day
- If you are running a half/all day meeting or training then try to think about where you can build in "offline" time --- set people up for a task and give them 30 60 mins to do it off the call, and reassemble at a set time
- Schedule some energisers in there too --- why not share your screen and have everyone do a 10 minute online workout?
- You will get fatigued too: I often find I'm far more exhausted immediately after an
 online training than an in real life one. Try to find ways to keep your energy up, make
 sure you are staying hydrated (and remind your participants to, too!) and if it's a long
 session consider finding a co-trainer/facilitator. Also remember to take some time out
 after the session and gather your energy

You should also consider some of the other things you would do in a real life training to engage and enable different forms of participation:

- Different group sizes: lots of online platforms have a <u>"breakout room" function</u> which enables you to break the group down into smaller groups for better participation
- Personal reflection: give people time on their own to make notes and reflections before asking them to share in the big group
- Lists on flipcharts: type straight into a shared slide show as people are talking as if you would a flipchart
- Post it notes: there's lots of free post it note apps online!

• Pair shares: if you don't have a breakout room feature, have pairs call each other for some pair time

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Post online training application and follow up: Top tips

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In the last 4 blogs <u>in this series</u>, I've looked at how you plan for, design and facilitate an engaging online training. This blog looks at what you should consider for the end of the session and beyond: how you evaluate its success, debrief and create space for participants to reflect and take action.

This is a big one -- like in real life the measure of a good session is how well people apply the learnings/outcomes in their life outside.

- Don't forget to include time in your session for people to think about what they are taking away and how they will apply and share it.
- Make sure you've got a clear list of action points for follow up with participants;
 whether they've committed to things, or you've promised to send them handouts or notes
- Think about whether you will evaluate the session or have follow ups with participants to check in on them and make sure you give them what information they need at the end of the call
- Many online platforms will record your training and/or create a live transcript. You can
 use this to share information after the session.
- Have a team debrief if you had other people working with you
- Do your own trainer reflection at the end of the session:
 - O What worked well?
 - What was challenging?
 - What did you learn about the tech?
 - What did you learn about pacing the session?
 - What could you try differently next time?

Finally, remember to look after yourself! We are not just machines designed to produce labour. Looking at a screen for 8 hours a day producing work is not how we live our best lives. Take a rest, drink more water, eat well and reconnect with yourself. Here's some strategies I am using in these times:

- Waking up at the same time each day
- Showering, eating breakfast and a short work out (some push ups, squats and skipping) before I start work
- A friend shared the Lvy Lee Method with me and I'm trialling it. Basically each day you write a max of 6 "to-do's" each day and list them in priority order. You focus only one

- priority 1 until it's done, then move to 2 and so on. Any of the list you don't get to you use as the start of the list the next day
- Taking regular breaks and maximising my walking outside time
- Stretching on a break, even if it's only 5 mins
- Making sure I reach out to 2 friends a week meaningfully
- Setting aside 10 mins each day to intentionally do something that brings me real joy
 and presence without distractions; listening to some songs I love, feeling the sun on
 my face, dancing in my living room. Whatever brings you joy.

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Top resources for running online trainings

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In my <u>blog series</u>, I've outlined everything I've learned and know about how to run an engaging online training. This final post is a collection my favourite resources to help you on your journey running virtual trainings!

Tools for facilitating online:

- Virtual Facilitation Tools Spreadsheet
- Online meeting platforms research: Campaign Bootcamps' access review of platforms
- Quick Guide to Online Meeting Platforms
- Tips for Zoom Breakout Rooms
- 28 Tools for Online Brainstorming and Decision Making in Meetings (2019 update)

Tips for facilitating online:

- The Definitive Guide To Facilitating Remote Workshops
- Online Meeting/Gatherng Resources
- How To Facilitate Effective Virtual Meetings
- Online Facilitation in Design Engineering Overview
- Getting Started with Online Training & Facilitation

Tips for specific activities:

- 10 Ways to Use A Spectogram Online
- Virtual icebreakers for remote teams
- Advance Your Meeting Conversation with Norms

Click below for the other blogs in this series:

- Part 1: What to consider when picking your tech
- Part 2: Prepping an online session
- Part 3: Building trust in a group online
- Part 4: Thinking about learning styles and needs online
- Part 5: Post-training application and follow up online