

Distance Training Expectations and Roles

Distance trainings require a variety of positions to ensure they run smoothly. These positions include the trainer, support training, and producer.

There may not be enough trainers participating in each distance training to have each trainer fulfill only one position. When this occurs, the essential roles for each position included in this document must be divided up among the trainers to ensure all roles and expectations are being met.

Expectations and Roles of the Producer

Using a producer to cover technical needs during online trainings allows the trainer(s) to focus on guiding learners through the content.

Expectations

The producer is expected to prep for the training as if they are a trainer. This includes:

- Reading through the TN, PG, and PPT before class.
 - Be sure to understand the content so you can assist trainers and learners when needed.

Understand the platform being used.

- They should know:
 - How to log-in
 - Breakout rooms
 - Audio connection options
 - Where to find tools (annotation, raising a hand, chat, etc.)
- Producers are expected to know what the learner side of the platform looks like so that they can provide accurate instructions to learners.
- Figure out the logistics of moving windows to see all necessary tabs before class.
 - At a minimum, the producer needs to see what is being shared, and always have the chat window and participant tab open.

The producer is expected to attend all test sessions and participate in all debriefs.

The producer and trainer(s) must meet before the training to go over expectations and make sure that everyone is on the same page.

Some key points you may want to go over during this meeting are:

- Who is expected to complete the sign-in sheet and submit it to reg staff?
- Who is emailing Reg Staff to pull the evaluations from Quia?
- Who is expected to keep track of time (trainer breakout)?
- How do the trainers want to be informed of questions (in the chat or raised hands)?
- Are breakout rooms being used?
 - How are the learners being broken out into breakout rooms?
 - How much time should the breakout rooms be scheduled for?
 - Should they be automatically pushed into the rooms?
 - Should they be allowed to return to the main room whenever they want?
- Are polls being used?
 - Who is creating the polls?
 - When should they be brought up?
- Are annotations being used?
 - Who clears them before moving to the next piece?
- What external links will be used (evaluations, links to videos, etc.) as well as other information to add to the chat box?

Roles of the Producer

The specific role of the producer may vary depending on the size of the webinar or training and the number of trainers.

Host

The producer should log into the platform as the host at least 30 minutes before the start of the training.

They should make sure the correct settings are in place.

- For example, is the waiting room enabled? Are the annotations tools turned on? Can learners share their screen? Are breakout rooms enabled? Is Closed Captioning turned on?

If using the waiting room, the producer is responsible for admitting learners.

If using breakout rooms, the producer is responsible for sending learners to breakout rooms and bringing them back.

If learners must call in, the producer should merge the number with the appropriate learner if the platform allows it.

- If the producer is unsure who the call-in is, they should make a best faith effort to find the appropriate learner.
- Change learners' names if they come in under something generic. For example, if someone comes in under Resource Room 1, find out who it is and change the name.

Technology Point Person

Producers should handle technical and logistical questions and issues that arise.

They should troubleshoot technology issues with learners via private chat if allowed by the platform.

- Sound issues, not being able to see the presentation, display settings, etc.
- Make sure everyone can hear us and we can hear them as they arrive.

The producer should also provide technical assistance to the trainers if needed.

- This includes letting trainers know if they need to zoom in on their screen or if the wrong screen is displayed.

If there are learners who are disruptive due to noise, the producer takes care of muting those learners.

- You may want to mention you are going to do this when you introduce yourself.

If there are learners who are disruptive due to webcam, the producer takes care of turning it off for learners.

- You may want to mention you are going to do this when you introduce yourself.

If there is no Support Trainer, the Producer should clear rouge annotations from learners.

Monitor

The producer is responsible for monitoring the chat. If there is a question that must be addressed and the trainer(s) did not see it, they should interject with the question.

- If you receive a question via private message, and it is a good question, let the trainer know so it can be answered out loud for everyone.

Additionally, the producer should monitor the participant tab and/or reactions to see if a learner raises their hand or is asking for the trainer(s) to slow down. If so, the producer should let the trainer(s) know in a timely manner.

Assistant

They should put the link to the Participant Guide, website addresses, and evaluations in the chat as needed. They should also include other relevant information, such as page numbers, in the chat when they are able to.

- You may want to have a word document open with all this information to copy/paste into the chat.

If the producer has a working knowledge of the system for hands-on training, they should help fix issues with cases and/or PINs if needed.

Expectations and Roles of a Support Trainer

Co-trainers who are not actively training should support the main trainer(s). Remember, not all trainings will have a designated Support Trainer. When you don't, the co-trainer must fulfill the roles and expectations of the Support Trainer.

Expectations

The support trainer is expected to prep for the training as if they are a trainer. This includes:

- Reading through the TN, PG, and PPT before class.
 - Be sure to understand the content so you can assist trainers and learners when needed.

The trainers and producer must meet before the training to go over expectations and make sure that everyone is on the same page.

Some key points you may want to go over during this meeting are:

- Who is responsible for creating cases if it is hands-on training?
- How do you want the support trainer to interject with a comment or clarification?
- What will the support trainer respond to in the chat and what will the producer respond to?

Support trainers are expected to devote their full attention to the training. They should not be working on other work as well.

There may be times when more than one learner needs assistance. When this occurs, all trainers are expected to help get learners back on track.

Support trainers are expected to participate in all debriefs after class.

Roles of the Support Trainer

The roles of the support trainer may vary depending on what your team determines during your initial meeting.

Assistant

If it is hands-on training, they should troubleshoot cases/PINs and help learners when they get stuck.

- If a learner asks for help in the chat or out loud, the support trainer should look up that learner's participant and help get them back on track.
 - Support Trainers should always go into the system to quickly fix the issue and then let learners know the steps taken to resolve the error.
 - Alert trainer when the learner is back on track so that the training can continue.
 - If several learners are getting stuck at the same point and/or getting the same error, bring it to the trainers' attention to discuss/go through as a big group.
- They are expected to correct errors if needed.

Support trainers should put the PG page numbers and fill-in-the-blank answers in the chat as needed.

They should monitor the chat and answer questions as needed. If they are not sure how to answer the question or feel that it should be brought to the attention of everyone, they should alert the main trainers.

Support trainers should be watching the presentation to ensure that the correct screens are displaying at all times (PPT vs system).

- If the wrong screen is displaying, they should alert the trainer.

Keep track of timing.

Best Practices for the Trainer Role

There are some distinct differences to training via distance rather than in the classroom. Here are some best practices to consider when training via distance.

Schedule More Prep Time

Because there are additional factors to consider with distance training, you will need more time to prep. Thoroughly read through the TN, PG, and PPT before training. It is also recommended that you practice navigating the PPT and/or system website while sharing your screen within the platform you are using. Practice toggling between a PPT and the system website using ALT + tab.

You need to know what the platform looks like for learners to assist them during training. You may want to log into the platform with two different devices so you can see the difference between what you see and what they see. Using two different devices while prepping also allows you to see how much lag there will be for learners.

The Trainer Speaking is Not the Trainer Sharing

Navigating the PPT, system website, and/or making entries is difficult when you are also the one speaking. It is easy to lose your place in the TN while multi-tasking. It is best practice to have one trainer speaking and have the other trainer sharing/making entries. The sharing trainer is still expected to engage in the training and can jump in to answer questions and provide information when needed. Switch the speaking/sharing trainer throughout the training.

Decide who will be speaking and who will be sharing when you create your trainer breakout.

Reduce the Number of Times you Stop Sharing/Switch Sharers

Whenever you stop sharing to switch screens being presented or for another person to share, there are delays. Depending on several factors, these delays could be a few seconds to several minutes. This hinders learners' ability to view the content being presented and may cause them to believe there are technical issues.

To avoid delays and confusion, it is best practice to reduce the numbers of times you stop sharing/switch sharers to as little as possible. There are two key ways to do this.

1. **Instead of sharing just one window, share your desktop.** - This allows you to use ALT + tab to toggle between screens being shared instead of needing to stop sharing one window and start sharing another.
 - a. If you have more than one monitor, be sure to select the appropriate desktop when starting the screenshare.
2. **Limit the number of times you switch trainers.** – While you may prefer switching trainers often (like we do in classroom training), it does not create the best experience for learners via distance. It is recommended that you only switch trainers during breaks.
 - a. This ensures that if there is a significant delay, it does not impact learners.

Log in 30 Minutes Early

Just like in classroom training, you should arrive to training early. This allows the trainer(s) and producer to discuss any last-minute items before beginning, pull up any needed information, enable appropriate tools (breakout rooms, annotations, etc.), and ensure audio and video are working properly.

- This ensures trainers look prepared and ready when learners start to arrive.

Slow Your Pace

When training via distance, it is best practice to slow down your pace. It is recommended that you pause every couple of sentences to allow learners to comprehend the information you are providing. It also accounts for any lag learners might have.

- This is especially true for hands-on, distance training. It takes time for your audio to reach learners, for them to process the information, and then to act on that information by making entries.

It is also recommended to ask learners how the pace is, as they may not be comfortable asking trainers to slow down.

Pay Close Attention to your Co-Trainer

Because you are training via distance, you cannot rely on the visual cues of your co-trainer. Instead, you must pay close attention to your co-trainer. Let them know if their pace is too fast. Verbally ask their opinion if you are unsure how to answer a question or want them to share their input.

Frequently look at what they are sharing on the screen to ensure you are in sync.

- If they are making entries, use them as a guide to know your pace.
- Ensure they are highlighting the fields needed or showing the proper slides.
 - If they are going too fast, let them know.

- If they seem lost or are not moving on, ad-lib by providing verbal cues to help get them back on track.
 - For example, if they are supposed to be entering information in WWP to show additional fields, but they are not, you deviate from the TN by saying, “To get the Good Cause Granted? to populate, Kelsey is going to put RO in the **Participant’s Reason** field. After she selects Yes, you can see additional fields display.” Or, if they are not toggling back to the PPT, you could say “Kelsey is going to pull up the PowerPoint for us to discuss a few additional items.”

Technology Considerations

Virtual training platforms pull heavily on your computer. Having several windows open while presenting via distance can cause your computer to lag and affect the quality of your training. It is recommended to close out of all windows except what is needed for training. This includes logging out of Teams and closing out of your email.

- If you have more than one monitor, choose which monitor you are going to share. Then, open only the windows you are going to share on that monitor.
 - For example, when training Practical Apps, I have Zoom, PPT, and CWW open on my computer. I log out of Teams, Skype, and close all other windows. PPT and CWW are the only windows open on my 2nd monitor as that is the one I always share.

Be sure to have your computer plugged in while training. If you are able, use a wired internet connection.

- If you have slower internet and are limited to a wireless connection, disconnect all other devices (cell phone, Alexa, etc.) from your wi-fi. Even if you are not actively using the internet on the devices, they still pull on your connection.

Role and Responsibilities Worksheet

Tasks	Producer	Presenting Trainer	Speaking Trainer	Support Trainer
Is assigned as the host				
Are assigned as the co-host				
Turning on Closed Captioning				
Admits learners				
Renaming Learners and merging phone numbers				
Completes sign-in				
Drives system (if needed)				
Moves along PPT				
Clears annotations				
Launches Polls (if needed)				
Sends learners out to Breakout Rooms (if needed)				
Turns off webcams and mutes learners				
Troubleshoots technical problems/monitors the chat for these issues				
Troubleshoots system problems/monitors the chat for these issues (if needed)				
Monitors the Participant Tab/Reactions (slow down/speed up)				
Answers questions from learners				
Puts PG answers in the chat				
Puts evaluation and links in the chat				
Keeps track of timing				
Sending sign-in and evals to RegStaff				
Create and check pre-requisite cases (if needed)				
Create and/or update soft introduction PPT (if needed)				