

Guidelines for Presenters & Trainers during VTC-based Sessions

Though “presentation” or “training” via Video-Tele-Conference (“VTC” or simply “Videoconference”) is in many ways similar to performing these actions with a live local-only audience, there are a few significant and essential elements that the presenter or trainer having little experience in VTC-based delivery **MUST** prepare for and practice during the actual delivery of the materials (and during the conduct of any discussion) anytime the session includes a remote group connected by live digital video & audio (videoconference or “VTC”). A very short-list of the most important of these essential items appears below, not listed in any “priority-order”. Please read these over and prepare any questions for your colleagues, the technical staff or presentation professionals who might be assisting you with your sessions. In the interest of brevity we will attempt to cover as many elements as possible without delving too far into the minute details of each and every issue. As much as possible we will attempt to explain not only “what” is important, but “why” any particular element is important to the maximized success of your session(s).

For the purpose of this particular discussion / paper, we will assume that the presentation or training session is being delivered to a local audience and, at the exact same time, is being delivered to a remote audience. We will further assume, for this discussion, that the remote audience is located in two or more locations. In other words, there will be a multi-point VTC connection active during the session(s), and the location where the Presenter or Trainer is working will also have a live local audience. This is the most complex of all combinations, since the simultaneous needs and perceptions of a live local audience and those of the remote audience do not always coincide in a clean and precise manner. Surprisingly - Some of the “best presentation practices” that trainers might use for live local-only presentation and training become highly problematic when the event or activity includes a remote VTC-connected group or groups.

Time: There are a number of discrete elements related to time that you must keep in mind (and actively manage) when delivering your session(s). The two most important things to remember are that proper management of “time” is the means for you to first take-control of the session, and that any statement you make about time is a “promise” or “commitment” you make with your audience, one that they will expect you to honor.

1. Amount of Time: “Distance Always Equals Time”. When you are communicating with a remote audience, especially one that is split between multiple remote locations, the delivery of materials and the discussion that accompanies this almost always takes longer than if the presentation is communicated to a local-only audience. A good rule of thumb to follow is that when you add a remote audience it will take you approx. 15-25% longer to deliver the presentation. In other words, with a remote connected audience joining your local audience, your 1-hour “local-only” presentation communication will almost always take between 1-hour + 10 minutes and 1-hour + 15 minutes. If you are strictly restricted by the timetable of the actual “event” to only 1-hour (for the actual delivery of content and any Q & A or discussion that accompanies this), then this means you will either be forced to move your presentation along at a considerably faster delivery pace (generally faster than you should for either your local or remote audience to feel

comfortable), or you will need to contract your materials so that you are able to condense or remove enough time from your 60-minute original local-only presentation to allow the presentation to then become 45-50 minutes when delivered local-only. This means, by virtue of what we have stated here, the adjusted or “contracted” delivery will then become a full 60-minute “local-plus-remote” presentation of materials.

2. Starting and Stopping: You must start on-time. Don’t make the people who actually showed-up on-time wait for those who are late. Some people may have been honestly delayed. A few may simply be less considerate and diligent than those who have arrived on-time. No matter what the reason might be for any tardiness, starting late will almost always alienate a large portion of your audience, especially those who make up the remote audiences, since they do not have the benefit of friendly ad-hoc pre-session casual chatter with you, the expert, like those in your local audience. Chatting with your local audience and starting late will make the remote audience feel cheated and extraneous. Additionally, casual conversation between you and the local audience members prior to the start may then cause you to take facts or ideas for granted during the presentation (you may think you spoke about something with the entire group prior to the start of the session when, in reality, you did not – you only spoke with the local group). As a result, under this misperception of prior-delivery you may subconsciously cut subsequent discussion short or “out” altogether. Although your own preferred “local audience style” may be to chat in a friendly manner (in an effort to make people feel welcome and comfortable), and perhaps even begin to highlight some content points prior to formally beginning the session, remember that at least 50% of your audience is “far-away” and does not have the luxury of direct pre-class ad-hoc communication with you. Avoid discussion of topic materials with your local audience during the walk-in period prior to class, and even minimize general “chatter”. **To keep things “timely”:** Have the video connection active about 15 minutes before the actual “start-time”. Make sure that you have a countdown-timer with nice large numbers running on your PC and displayed as a source for participants at all locations to “see” as they enter the room(s). The timer I use allows me to include a statement, like the name or title of the session or a short sentence saying “We will begin in: ____ Minutes”. When the timer “runs-out” (hits “zero”), make sure your microphone is un-muted and active, place your own image on-screen (this is your “main-camera” in a waist-high or tighter close-up of you / your “face”) and, in a clear and commanding voice, begin your “welcome and introduction” (see notes below on the structure of this “welcome and introduction”). Do not allow late-comers to delay this “start” of the session. **Likewise- If the session has been advertised as taking “60-minutes”, you must make certain that you end on-time.** Have a local timer or clock to prompt you. Don’t use your own watch that you wear on your wrist, or you will look like you are eager to “get the session over and leave” as you keep checking your watch. It is often best to make use of another mechanism. I prefer to select a participant to keep track for the full period of the session and who then gives me a signal at pre-determined intervals. The objective is to be certain that you know clearly when you have 10-minutes left, 5-minutes left, and 2-minutes left. At the “10-minute mark” you need to begin to wrap up the actual materials (this 10-minute time-interval is probably within your Q & A period, so finish answering the current question or let them know you only have time for just one more quick question). At the “5-minute mark”, go through your “summary and conclusion” (see below for details on the content of the “summary and conclusion”). At

the “2-minute mark”, go through your “thank you” and your acknowledgement of the audience and of those who may have helped to put this together and/or helped you to deliver the session. END ON-TIME, and ALWAYS SAY “THANK-YOU”.

3. Breaks: Videoconference is far more focused and productive than meeting in-person, but the penalty for this is that VTC as an “activity” is more tiring. If the total time required for the comfortable and complete delivery of your materials is as long as or longer than 1.25-to-1.5 hours, you MUST incorporate a “Break”. Tell everyone at the beginning of the session when this break will occur and how long the break-duration will be, and then stick to this commitment of “when” and “how-long”. When you announce that it is “Break-Time”, remind the audiences to watch the on-screen timer in order to remain “timely. Put the countdown timer on-screen so that they can all see how much time is left. **When the “Break” is ended:** Make sure that you begin the session immediately after the Break-time concludes. Generally – It is best to allow for a break of not less than 10 minutes and not more than 15 minutes. I have found that 12-minutes seems to “feel-right” to most participants, and allows people time to get to the restroom or other areas, conduct their business and return to the class on-time without having to either “hurry” or hang-around idly waiting to get started again. **Also Remember – Your “Break-Time” cuts into your allotted and planned total-session-time.** If you have a session that contains a solid 2-hours worth of material delivery and you allow the group take a 12-minute break, you will then be 12-minutes short on material delivery time. You must structure the “material-delivery-time-total” to account for the lost time consumed by the “Break”. Remember: Giving them a “Break” is not a tacit agreement on their part to stay late to make up for the lost time. If you told your audience at the beginning of the session that you would end at noon (12:00), then “noon” it-is, not “noon-plus the time of the break”.

Materials and Visuals: These days the most frequent “visual” elements used in any videoconference are PC-based materials (slide-shows, spreadsheets, actual software applications, etc.), live “drawing and writing” (whiteboard and flipchart), and the faces of the participants (the participant preset camera views). There are certainly many other application-specific source materials that might be used (video microscopic images, medical x-rays, 35mm slides, DVD-based video, test & measurement signals, etc.), but the PC, whiteboard/flipchart and main camera are the most common, especially in general business and education. That being said, there are a few issues related to these that we must consider in order to be certain that we use them to maximum effect. The following lists a few of the broad guidelines related to the general use of visual material and also lists a few discrete guidelines related to the use of audio & video sources.

General Guidelines for the use of visuals during a videoconference:

1. Size: Remember – Your audience(s) will tire less quickly if the visual material is easy to read and visually comprehend. This often correlates to the size of text and line materials (>36-point fonts, >3-pixel-wide lines). This can also include the “size” of your own camera images. A sea of 100 faces as little tiny non-descript dots will quickly tire the eyes of the remote sites, and they will “mentally check-out” as the discussion takes place. Use close-up camera presets of not more than 2 or 3 people at a time.

2. Color: Primary / “Rich” colors, especially when used in ad-hoc wide and random combinations, will also be visually tiring. Try to use less-rich or “muted” colors.

3. Contrast: Light colors on a light background or dark colors on a dark background are extremely difficult to discern visually and are, by their nature, more tiring. Maintain wide contrast between overlaid elements, such as black background with white text on top.

4. “Reason” and “Consistency”: If you are going to use colors, make sure there is a reason. Using or changing colors simply because you “can” will act to mentally confuse people. When you use or make a change in color or text style or placement on a video display, this conveys “meaning”. Make sure that there is reason or “meaning” behind any selections that you make from one visual to the next, and make sure that you are consistent. If your use of “red-text” always means “you should not do this”, then make sure that you are consistent. Do not then make your text or visual “red” when indicating “you should do this”. **Likewise:** Graphics and “pictures” are great, but make sure clip-art or graphics make sense as a metaphor or illustration of your thought. If you are talking to a class about how to properly log-on to a software application, and you have a splash graphic that animates up and down on the screen while you explain the fields that they need to fill-in, and the graphic is that of a big yellow dump-truck filled with food, toys, medical supplies and an astronaut, then your audience will probably brain-lock for about 10-minutes while they try to figure out what the “connection” is between the discussion topic or thought and the graphic you selected as a “metaphor”. **Get help** from a qualified person if you want to “spruce-up” your presentation materials with graphics.

5. Clear and Concise: Especially when writing or printing on a flipchart or whiteboard, you must be sure that you use the fewest words or pictograms possible, and that you create these with care so that they are discernable on-camera. If you simply cannot draw a legible diagram or print in simple block letters, then avoid this form of visual material support. If your text-list of bullet-points has the legibility of a hand-written doctor’s prescription, then your audience will tire quickly and become frustrated. Additionally – When using electronic text visuals, “flying text bullets” or any wildly animated text is visually extremely tiring (and generally completely unnecessary to the focus of the discussion and does not lead to further or deeper understanding of your specific point). Use of animated text should be kept simple (fade-in or simple wipe of a complete sentence or paragraph, avoiding even these simple transitions as “one word or one letter at a time”). Also remember – in western cultures we read from left to right, so “wipe” the text from left to right, not right to left. Additionally - If you are going to show a slide with only a single paragraph or one simple statement, you should only transition the slide, not the slide and then the simple text bullet. **In short** - Keep slide and text transitions simple and use them sparingly, not liberally. If you have not been trained in electronic slide creation and the psychology of proper transition of electronic graphic and text materials, seek some training and guidance before setting up a lot of fancy visual “busy-work” that has no meaning and that will always detract from your message and delivery.

6. Accurate Facts & Reasonable Grammatical Structure: Check your facts (especially commonly known items) and make sure that everything is “correct”. Also – Check your grammar and spelling. Don’t make the audience figure out what you would have meant if you had only spelled things correctly and used proper grammar. I recently saw an example that was a classic case of violating this rule. The presenter (a highly paid engineering business-process consultant) actually wrote on the whiteboard: *“Half the first parst of anew qu toe from all frm. Provide all then some exsamples ITMT when they would finally L2L at it”*. Right...

7. Acronyms: As we see in the example above, the use of acronyms is often confusing. In the previous example it turned out that “ITMT” meant “In The Mean-Time” and “L2L” meant “Like to Look”. *Give everyone a break* - - write it out and, if you must use an acronym, define it clearly for everyone. Save your “U R RIL EZ 2 LUV <;-)” for your evening AOL chat-room or the email that you send home to your spouse or the kids. Your audience expects *communication*, not “secret-code” or “cute”.

8. Matching: Always coordinate and “match” the Slides to the Handout & to the Flipchart & to the Software etc. Make sure that everything “matches”. If a single item in the software interface you are showing the class is called “Edit” and in the handout outline the same item is called “Modify” and then you write “Update” to indicate the exact same item on the flipchart - - well, you get the idea. “Continuity” is king.

9. Variety: Remember – For better or worse, people are used to TV and the Movies. *Though using VTC does not require us to “perform” like we are on “TV” or “in the Movies”, we do have to compete with the audience mind-set that these other media have developed.* Do not place a static 7-word text image on-screen and then leave it there for 15 minutes while you drone on and on. Show any visual long enough for them to “get-it” (and/or “write-it” if they are manually taking notes), then bring your camera back “on” your own image in order to talk, toggling back and forth to the graphic visual from time to time to make any graphic-visual-specific references. Likewise- Sometimes it is easier if they see you write something out on a flipchart while talking it through than if they see thirty PowerPoint slides, each with the same background and each with 6 bullet-points with 8 words in each bullet etc.... Variety will keep them interested and engaged.

10. Don’t make things too “busy”. The best way to emphasize something is not to have a dozen arrows, bold text, lots of rich colors, and stars all around a single word that appears within a 20 word paragraph. Simpler is better. A simple statement using white text in 48-point Ariel font on a dark background, with one of the words colored bright-yellow, can provide all of the “emphasis” you need.

11. “Verify”: When you are going through your materials be certain that everything makes sense to the audience as delivered in real-time, especially when you are writing on a whiteboard or flipchart. In an effort to engage the audience, and in the interest of maintaining “dialog” even when I am doing most of the “talking” (as the trainer), I often ask, as I finish with an electronic slide “did everyone get that o.k., and did it help our discussion?” I also often ask, when writing on a flipchart or whiteboard, “is this clear - - can you read this ok?” The audience will then prompt me [you] if the printing is too small or sloppy, or if things are moving too quickly and if they do not understand a point has just been made with a particular visual (text or graphic). Additionally, I often say to the local & remote groups, “Tell me if I have made something too confusing” This statement of “*Tell me if I have made something too confusing*” allows them to “blame” me for any confusion, instead of having to admit openly to the group that (as they might feel in their own mind) they aren’t smart enough to understand something. Any trainer knows that the fear of looking foolish in front of others is what keeps many people silent, unable to ask perfectly reasonable questions or provide valuable insights to the materials. Remember - You always get good feedback and strong participation if they get to critique you and the materials. You get very little feedback if they feel that *they* are being critiqued, as-if they are the one person in the audience that has to publicly admit to being [in their mind] the only person that is lost or confused. Take the pressure “off” and they will open-up.

“Audio” and Working with Microphones: It is worth noting that you can have a “conference” with audio and no video (we do it all the time using telephones), but you cannot have it the other-way-around. Fancy video with poor or missing audio will not allow you to properly deliver a presentation to a remote group. Audio is THE most important element of human communication (for a variety of reasons we will not cover in this paper). Of all the audio elements available to us, the spoken word from one person to another is the ultimate communication element. This means that we must be able to hear and be-heard, and also means that this “voice-audio” must have the requisite clarity and volume required by humans if it is to be useable and effective as a communication tool.

1. Enunciate: You must speak clearly. *Practice speaking with clarity and proper volume & emphasis.* Avoid mumbling or slurring, often the result of fatigue or moving too quickly through materials. If you are using particularly difficult or unusual words, take time to provide extra emphasis. Spell any unusually complex word after you say it so that everyone can fully understand the actual word you are using and take accurate notes.

2. Avoid “Jargon”: Some material requires you to use some unique “industry” or “application-specific” terms and phrases. That is fine. What you want to avoid is any casual slang or jargon that you may have incorporated into your own speech patterns over time. Also remember: Out-of-context references, for the purpose of making a metaphoric illustration, will often lose a large portion of the audience. *For example:* Suppose you tell a group that, “Setting up this software on a Windows-2003 Server can be tougher than the trail-calculation for determining the proper fork extension of your custom-chopper motorcycle”. This will probably leave the audience baffled and confused, since they likely do not know the logarithmic calculation for the trail calculation, what the trail of the fork or the even the fork itself actually is, or how any of this even remotely relates to software configuration (and let me say here that, aside from possible similar “difficulty factors” in these two tasks, “trail-calculation” does NOT relate, in any way, to software configuration). Hobbies are nice, and you may live-and-breathe your own hobby (like motorcycles) in your spare time, but keep references to unrelated topics or training subject items to yourself during your presentation.

By the way: Trail = [($R_w \times \cos(A_h)$) minus O_f] divided-by [$\sin(A_h)$] ...where R_w = wheel radius, A_h = the triple-tree head angle as measured clock-wise from horizontal, and O_f = the fork-offset or rake.

3. Speak “Up”: The volume of your voice is CRITICALLY important. **People get extremely upset if they cannot hear you clearly and if the volume is too low.** If someone asks you to speak “up”, that is a HUGE warning flag that you must immediately correct. Make every effort to keep your head “up” and speak at a level as though you are speaking to a group that is 2-times larger than the group right in front of you. If different people ask you to “speak-up” more than once, you are in danger of completely alienating the remote group(s). You must instantly and completely eliminate this as a source of difficulty or frustration to the audience(s) for the full remainder of the session.

4. Microphones: This is the artificial audio pickup device that takes-in your voice and transports it to the electronic systems and then to the other end of the connection. “Enunciation” and “Volume” are often linked directly (and only) to you, the human, but may also be linked to the microphone (or your own use of the microphone). There are many types and styles of microphones, each having very specific electronic operating characteristics. You do NOT need to become a technical expert in the discipline of

microphones and acoustics. You DO need to learn a little about the types of microphones that you may be asked to use, and you need to practice with the actual microphone you are going to be using during any session(s). Arrange a time with the technical group when you can stop-by the VTC space, set-up a connection to other locations, and then speak as though you are actually presenting your materials. Have some people at the far-end(s) of the test-call tell you if they can hear you clearly and if the sound is of adequate volume levels. If they tell you that there is any problem, don't become defensive or try to debate them - - Put your ego or preconceived ideas of vocal emphasis away - - Adjust according to their responses during the test. If they tell you they cannot hear, then they cannot hear, *no matter what you might think and no matter what your local-only audience might say*. If people at far-end location(s) tell you that they cannot understand the words due to interference of your dialect or your speech pattern or your lack of proper enunciation, then you must immediately make the adjustment, *no matter what you might think and no matter what your local-only audience might say*. The technicians can make certain that the placement and operation of the microphones (and the rest of the audio component systems) is functionally correct. Once the technology is functioning properly, then the rest is entirely up to you. **Most Importantly** – be aware of the fact that as the session gets longer (perhaps you are used to a 1 or 2-hour session delivery and suddenly you are speaking for a total of 6 or 7 hours in a single day), you will become physically and mentally fatigued. As you get tired you will begin to mumble / lack proper enunciation, and you will tend to lower your volume levels, especially as you reach the end of a thought or sentence (your voice will begin to trail off in volume level). This happens to everyone. **Fatigue always plays a factor in our performance, both mental and physical. Be aware of this and make a conscious effort to compensate.** Put a note in front of you to remind you to speak-up and enunciate, especially during late afternoon or evening session(s). *Once again* – if everything has been going fine all day, but in the middle of the afternoon session someone tells you that they are having difficulty hearing you or understanding your words, then take this as a helpful HUGE “red-flag” warning and make every effort to instantly compensate. Like we recommended [above] in our discussion of the “visuals”, you can also check your vocal delivery with the remote-connected audience from time to time by asking something like, “Are you getting all of this? Am I speaking loudly & clearly enough? Can you hear me ok?” They will generally be helpful and tell you if there is any problem. **Finally** – **Avoid making noise that will compete with your voice and vocal clarity.** Jiggling change in your pocket, drumming on a table, tapping your pen, rustling paperwork, typing on a keyboard, allowing a necklace or other jewelry to randomly bang or slap against a table or podium surface or (worse yet) against a clip-on microphone – these are all very annoying when amplified over the connection to the remote locations, and these sounds compete with your voice as the collective sounds enter their ears. Relax, and avoid making any extraneous noises.

Working with Cameras: The microphone provides an electronic representation of your voice, and the camera provides the remote sites an electronic visual image of your face (and the faces of others within your own room and at the remote locations). The following are a few of the essential elements that you must keep in mind as you appear “on-camera” (possibly for the very first time).

1. “Framing”: This means setting of the Pan-Tilt-Zoom or the “shot”. You are best served to provide the far-end(s) a shot of yourself that is either from the waist to just-above your hair or from your chest to just-above your hair. The “tighter” the zoom, the more detail of facial gesture nuance you will automatically deliver to the far-end(s). You will capture an excellent view of your eyes, and this is good, since eye-contact is the #1 critical element of any face-to-face communication with others. However – the “tighter” the shot, the less room you have to move around and the more difficult it is to capture any arm or hand-gestures. Many people prefer to set an extremely wide (not “tight”) zoom, thinking this allows them room to actually walk back and forth, eliminating their need to change the setting of the camera during the session. ***This is a big mistake***. All facial gesture, including the critical element of eye-contact, will then be lost. These types of “long-shot” zoom settings often elicit the question – “Why do we even need this video in the first place? If we cannot see their face or discern their subtle gestures, the live video is virtually unusable as a communication support element”. Use close-up shots, and set a couple of different presets for “variety”. That being said, you should avoid switching preset zoom levels too frequently. Set it and leave it for a period of not-less-than 3-to-5-minutes, changing only when there is a logical reason to do so and when it will add to your visual emphasis and “human face-to-face connection” with others.

2. Focus and Brightness: Just like poor clarity or volume in your vocal audio will drive your remote audience completely crazy, so, too, will poor focus and brightness. During your “test-call” (mentioned above in the audio discussion), check the focus and brightness levels of your camera image presets by asking if they can easily and clearly “see” your face. Have the technicians adjust the camera or the lighting as necessary.

3. Surroundings: Remember – When the camera is set to pick up your image, it is also able to “see” anything that is around or behind you within the visual field. **Do not** stand in front of windows or open doorways. **Do not** stand in front of wall-covering that has an intricate or “busy” pattern. **Avoid** placing any plants or other “decorations” within the view of the camera. **Using a plain, un-busy and neutral-colored background** is best.

4. “Movement”: By virtue of how the VTC technology actually works, it is best to minimize any movement within the camera field-of-view. **Avoid** rocking back and forth. **Avoid** wandering around as you speak. **Avoid** rapid repetitive gestures. **Avoid** having anything within the camera view that is also “moving” (like a fan or vertical window blinds or banners or other similar elements). **The less movement there is, the better the video clarity will be at the far-end.** BUT, REMEMBER - You do not have to (and must-not) stand “frozen-stiff” when on-camera. You shouldn’t be a “statue”, but neither should you be a “whirling dervish”, seemingly stuck in perpetual motion.

5. “Position”: Make sure that your camera, that sends your video image to the far-end, is positioned at the top-center of the display of inbound video from the far-end, and try to get the video image display of them as close to the level of your local audience as possible. This will dramatically increase your eye contact (or at least their perception of the level and quality of your eye-contact with them), and the result will be a dramatic increase in their interaction with you. **Do NOT** set the camera way-off to one side or high-up at the back of the room or below the display table-height. While we do not have time or space to discuss the full technical and psychological aspects of this, it is critically important that you do everything possible to make them feel as though they are seated in your own room, within your own local audience, and this is accomplished by the

placement of the camera, it's relationship with the in-bound video display of their faces, and your own physical relationship to this electronic setup.

We now move on to discuss a few of the procedural elements related to working via VTC. The following items are suggestions for making your “start” and “conclusion” clean, precise and supportive of the body of the session(s).

Introduction and Getting-Started (5-7 minutes max): We previously discussed the “Start” activity when we talked about the Timer and your behavior just prior to the formal beginning of the session. This portion is related to some recommendations for the actual initial portion of the session after the entry-Timer has lapsed to “Zero”.

1. Greet everyone: It is simple courtesy to say “good morning / afternoon” or some similar greeting, and to verbally encourage a response. This helps to warm them up and define this as a dialog (even if the “exchange” is weighted heavily in favor of you doing most of the talking).

2. State the “Title” or topic: If there are simultaneous events or meetings taking place, this may alert someone that they are actually in the wrong room (this can frequently happen in a busy environment or very large organization).

3. Introduce Yourself: Tell them about yourself, and give a short background to help them understand why you have been selected or assigned as the presenter or trainer for this session. Help them “get-to-know-you” a bit.

4. “How” to communicate via VTC: Explain that this session includes multiple locations connected via VTC, and describe how you want them to speak via this artificial electronic connection. Tell the participants at the remote locations to make sure that they have un-muted their microphone before speaking, and that they must mute it again after they finish their verbal input. Explain that this will help to keep the meeting orderly and easier for everyone to “track”. Tell the entire group (local and remote) that everyone should interrupt by saying in a clear voice with plenty of volume, “Excuse me – this is [give their own name] – I have a question” or “...I want to make a point”, and that you will then pause and either recognize and prompt the input or ask that they wait for a moment until you complete a point or thought. Explain that this form of initiating input helps everyone to know who is speaking and that, in a VTC connection, it gives time to recognize that someone at a remote site is speaking so that everyone, including the instructor or presenter, can become silent after they recognize the questioner so that any question or comment can be clearly and completely heard.

5. Taking “Roll”: If you have a manageable group size, take “attendance” or have each person introduce themselves. This may be necessary for their time-sheet reporting or for “credits”, and it gives them a chance to see how to communicate via VTC.

6. Personalized Communication on your part: If possible, have a class roster and seating chart printed ahead of time, with the names noted on separate sheets for the separate locations in the VTC connection. This will help you to recognize where questions are coming from (which location has certain questions), and also allows you, if you are the person asking the questions, to address them to specific people by name.

7. Handling Questions & Helping to create and encourage personalized interaction: Tell the group how you wish to handle questions (whether you will accept these as they come-up during the session or whether you prefer that the class wait until they are asked

if they have any questions). Remind the group that they need to write down their questions as they think of them so that they do not forget the content and detail of what they wished to ask. If you are asking that the group “hold” their questions until you ask for them, it is often a good idea to select one person, by name, at each site to collect questions from the group and keep track, in case someone forgets to ask their question or in case there are multiple instances of the same question. Use people’s name - Engaging different people by name at the start of the session helps establish a better rapport.

Remember – some of people in your class or presentation are connected by VTC and are physically thousands of miles away, and to make them feel included you have to work to personalize the interaction. Letting them state their own name at the beginning of the session is one way to get this started, and this will assist you in creating interactions during your session. It is much more effective to ask, “John Smith, in Chicago - - can you help explain why this might be important?” than it is to ask “Can anyone in the Midwest tell us why this is important?” or, worse yet, a non-specific broadcast question like “Who can tell us why this is important?” The latter two questions stated here will rarely elicit a response from the remote participants (everyone will wait for someone else to respond). When the questions that you ask are not specifically personalized, the remote participants will lapse into “watching” the class instead of acting to become full participants. Their level of interaction and the resulting quality of their experience is entirely in your hands. Also ask that they limit their discussions to those addressed to answers and to the entire group, noting that they should resist the temptation to engage in side-bar conversations and chatter. This is disruptive to others in their own room (or the entire group in the connection if there’s an open microphone in the talker’s room), and side-bar chats are disrespectful to anyone else who is formally speaking to the group at the time.

8. Breaks: Tell them when any breaks will occur and how long the break(s) will last, and let them know that the Timer will strictly define the startup of the session. Tell them that if they must leave the room during the session they should do this quietly and discretely, and to open and close the door quietly and carefully. Ask them to limit this type of activity, noting that even when they are being careful it is always somewhat disruptive to others and that it certainly limits their own individual learning experience.

9. Food or Drinks: If you allow (or there is available) any food or drink, tell them about this and let them know that you need these elements not to disrupt the session. If they have food wrapped in paper, ask that it be unwrapped at the start in order to avoid extraneous noise during the session. The same is true with opening soda or passing food items around the table. The noise can be very disruptive, and you must let them know that you need this (and *any* noise) kept to a minimum.

10. Personal Electronic Devices: Tell them that “muting” any devices or putting them into “silent operation” is not enough. They **MUST** turn all cell phones, PDA’s and pagers “**Off**” completely. These devices not only make noise when they signal incoming communication (when they “ring”), they make Radio Frequency (RF) noise that by itself cannot be heard by the human ear, but that will enter the audio system and become audible sound as the device randomly and constantly signals to the local tower. This RF noise will crowd your audio connection with rapid digital “dit-dit-dit-dit-dit” sounds that make human voice communication during the class frustrating, if not fully impossible. (Remember to turn your own device(s) “off” as well - - or you will face the embarrassment of being the lone main disruption and rule-breaker during the session).

11. Describe the Topic Materials: Explain the “outline” of activities for the day, making special note to establish the goals and outcomes expected, discuss the supporting materials or handouts that may be available, and how these elements should be used.

12. Ask if there are any Introduction or Procedural Questions: This helps to ascertain that everyone is “on the same page” and ready to “go”. Ask this of the individual sites. This helps them to have one more chance to practice formal “un-mute”-speak-“mute” activity, and reminds the entire group of the need for orderliness during the session(s).

Summary-&-Conclusion plus “Wrapping-Up” (3-5 minutes max): We have, once again, already addressed a few of the elements of this process during our discussion of the use of the Timer software. In this portion of our paper we will note the other elements of the “Summary / Wrap-Up” process and highlight a few of the essential elements.

1. Announce the Session Completion: It is always best to clearly state that the session has “ended”. This allows everyone to adjust their thinking process and prepare for any summary, taking their minds out of “new-information” receipt-mode.

2. Summarize the Presentation: Return to the original outline of topics, noting each one and highlighting the major points that were covered as you fully communicated the core of each topic. Make this brief, and state the desired outcomes or goals that should have been achieved. Ask if there are any questions about this portion of the summary.

3. Tell them “What’s Next”: Explain how they can or will implement their new skills or knowledge-set, or explain how they will take this new information, combine it with other skills or information, and achieve a greater result. If this session is only one part of a multi-session activity, explain what the “next step” or session is, when-where-how it will be delivered, and what, if anything, this group must do in order to take advantage-of or access the next module or session. Ask if there are any questions about this explanation or about the clerical or procedural processes moving forward.

4. Wrap-Up: Be sure that you say “thank-you” to everyone in the group, including any support personnel who may be present (to operate the technical systems, provide food & beverage, provide clerical services, etc.). Be sure to openly “thank” other persons or groups who may not be present but who were involved in the successful preparation, delivery and completion of this material.

5. Ask that everyone pick-up and tidy-up their meeting area on their way out of the room. Include picking up waste class materials, food & beverage items or containers, and any other elements that may have been temporarily brought into the space for use by the group. Ask them to reset any tables or chairs and to erase any white-boards or flipcharts and to shut-down any electronic systems that you specifically name after the VTC connection has been terminated.

Conclusion: *We have just barely scratched the surface of this topic area.* Naturally – good presentation and training practices always apply. As we have seen here, however, there are additional elements, many of which influence almost imperceptible nuances that will have a dramatic impact on the success of your delivery and the up-take on the part of your audience. As a concluding note we can only say that practice is essential, and strict adherence to some of these guidelines is demanded, in order to better ensure your success. If you attend to these and other details, you will do well.

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