

HOW TO BECOME A

VIRTUAL TRAINING PRO



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INTRODUCTION

In the next 10 minutes, **I'll help you transform your virtual training skills.** This is a **fast action accelerator** with clear steps and solid practices you can use right away to create training that's engaging, memorable, and effective.

After spending over 15 years designing and leading virtual and hybrid training programs for audiences around the world, I've seen what works, what flops, and what truly transforms learning. The good news: **virtual training doesn't have to be boring.** With the right techniques, it can be energizing for both you and your learners.

In the next few pages, I'll cut through the noise and give you the essentials:

- The biggest myths holding facilitators back
- The fastest actions to boost engagement
- The most common mistakes to avoid

Whether you're new to facilitation or a seasoned trainer looking to sharpen your edge, this accelerator will help you:

- Grab and hold learner attention
- Build interaction into every session
- Deliver content that sticks

“Virtual training isn't about tech. It's about connection.”

If you bring presence, clarity, and a few smart engagement tools, you can create learning that feels powerful, human, and real.

So, let's get started with the tools to make your next session more engaging and impactful, and maybe even a little bit magical.

Imagine the change in your next virtual training session. Learners are energetic, focused, and collaborating. What difference would that make?

For another second, imagine the change in the next 1:1 with your stakeholder, when your training evaluations come back with solid reviews

and actionable learning that your colleagues can apply on the job. That's a meeting you want on your calendar!

We all know that virtual training can be stressful. Hybrid training is even harder. Training evaluations can be brutal. And anyone who tells you it's easy (such as your boss, your client, or your customer) is asking you to do it because they can't do it better themselves!

In the interest of transparency, this accelerator is not a cure-all. It is a springboard to build improvement in every part of your virtual training. And that alone can have a dramatic impact on your virtual training skills and confidence. Because the right engagement approach with the right technical tools results in better training evaluations.

VIRTUAL TRAINING MYTHS

Before I show you how to facilitate virtually like a pro, and significantly increase your learning outcomes, let me clear up some myths about virtual training.

MYTH 1: VIRTUAL TRAINING IS GOING AWAY

While companies continue to push going back to the office, the reality is, hybrid work is here to stay. And so is virtual training.

Several notable companies have adopted hybrid work models, allowing employees to work both remotely and in-office, including Google, Salesforce, Amazon, Apple and IBM.

And they rely on virtual training for accessibility, cost-effectiveness, flexibility, scalability, technological advancements, adaptability to remote work trends, and environmental sustainability.

Virtual training is a valuable option for organizations, small businesses, solopreneurs, learners and everything in between. It's flexible, accessible, and enduring. You can literally learn from the middle of the ocean. How amazing!

MYTH 2: ZOOM FATIGUE IS PROBLEMATIC

Worth discussing. "Zoom fatigue" is the feeling of exhaustion, burnout, or increased tiredness that many people experience after participating in video conferences or virtual sessions.

Here's the flip side: You can implement strategies to alleviate fatigue and promote well-being. Schedule shorter, more focused training. Layer in verbal cues and movement breaks to keep energy high. Do that, and your learners will stay engaged and energized.

MYTH 3: VIRTUAL TRAINING IS EASY

If it were easy, everyone would already be doing it well.

It takes a lot of confidence to be an effective public speaker. Now, remove the body language cues, add technical know-how to the skill set, sprinkle in

some paralyzing anxiety, and virtual training becomes stressful for everyone involved.

The good news? There are transformational strategies to enhance the learning experience, ease stress, and reduce the barriers to effective virtual training.

WHY SHOULD YOU LISTEN TO ME?

I've swum the vast ocean of virtual training, well before "Zoom" became a verb.

I set up my first virtual training session early this century to 17 groups, each team paying \$495. The pressure was ON! I had to coach a reluctant and skeptical SME (Subject Matter Expert) on how to present and engage virtually. He was expecting that he could simply present his in-person training on Webex, then allow for Q&A at the end. But I stuck with it, persuaded him to build in interaction, and take questions in real time. And that became the start of my mantra to engage virtually by design.

Over time, I have facilitated thousands of virtual training sessions and meetings, from nonprofits to high-level government sessions, Santa Claus to recognition events. Each client expected white-glove, flawless facilitation, along with stellar training evaluations. I had to know my audience, facilitate engagement, and execute on their training goals.

Fast forward to now, I simply love creating rich and engaging learning experiences that inspire and motivate learners all over the world.

Let's dive in.

ACTION 1: ENGAGE BY DESIGN

The first minutes of your virtual training set the tone for everything that follows. Begin with energizers and connection-building activities to create psychological safety and spark engagement. Engagement isn't accidental, it's by design. When learners feel safe and invested from the start, participation flows naturally, and learning thrives.

START STRONG

Begin every virtual training with energizers and connection-building activities. A simple strategy is to level-set the room and ask everyone to share their experience with the topic. That way you will know who your ringers are, and you can make sure you have an experienced learner in each of the upcoming breakout rooms. You can add to this by running a poll to calculate the collective experience of the learners and emphasize the power of learning from each other.

If you are feeling spicy, you can start breakout rooms immediately in the session to encourage small group discussions where people feel more comfortable opening up. Begin with a simple topic that can spark a connection between people in the room, such as, "Why did you register for this session?"

“ Engagement isn't accidental; it's by design. ”

Alternatively, you could ask a more complex question such as, "What was the best virtual training session you have ever taken?", and everyone will have a story to share. Once the learners are invested in engaging, you won't need to prompt them to engage.

The real benefit of starting strong with engagement is that you build psychological safety. Google's *Project Aristotle* studied what makes teams successful and identified psychological safety as a key factor in effective teams. Teams that felt safe to take risks and be vulnerable with each other were the most effective. One of the four stages of psychological safety is **Learner Safety**, when people feel comfortable speaking up with ideas, questions, concerns, or mistakes. Without it, engagement stalls. With it, learning thrives.

MAKE ENGAGEMENT AGREEMENTS

Like a huddle before the game, take the time to create engagement agreements before the start of every virtual training session. This includes how to ask questions, requirements to keep cameras on, agreement to turn off phones and email, expectations to engage, and what to do if a learner must step away.

We don't want your learners coasting through your virtual training as a background to all of the other distractions they are bombarded with constantly. So, rein that in, and require your learners to focus, through engagement, **on their development**, for the length of the virtual training session.

ENGAGE FREQUENTLY

No matter what you hear, there is no secret number of times you should engage during virtual training. That said, you do want to be mindful of how much you are speaking. Virtual training is a conversation that volleys back and forth. You bring up a concept, the learners practice and reflect. If you are doing most of the talking, your learners will quickly tune out.

It's also a mindset. Virtually, your role in training is as a facilitator rather than a lecturer. You want to encourage learners to actively engage with the material and with each other. Think of it as a journey and you are all in it together.

An easy way to start engagement is to ask open-ended questions, then literally *stop talking!* Seriously, count 1-2-3-4-5-6-7-8-9-10 in your head and I guarantee, one of your learners will speak up before you make it to 10, if only to make sure you are still connected.

Next, encourage discussion and collaboration. Pay attention to who is doing most of the talking. If you are talking more than your learners, find a way to flip it.

For example, instead of teaching a skill, let's say SMART goals, facilitate it instead. Go ahead and define the acronym: Specific, Measurable, Achievable, Relevant, and Time-bound. Then walk through 3-4 examples of SMART goals and ask the learners to identify the parts of the goals that are SMART, and rewrite the parts that aren't. They will learn far more about

writing SMART goals from participating in the activities, practicing, and debating with each other, than they would have by you lecturing about it.

Another great engagement activity is to provide several case studies of real-world challenges. Create a breakout room for each case study, then challenge each room to analyze an assigned case study to find solutions. As the facilitator, visit each breakout room to answer questions and offer guidance. Once the breakout rooms are complete, ask for the spokesperson from each room to present their findings. From experience, this format is wildly effective!

ENGAGEMENT SECRET HACK: LEVERAGE TECH

It's crucial to acknowledge that virtual training engagement requires intentional design. It requires far more than transferring your in-person training content to a virtual setting and expecting it to be impactful. Incorporating frequent activities and setting expectations for engagement is essential. In contrast to in-person sessions, where you can easily scan the room and provide support, it takes more work to do so virtually.

The key to level this up, is to engage with a variety of formats. Start by using the simple tools such as chat, reactions, and polling that are built right into the collaboration tools such as Zoom, Webex, and Microsoft Teams. Then once you are comfortable, add in the more advanced tools such as whiteboards, annotation, and breakout rooms. As you continue to upskill, learn to leverage the in-meeting/in-product third-party apps now readily available in the collaboration tools. These apps are always evolving, and many are free or limited, and some are subscription-based. These apps can really take your session to the next level of training. My favorite apps include the Timer, Music (at start, during reflection exercises, and at closeout), and Mentimeter for word clouds and visual polling/quizzes.

PRO TIP!

Be sure to add at least one video to every session from your content or from YouTube to emphasize a relevant story or to provide an example.

ACTION 2: FOCUS ON WHAT REALLY MATTERS

In virtual training, not everything carries equal weight. Learners remember the essentials: what they hear, what they take away, and what resonates. That's why strong audio, clear learning objectives, and powerful stories matter most. Nail these three, and your sessions instantly become more engaging, more memorable, and more effective.

AUDIO

When it comes to virtual training, audio is everything! If your learners are straining to hear, either because you are soft-spoken or you have low volume from your tech, then they are also straining to learn. I have trained countless virtual facilitators and upgrading their audio absolutely transformed their training ability.

PRO TIP!

If your training evaluations come in with feedback that you are monotone and boring, fixing the audio can completely turn that around.

There is no need for you to go through an audio learning curve! Go buy a good microphone right now. I personally use a Blue Yeti microphone which comes in around \$100. I add a pop filter for about \$10 and that really fixed the hard consonant pops. I can also plug in a headset or speakers, when needed.

When you receive your microphone, be sure to test it with friendly colleagues *before* your next virtual training.

And while we are talking about tech, go ahead and upgrade your internet. Low bandwidth will cause your audio to garble or cut out, so get ahead of that. You can run an internet speed test on your browser. Mine is currently 297.6 Mbps download and 16.0 Mbps upload. I never have issues with distorted audio.

LEARNING OBJECTIVES

As a learning professional, it is imperative that you clearly define the learning objectives and desired outcomes of the virtual training session. Identify what knowledge, skills, or behaviors your specific learners should

gain or improve upon by the end of the session. This holds true for any training session, so if you haven't mastered learning objectives, let's work through that now.

Focus each virtual training session on 3 Learning Objectives. The power of 3 is everywhere, starting with learning our ABCs, and our 123s. We can all remember 3 pieces of information. Three creates a simple, memorable structure for learners and forces you to prioritize what matters most. It's standard in marketing, religion, fairytales, comedy, training, and everything in between.

If you have more than 3 Learning Objectives, then break them up into additional sessions. It's that simple!

Learning Objectives also provide an opportunity to do a pulse check with the learners to further establish trust. Ask learners to annotate which Learning Objective is most important to them. Let them know you will adjust the timing to spend more time on the most important objectives.

No need to reinvent the wheel here. If you haven't mastered Learning Objectives, the quickest tool out there is Bloom's Taxonomy. The basic formula for writing a Learning Objective is:

A measurable action verb + A clear behavioral outcome + A singular result

Bloom's Taxonomy breaks it down even further, providing a comprehensive list of verbs for each of its six categories. I refer to this list every time I write Learning Objectives!

So, let's say you want to teach learners how to create activities to improve virtual training participation. Let's break it down:

A measurable action verb: Design (from the Create category)

A clear behavioral outcome: Three virtual training activities

A singular result: Increase learner participation by 20% (20% is measurable)

The learning objective becomes: **Design three virtual training activities to increase learner participation by 20%.**

TELL STORIES

Think back to some of your most memorable speakers. Ones where you were literally sitting on the edge of your seat. Was it because the slides were beautifully designed, and the facilitator spoke with impeccable grammar?

Probably not.

If you think of the speakers you follow, they absolutely know their stuff. But what really draws you in is their stories. Their stories are their training, and those stories are what makes their content stick.

“Your slides support training. Your stories make it stick.”

Go back and review your virtual training sessions and think of one or two stories for every learning objective. That tactic alone will dramatically improve your likability, along with making the learning more memorable, and therefore, more impactful.

ACTION 3: MAKE IT STICKY

Engagement isn't enough, you must lock in the learning. That's where debriefing, teach-backs, and follow-up come in. A strong debrief helps learners reflect on what happened and why, while a teach-back reinforces key outcomes in their own words. And when you follow up on your promises after the session, you not only boost retention, but also build trust and accountability. Together, these steps transform a one-time training into lasting impact.

DEBRIEF

I see this time and time again. A facilitator runs the learners through virtual training activities but doesn't allow time to reflect and debrief.

Debriefing is a tool that allows learners to reflect on WHAT and WHY. Debriefing will improve recall as it helps learners tell the story of what happened, and why it happened. It further builds rapport and helps to quickly identify gaps in knowledge, which the facilitator can course correct. Learners will uncover strengths and weaknesses and take small steps that build toward continuous improvement.

PRO TIP!

If you have been neglecting to debrief after each activity, look at your sessions to see where you can add that in.

BUILD IN A FINAL TEACH-BACK

Do you want to receive higher ratings for your virtual training session, increase retention, and ensure your learners will apply what they learned on the job? Of course you do. This is the perfect opportunity to complete a teach-back, a tried and true three-step activity:

Step 1: Make sure to provide a summary at the end of the session. The summary should simply flip the three Learning Objectives into the three Learning Outcomes.

Step 2: Send the learners into three breakout rooms, one for each Learning Outcome, and ask them to explain, in their own words, what they learned. Then, ask for the spokesperson from each room to

present their findings to the group. As the findings are being presented, write the outcomes on a whiteboard so that the group can visualize their learning.

Step 3: Ask each learner to write their name next to one learning outcome they can apply on the job within the next 24 hours. (This also serves as a visual accountability roster.)

The key to this activity is to make sure you have built in time to make this happen. You don't want to rush this section as it is truly where the learning magic happens.

FOLLOW UP ON YOUR PROMISES

Immediately after the virtual training session, send the learners the whiteboard of learning outcomes that they created together, along with their signatures of accountability. Also send promised materials, or at a minimum, communicate when you will send what you promised. Following up on promises made during the session seals the deal with psychological safety, so be impeccable with your word.

Provide any additional post-training support and resources to help learners apply what they've learned within 24 hours. Create a channel so that learners have a way to connect for ongoing learning and development. **And be sure to check in with your learners to share with each other the stories of how they can apply what they learned on the job.**

DON'T MAKE THESE MISTAKES

From rookies to seasoned facilitators, I observe common slip-ups all the time, and I'm here to accelerate you past these virtual training pitfalls.

MISTAKE 1: LACK OF COMMUNICATION

You may have the most beautifully designed slides and a captivating command of virtual training, but if you neglect to communicate clear expectations around the schedule, technical requirements, and rules of engagement, then you are behind the 8-ball.

Learners expect and deserve a seamless virtual training experience, and that starts with distributing materials and login information ahead of time. Once the virtual training starts, be sure to greet learners as they arrive. Keep an eye on chat and feedback tools and be sure to respond so that communication continues in real time. When you are closing out, communicate any next steps and be sure to follow up on any materials promised during the session.

This may seem like common sense, but you don't want communication to be a barrier to virtual training. So, take a moment to review your communication from end to end, and make sure it is simple and clear.

MISTAKE 2: WINGING IT

You may get away with winging it from time to time, or you may just as easily crash and burn, which is rather painful. So do yourself a favor and take the time to set yourself up for success.

Follow the tips provided, and practice on a friendly group of colleagues. Ask for feedback, and don't take it personally. Check your ego, be your genuine self, and know your materials inside and out. If at first you don't succeed, try again, and then try again.

“ Confidence comes from preparation, not perfection ”

If you see someone who is literally knocking it out of the park with virtual training, I guarantee you, they have a higher number of failures than your

number of attempts. They didn't give up until they got it right, and the same goes for you.

MISTAKE 3: BOILING THE OCEAN

Have you been to a virtual training session where the facilitator talks like a firehose to get it all done? Trying to include every trick in the book is admirable, but it really doesn't work because the gems get lost in the weeds.

Instead, focus on need-to-know (learning objectives) versus nice-to-know (supporting materials) based on your learning outcomes, and drop the fluff when you get rushed on timing. The easiest way to do this is to set up cues in your materials. And when you start running off schedule, present the nice-to-know slides as reference material for further reading.

If you find that you are consistently going over on time, then you are probably forgetting to build in time along the way for Q&A and tech transitions. A good rule of thumb is to add in 20% more time for engagement activities. You can do this by extending the time of the session, chunking the learning into smaller sessions, or cutting nice-to-know content.

PRO TIP FOR GETTING STARTED

At the end of the day, the best advice I can give is to start with one tool and master it. The chat tool is easy to use and a great place to begin. Too often, facilitators treat chat as background noise. Used intentionally, it becomes a front-stage engagement driver. The key is to review chat in real time, either with an overlay on the slide deck or a second screen. Try these quick wins:

- **Real-Time Idea Generator:** Ask for one-word responses to spark momentum.
- **Waterfall Chat:** Have everyone type, then hold until “3...2...1... send!” to keep answers authentic and energizing.
- **Paired Chat:** Replace breakout rooms with paired chats for focused, time-efficient practice.
- **Instant Summarizer:** Reflect back chat themes to validate contributions and anchor takeaways.

Bottom Line? Chat is more than a side channel. It’s your co-facilitator. Use it with purpose, and your sessions will be more interactive and memorable. Once you master one tool, then add another. Sprinkle in stories. Learn the tech. Engage by design. Virtual training isn’t a destination, it’s a journey.

NEXT STEPS

Be sure to explore virtualtrainingpros.com for free quick learns, upcoming programs, and book a discovery call.

Ready to become a Virtual Training Pro?

I'd love to help you take the next step. My individual coaching sessions are designed to upskill your virtual and hybrid training game with practical strategies you can put to work right away.

Coaching creates clarity. When you know where to focus, you move faster, build confidence, and achieve results that stick. Have a virtual session, program, or learning experience you want to make more engaging? Let's work on it together.

READER OFFER

As a reader of this guide, you can book a **50-minute Virtual Training Strategy Session with my "friend rate" of only \$50.**

Bring me a session, challenge, or idea, and we'll use our time together to identify practical ways to make it more engaging, effective, and sticky.

Email me at barb@virtualtrainingpros.com or connect with me on LinkedIn: <https://www.linkedin.com/in/barb-potter/>.

Mention this guide to claim your reader rate.

Let's turn what you know into what's possible.

TESTIMONIALS

“I had the pleasure of collaborating with Barb during her leadership of the Effective Collaboration and Creativity & Innovation Transformational Skills programs where I was a guest subject matter expert (SME). Barbara’s ability to engage participants is truly remarkable, involving more than 100 learners.” — **María José, Effective Collaboration, Creativity & Innovation Virtual Training**

“It was an absolute pleasure working with Barb on Continuous Improvement Virtual Workshops. I was really impressed with how she took minimal information and created a very nice slide deck that made it easy to present and offered a great flow to the material.

Barb brings exceptional energy to the process, and it is easy to feel this energy in the virtual training. It was also very apparent that Barb is a superb planner, having scheduled touchpoints along the way, preparing everyone to ensure the sessions ran smoothly.” — **Matt, Continuous Improvement Virtual Training**

“Barb’s passion for educational design has been an invaluable asset to our team, instilling a sense of enthusiasm and possibility in those who have had the opportunity to work with her. What sets Barb apart is not only her ability to weave together a captivating narrative for content, but her innate ability to elevate the level of energy in the room (both in person and virtually) to draw out participation and the sharing of invaluable perspectives and insights.

Throughout our collaboration on numerous learning and design projects, Barb helped to make each experience not only informative but also enjoyable, leaving participants inspired and eager to implement the knowledge gained.” — **Brian, Virtual and Hybrid Training**