



Using the Tools of Engagement: Make Online Training a Conversation

by Tom Bunzel

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Objective: This eBook provides an overview of how to embrace the new social media and web environments to engage learners with new technologies and integrate them into a strategy for effective communication.

The New Training and Presentation Environment

The new “world order” of social media is a reality.

Like it or not, audiences are expecting the ability to interact with speakers and among themselves, to be engaged and listened to, and to influence the content and methods of learning. Particularly if you are creating training for online delivery, it is really important to harness the power of new social tools to effectively engage and meet the expectations of your audience.

Everyone Counts

In their book *Groundswell*, Charlene Li and Josh Bernoff laid the foundation for understanding the impact on brands and marketing in particular when everyone suddenly has a voice and anyone’s opinion can be counted. And in today’s information environment, the key to marketing success is often educating consumers, so that the social tools have become very influential in all areas, from internal help desk and support to external live training events that help customers use products more effectively.

- Facebook is now the 3rd largest country in the world
- Facebook exceeds Google for weekly U.S. web traffic
- Social media has become more popular online than porn
-- Socialnomics by Erik Qualman
(www.socialnomics.net)

Training is No Longer a Broadcast

In this environment the person delivering the training is no longer just a “broadcaster” who dispenses information. With the new democracy of participation audiences have come to expect to be included in shaping the training event from planning to delivery to follow-up.

A great example of this trend is the “Backchannel” – which is the chatter that now goes on during an event on cell phones and PDA’s. Using text messages and on Twitter, attendees at live and online events are discussing aspects of what is being offered by a speaker and evaluating its effectiveness *as it happens*.

Trainers and speakers who remain unaware or ignore this phenomenon do so at their peril. Particularly with respect to online events, audience attentiveness is fragile, but even at live venues the impact of forces like the Backchannel are having a major impact on how speakers are received and perceived.

At this point trainers have a choice to make: do they see these new realities as a “problem” of maintaining attention or an “opportunity” to engage and add dynamism and energy to their content?

Many educators have already found that they need to learn a set of social tools to integrate with their current content creation platforms to effectively leverage the new environment

Example Social Training Scenario: Law Firm

The following is a two-level scenario for a law firm that has begun to integrate a social strategy with two common initiatives— training staff on new software and recruiting the very best set of young associates.

Train Staff

1. Prepare staff for topics using a blog – solicit feedback via comments - engage in conversation

2. Stay connected online and with home PC's, smart phones/PDAs
 - a) Send to Facebook Page for Legal Staff
 - b) Create a hashtag for firm to filter updates on Twitter – engage staff with questions and issues
 - c) Show firm social activities in Whrrl – engage on personal level
3. Invite to webinar about litigation issues– use social tools to promote via Facebook page
4. Post PowerPoint with narration on AuthorSTREAM/YouTube – blog – to prepare for webinar (with hashtag on Twitter)
5. Cover training topic in Webinar using PowerPoint and Word docs – annotate with conference tools
6. Monitor backchannel on Twitter using hashtag
7. Archive webinar and use social tools to reach staff members who missed the event
8. Continue with Steps 1 & 2

Recruit New Associates

1. Locate prospects through Linked In, Twitter and Facebook – – solicit feedback via comments - engage in conversation
2. Stay connected online and with smart phones/PDAs
 - a) Send to Facebook Page
 - b) Create a hashtag for firm to filter updates on Twitter – engage prospects
 - c) Show firm activities in Whrrl – glamorous locations to entice recruits
3. Invite to webinar about the firm – use social tools to promote event via Facebook page
4. Post PowerPoint with narration on AuthorSTREAM/YouTube – blog – to promote webinar (with hashtag on Twitter)

5. Present exciting interactive webinar
6. Monitor backchannel on Twitter using hashtag
7. Archive webinar and use social tools to inform prospects who missed the event
8. Continue with Step 2

Dealing with the Backchannel

The Twitter backchannel is probably the best example of the impact of social media on training and other presentations. You can learn more about this phenomenon at thebackchannelbook.com, a web site for the book by Cliff Atkinson, a presentation expert and author of *Beyond Bullet Points*, and an eBook by Olivia Mitchell.

Essentially what is going on is simultaneous electronic commentary and chatter during and even in opposition to a presentation. This is particularly prevalent during an online event where attendees are invisible to the presenter, but even in live audiences today there is activity going on with cell phones and PDAs where people are discussing the content as it is being presented.

Many old school presenters, of course, view this as a rude distraction. They are used to being accorded respect and attention by virtue of being at the podium—but among younger audiences in particular the use of electronic devices during an event is now a foregone conclusion. They are *always connected*.

Both Atkinson and Mitchell make the point in their work with the backchannel that trainers and presenters need to be aware of and harness the energy of the backchannel. By acknowledging its presence and responding to some of the issues raised, they become part of a *Conversation* which an audience expects. To this end it is helpful to have an assistant or aide monitor the backchannel, generally the Twitter stream for an event, and make the speaker aware of key points that may come up. Atkinson's key tips about the Backchannel are to:

- Survive the experience – adequate preparation
- Respond to the audience's needs – master the phenomenon
- Engage with the backchannel – use it for your own purposes

- Monitor and even display the backchannel during the presentation

On this last point some live presenters even have a separate screen which is not devoted to PowerPoint slides, but rather just to showing commentary and questions that are coming up on a Twitter screen. This can increase the interaction between a presenter and panel and both the live and Internet audience.

Filter the Twitter Stream with Hashtags

Twitter has a system for filtering a stream dedicated to a particular topic—this is the key to harnessing the Twitter backchannel – by creating a Buzz with “#” Hashtags.

A *Hashtag* is simply a pound sign “#” directly before a phrase that is inserted in “Tweets” so that users can search on that phrase and find all messages relevant to the topic. For example, for a webinar about this eBook, the hashtag #ToolsEngage, when entered in Twitter, allowed all participants to monitor the reactions and insights of others during the event.

Atkinson and Mitchell suggest that every speaker set the hashtag for their event and let it be known through social media, on a FaceBook page, Twitter stream, blog or elsewhere so that a buzz about the event begins to build. This also will build an audience for public events and allow developers of private events to begin to poll the prospective audience to learn more about their specific needs. To the extent those needs are met, the Backchannel will align with the speaker’s plans to create a better event.

tweetdoc
document your twitter events

logged in as Tom Bunzel Home Browse Account About

It's more than just data
Brand Listen analyzes data to determine whether it's positive or negative and identifies who your most influential and frequent engagers are.

Event Details

Creator @tombunzel

Search #toolsengage What does this search return?

Name webinar

Description Tweets about Tools of Engagement

Date Range

Header Images

Document Options

Tom Bunzel [logout](#)

Technology writer with a spiritual and philosophical slant

Your Tweetdocs

Create

webinar
Tweets about Tools of Engagement

3 Tweets @tombunzel 05/05/2011 [Delete](#)

Page 1 of 1 [« prev](#) | [next »](#)

Create Tweetdoc

Another tool to keep in mind is Tweetdoc.org – which connects with Twitter and lets you monitor and create a page of Twitter stream, including a transcript of a stream based on a specific hashtag.

The New "Tools of Engagement"

It is helpful to review some of the main social tools that organizations are using to create a conversation with their employees, customers and vendors with the idea of seeing strategically how they might impact training. Many are well-known but some might surprise you— by the way, none of these are meant to be endorsements. As this landscape is constantly changing, these tools will be replaced by others and different social media users will find their own combination for their specific needs.

A great resource for a detailed overview of how these tools are used strategically in building confidence and influence among social media users is the book *Trust Agents*, an instant classic, by Chris Brogan and Julien Smith. Where Brogan and Smith concentrate on how reputations are formed in the new environment, the following are some of the tools being used:

Leveraging LinkedIn for Research and Referrals

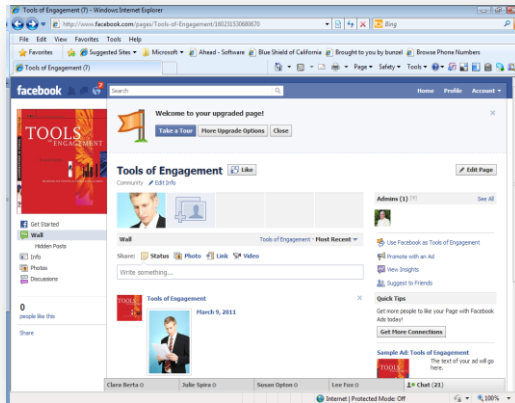
As a fast growing business network, with one new user per second and having doubled in size this year, LinkedIn is a premiere professional resource to locate experts and potential attendees for training events. LinkedIn lets you connect to your contact list in Outlook and use Search to identify key contacts and potential audience members. Strategically, asking questions is a great way to generate dynamic discussions and build community in social media; LinkedIn has a powerful Answers feature that allows you to ask a question broadly to the community, to only your contacts, or to special interest groups within LinkedIn. (Similar web sites with complementary features for locating and connecting with colleagues or clients are Focus.com and Plaxo.com).

Friending in Facebook for Events

Facebook has obviously become one of the preeminent social venues and many businesses now have a presence on Facebook as well. In terms of training, you can use Facebook to create a web page for an event and then have your “friends” comment and “Like” the content and topics within the event. You can use the page for registration and describe event or webinar within Facebook, or use the page to link to another web site for registration or more information.

Facebook also lets you create a page for your organization, from which you can build community, link to events and post news or status updates. This becomes another hub where you can communicate about the latest events and interact with students or colleagues. In terms of research, using either your organization or event page(s) to ask attendees about their areas of interest and paying attention and listening to their main concerns can take the guesswork out of content creation.

For either type of Facebook presence, the steps to take in development are to plan and populate the page with interesting pictures and video, plan a promotional campaign to spread the word, regularly post updates and new and exciting content and build buzz and anticipation for the training event(s) that your organization will be offering.



New Facebook Page Features

Like all social sites Facebook keeps changing. The latest Facebook page features include:

- Notifications when fans interact with your page or posts
- A place to showcase photos along the top of your page
- A news feed for your page
- The ability to Like and post on other pages as your page

Giving Your Anecdotes and Stories a Whrrl

If you read some of the best-selling works by the major social media experts, like *Groundswell*, *Trust Agents* or *Tribes* (by Seth Godin), it becomes apparent that what makes social tools work is their tendency to humanize interactions and allow people to see each other with more depth, *by sharing stories, photographs and video.*

A popular tool that combines two aspects of this is Whrrl, which lets you create storyboards online that can be linked to on Facebook, Twitter or blogs and personalize your presentation or training by posting a series of text and photo “stories.” In some ways it’s like an instant mini-PowerPoint, but Whrrl also uses the location capability of some social tools by having users “check in” to let others keep abreast of their actual location in the “real world.”

Whrrl even becomes part of the Backchannel because attendees at events will upload pictures from portable devices to create a story and connection while they are at your event, and presumably paying attention.

Distributing Your Content Effectively – Sharing, Tags Mashability and Bookmarks

Social media is perhaps the most powerful way that users take advantage of the hyperlink capability of the web browser; everything points and connects everywhere else so that whatever tools are being used they can access (and not copy or repeat) the content stored elsewhere.

Particularly with video, this capability to host once, and display everywhere is what makes it possible for a story to go “viral,” because people who like it will share it all over the web with their contacts and communities.

This also means that everyone is a critic – comments are key elements of all content and if you use social media you must be prepared for the good and the bad, and also to become engaged with those who take the time to post their opinions. This doesn’t mean that you have to refute or confront critics; but it is important to be known as *listening* to the voices and responsive when appropriate.

How People Tag and Bookmark Can Affect Your Reputation

As Li and Bernoff describe so well in *Groundswell*, everything in the social world impacts your brand or reputation. Brogan and Smith call this “social capital” in *Trust Agents*. For example, you can get a great idea about who is visiting and active in areas of interest and concern, and how they view your own content, by following the public bookmarks on sites like Delicious.com.

A Google search will also provide you with a sense of who you’re viewed, and you can also locate a wide range of tools that let you manage your online reputation and track users.

Of course this brings up the issue of security—trainers will want to partner with HR, Management and IT to set specific policies for social media use as they plan their strategies for using these tools for training and educational events.

ShareThis: Get Users to Distribute Your Content

ShareThis is a popular program for “Mashing”—this means that you give visitors to your blog or social site the instant ability to share your content on other social sites, for example, directly tweeting on Twitter or posting to their Facebook account, which of course makes the content visible to all of their followers and friends. This is how content can become an overnight hit, or your reputation can be tarnished beyond your ordinary scope of influence if you aren’t vigilant and careful.

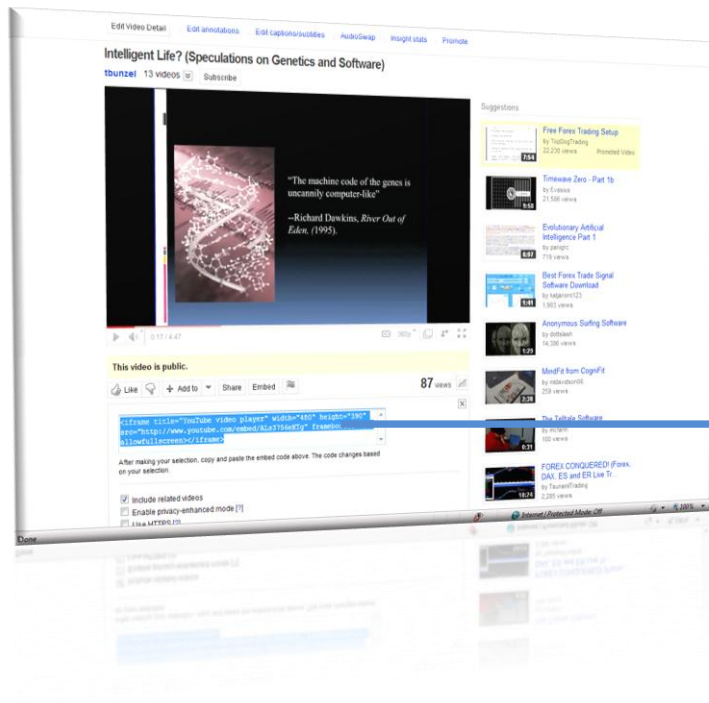
Using Hosted Video in Blogs and Presentations for Social Content

Blogs were probably the original social tools and gained much of their popularity because of the engagement that ensues from commentary and response—they are truly the *groundwork for the Groundswell*. Blogs can connect in two directions: you can create a channel in YouTube, embed the code for a posted and hosted video in your blog, and use it to communicate your message (or provide a preview to your event), and then if the content is compelling, your blog post(s) will hopefully be reposted and shared by social media users who read it. “Blog your brains out” is probably a good way to get started in the social world, but plan your blog strategically to support your content.

Embed Code from YouTube to Put Video into a Blog Post

Web video hosting sites like YouTube (and also presentation hosting sites like AuthorSTREAM and SlideShare, see below) allow both linking to and the embedding of their content on other sites, such as blogs. You can copy the embed code from the hosting site, or use the buttons on some sites to share directly to more popular sites like Blogger, and your content is instantly “mashed” or distributed online. If you have copied the embed code from a hosting site, you will want to use the HTML tab of any blogging tool to paste the HTML embed code into your blog; then a thumbnail for your video will be on your own page, and clicking it will play the video directly on your site. Or you can create a “channel” on the hosting site and send visitors to view your content there, and in both cases you should be responsive to the commentary that ensues.

Hint: Sometimes YouTube changes the embed code and it doesn’t work quite as anticipated; you can check a box for Use Old Embed Code to make sure that the code generated is one that is tested and works. You should still test your page with the embedded video in multiple browsers if possible.



Copy
Embed
Code from
YouTube

Integrating Effective Content Creation with Familiar Tools

PowerPoint is still the standard presentation tool for most training and online events and it's likely that as a content creator you have your material at least partially in this widely used format. What many people still don't realize, however, is that while PowerPoint itself is not a web standard you can tell your message online and still use your slides for graphic support.

(PowerPoint does let you output your slide show as HTML and post it as a web page—but *in most cases you're not there to tell your story—making it much less effective for training*).

The key is to create a video with PowerPoint as the graphic storyteller, and the trainer or narrator's voice available to create context and provide the important information.

Painless Video with PowerPoint:

The strategies for using PowerPoint effectively to communicate in social settings online are similar to delivering an effective “live” training presentation:

- Ask questions to stimulate discussion
- Use analogies and metaphors
- Use visuals to connect emotionally
- Pose problems that evoke understanding
- Refer and relate to ongoing conversation online in blogs, social networks and email
- Let audience participate in discussion and solutions

Strategies & Technologies For Posting Training PowerPoint Online (as Video)

Make YouTube (or Vimeo), a central video repository

AuthorStream, a web-hosting site specifically for PowerPoint presentations, hosting a presentation with embedded narration.

Camtasia, a screen capture program capable of recording a live PowerPoint presentation with narration (and optional video of the presenter) and saving it various digital video formats that are web-friendly.

GoToTraining, a web conferencing solution created specifically for training professionals -- lets you show a PowerPoint during an online event, and archive a digital video version for hosting online.

Got Movie? Upload to YouTube

One of the great benefits of hosted video sites like YouTube is the reliability of playback, along with the ability to post once, play anywhere: blogs, social networks, web pages, and so on to build buzz about your content, augment its impact, and increase your reach to more people. With the video uploaded, once it is converted to the YouTube format, you can use links and the embed code (see above) to include your content in email, web pages, blogs, on Facebook or link to it on Twitter. Your story may go viral.

Currently YouTube accepts video in three main formats:

- AVI
- MOV
- WMV

To post a video, all you need do is:

- Access Your Channel (Account)
- Fill in an information form—don't forget to use key words and metatags to enhance search
- Locate and Upload your video file

AuthorSTREAM Accepts Embedded PowerPoint Narration

A powerful way increase your reach and maintain a connection with your audience is to post a narrated presentation on AuthorSTREAM; the advantage here over simply sending the slides is that *you are there to tell your story*. AuthorSTREAM will convert your narrated PowerPoint into a hosted video file, and it can even be sent to YouTube as well.

The key steps involved are:

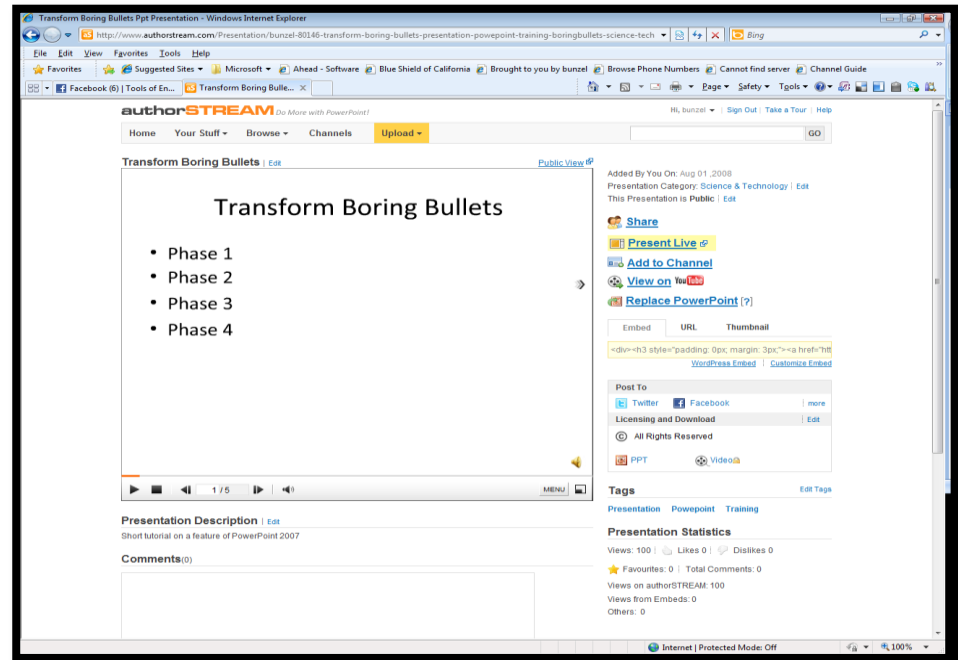
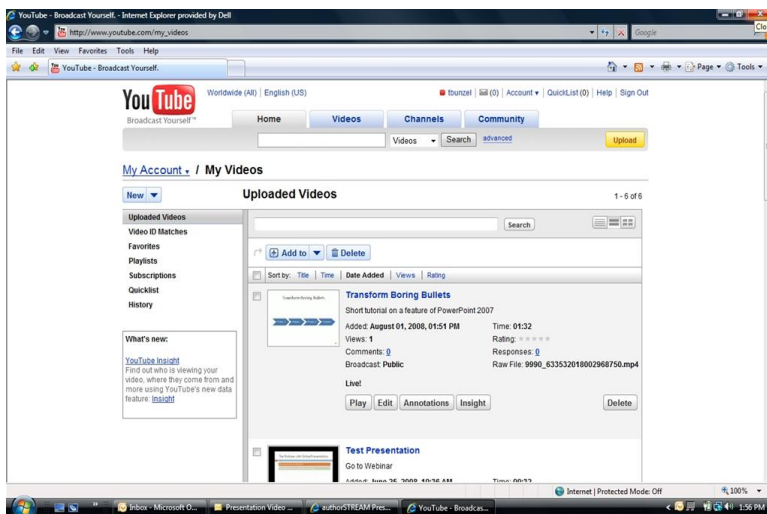
1. DO NOT LINK Narration
2. Present and Narrate
3. Check Narration in SlideSorter –
4. Upload to AuthorSTREAM

- 5. Fill In Search Data (Meta Tags)
- 6. Check Confirmation Screen
- 7. Use URL and Embed Links Online

Play in AuthorSTREAM or Send to YouTube

A presentation hosted on AuthorSTREAM can be linked to or embedded elsewhere just like a YouTube video – and you can increase its reach by also sharing it on YouTube.

Converted Video in a YouTube Channel



New AuthorSTREAM Levels of Service

As with all of these programs terms and features constantly change. Currently AuthorSTREAM offers three tiers of hosting and conversion services:

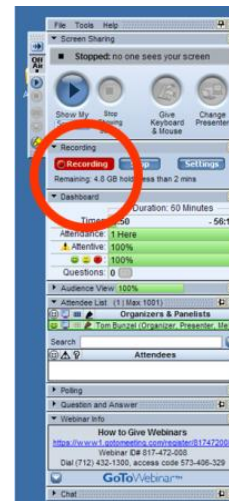
- Free - Unlimited number of videos of up to 5 minutes with the authorSTREAM watermark
- Pro - \$2.50/mo. - 15 videos of up to 100 minutes without any watermark or advertisement (redeem authorSTREAM credits) (300 credits for conversion)
- Business – \$39.95/mo. - Unlimited number of videos of upto 100 minutes without any watermark or advertisement – Unlimited conversion credits

Record a Web Conference

An archived video of a web conference is a third alternative for trainers who want to broaden the impact of their content. Online conferencing tools like those from Citrix enable the screen capture of the full presentation with audio, which can then be posted or hosted like any other video.

Citrix Tools:

- GotoMeeting
- GoToWebinar
- GoToTraining



Pre-Set Recording Options (Local or Online Archive)

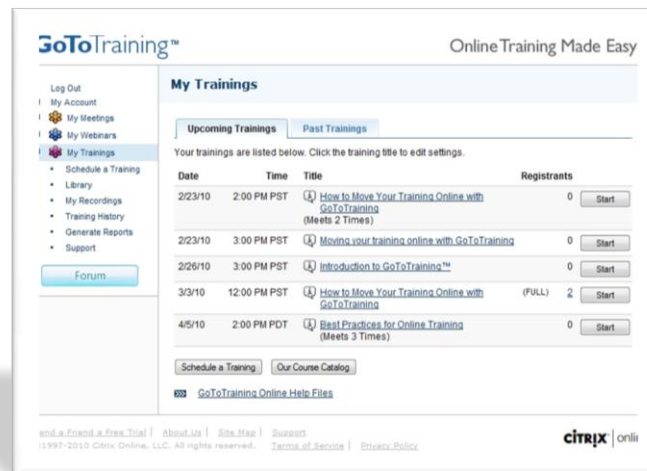
When delivering a web event, it is helpful to have assistants who can monitor chat (or the Backchannel on Twitter) so that the presenter can pay attention to Audience View. Using a professional service can also ensure that SOMEONE monitors recording and uses the right pre-sets and options to provide the best quality output for posting and reuse.

GoToTraining – Comprehensive Registration and Delivery Tools

Trainers should be aware that Citrix offers a web conferencing tool specifically for their field with features that integrate specifically with social tools to enable engagement, thorough content management and testing and follow-through. These features include:

- Use a Central Administration Center
- Maintain a Library of Content
- Present and Record – Save and Distribute (Archive)

GoToTraining™



The screenshot displays the GoToTraining Central Administration Center interface. The header includes the GoToTraining logo and the tagline "Online Training Made Easy". A navigation menu on the left lists options such as "Log Out", "My Account", "My Meetings", "My Webinars", "My Trainings", "Schedule a Training", "Library", "My Recordings", "Training History", "Generate Reports", "Support", and "Forum". The main content area is titled "My Trainings" and features tabs for "Upcoming Trainings" and "Past Trainings". Below the tabs, a message states "Your trainings are listed below. Click the training title to edit settings." A table lists upcoming trainings with columns for Date, Time, Title, and Registrants. The table contains five rows of training events, each with a "Start" button. At the bottom of the interface, there are links for "Schedule a Training", "Our Course Catalog", and "GoToTraining Online Help Files". The footer includes contact information for Citrix Online, LLC and the Citrix logo.

Date	Time	Title	Registrants
2/23/10	2:00 PM PST	How to Move Your Training Online with GoToTraining (Meets 2 Times)	0
2/23/10	3:00 PM PST	Moving your training online with GoToTraining	0
2/26/10	3:00 PM PST	Introduction to GoToTraining™	0
3/3/10	12:00 PM PST	How to Move Your Training Online with GoToTraining (FULL)	2
4/5/10	2:00 PM PDT	Best Practices for Online Training (Meets 3 Times)	0

Central Administration Center

Getting the Most out of Online Training

Integrating some of the most effective strategies from conventional training into online events can increase attention and retention to make the entire experience more effective.

- Be creative and have fun
- Use chat, Q&A and polling to foster participation
- Emphasize visuals to maintain attention
- Develop games, exercises and participation prior, during and subsequent to webinar



Summary

In the new training landscape getting cooperation, buy-in and delivering your message effectively is key—Training is no longer a broadcast; it's collaboration.

Trainers would do well to learn and integrate the most appropriate social tools into their development and delivery strategies to mine their user base for ideas, needs and feedback.

At the same time, trainers can effectively use their most popular existing tools, like PowerPoint, in new ways to supplement social tools and web conferences online, and distribute their content to a wider audience with narrated video—with hosting sites like YouTube and AuthorSTREAM, video tools like Camtasia, or by recording and distributing an actual online training web conference as a video after the live event.

Additional Resources and References

Cliff Atkinson - www.backchannelbook.com

Olivia Mitchell - <http://speakingaboutpresenting.com/twitter/present-twitter-backchannel-ebook/>

Geetesh Bajaj, Indezine Presentation web site and blog, <http://www.indezine.com>

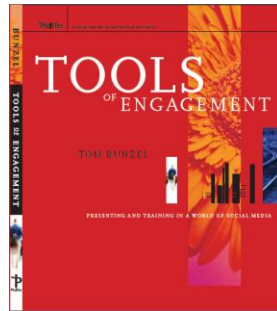
Nancy Duarte, *Slide:ology: The Art and Science of Creating Great Presentations*, O'Reilly (2008)

Terrence Gargiulo, et al, *Building Business Acumen for Trainers*, Pfeiffer (2006)

Particia Fripp - www.fripp.com

Robert Pike - www.bobpikegroup.com

Dr. Carmen Taran, *Better Beginnings, How to capture your audience in 30 seconds*, principal, Rexi Media – www.reximedia.com



About the Author

Tom Bunzel specializes in knowing what presenters need and how to make technology work. He has appeared on Tech TV's Call for Help and spoken at InfoComm and PowerPoint LIVE. He was a "technology coach" for Iomega, MTA Films, Nurses in Partnership and the Neuroscience Education Institute. He has taught regularly at Learning Tree International, West LA College Extension and and does presentation and video consulting in Southern California.

Among his books was "Master Visually Microsoft Office 2007," and he wrote a weekly column as the Office Reference Guide for InformIT.com. Published in 2006, "Solving the PowerPoint Predicament: Using Digital Media for Effective Communication" is a detailed, project-oriented approach to creating effective multimedia presentations. His eBook, "Do Your Own Ning Thing: A Step-By-Step Guide to Launching an Effective Social Network," is available through his Web site: www.professorppt.com or his blog: tbunzel.blogspot.com. "Tools of Engagement: Presenting and Training in a World of Social Media" is now available from Wiley/Jossey-Bass.

About GoToTraining

GoToTraining is an easy-to-use online training service that allows you to move your entire training program online for more efficient customer and employee training. Hold unlimited online training sessions with up to 200 attendees from around the world – right from your Mac® or PC. Reach more trainees, collect real-time feedback, record and store your training sessions and more – all while slashing travel costs.