

Learning Uncut Episode 60
Jennifer Waltmon, Dr Cathryn Lloyd and Chemene Sinson
– Lessons from converting and facilitating courses online
Hosted by Michelle Ockers



Michelle Ockers:

In the five and a half months since COVID-19 hit, learning teams around the globe have been denied access to face to face classrooms and had to shift to support learning in an online environment. Many have grappled with converting courses designed for classroom facilitation to live online facilitation. The Australian Institute of Training and Development had a portfolio that included a number of courses that were delivered face-to-face. They decided early in the pandemic to convert six courses for online facilitation. In a massive effort they formed 15 course facilitators into teams who undertook all six conversions simultaneously – at the same time a continuing a rebrand, new website build and transition to a new Customer Relationship Management system.

I'm joined by Jennifer Waltmon, the AITD's Programs and Content Manager alongside two of the conversion team members, Dr Cathryn Lloyd and Chemene Sinson. Cathryn and Chemene participated in several conversion teams and have also shifted from facilitating these courses face to face to doing so online. They reflect on the experience of converting so many courses simultaneously, the parallels and differences between designing courses for face to face versus online delivery, and what they've learned about facilitating effective online learning experiences.

In some ways their experience is a microcosm of that which many teams went through during the early part of the pandemic – with a strong sense of purpose, collaboration and camaraderie as well as a hothouse experiential learning environment. This Learning Uncut story is highly representative of the experience of many L&D professionals in the fierce urgency of the early pandemic period.

Michelle Ockers:

So welcome to all three of our guests today. Jen, welcome.

Jennifer Waltmon:

Hello. Thanks for having me.

Michelle Ockers:

And Chemene, welcome.

Chemene Sinson:

Hi, Michelle.

Michelle Ockers:

And Cathryn.

Dr Cathryn Lloyd:

Hi, Michelle. Thanks.

Michelle Ockers:

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Let's start the conversation with you, Jen. Can you please introduce us to the Australian Institute of Training and Development, who we'll probably shorthand to AITD from here on in, and to you all in the AITD?

Jennifer Waltmon:

Yep. Of course. Sorry about that. My name is Jennifer Waltmon. I go by Jen. I am the Programs and Content Manager at AITD. I'll be celebrating my one-year anniversary with AITD next month. I manage all of the public face to face and virtual courses. I also manage our monthly webinar program and our annual mentoring program. And because we're not-for-profit, I also do other tasks like I assist with content writing and editing. I like to go to events to try to poach speakers for events, and for our conference, and possibly writing articles for our magazine. And then just being an L&D Professional for over 20 years, I try to stay across all things kind of L&D, and make sure that I'm networking with people and going to events. So that's me.

Michelle Ockers:

Okay. And of course, the AITD is a professional association based here in Australia for Learning and Development Professionals. And so, Jen, the pandemic hit Australia in early March 2020. Can you talk to us in broad terms about the AITD's response to support its members? What was your approach? What sort of things did you do?

Jennifer Waltmon:

Well, we had a very intuitive, and still have a very intuitive leader at our helm, Lynette Pinder, who is very intuitive in the way that she approached how we're going to support our members. The first thing on the agenda, because of the timing, was our annual conference. So, she kind of took the initiative and said look, we may have to go virtual, so be prepared. And she did this weeks out, and we thought, oh, she's crazy. We'll be fine. But started putting in a contingency for that, which really helped us get through it. Sam, our Events Manager, was amazing, the way that she started communicating with our members about the on-site conference and our plans to possibly go virtual. And kind of every step along the way was communicating with everyone.

Jennifer Waltmon:

And again, because Lynette was so organized, we really had a plan in place, even though we kind of decided on Friday that, following Tuesday, when the conference was happening, we are going to be able to put it together by Tuesday. And we did. And so we were able to pivot our whole onsite conference from a physical venue to virtual, which we think is pretty amazing. And throughout that time, as well as even to present day, it's really just for us been about communication, and that's been the key, is trying to support our members and communicating with them kind of every step along the way.

Jennifer Waltmon:

So after we got through the conference, then next up was courses. We thought, okay, we really need to talk about courses. I didn't want there to be a huge gap in learning, so I met with the team and I agreed to kind of lead us down the virtual road. And we aimed very ambitiously for the first virtual course to run in June, and it did on the 18th of June. And, again, because we weren't prepared for COVID, it really changed our way of working.

Michelle Ockers:

...and we're kind of focusing on the courses, and the conversion of a number of your courses from face to face to an online format. You already had a portfolio, a course portfolio, that

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included some online and some face to face. So can you talk to us a little bit, just at a high level, about what the portfolio of programs looked like before March?

Jennifer Waltmon:

Sure. Like you mentioned, most of our courses were being done in the classroom. And we had four courses that were running virtually already, in the curriculum. So our face to face were things like adult learning facilitation, presentation, L&D project management, training room, needs analysis, and instructional design. And then our virtual were content creation. Or sorry, content curation, e-learning, and virtual classrooms. So, that's where we started, and then we'll obviously get into the rest later, about how we went about deciding which ones to convert. But we knew that we weren't going to be able to continue on in the classroom so we had to think about the ones that were only being delivered in the classroom, and how we could convert those to a virtual environment.

Michelle Ockers:

How soon after we went to remote working and started isolating, did you make the decision to move to convert some courses? And what were some of the key decisions you made, and why?

Jennifer Waltmon:

Well, we didn't delay much. Our conference was on the 17th and 18th of March, and I think it was the end of that week that we met as a team, and decided we'd go virtual. And I think my first email went out to the facilitators that following week, I think on the 23rd of March. So it wasn't a lot of hesitation. And again, being an L&D person, I knew that our learners would continue to want that content, that really great content that we have on offer. But I knew that it was going to be a project, where it was going to take a while to get to a point where we could deliver it virtually, and still have that same quality in the content. So I knew that we had to make the decision quickly, and then start working on it as quickly as possible.

Jennifer Waltmon:

In terms of what was actually made, or what was decided on for the project, it basically just came down to the team meeting, making the decision, emailing facilitators and other people and partners we'd worked with in the past, and also those that were keen to work with us on conversion, and just saying, hey, we realize we don't want a huge disruption for our members. Would you like to help? And so the questions were, can you help? What would you like to help with? What's your area of expertise? What's your availability? And then starting to talk about timelines.

Michelle Ockers:

Yeah. And I think it's worth noting, you don't have an in-house team of designers and developers. Right?

Jennifer Waltmon:

That's right.

Michelle Ockers:

You have to go external.

Jennifer Waltmon:

That's right.

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Michelle Ockers:

So who did you reach out to, to set up the conversion teams? How did you set up these teams? And what brief did you give them?

Jennifer Waltmon:

Right. So I reached out to current facilitators, so people that were already delivering our courses, whether it was face to face or virtual, as well as facilitators that had in the past done some work for us, as well as kind of partners and members that had a keen interest to help, at least with the conversion, if not also with the facilitation. And really, again, it was about reaching out to the people and asking about their areas of expertise, and what their kind of, their idea was around what would fit them best, or what they felt like they would feel comfortable converting and/or delivering. So hopefully that answers that question.

Michelle Ockers:

Okay. And in terms of the brief you gave them, was it as broad as, take this course and convert it, or was there a little bit more to it than that?

Jennifer Waltmon:

There were a lot of emails and a lot of communications going back and forth. And I think the longer that time went on, the more we started to realize what was going to be included in that brief, that I think we did realize quite early on that it wasn't just a matter of moving it from one medium of delivery to another, but rather, that the content itself would have to be revised and delivered in a way that we'd have to still be engaging in a virtual environment. So, I think probably Chemene and Cathryn can speak more, because they were on the actual teams that converted the content. But, I think the brief, from my perspective, when I was trying to communicate that with the rest of the teams, is that it needed to be engaging. We needed to be able to hold the audience.

Jennifer Waltmon:

We didn't... I think my biggest concern was that people were approaching me and saying, why can't you just record the facilitator delivering a course in their office, or in their workplace, and then stream it. And I knew straightaway, being an L&D person, that I don't want to deliver content to our learners that wouldn't be effective. And that certainly wouldn't be effective to sit in front of a screen for seven hours, and watch someone deliver a course, when it wouldn't be interactive or engaging. So I think engagement was definitely one of the key variables I was trying to get across to the teams is, let's make sure that it's engaging, it's interactive, and that it's kind of the learning that you keep, we keep revisiting. So it's not just done all in seven hours, but that you keep coming back to it so you're able to reflect, and learn, and then take it back to your workplace.

Michelle Ockers:

So let's shift the conversation, then, to the actual conversion process. And we'll start, perhaps, with Chemene. Why did you decide to join a conversion team when the call went out, and which courses did you help to convert?

Chemene Sinson:

Thanks, Michelle. Well, I'm a freelance educator. So when COVID happened, any face to face training that I had scheduled was immediately cancelled. So I was really grateful for this

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opportunity. So I guess there's two reasons why I ended up volunteering to be part of the conversion team. The first was, because it just felt like the right thing to do. I was teaching three of the AITD courses in the face to face format, and two of those were going to be converted to virtual. So, I just assumed that, wouldn't it be useful if the people who had been teaching it could be the ones who might have some educated insights into what might work when we convert to a virtual format. So that was one reason.

Chemene Sinson:

The other reason was because it was just a great opportunity to learn through work. For all of us, if you're a facilitator, and if we don't want to be dinosaurs immediately, we're going to have to get our heads across this virtual facilitation thing. And here was AITD offering us this great opportunity to work with other people, share ideas, learn from each other, and in the process of doing a job that needed to be done, I think also equipping ourselves with some skills that also made us more marketable, not only to AITD, but to our other clients as well.

Michelle Ockers:

Absolutely. And Cathryn, would you like to talk to us about your motivation? Was it similar to Chemene's? Was there other factors for you?

Dr Cathryn Lloyd:

Yes, Michelle. Certainly, my motivations were very, very similar to Chemene as well. I'm self-employed educator and facilitator. And I could see very quickly that a lot of the work... Well, I didn't really know what would happen, actually. But suddenly I could see that change is ahead. What does this mean? And certainly, and of the AITD courses that were coming up for me, I realized wouldn't happen, because they were face to face. And so, on a personal level, personal/professional level, that was quite devastating. And I appreciated what it would be for AITD as well, in terms of they could see that all their courses, potentially, would not run. So as a collective impact, that was going to be enormous. And as Chemene said, I then saw what a great opportunity this would be. So when the call came up, it was like, oh yes, I'd love to be involved in whatever capacity.

Dr Cathryn Lloyd:

I'm not really sure right now, but I'm happy to be involved in some way, shape, or form. Because of the various aspects of that, of the learning, the collaborative approach, the opportunity to look at the material as well, having delivered it, some of these courses, for quite a few years. I was also aware of my own inclination to think that some of the content was due for review as well. So it provided a perfect opportunity to do everything. It's almost like the perfect storm, in some respects, to look at everything and go, okay, what's the future? What do we want to do? How do we want to change things, and in what form? And then to be able to do it with a group of people was an amazing opportunity and experience.

Michelle Ockers:

So let's pick up on that collaboration and working with a group of people in a team. And I believe yourself and Chemene both worked together on two of the conversion teams. Can you talk us through using one of the teams, as an example, how the team worked together and actually undertook the conversion?

Dr Cathryn Lloyd:

Well, I was involved in three conversions. So, the adult learning, the facilitation, and the instructional design. The adult learning and the facilitation were, certainly, a conversion. And the instructional design was quite a major review. That was the one that sort of came under

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quite a lot of scrutiny. So that is quite different, from the point of view of that everything was, the face to face content, as well as the online content, was reviewed and looked at. The adult learning and the facilitation, both Chemene and I, were part of. We very quickly established how we wanted to work together, and I think that was really important. We realized there was a quick turnaround on this, and also, how would we work together? And we decided that all of us had had experiences in different ways, with the content, and with the delivery.

Dr Cathryn Lloyd:

So there was nobody who kind of had that more advanced perspective on things. We all brought a perspective on things, and we all brought an experience, and we felt that the best way that we could, and offer the best possible solution was to really, collectively, draw down on what it is that we had all done, and how we delivered things and made sense of the content. And then really looked at the essence of things, and said, what do we think is really fundamental to this particular topic? What stays in as an online... Because you can't put everything in. So we were having to be selective about what was going in as an online course, and what would, potentially, not be able to be part of that online delivery as well. So it was a very collective and collaborative approach to it, actually.

Michelle Ockers:

Amongst the people in the team, did you have different roles, as such? Or was it just a matter of, everybody roll up their sleeves, and there were working sessions, and you just worked through it all together? How did that all play out?

Dr Cathryn Lloyd:

There were certainly aspects of the work that had to be done, so we all took different parts to it. As far as how we grappled with the content, that was very much a collective decision making. And so we had some fantastic conversations around the content. And that itself was an amazing learning experience for all of us, in terms of how we all thought about things, and how we, the perspective we had, how we understood things. And so that, the decision making of content, actually was very, very collaborative. And then yes, we all went off and did different parts, in terms of how the PowerPoint would be approached, and certain things, and Chemene was fantastic in that aspect of it, and pulling together some great ways of working with the PowerPoint visual side of things.

Dr Cathryn Lloyd:

And then there was whoever else we were working with, Susan or Jane, also had their experiences of working with things, so we were working on the facilitative guide, or activities that we would include, and... But it was very, very collaborative, actually. And we went backwards and forwards with the material, and worked on it, and shared it. We used all the technology that was available to us to be able to communicate. We were using Slack. We were sharing articles. We were using Dropbox to share things. We were, Google, worked live with documents and things like that. So, yeah, it was very much a real time activity in that regard.

Michelle Ockers:

Chemene, would you like to add anything, any other reflections to how the team worked together.

Chemene Sinson:

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Yeah, I think. Well, I had two thoughts, but I think really, you've said them really nicely, Cathryn. I think AITD, in the first instance, offered us a bit of a process, which was a good, strong, traditional process, which suggested that one of us on the team might be the principal writer, the second person might be the key editor, and then there would be a third person who would be a bit of a reviewer. I think what... And that works for most design programs. You know? People with these clear, different roles. But I think, then, when we all sat around the table, we realized everybody knew so much that we were going to end up with a much better program if we did as Cathryn suggested. Share those roles equally, and collaborate on the content. Which is why it took us so long, because we just had these chats that were fabulous. But I think it did lead to a much better product that resulted, had we not done it that way.

Chemene Sinson:

So that was one thing. And I agree. Once we collaborated on the content, then we all went off and, I think, leveraged our individual strengths in the team as well.

Michelle Ockers:

So content is one thing. But, of course, just throwing content at the paper, as Jen alluded to right at the start, is not going to work, particularly in an online setting. So you had the question that you needed to grapple with, around what kind of activities might be appropriate to actually get people to engage, to create that reflection, to create the ability to apply. So how did you approach the design of activities, and what's different in creating activities in online versus face to face.

Chemene Sinson:

Well, for my part, this is Chemene, I know that what we came to realize pretty early on, was that, really, it's not that different virtually. And I guess what I mean by that is, the rules stay the same. What we need to be able to accomplish in our training programs is to come up with a way to content that is genuinely useful, that's relevant to everybody, and that allows participants the chance to play with it, discuss it, mull it over a bit, think about how they can use it in their real lives. So that need for engaging purposeful content, I think that's the case, regardless of the delivery mode. Online, self-paced, whatever - face to face, virtual, classrooms, whatever.

Chemene Sinson:

And I think when we could sit on that, we were saying, well really, what we need to do isn't all that different. It's just how we do it, of course, in an online platform and using the tools that became different. So for us, I know, we looked at... I think the first challenge was just knowing what was possible. And I think one thing that was fantastic was AITD's support of all of us attending Cheryle Walker's two-day virtual classrooms course, which really opened our eyes up to the different options that were possible with virtual classroom delivery, how to achieve that same engagement. So big shout out to you, Cheryle. You were a life saver.

Chemene Sinson:

And then once we started looking at that, I think from there it was lots of Zoom meetings where we all came together and played with ideas that we were mulling over, reading blog posts and then sharing them with each other. So we came up with lots of ways, I think, first of all, just to look at what was possible. The second thing, I think, was then to look more closely at the tool that we were using, which in this case was Zoom, and think, okay, how can we achieve all of that engagement, then, using this tool? And again, coming back to, it's doing what we've always done. So, for example, we want people to brainstorm ideas, and

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share ideas. And so we can do that on the white board in a face to face classroom. In a virtual classroom, they have a white board. We can do the same thing. Or we could have a whole group discussion by setting up a slide that looks like a white board and using text tools.

Chemene Sinson:

So I think, for me, it was really remembering that what we need to do to create a good program is, what we need to achieve, is no different, regardless of the delivery mode. And then explore how we can achieve it in the virtual online environment, and got some great ideas.

Michelle Ockers:

Were there any other challenges you faced to converting the course for online delivery that you'd like to add, Chemene, that we haven't touched on yet?

Chemene Sinson:

No, not really. The only challenge that Cathryn mentioned was just knowing what to cut. Knowing if you're going from a full day face to face program, to an equally engaging, but much shorter, virtual program, you were better off cutting content so that you could keep those activities, the level of engagement, and so on. So the question was, which content best achieved the purpose of the program, the learning outcomes? And which content could as easily be acquired through reading and other means that people could do outside of the virtual classroom? Once we had that worked out, and that took a little bit of to-ing and fro-ing, I think we were off to the races.

Michelle Ockers:

Okay. So...

Dr Cathryn Lloyd:

Can I just add something to that too?

Michelle Ockers:

Yeah. Please do.

Dr Cathryn Lloyd:

I think the other thing, too, about thinking about the engagement was really interesting, because we'd all been delivering or facilitating these courses face to face over a number of years, we'd all adapted in different ways. And so, when we shared our way of working, it was really fascinating, because, oh, you approach it like that. Or you do that. Or you frame that activity that way. Or, oh, that's an interesting activity. So it was in that process of kind of sharing our own experiences that we could look at, what are the things that have worked well in person? And then, how would some of those things be converted online?

Dr Cathryn Lloyd:

So, we really took the very best, I think, of what all of us had done over time, and started to look at, that works really well. We could see how that would work online. Or, that's a little bit more challenging, but there's something else. So it was in, again, it was in that kind of sharing with one another about how we'd approach things, that we really came to understand the content, and the activity around, or the engagement around that content.

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And then be able to put that into some sort of interactive way of engaging people in the content online, as well. So it was a very fascinating experience in that regard.

Michelle Ockers:

It's interesting that that kind of opportunity hadn't been there before, for the facilitators to come together and do that kind of sharing and reflection, and this created that opportunity. So, that sounds like something that was well worth doing, and something worth holding onto, moving into the future as well, around the facilitator community.

Dr Cathryn Lloyd:

Yeah, yeah, yeah.

Michelle Ockers:

We've talked about quite a few things that worked well during the conversion process. Is there anything you'd like to highlight, or add to what worked well, Cathryn?

Dr Cathryn Lloyd:

I loved the teams I worked with. They were just marvellous. It, truly, it was just the most remarkable experience. And particularly, at that moment in time, when suddenly, you could see the world crashing around us, and going, I have no idea what this will mean, and where my work will come from, and what will happen. And my experience of being online, and educating online was fairly minimal. I had done certain things, but not to this kind of depth. And to be able to spend those first few weeks of that... And I guess I hear what you're saying about our lockdown, but that real sort of isolation. That was actually spent with these people. You know? And so, it was the most, again, remarkable experience of having those few weeks of, where you couldn't go anywhere, really, and do anything at all.

Dr Cathryn Lloyd:

And I was spending all my time with these wonderful people, who I thoroughly enjoyed meeting with, and working with, and yeah. That, to me, just in itself, of the timing of that was just absolutely fabulous too. So that worked really well, and I really enjoyed everybody's personalities, and contributions, and just this collective energy that we all brought to it. And yeah, there was certainly no leaners in there. They were all lifters, and it was a wonderful experience in that regard.

Michelle Ockers:

I think it says a lot about the sense of purpose and belonging.

Dr Cathryn Lloyd:

Yes.

Michelle Ockers:

I think we... If we had lost sight of that, prior to the pandemic, I think it's certainly been one of the big things that we've rediscovered as human beings, how powerful and important that is for us. I think what you've talked about there just illustrates it beautifully, so thank you for that.

Dr Cathryn Lloyd:

And if I can add one other thing in there, there was a lot of communication with AITD. And sometimes it did feel a little bit like, oh, wow, here we go, this... However, they were incredi...

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Jen and the team were all very, very supportive of us. And so, I actually felt supported by them in so many ways. And we were able to just get on with things too, and really bring our professionalism to this, and our experiences. And I think, and they valued that. And that is a wonderful feeling as well.

Michelle Ockers:

So Jen, the teams were off, very busily working away to the brief you'd given them. It sounds like you might have been off having cocktails on the balcony. What were you doing during this period of the conversion process?

Jennifer Waltmon:

I think cocktails happened at about three or four months into the project. You know, COVID obviously was a big shocker to us. We weren't prepared for a global pandemic to happen. And so, when it did, we had already had other projects happening in the background. And they were pretty massive projects. One was that we had decided to rebrand. And so, approaching new, basically revised, or new content also meant that we had to rebrand all of that content. But we still were in the works of deciding what that looks like. The logos, the colour palette, even the fonts. It was down to that kind of level of detail. So that was already happening when COVID hit, so I did a lot of work on trying to get that branding kind of finalized, so that we could insert it into our new course content, as well as another project that had been in the works for quite a long time. And that was to migrate onto a new website, and a new CRM at the same time. So, there was a little bit going on in the background when COVID hit.

Jennifer Waltmon:

So I was trying to kind of manage the conversion of six courses on top of the new website, and the new branding. And then, obviously, once the teams, our well-oiled teams, were up and running, just managing the incoming content, because taking on a project of this size, where there were six courses being converted at the same time, with about 12 to 15 facilitators working on the six courses, meant that there was a lot of content to be managed. So I was trying to kind of sort that out and get that organized.

Jennifer Waltmon:

So, I think what was a lot of just going along the way and working out what needed to be done, rather than having all of the answers at the beginning. So there was a lot of revisions around expectations and outcomes. And then of course, I was then sitting down and scheduling all of the courses that we wanted to run, starting in December, and then putting the calendar out there for December through, sorry, June through December, with the idea that hopefully we'd be back in the classroom in October. So we're still kind of hoping to plan to be in the classroom, though we don't know. As we know with COVID, things can change on a daily basis, and change on a daily basis.

Jennifer Waltmon:

So, we're projecting that we can, and then end up with both face to face and virtual courses running at the same time. And again, just lots of email, and lots of communication going back and forth. I tried my best to at least communicate on email, or a calls, or joining Zoom meetings on a weekly basis, to try to keep everybody on top of what was actually happening in the background, and just to gauge the progress, and the how we were, and if we thought timelines were still going to happen, from the beginning. So, it's just a lot of, for me, I felt like there was a lot of communication.

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Jennifer Waltmon:

But if I can just add to what Chemene and Cathryn were both mentioning, I really found it rewarding as well, because it allowed me to get to know the facilitators a lot better, because coming in, I had about four, five months of kind of getting to know the facilitators a little bit, in the background, online, maybe meeting less than a handful of them in person, but now being able to spend more time, virtually, getting to know them a lot better, which was really, really enlightening, really educational. And just a really good way to up my engagement with them, which was a great experience for me.

Michelle Ockers:

There was a bit going on.

Jennifer Waltmon:

Yeah.

Michelle Ockers:

And isn't it interesting? I think this is a really nice example of what we saw in many different organizations, many different activities with COVID, of how much got accomplished because it just had to be, that you had... If you thought, oh, we're going to convert courses. We'll do all six at once, and we'll do it at the same time as a rebrand and a website rebuild. No one under normal circumstances would tackle that.

Jennifer Waltmon:

(laughs)

Michelle Ockers:

But there was urgency about it, and people found ways to make it work. And I think there was an accommodation around some of the tensions and stresses that went with that. It was just sort of camaraderie and sense of connection to make it happen. I think it's such a great example of that in this story.

Jennifer Waltmon:

Yeah, I think, as with any project of this size, which I find is pretty massive, you're bound to have little blips and bumps along the way. But I think a real upside to being part of a time like this, is that L&D professionals are very supportive of each other, and very open minded and collaborative as well. So, there was even a point where we were trying to schedule, when we said, okay, we're getting towards the end. Now let's start scheduling these courses.

Jennifer Waltmon:

Sharing the load, in terms of availability and people being able to kind of share their courses around. So, if someone wasn't available, another facilitator would be able to pick up and run with that course, if they had been working on the conversion, and were familiar with the content. So, I think that we have the advantage, as L&D professionals, of being in a community that is so supportive of each other as well. That really helps.

Michelle Ockers:

Absolutely. So, before you can run those courses, though. You've done the conversions. A whole stack of content has been created, activities, we had these courses redesigned, redeveloped. You had to pilot them. How were they piloted? Jen?

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Jennifer Waltmon:

So, the pilot, I think, was probably one of the best moves that we made during this conversion process. And I think, again, just like other bits and other steps along the way in this project, it was kind of, I think we said, look, let's do this as a practice run, so that it... It does a lot of things, or it hopefully would do a lot of things, and that would include, giving the facilitators the opportunity to just do a practice run to see how the flow felt, and have others join as participants. So we could see it from both the perspective of the facilitator, as well as from the perspective of the learners. And just to see, again, how the flow went. And if it didn't work, we took that out. Or we might move an activity to later in the course, or run it a little bit differently.

Jennifer Waltmon:

So, the idea behind the pilot wasn't to run it in real time, for the entire duration. But, in order for the facilitators and learners to get a better idea of how that would look, and how it would feel, and how it might run. And I think it was pretty enlightening. And it also allowed us... Because we didn't have, I suppose, external learners on the course with us, on the pilot with us, it allowed us to have very open and honest communication and feedback as we were going along, including chats, verbal feedback, and then handing it back to the pilot teams at the end, so that they could then go away after the pilot, and kind of revise and refresh again, based on the feedback, and based on their own reflection, to get that content really where they wanted it to be in terms of feeling comfortable delivering it, feeling comfortable with the content itself.

Jennifer Waltmon:

And it was really good, in that we had not only other team members from other conversion teams, but also some of the support team from the AITD office who really, most of them aren't L&D people. So just to even get their perspective, if I'm new to the L&D profession, and now I need to start learning, and I start on my very first course, how does that look, how does that feel, do I understand it? So lots of different perspectives, I think, were, where we were able to tap into by running those pilots. And again, it also gave, I think, other people opportunities to learn more about each other, as facilitators, as human beings. You know? Yeah, it was a great opportunity, I think, and I'm sure Cathryn and Chemene will be able to speak to the pilots as well.

Michelle Ockers:

Chemene, we might start with you. You had the experience as a member of the conversion team, of both having the courses you'd converted, piloted, and also being a participant for other people's pilots. And what did you learn during the pilots?

Chemene Sinson:

Oh, heaps. Well, first of all, we know that every program has a pilot. If we're lucky enough to have a pilot that has a label of pilot, where we have friendly people ready to critique, in a safe environment, without sort of real participants, so to speak, then isn't that great, because we can work all the bugs out there before it goes live to clients. But the reality is, had we not had that pilot, all that same working the bugs out would have just happened with the real participants. So, there's always a pilot. There's always that first delivery. And I always call it the work the bugs out delivery. And it was lovely to have a chance to do that with the feedback of colleagues, peers, and other people that we respected.

Chemene Sinson:

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So again, it just amplified the learning, I think, and it amplified the quality of the finished product as well. And you're right. You mentioned, Michelle, that I not only was involved in the pilots of the courses that I was part of, but to the extent that we could, we also sat in on the pilots of other people. And of course, isn't that where we just picked up more fabulous ideas on how to facilitate? So it was just one big professional development festival as a facilitator, as far as I'm concerned. And it was a really great chance to just totally consolidate and evolve some of these skills as virtual trainers. And I know all of this experience has helped me with other jobs that I've gone on to do since then.

Michelle Ockers:

So was there anything in particular you recall observing out of the pilots, like when you had to go back and complete the program conversion? What came out of it that you needed to go back and adjust as a result of the pilot?

Chemene Sinson:

I would say, I mean, the ultimate test of a pilot is to see what a program feels like from the perspective of somebody who's coming at it cold. You know? Who doesn't have the benefit of knowing what's inside the heads of the three developers, and having been listening in on all those hours of conversations that led to the decisions that we made about the first program content? So I think that was the biggest learn was just to get a sense of, we thought it made sense, and it might flow. But we wondered if, when all of that context that we had to inform our decisions gets stripped back, as it does for participants who are attending for the first time, does it make sense to them?

Chemene Sinson:

For some people, it's the first time in a virtual environment, and so, in addition to planning how we would teach the content, and engage in activities, we also thought we would need to plan to teach, how to use the tool to engage in the content.

Chemene Sinson:

So our content, which we tried in the pilot and it seemed to get good feedback, was show them how to use Zoom, which was the platform that we were using here. When we had an activity coming up where we wanted them to write text on the screen, we decided to take the time to show them how to access those text tools, and how to write on the text. And then we'd introduce the activity. So we found that breaking it down step by step, that was something I learned in the pilot, that that seemed a good thing to do. And if you could cover it lightly, so that those who've done it before, it's fine. But those who haven't, then, suddenly you've given opportunity to everybody to be able to participate, and not just those who are already familiar with the tool. So, if you asked me to pick one key learning from the pilot, that, it was probably that.

Michelle Ockers:

How about yourself, Cathryn? Did you have sort of a key learning, or something that particularly stood out for you, from the pilot experience?

Dr Cathryn Lloyd:

As a learning experience, it was absolutely amazing. Again, we had our co-facilitators from other courses come in and give feedback around that. So, and very collegial and very respectful, really quality critiquing. There was no grandstanding, or egos, or things like that. Everybody just wanted to see this work, and be successful, and make it happen, so the feedback was really valuable, and done in the most respectful way.

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Dr Cathryn Lloyd:

I think the three, there's sort of three F's there, isn't there, about the pilot, which is to be able to do the facilitation, actually have a go at the facilitation, sort of run it through, to see the flow, and then to be able to get the feedback. So those three things were really, really invaluable. And it's interesting what Chemene says about the tech side of it. That was one of the things we were a little bit concerned about, because we didn't want to be spending a lot of time taking people through the tech. And we were very concerned that some of the activities, we wanted to make them engaging, and some of them are a little bit advanced at the time. And of course, we're all getting our heads around this technology, and what Zoom, and ultimately, Zoom is the platform that we went with to use, which we're all very grateful for, because we'd all been spending time with it.

Dr Cathryn Lloyd:

But to actually, to work with that, and then have a group of people on a course, who may or may not be very experienced. And we thought, we can't spend our whole time bringing people up to speed with the technology. We need to be able to get into the content. Really, it's about adult learning, or it's about facilitation. It's not about Zoom, per se. So we were conscious of that. So that was important. And I guess as time goes on, and now we've all had more experience, what I'm seeing in the actual facilitation side of it with the online, is that we don't have to spend so much time there, because people have experienced it, and they kind of know things now. So as time goes on, some of that may or may not be relevant anymore, as well. And maybe it's other technology that we use, may well be needed to be explained, rather than other aspects of the technology in that regard. So I think this is an evolving situation as well.

Michelle Ockers:

Okay, and Jen, is there anything you'd like to add about the pilots, before we move on to talk about facilitation?

Jennifer Waltmon:

Oh sure, just a couple of things. One was just mentioning, kind of adding on to what Cathryn was saying about Zoom. I think being part of those pilots made us realize that, perhaps, some of us weren't super familiar with Zoom. Our learners might be the same. And so we created some Zoom tutorials to send out to the learners prior to them joining the first online session, which I think has had some pretty good uptake. Just so, like Cathryn said, you don't spend the first half of the session facilitating how to use Zoom. So that hopefully helped.

Jennifer Waltmon:

But as a program manager, I think joining the pilots was really essential to getting some consistency, because as Cathryn and Chemene both mentioned, there's some amazing ideas that were being bounced around during the pilots that made me realize what was going to work, and what was not going to work. And then putting consistency across all of the courses, so that when learners would join any AITD course, they had that sense of familiarity as soon as they joined the course, because it had the same look and feel. So it really helped from a program management level to go, this is where we need to be. This is a great idea for a Zoom introduction, a housekeeping introduction, welcome to country introduction, those kinds of things, where I could take them and apply them to the other courses. So it was great for consistency to have those pilots run the way that they did.

Michelle Ockers:

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That's such an interesting insight, because under different circumstances, without the same time pressure and sense of urgency, you might have done one course first, and then gone on to the others. But in this way, you got the benefit of looking at what worked across all six, and saving that good practice across everything all at once, so...

Jennifer Waltmon:

Yeah. Yeah.

Michelle Ockers:

...it was probably a quality benefit at the end of the day there as well.

Jennifer Waltmon:

It was.

Chemene Sinson:

And, Chemene here, Michelle. I can certainly say that having sat in on other people's pilots, and also having experienced the first of the pilots for a program I designed, it then, it took me back to other courses that we were still working on, that were still in progress, and then we thought of ways to improve those even before the pilots. So yeah, there was a whole lot of cross-fertilization and great ideas going on.

Michelle Ockers:

Absolutely. And speaking of cross-fertilization, you both went through this journey from being the facilitators on these programs face to face, to designing them, and then facilitating them in the online setting. So how does your experience, perhaps Cathryn, how does your experience of facilitating a course online compare to facilitating the same course in a face to face setting?

Dr Cathryn Lloyd:

Ah, it's such an interesting question. And I really didn't know how I would be myself facilitating online, because I love being face to face with people. And there's something so incredibly, I don't know, intuitive there, and responsive, and you can, you've got this whole spatial thing going on, and the body language, and all of those sorts of things that happen in a moment. And also, just space to work with, and again, the activities. So... However, I have to say that I have really come to enjoy the facilitation online. And there's a lot there that you can do. And there is something quite intimate with it too, that I hadn't appreciated as well.

Dr Cathryn Lloyd:

And I've been quite vocal about my, I guess, what I think is a good size to have online as a learning experience. And certainly, I think the smaller groups work incredibly well. And so I encourage anybody that deep learning experience, to keep the groups at a fairly small size. And AITD has responded very, very well to that. And I know that the courses that I've now facilitated, they have been at that, what I think is a really, that kind of, that size where you can keep a group together, and you can split off and do things as well. And there is something that really creates a sense of community of learners, or a community of practice, in some respects. And there's an intimacy there, that when you've got a large group online, somehow that can get lost if there's too many, so...

Michelle Ockers:

But what size do you think is a good size, then, to create?

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Dr Cathryn Lloyd:

I think eight, max, is a really good size. Look, I think you could push it to twelve. But I actually think that's getting too much. I think six to eight. I think that's a beautiful number, and works extremely well. And you can break off into, you can be as a whole group, you can break off into pairs, you can break off into fours. Six is great. Twos, threes, a whole group, easy peasy. It's a fabulous number, in that regard. Online, I think it's perfect. Even in person, I think it works really well too. But online, I think it works marvellously well.

Michelle Ockers:

There's something about that bigger space in a physical room that is difficult to feel if the room is large and you've got a small number of people. The environment is different.

Dr Cathryn Lloyd:

Depending. Again, depending on what you're doing, and the activities, or the experiential work that you're doing. Sometimes you really do need that big space if you're doing certain things. So again, it depends on the purpose, and the facilitation, what it is that you're doing will actually allow for yes, this space is far too big. And it's, with that small a number, it's not working so well. But then a bigger space with a smaller number, depending on the nature of the facilitation may work extremely well. So I think this, it's just a reminder of looking at things, being very intentional around, what are we doing and why? What's the purpose? And what do we think works well, particularly well, in this particular context?

Michelle Ockers:

So Chemene, is there anything you feel you've had to adapt as you've moved from facilitating face to face, to online?

Chemene Sinson:

Sure. I mean, I don't get to touch you, except, without putting a strange finger into the camera. And then, that's just weird. Isn't it? But I think, for me, the big focus of facilitating online wasn't so much on what I had to adapt and change. But it was on what I needed to make sure that, however I adapted and changed, that I was keeping, that you get from face to face. So I mentioned earlier the need to be purposeful about what the program can achieve. And to make sure that, in any learning context, for example, people need to feel safe in the environment, if they're going to speak up and genuinely share what's going on for them, and share their challenges, and fail productively when they make mistakes, and know that that's an important part of learning, and that's okay.

Chemene Sinson:

So for me, with adapting, I actually started with just reminding myself what needs to stay when we convert to this online. And then thinking, how can we do that? And I guess, with the adaptation ... in order to think about adapting, I also thought about, well, what would be some of the things that would cause problems? And certainly, technology being new to people has been something that, I agree with Cathryn, is starting to go away. But there are still... We still need to give people permission not to know where something is, and make them feel safe enough asking. Otherwise, all that participation and engagement we hope will happen, just doesn't happen.

Chemene Sinson:

So those are some of the things that I was grappling with. In terms of how I did it, and how I adapted, I think it was really just thinking, all right, we've got a white board activity in a classroom. We can move to a white board activity in the training room. When I think about

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ways to keep, help people stay anonymous. So if they wanted to come and have a private word with me about something, if they needed to, in the face to face, that's easy. They just come up and have a word. So I thought, in the virtual environment, I can invite a private message. Or, on one occasion, when it was the different platform, with the different client, that didn't have a chat function, I just said, here's my mobile. Here's my number. And send me a private text if there's something you need to tell me that you don't feel comfortable sharing.

Michelle Ockers:

And that point about creating a safe space is really important. And of course, AITD's policy's not to record sessions, and that helps with the safety of the space. Just because you can, doesn't mean you should. I remembered that from the Cheryle Walker training session. So, Chemene, what do you think are some of the pros and cons, then, of online format, versus the face to face format, from the participant's perspective?

Chemene Sinson:

The obvious, immediate pro is easier access. You can do it from anytime, anywhere. Another pro, I think, is, there's the potential for it to be a stronger learning experience, because typically good, virtual programs are part of a broader learning journey that might begin with some priming or some pre-reading, then lead to a virtual session. And then, perhaps, if it's going to be more than one virtual session, there might be some time between virtual sessions, and so on. So I think you get more sustained and stronger learning if learning is spaced out and in those small bits at a time. And we have a plethora of research that backs that up, so I think that's a pro of virtual.

Chemene Sinson:

I think one of the cons of virtual, of course, is that we have to think about some of those instinctive ways that we communicate, visually, in particular, where we have access to people's body language to get a sense of how people are progressing or feeling about doing an activity. Which, we often don't think consciously about as facilitators. But, if we're standing at the front of a face to face room explaining something, and then we see someone just look, even subtly, confused or overwhelmed, we can see that quite immediately, and then do something about it. Either schedule a break, re-explain an idea, and I think those are some of the challenges of the virtual environment, where some of that really nuanced conversation, and some of those nuanced cues that people can send to us, and we can send to them, are, we're a little bit more limited on what we can do there.

Chemene Sinson:

Cathryn's point, I'll back up. A small group, if you're talking about a virtual classroom, I think a small group is essential. My sweet number is 12. Anything up to 12, I'm happy with. But much more than that, and you're really broadcasting, which gets a little bit trickier.

Michelle Ockers:

Is there anything you'd add to that, Cathryn, in terms of pros and cons of the two formats, from the participant's perspective?

Dr Cathryn Lloyd:

It's interesting the feedback that I've had so far from the courses that I've now facilitated, that people have commented that they have really enjoyed the experience, and found it really valuable, and that they actually don't feel that they have missed out, really, on anything, by not being in person. So I think that's really quite telling, in terms of what we have done, in

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terms of the design of the courses to give good content, but not overload. And make it interactive and experiential. And also to keep, to build those relationships, and I'd put a huge emphasis on building relationships.

Dr Cathryn Lloyd:

And I endeavour to create a community of learners, and also too, to recognize that it's not about me. It's actually, yes, I'm there helping to guide, and sort of facilitate, and what have you. But at the end of the day, it's the wisdom of the group. And the people who are arriving to those courses are, they've got all sorts of experiences, and knowledge, and what have you. So the more that we can sort of work with people to bring those experiences to the fore, are so rich and valuable, and that's what really creates a fantastic learning experience for everybody. And I think you can do that online with the smaller numbers, absolutely. And create that sense of the group wisdom coming through, and that's something that I've really enjoyed myself and valued.

Dr Cathryn Lloyd:

I guess the cons are that there's a lot of things that I've done in person where I, creativity's a real thing for me in working with props, or various making, and tangible, and prototyping, and trying to make things as experiential as possible. And missing out on that is something that I think is, that's a shame. So again, that, we're not in that room together, kind of bumping up against each other, and maybe the sticky notes are going up on the board, or you're writing together, or you're working on something together on a table, and you're getting that interaction in that way. And I guess that's that, yeah, interpersonal connection in that way is slightly different. But I do feel that there's... I think that we can do marvellous things online, and probably much more than I have really appreciated.

Michelle Ockers:

Absolutely. And Chemene, would you like to add anything around facilitation?

Chemene Sinson:

Well, this is actually just something that I really learned, that I know something you were looking for is even just tips for people coming to terms with it. And what I really came to realize, the key to facilitating virtual learning, I think, is also very much to trust the learners. If we didn't already, we really need to now. And encourage them to take responsibility for their own learning. So there are some things that are tricky. And I think that if we build a virtual program on the basis of no trust, for example, don't let them chat because they'll all have off task conversations, or don't send them into breakout rooms, because they might not talk about what we want them to talk about. I think what we have to do is really treat adult learners like adults, and help reassure them, I guess, that they're going to get the most from this experience if they immerse themselves fully into that. And we will give them every opportunity to make the most of the people in the room, and make the most of this opportunity to learn together. And then we need to trust them.

Chemene Sinson:

And I think that the best virtual facilitation I've seen is facilitation where we can help them acknowledge their responsibility to learn, but also then trust that they are going to do that, and allow that to happen. So I just wanted to make that point. I guess one other point I'd love to make, two others, actually, is, for any of us thinking about designing, I find the best virtual programs work when we have materials and processes that have been designed specifically for the virtual environment. I think early on in COVID, we were being applauded if we could

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quickly pivot and just chuck some face to face PowerPoints up there and quickly talk to it and do a breakout room.

Chemene Sinson:

But I think we know those programs are clunky. And now that we're a bit further down the track, and know more, I'd really encourage people to recognize that virtual facilitation is the design in itself, and the best virtual programs work when we have materials specifically designed for that. And the last thing I'd love to throw out there is just to cry to all the facilitators I've been speaking to, who are used to face to face training, who are intimidated by the thought of doing this, and who have walked away. I know quite a few who have just said, I just don't think I can do it. It's not for me. To remind people that all those wonderful facilitation skills you developed in the face to face training room, absolutely have prime importance in a virtual classroom. Learning the tools is not as big an issue as I think many of us might think before we know more about it. And I'd really encourage all these people with so much to share, to give virtually training a go. Thanks, Michelle.

Michelle Ockers:

Thanks, Chemene. And Cathryn, we do like to be practical. We've got some good tips there from Chemene. Do you have any other tips around either facilitation or conversion of programs into the online environment?

Dr Cathryn Lloyd:

Oh, gee. The conversion is really interesting, because inevitably it really comes back to, what's your purpose?

Dr Cathryn Lloyd:

And then, looking at the logistics around that too. How long do you have? Are you going to do a course over a period of time? Is it a one hit wonder? Are you going to build on it? There are so many factors. So there's a real design element to it, in that regard. And that, the biggest thing of all is, front and centre, or at the heart of it, is a person. So we, that's fundamental. So you can have all the technology in the world, and all the various gadgets, and whatever you want. But you have to come back to the fact that there is a human being, who is going to experience that. So how do we actually help create an experience that is a human-centred experience, that that person feels valued, that they do feel safe to try things, experiment, fail, whatever it is, because the environments allows for that.

Dr Cathryn Lloyd:

So, front and centre, the person. And then we can start to kind of look at everything else that might sift in and around that to support what it is that we're trying to do. What is it that the person needs and wants? And we can get too clever as well. And sometimes it's about stripping it back and going, let's just keep this really simple. You know? We don't need all the whizzy things going on right now. What we need is just a good conversation right now, a way of sharing that information, or yes, the breakout room is perfect for this moment in time, or the white board is great, or let's bring in another tool that's going to really support this. But we don't... What we don't want to do is overload people. And I think that's the most important thing of all. And so, it's getting to the essence of things, and building on that, and getting feedback around that, and then, and going from there... And it's probably better to leave people wanting more, in some respects, than not.

Michelle Ockers:

So start with the person and the experience, and then look at the technology after that.

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Dr Cathryn Lloyd:

Absolutely.

Michelle Ockers:

Beautiful advice. So Jen, as the person who managed the conversion of all of these courses, what tips would you have for others who are undertaking something similar and managing the conversion of programs?

Jennifer Waltmon:

I would certainly say, hopefully there's not a global pandemic happening in the background. That would probably be a great tip to get through it a little bit more quickly, and without a lot of worry in the background. I think time was a big one for us. Again, I think we had a huge... For me, anyway, I had a huge, I suppose, I was really trying to steer us into being able to deliver the learning to our members and our non-members, without a huge gap, without a huge disruption. So, that meant that we tried to get through it as quickly as we could, but still at the end, like Cathryn was mentioning, what are the outcomes?

Jennifer Waltmon:

And for us, it was quality. Not how quickly could we turn it around, or... Was the quality, we didn't want the quality lacking. We wanted to focus on the quality. So, we have to keep that in mind, I think, in the back of our heads, when we're doing any kind of project. But especially in a worlds that we live in at the moment, when we're trying to convert information. We said all along the way, I think, we were really good about communicating the fact that it's the same great content, and the same great quality, just delivered in a different way. So we had to keep that kind of in the back of our minds. I think making sure that you're flexible, and that you're open minded, and you're dealing with lots of, and working with lots of different facilitators, from different walks of life, with different experiences, and different knowledge bases.

Jennifer Waltmon:

Also enlisting the help of subject matter experts. So, getting the right people into the right conversion teams, onto the right projects, based on their experiences and their knowledge. And even celebrating the wins, even the small ones. So, if we passed some particular milestone, it might seem like a small win. But to us, it was probably a really big win. And we were talking about technology. We even had a bit of a hashing out of technology to decide what platform we were going to go with in order to deliver these. And so, that felt like a huge win, to me, when we decided to go on Zoom to do this.

Jennifer Waltmon:

So, and then having contingencies. Along the way, people's level of commitment was changing as people were getting new work, which was great. But then that meant that we had to then make other facilitators available, or do what needed to be done in order for us to keep delivering without any, too many disruptions. So having contingencies in place is, I think, pretty important. So, I know lots of tips. But I think when you're approaching a project this big, then there's a lot to consider to try to get there.

Michelle Ockers:

I don't think we talked about timeline. How long did the conversion of the six courses take, from sort of start to when you had the first one live, and then the last one live?

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Jennifer Waltmon:

Not very long. Well, I think I mentioned about the third week in March is when I approached everyone and said, let's see who wants to get on board this wild ride. So that was kind of the third week in March. And by mid-June, we delivered, Cathryn delivered our first course, virtually. So, only a few months. I feel like if we had done one course, we probably could have done it a lot quicker. But we said, let's get this done and ready to go for six courses. So, we were very ambitious. But I'm very proud of us. We made it happen, so yeah.

Michelle Ockers:

Justifiably so, Jen. So I'm going to put links to all of our guests' LinkedIn profiles in the show notes, as well as the AITD site, where you can see all of the training programs now live. Thank you so much, Jen, Cathryn, and Chemene, for sharing your work and your insights with us. A very timely, and great depth of experience and practical advice shared out of this undertaking. Thank you.

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About Michelle Ockers

Michelle Ockers works with business and learning leaders to realise the untapped potential of learning in organisations. She is an organisational learning strategist and modern workplace learning practitioner. Michelle works with organisations to develop and implement transformative organisational learning strategy, and to build the capability of their learning team. She delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events. Michelle also mentors learning professionals at all career stages on career planning and professional development.

Michelle received the following prestigious industry awards in 2019:

- *Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*

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