# Virtual Learning is Real Learning

**Applying the InQuire Engagement Framework®
In the Virtual Classroom**

*With 5 detailed activities and leader instructions that you can adapt for your own programs.*

**insync**training

By Jennifer Hofmann

# InSync Training: Designing and Delivering the Modern Virtual Classroom to your Organization

## About InSync Training

InSync Training invented the virtual classroom support industry in 2000 and continues to evolve its practices as the needs of training organizations change. Virtual training is all we do – and we do it better and more effectively than anyone else. Our team can quickly scale to meet client needs on a global landscape, in local languages, and any platform.

We provide:

- World-Class Facilitators and Producers - A deep bench of world-class facilitators and producers in every language, location, and culture where you work.
- Accredited Train-the-Trainer Programs - Rapidly up-skill in-house teams with accredited certifications that set the industry standard.
- Processes Built on Brain Science - System-wide brain-science based applications for virtual learning that ignite learning transfer and engagement in three areas: Emotional, Intellectual and Environmental. This is our proprietary, research-based InQuire Engagement Framework®.

InSync Training, LLC is a WBENC-certified woman-owned small business (WOSB) and widely recognized as an innovator in new and evolving learning and professional development techniques, as well as best practices supporting virtual and blended learning.

InSync regularly supports 6000+ hours of live, online instruction per month in Zoom, MS Teams, Webex, Adobe Connect, Kaltura, and other virtual classroom platforms.

We support content in 20 languages and dialects, including English, Italian, French, German, Spanish, Japanese, Russian, Portuguese and Mandarin.

## The InQuire Engagement Framework®

The InQuire Engagement Framework is an ongoing research effort at InSync to develop, refine, and implement instructional practices that produce measurable improvements to learning outcomes. The framework is developed around three factors of learner engagement – emotional, intellectual, and environmental – and includes methods to improve instructional design and delivery against organizational objectives. The framework is developed and applicable to all learning environments (including virtual training).

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# Table of Contents

The following activities, including detailed multi-page leader guide instructions, can be found at the end of this eBook.  They are all grounded in brain-science, with a focus on learner engagement as described by our InQuire Engagement Framework®.

- **Activity 1 – Create a Marketing Funnel:** Create a marketing plan and elevator speech based on data you have never seen before
- **Activity 2 – Be a Hacker and Learn to Protect Your Assets:** "Hack" a bank account to maximize your haul, and protect your assets
- **Activity 3 – Win That Sale!** Work as a team over several weeks to win a large account
- **Activity 4 – Communicating with Legos:** Recreate a block image with only some people seeing the original and the creator only be able to ask questions
- **Activity 5 – Bring a Drug to Market:** Help all employees at a pharmaceutical firm understand what it takes for a drug to get to market

# Introduction – Virtual Learning is REAL Learning



Virtual training continues to be a top priority for organizations, but the reality is the virtual experience isn't living up to our standards for quality training.

We are beyond the era of the webinar. Virtual classrooms need to become real classrooms - spaces where individuals are fully engaged and expect to learn. We need to set our expectations higher, and demand that virtual learning experiences are instructionally sound options and provide the opportunity for learning transfer, application practice, and true collaboration.

We need to translate the training model from legacy, in-person practices to a brain-science approach that deeply engages the learner in the virtual classroom.

Meant as a starting point for those interested in improving their results in the virtual classroom using a research-based approach, this ebook will discuss:
- How to distinguish between a webinar and a true training experience
- The definition of Brain-Based Learning
- How to apply Brain-Based Learning principles in the virtual classroom to help ensure environmental, intellectual, and emotional engagement
- 5 activities that you can incorporate into virtual classroom designs

It's important to us that we represent the concepts of brain-science and cognition appropriately, so we'll bring in the perspective of our lead researcher, Dr. Charles Dye.

And we'll sprinkle some additional resources and links throughout, just to keep you engaged.

# Virtual First — The New Normal



Pre-pandemic, it was practically a given that 'important' training programs required an in-person classroom experience.

The pandemic didn't fundamentally change training strategies or organizational training needs; rather, it accelerated a trend. For years, organizations have been discussing moving more and more of their training to a virtual format. It took longer to implement than many would have liked because simply, change is hard. We are all accustomed to the best training programs being implemented in the classroom. Webinars have been considered boring and often a last option when face-to-face wasn't available.

That's not our future anymore. While virtual classroom adoption of this magnitude may have taken another decade or more without the pandemic, we are not going backwards. Here at InSync, we expect that 80% or more of the content that has been re-implemented in virtual live instruction will stay there.

This is why:

- **A hybrid model of working is driving a virtual model of learning.** If employees are splitting their time between homes, remote offices, and central offices, organizations need to decide what types of activity should take place in each location. And chances are, learning will largely take place at home offices or with audiences in hybrid learning environments – the only way to effectively allow everyone to participate as peer learners is to harness virtual learning (both live and self-paced). Anyone who has ever delivered to a part in-person, part virtual audience knows this – learners need to interact as peers in collaboration and problem solving, which would be vastly different if only some of the audiences are virtual.

- **A philosophy of 'virtual first' is being applied to decisions about training implementation (and employees are expecting it.)** In the "before times", it was a common perception that more rigorous training programs required an in-person classroom experience. Now, with years of experience proving that much of this content can be taught effectively in a virtual environment, training programs are being designed for virtual delivery first. Strong arguments will need to be made to justify in-person classes, especially those that include travel related expenses. There are, of course, strong arguments to be made for some face-to-face programs – especially where in-person collaboration and community building are critical.

- **The skills needed for working in the new economy is directly related to learning in the new economy.** As the workforce becomes more virtual, global, and mobile, workers will need to develop skills that help them be successful – for example, fully 63% of sales either start online or will be accomplished with virtual sales, rather than in-person. As training professionals, we can partner with our businesses to not just provide the content they asked for, but to demonstrate the skills required for people to be successful in this interconnected world using virtual technologies and methods.

- **Virtual classroom designs MUST continue to evolve to minimize so-called "Zoom Fatigue."** We really need to consider this experience from the learners' perspective. (Jane Bozarth talks about this in her post, Normal. Ish.) In 2020 and 2021, learners put up with poorly designed virtual classes that went on all day while on video…smiling. It was a lot of work to learn, but learned they did – it was a time like no other, and we all worked hard to make the best of whatever situation we were in. At some point, if things don't change, and we adapt learning treatments to virtual delivery, it won't end at "Zoom Fatigue", it'll end at "Zoom Attrition" - we'll just exhaust them into logging off. (**Listen: Zoom Fatigue and Video in Hybrid & Virtual Training Delivery**.) I've said in the past that a lack of design and preparation in the virtual environment is much more obvious than a lack of design in the face-to-face environment – instructors can't just "wing it" based on their presence in the room and the design can't just present materials – the learner has to be engaged. As an industry, we will need to adopt instructional strategies and techniques that accommodate this "new normal."

# How Brain Science is Transforming Virtual Training

## Dr. Charles Dye



In the past few years, you may have seen the term "brain science" used to introduce some (purportedly) new and improved approaches to instruction, whether it be a design, instructional technique, or instructional delivery methodology (e.g., virtual training). As with many terms of art, the meaning of "brain science" lacks some precision – indeed, readers must infer the meaning from the context, whether it be marketing materials, research, or instructional guideline.

The reality is that most experienced instructional professionals (designers, instructors, etc.) have been practicing specific implementations of brain science for some time – a simple example of brain science in learning and development will illustrate:

*We know from neuroscience that the amygdala in the brain processes emotion, including fear response – the perception of threat ("a threat stimulus") causes the amygdala to trigger various parts of the body in preparation for "flight or fight" including the release of hormones, adrenaline, etc.*

*Concurrently, other parts of the brain (the hippocampus and pre-frontal cortex) immediately begin a higher-order evaluation of the threat to determine a best course of action. At this point, higher order processes (including those relating to non-threat related tasks) are set aside to optimize the threat evaluation.*

*"OK", you say, "what's this got to do with a Zoom webinar?"*

*Great question – let's get to it.*

*In many instructional deliveries, experienced facilitators will strive to set up some ground rules for interaction during the session. Part of the ground rules involve creating a psychologically safe environment wherein learners feel free to ask questions without judgment or ridicule from their peers.*

*Why?*

*Turns out, it has to do with fear and the amygdala. If a learner is afraid of appearing ignorant by asking a question, that fear will not only preclude them from asking the question, but will, in fact, **supplant a great deal of the cognitive processes involved in learning**.*

While this is a gross simplification of complex processes, the example bears out that neuroscience can, and frequently does, inform our instructional practice. Even if we aren't aware of why setting ground rules before the virtual training begins is important, we know that doing so typically produces a better level of interaction with learners.

And so it is that for more than 5,000 years, without the benefit of an EEG, humans have been trial-and-erroring our way through instructional techniques and methods to develop best-of-breed practices to teach and learn in various contexts. Caine and Caine (1991) sought to develop a set of guidelines based on science-based interventions to enhance instructional treatment a priori based on what we've learned about the brain and cognition and ensure that the methodology and techniques applied provide measurable outcomes.

## What is Brain Science?

The term brain science, at least in the context of learning and development, was coined in 1991 by a husband and wife research team focusing on instructional practices in primary and secondary education (Caine & Caine, 1991). The research focused on applying an interdisciplinary approach to learning that included cognitive psychology, neuroscience, and has expanded to include computer science, biology, anthropology, and related disciplines.

Cognitive psychology involves the study of mental processes—all of the things that go on inside your brain, including creativity, perception, thinking, memory/recall, attention, language, problem-solving, and learning, and the observable phenomena around these processes with the environment. There are numerous practical applications for cognitive psychology, ranging from therapeutic treatment for brain injury to developing decision making protocols to enhancing instructional effectiveness to instructional strategies in the classroom to enhance recall and application.

Neuroscience is a field of study encompassing the various scientific disciplines dealing with physical structures, development, function, chemistry and pathology of the brain and nervous system. Like cognitive psychology, neuroscience has a broad application in medicine, therapy, and education.

Within the context of learning and development, it may help to think about
- neuroscience as studying the physical changes in the brain while learning,
- and cognitive psychology as studying the intangibles of thought and reasoning and environmental interactions as learning occurs.

## Measurability and the Learner

If we think about the learner in one of the diverse learning opportunities and environments available today, a recurring theme is the use of the term "engagement". A casual review of current literature in academic research finds more than 300 scholarly articles and more than 2,000 trade articles in the past two years alone that use some variation of the term "learner engagement", but few commentators define learner engagement explicitly. It is perhaps the ubiquity of the usage that allows researchers and commentators to continue the practice without a strict definition – it is assumed everyone knows what is meant by the term.

In the industry, learner engagement has developed into a short-hand term that loosely represents an amalgam of learner subject-matter interest/expertise, attitude, motivation, and mastery. Moreover, it is often explicitly or implicitly assumed that an engaged learner will achieve better outcomes against measurable rubrics than one who is not engaged, and the challenge for learning and development professionals has been re-cast into development of engaging instructional experiences. If the learning is engaging, the thinking goes, then the instruction will be a success.

Returning to the precepts of Caine and Caine (1991), however, we need to ask – What exactly is engagement, how is it measured, and what are the outcomes of an engaged learner versus a disengaged learner?

## The InQuire Engagement Framework®

InSync began research in virtual learning experience in 2005, well before the virtual classroom became ubiquitous in learning and development. Most recently, InSync developed and began validating a scale, instrumentation, behavioral artifacts, and measures related to the latent construct of learner engagement and applied it to the virtual classroom learning environment to assess the effects of learner

engagement on instructional outcomes. The findings of the research (still ongoing) can be summarized as "engaged learners achieve better outcomes" (a surprise to few, if any).

The important thing to take away from the research is not that InSync spent a lot of effort verifying something we already knew (because we really didn't know it, nor could we measure it) – instead, the takeaway should be that InSync now has a well-defined and measurable framework of instructional techniques and behavioral indicia that produces better learning outcomes through a construct called "learner engagement".

Based on the research, there are two key things to understand about the construct:
- Learner engagement is highly dynamic.
- Learner engagement factors (intellectual, emotional, and environmental) moderate each other – that is, emotional engagement can have a direct effect on intellectual engagement, etc.

The InQuire Engagement Framework® is an ongoing research effort at InSync to develop, refine, and implement instructional practices that produce measurable improvements to learning outcomes. The framework is developed around three factors of learner engagement – emotional, intellectual, and environmental – and includes methods to improve instructional design and delivery against organizational objectives. The framework is developed and applicable to all learning environments (including virtual training).

## How Designers, Facilitators, and Producers Impact Engagement

If we think about the learner engagement as a desired outcome within the learning experience, the instructional designer and instructional team roles can be thought of as instantiating and sustaining engagement throughout the experience. As a first matter, everything begins with the design. Key strategic

decisions are made in the instructional design and development process that have far-reaching consequences in delivery – this is not a new concept, but the consequence of poorly made decisions early in the design process are amplified in the virtual classroom because of the lack of mitigating circumstances (a strong facilitator can make a lot of problems go away).

If designers reflect on the need to engage learners, what they're really trying to do is align the intent of the learner with that of the instruction. A failure to do so vastly reduces the chances of learner engagement and will be perceived as violating a basic adult learning principle (Knowles, 1981). The fact of the matter is that relevance is perceived, not an absolute fact, and the relevance and applicability under Knowles' andragogical model can better be thought of as a consequence of alignment of learner intent with desired learning outcome in the instructional program, an alignment that the designer can design into the training experience and the instructional team make clear to the learner. Such alignment promotes engagement along all three factors to some extent, most

notable in the intellectual factor.

The instructional team of facilitator and producer work within the instructional experience to manage interaction between individual learners, lead the instructional experience for learners, promote engagement within the subject matter through discourse and interaction, and manage individual needs within the environment. Learner engagement is profoundly dynamic – it's easy to "lose" a learner if there's a misstep, intentional or not. The challenge in a virtual training setting is that missteps are easier to make, and so, extensive care should be taken to ensure all learners are capable of interacting and provided an opportunity to engage with all elements of the learning environment (their peers, the facilitator, and the subject matter being discussed) and sustain the perceived relationship between the learner and the desired outcome of the instruction. The InQuire Engagement Framework provides a variety of observable criteria and tactics within the instructional practice to sustain engagement and remediate a learner that may be lost.
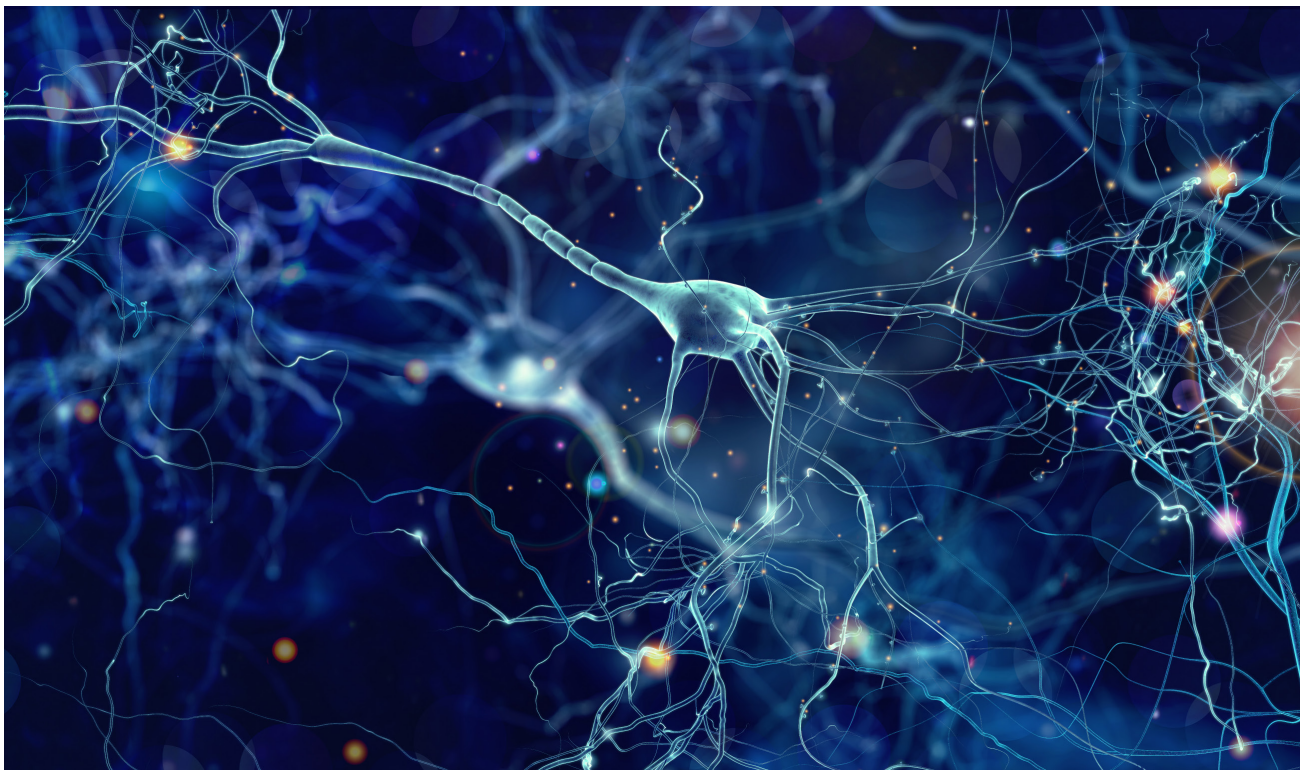
# Webinars & Virtual Training — What's the difference?



Here's a quick litmus test for determining if a virtual session is a webinar or training program.

Critically consider the last virtual program you attended.

Ask yourself, "If I had watched a recording of the session, would I have had the same experience as if I had attended the session live?"

- If you answer, "Yes," that session was a webinar. It may have been a super interactive webinar with meaningful content that captured your attention, but it wasn't TRAINING.
- If you answer, "No, I would not have gotten the same result watching a recording of this session," then you have attended virtual training. You got beyond transferring knowledge and ensuring comprehension, and started to apply what you learned, and left being able to analyze your own performance.

There is nothing inherently wrong with a webinar, but you, and your learners need to be clear as to the intent of the program. If it's training, then learners need the opportunity to practice and apply what they have learned, and that learning needs to be measured.

Designing for these types of training outcomes, especially after years of webinar style data dumps, can be challenging – and we need to convince our learners that our new approach to virtual training is worth their time.

Using a brain-science approach that focuses on engagement makes positive outcomes much more achievable, and turn your webinars into REAL training.

# The Principles of Brain-Based Learning



Research by Caine and Caine is the basis for what we call "brain based" or "brain science." It's about HOW people learn.

In this model, environment matters. Our job is to orchestrate learning so that as many aspects of learning are engaged as possible in order to create an ENRICHED environment for learning.
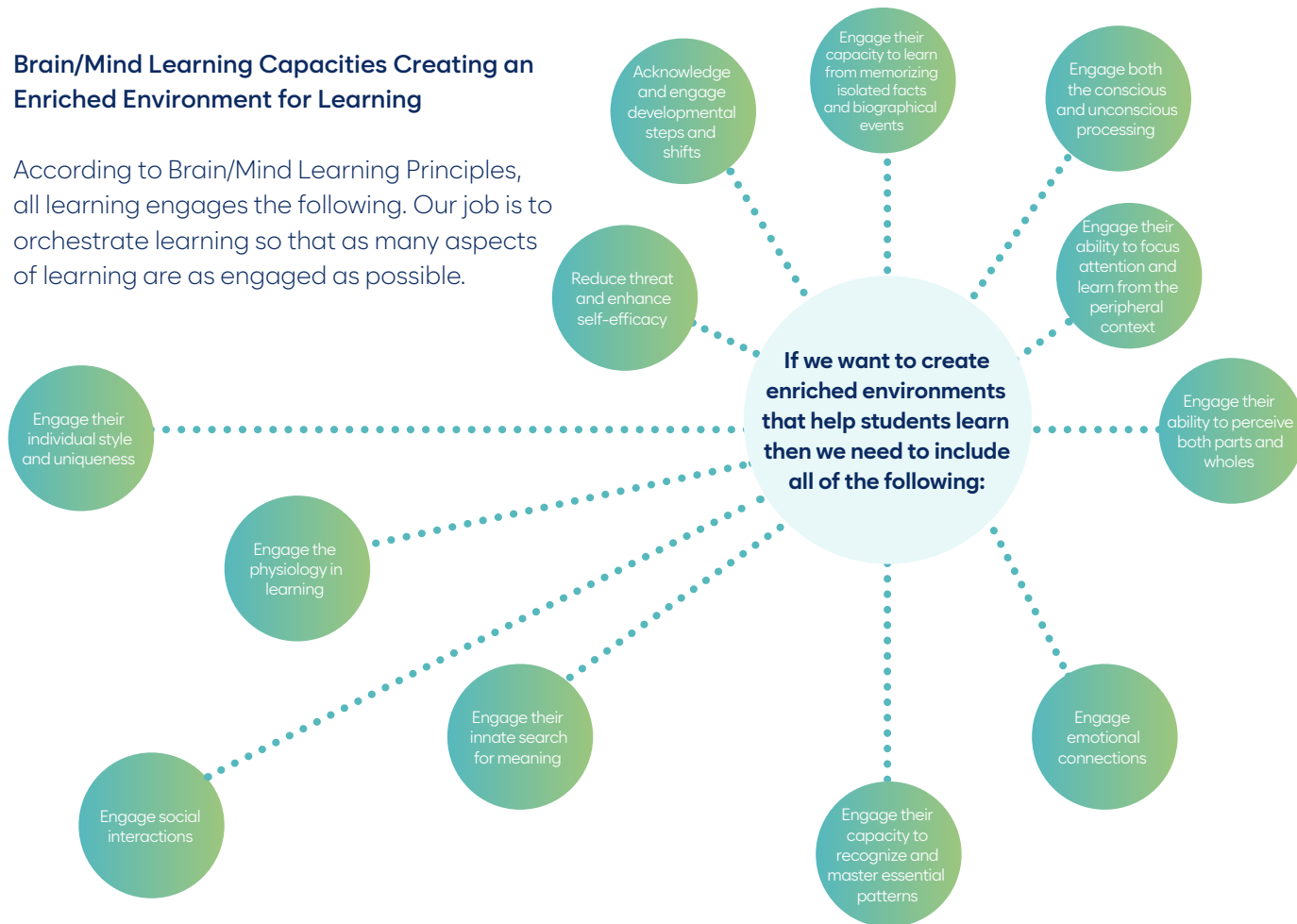
Remember, training is an intervention to bring about change. We must understand how human beings learn and place that understanding at the very center of teaching in order to get to that change. Here is a high level explanation of the research.

You can learn more by buying their book,
*12 Brain/Mind Learning Principles in Action.*
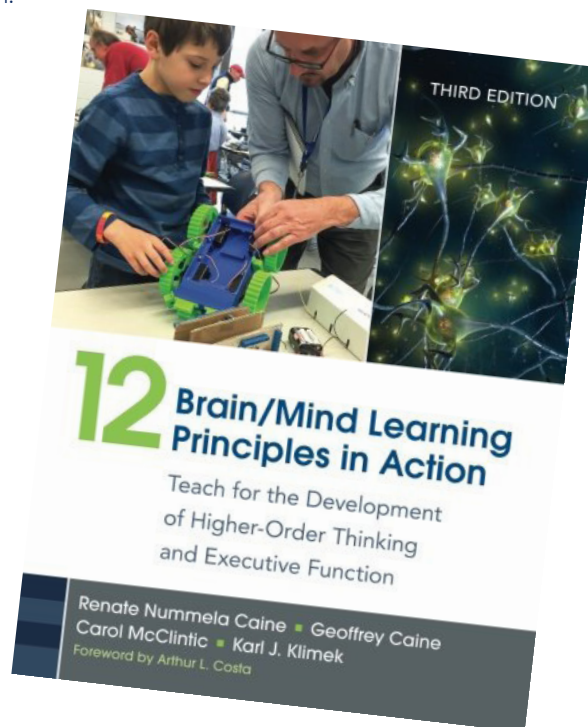
## Brain/Mind Learning Capacities Creating an Enriched Environment for Learning

According to Brain/Mind Learning Principles, all learning engages the following. Our job is to orchestrate learning so that as many aspects of learning are as engaged as possible.

Acknowledge and engage developmental steps and shifts

Engage their capacity to learn from memorizing isolated facts and biographical events

Engage both the conscious and unconscious processing

Reduce threat and enhance self-efficacy

Engage their ability to focus attention and learn from the peripheral context

**If we want to create enriched environments that help students learn then we need to include all of the following:**

Engage their individual style and uniqueness

Engage their ability to perceive both parts and wholes

Engage the physiology in learning

Engage their innate search for meaning

Engage emotional connections

Engage social interactions

Engage their capacity to recognize and master essential patterns

## Brain-Based Principles

1. The Brain is a **Living System**

2. The Brain/Mind is **Social**

3. The **Search for Meaning** is Innate

4. The Search for Meaning Occurs Through **Patterning**

8. Learning Always Involves **Conscious and Unconscious Processes**

7. Learning Involves Both **Focused Attention and Peripheral Perception**

6. Every Brain Simultaneously Perceives and Creates **Wholes and Parts**

5. **Emotions** are Critical to Patterning

9. We have at Least ways of **Organizing Memory** – Spatial Memory and Role Learning

10. Learning is **Developmental**

11. **Complex Learning** is Enhanced by Challenge and Inhibited by Threat

12. Every Brain is **Uniquely Organized**

# Brain-Based Learning and
# the InQuire Engagement Framework®



## Defining the InQuire Engagement Framework®

The InQuire Engagement Framework® is an ongoing research effort at InSync to develop, refine, and implement instructional practices that produce measurable improvements to learning outcomes. The framework is developed around three dimensions of learner engagement – emotional, intellectual, and environmental – and includes methods to improve instructional design and delivery against organizational objectives. The framework is developed and applicable to all learning environments, including virtual training and hybrid learning.

## The Role of Engagement

When designing for the virtual classroom and hybrid learning environments, it's important to keep the following things in mind:

- The virtual classroom amplifies effects often overlooked in face-to-face settings.
- It is critical to measure the quality of learning transfer and the quantity of engagement points for learners in the learning experience.
- The learning environment has many consequences for learners – some good, some bad (e.g. "Zoom Fatigue")
- The virtual environment has many more capabilities for the learner to interact and engage.
- It is important to recognize that there is an "environment within the environment." It's not just the virtual classroom but the environment surrounding the learner that makes an impact.

These characteristics must be acknowledged and accommodated to maximize learner engagement.

Engaged learners:
- Perform better on assessments related to the instructional materials and desired outcomes;
- Are more likely to apply what they have learned; and
- Are more likely to want to learn more.

Using a brain-science approach means we develop measures and techniques to ensure learners are measurably engaged in the experience.

Engagement in the virtual classroom is more than answering polls and watching other people on video – based on our research, there are three dimensions of learner engagement to consider.

## What is Learner Engagement?

Let's start with what learner engagement IS NOT. Learner engagement is not motivation, which is a character trait. It's not attitude; emotion is part of learner engagement, but it's pre-existing (I might be motivated to come listen to training, but I might lose that). It's not the competence of the trainer or active participation. As you know, just because a learner is completing an activity, or following provided directions for an exercise, it doesn't mean that they are engaged in the learning process.

To fully understand learner engagement, we need to consider the mental state of our learners and the reaction caused by the learning treatment.

Anecdotally, we all can picture what a lack of engagement looks like. But when we try to pin down an actual definition, things become more blurred. Some liken engagement to motivation, while others talk about causal factors affecting engagement, without providing a definition at all. Looking to academic sources adds to the confusion.

A casual review of academic research from the past two years finds more than 300 scholarly articles and more than 2,000 trade articles that use the term, "engagement." However, the fact is that only a couple of formal research efforts have looked at learner engagement at all, for all the ballyhoo associated with it.

Organizational behaviorists have considered "worker engagement" and its factors of "Emotional Engagement" and "Intellectual Engagement." Initial research has found that the traditional engagement model from Organizational Behavior and other research is a good first step, but misses a key factor that the modern classroom brings into the learning experience—the learning environment.

Our definition of modern learner engagement, therefore, includes three factors:
- An emotional response to the training: How does the learner "feel" about the content and its presentation/treatment?
- An intellectual response to the training: Does the instructional experience require and involve the learner's intellect?
- An environmental response to the learning: Do the learners interact with the learning environment and is the environment changed because of the training?

If we constrain engagement with these factors, differences between engagement and concepts such as collaboration and interaction become clear.

Collaboration is a social learning exercise that uses a set of tools to interact. Interaction is a stimulus / response interaction between the learner and some aspect of the instructional treatment. Engagement is an internal learner dynamic that varies throughout a learning experience, which can affect motivation, persistence, and satisfaction.

Enter, Stage Right...The Modern Classroom

I define the modern classroom as, "the superset of possible learning environments, and related instructional treatments and techniques, in which a learner may find him or herself in the corporate training domain."

Modern classroom instructional contexts include formal and informal content treatments, as well as, performance support and on-the-job training. Treatments leverage a wide spectrum of techniques to accomplish their objectives, ranging from immersive simulation, to YouTube videos and mobile-enabled job aids.

It likely comes as no surprise to learn that each treatment has strengths and limitations that affect the implementation for your organization. These differences are important for your implementation, and are similarly important in how they affect learner engagement.

Engagement is an internal learner dynamic that varies throughout a learning experience, which can affect motivation, persistence, and satisfaction.

## Three Dimensions of Learner Engagement

Since the introduction of the virtual classroom in the 1990s, we've been concerned with how we can ensure people are actually learning, and it's become increasingly clear that interacting in the digital environment is very different than interacting face-to-face.

Virtual classrooms provide many opportunities to ensure that learning happens – we just need to make sure we know what they are. To take advantage of the opportunities afforded by the virtual classroom, the virtual facilitator skill set must evolve.



FOSTER *Environmental* ENGAGEMENT

NURTURE *Emotional* ENGAGEMENT

STIMULATE *Intellectual* ENGAGEMENT
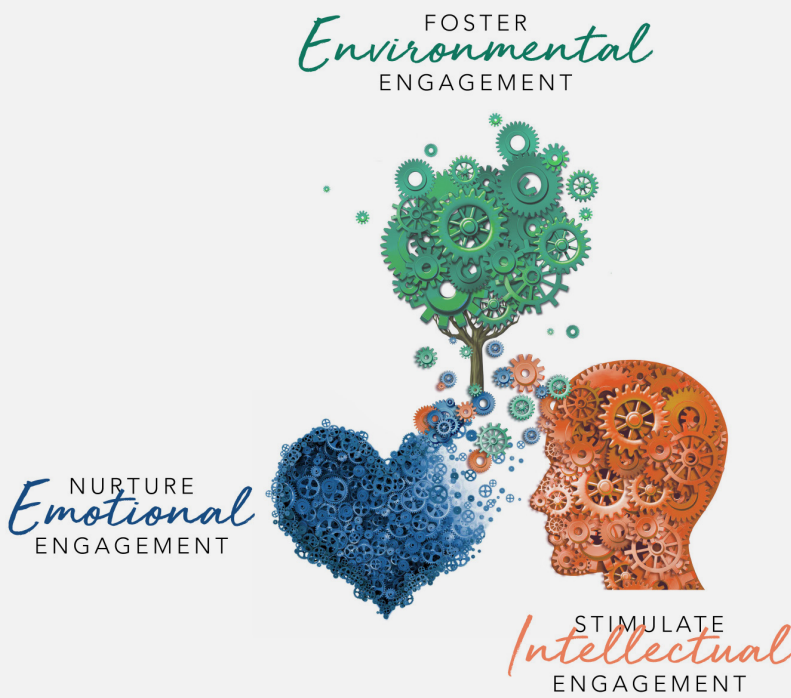
**1. Environmental Engagement**
How the learner's interaction with the learning environment changes both the environment and learner's perception of the experience.

Goal: Create a place where people can, and want to learn.

**2. Intellectual Engagement**
What the learner thinks about the information presented in the learning experience.

Goal: Stimulate learner curiosity and emphasize relevance and applicability.

**3. Emotional Engagement**
How the learner feels about the learning experience.

Goal: Enable learners to feel good about the experience, and nurture a sense of community.

These three dimensions of engagement are the foundation for our InQuire Engagement Framework®.

Let's look at them in more detail.

## What is Environmental Engagement?

If a tree falls in the woods and no one witnesses it, does it make any noise? If an individual hates the virtual classroom, does it have an impact on the success of the program?

Of course it does.  The learning environment and the learner are both changed by contributions from the learner, interactions with the other learners, delivery of content, and interactions with the facilitator. In the case of the virtual classroom, this environmental engagement begins with comfort with the capabilities and requirements of the virtual classroom.

What is environmental engagement and why should it matter to a virtual classroom professional? Our research tells us that:

*Environmental engagement relates to the perception of and interaction with the learning environment itself. We consider: How do learners perceive the learning environment? Does it create a constructive, effective experience? Does the learner interact with the environment?*

*The facilitation process aligns with both design and delivery within a particular environment, like the virtual classroom. When a learner is environmentally engaged, the learner knows how to interact with the environment and easily perceives opportunities when they can connect and interact with the content, peer learners, or the facilitator.*

Facilitators often think the virtual learning environment exists outside of our control. In reality, though, we can positively manage and contribute to the environment to foster strong learner engagement in the virtual classroom environment.



# Environmental Engagement

How the learner's interaction with the learning environment changes both the environment and learner's perception of the experience.

**Goal:**
Create a place where people can, and want to learn.

## Eight Techniques that Foster Environmental Engagement in the Virtual Classroom

If a tree falls in the woods and no one witnesses it, does it make any noise? If an individual hates the virtual classroom, does it have an impact on the success of the program? Of course it does.  The **learning environment and the learner** are both changed by contributions from the learner, interactions with the other learners, delivery of content, and interactions with the facilitator.

Learn more about how to apply these techniques by visiting our blog.

| | | | |
|---|---|---|---|
| 1. FOSTERING COMFORT AND DIGITAL FLUENCY IN THE VIRTUAL CLASSROOM ENVIRONMENT | 2. FOSTERING A DIVERSE ENVIRONMENT THAT IS ACCESSIBLE TO ALL LEARNERS | 3. FOSTERING DIVERSITY OF OPINIONS AND OPEN CONVERSATIONS | 4. FOSTERING CONVERSATION WITH LEARNERS |
| 5. FOSTERING POSITIVE ENGAGEMENT IN THE LEARNING ENVIRONMENT | 6. FOSTERING A WILLINGNESS TO CHANGE AND ADOPT NEW KNOWLEDGE AND SKILLS | 7. FOSTERING UNDERSTANDING BY ENCOURAGING LEARNER QUESTIONS | 8. FOSTERING INTERACTION BETWEEN LEARNERS |

## What is Intellectual Engagement?

Can the virtual classroom actually achieve the same learning results as a face-to-face approach? Or is it a 'second best' solution?

The answer is, if our approach is authentic and well-designed, virtual learning professionals can ensure that virtual learning is REAL learning. And help learners recognize this as well.

In the same way we can foster environmental engagement, we have a unique opportunity in the virtual classroom to stimulate intellectual engagement. This opportunity isn't NEW - great teachers have piqued our interest and motivated our participation since the earliest educational experiences. But many of us have doubts as to

whether intellectual engagement in the virtual classroom can rise to the levels we expect in a more traditional approach.

Intellectual engagement involves more than learners feeling mentally inspired by training content.  We must recognize that the learning environment is changed by *how* people are learning, and *how much* they are learning, and manage the class accordingly.

Our research uncovered that facilitators need to focus on specific, proactive action in order to support this dimension of engagement.

Research demonstrates that activities that might exemplify this aspect of learner engagement would include asking sophisticated questions

(particularly "follow-on" questions that build on a point made earlier in the same discussion) and a sense of alignment of subject matter with task and performance (Cooper, 2010) – they may make frequent comparisons to practices "in the field," and questions from such a person would be directed at the question of real-world implementations of theoretical or activity-based concepts presented in the learning experience.

## Intellectual Engagement

What the learner thinks about the information presented in the learning experience.

**Goal:** Stimulate learner curiosity and emphasize relevance and applicability.

### Techniques that Stimulate Intellectual Engagement in the Virtual Classroom

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Learn more about how to apply these techniques by visiting our blog.

1. CONNECTING CONTENT TO INDIVIDUAL EXPERIENCES

2. FOCUSING ON HOW MUCH INDIVIDUALS ARE LEARNING AND NOT FOCUSING ON SLIDES

3. ENSURING LEARNING IS TRANSFERRED

4. DEMONSTRAT-ING SUBJECT MATTER EXPERTISE

5. HIGHLIGHTING AND INCORPO-RATING COURSE MATERIALS INTO THE CONTENT FLOW

## What is Emotional Engagement?

We often frame corporate training as a compulsory process: complete these requirements and move on to the next task. It's a reinforcement of a "Push" learning culture that is content-centric, and not a personal experience.

Effective learning involves an emotional component. Employees want to do well on the job. They hope to have the skills required to meet their goals. They stress about balancing their professional responsibilities while upskilling. The training function has an obligation to recognize these emotions, and we can improve virtual training experiences by addressing them in their delivery approach.

It's important to realize that the learning experience is changed by how learners feel about the experience. Facilitators should strive to enable individuals to feel good about the experience, and even nurture a sense of community.

Charles Dye's research shows that emotional engagement serves as the third influential component of learner engagement, along with addressing environmental and intellectual factors. Charles clarifies:

*"Experienced facilitators focus on activities that might exemplify this aspect of learner engagement, including positive collaboration with peers (McDonald & MacKay, 1998; Calvani, et al., 2010), articulation of shared experience and social modeling (Bandura, 1986), scaffolded development/demonstration of skill/expertise with a facilitator (Vygotsky, 1986), and the sense of self-worth that comes from participation in a learning experience (Cooper, 2010)."*
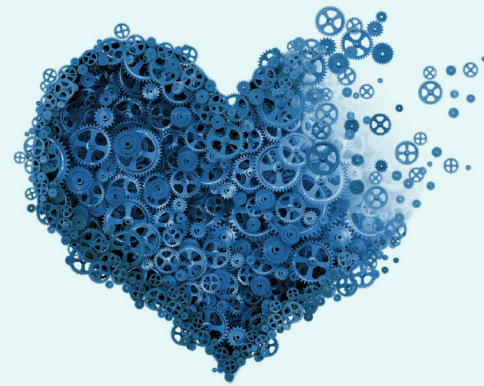


**Emotional Engagement**

How the learner feels about the learning experience.

**Goal:**
Enable learners to feel good about the experience, and nurture a sense of community.

## Seven Techniques that Nurture Emotional Engagement in the Virtual Classroom

We often frame corporate training as a compulsory process: complete these requirements and move on to the next task. It's a reinforcement of a "Push" learning culture that is content-centric, and not a personal experience.

Effective learning involves an emotional component. Employees want to do well on the job. They hope to have the skills required to meet their goals. They stress about balancing their professional responsibilities while upskilling. The training function has an obligation to recognize these emotions, and facilitators can improve virtual training experiences by addressing them in their delivery approach.

It's important to realize that the learning experience is changed by how learners feel about the experience. Facilitators should strive to enable individuals to feel good about the experience, and even nurture a sense of community.

Learn more about how to apply these techniques by visiting our blog.

| | | | |
|---|---|---|---|
| 1. INSPIRING CONFIDENCE IN THE VIRTUAL CLASSROOM EXPERIENCE | 2. DEMONSTRATING THAT ALL CONTRIBUTORS AND INTERACTIONS ARE VALUED | 3. NURTURING AN ENVIRONMENT IN WHICH LEARNERS FEEL SAFE ABOUT OFFERING OPINIONS AND ASKING QUESTIONS | 4. CREATING AN ENVIRONMENT WHERE INDIVIDUALS ENJOY LEARNING |
| 5. ENCOURAGING LEARNERS BY PROVIDING POSITIVE, PERSONALIZED FEEDBACK ON CONTRIBUTIONS AND PROGRESS | 6. BOLSTERING EMOTIONAL ENGAGEMENT BY REINFORCING WHY THE CONTENT IS IMPORTANT | 7. ENCOURAGING A COMMUNITY AMONG LEARNERS | |

# Mapping the InQuire Engagement Framework®
# to Brain-Based Principles



This graphic shows how InSync aligns the concepts of "learner engagement" and "brain-based" principles. We don't force fit them! The connections need to be natural, or they don't fit at all.

## Alignment of Brain-Based Principles & InQuire Engagement Framework

This graphic shows how InSync aligns the concepts of "learner engagement" and "brain-based" principles. Not every brain-based principle aligns with our engagement model – but there are some strong connections. There was a desire to 'force-fit' a relationship, but we soon realized the connections need to be natural, or they don't fit at all. **What relationships do you see that we have not identified?**



**1. The Brain is a Living System**
Environmental Engagement
WHERE we learn matters. This is relevant to the concept of the meta-environment – that is, the environment in which the individual is learning. Learning on a phone while waiting for a flight is possible, but may not lead to the best outcome because the external environment and its effects on the ability of the learner to engage.

**2. The Brain/Mind is Social**
Emotional Engagement
People learn more effectively when their needs for relationships are engaged and honored. Moving away from lectures and webinars into true virtual learning programs creates better connections and higher comfort levels within the learning environment.

**3. The Search for Meaning is Innate**
Intellectual Engagement
People learn more effectively when their needs for relationships are engaged and honored. Moving away from lectures and webinars into true virtual learning programs creates better connections and higher comfort levels within the learning environment.

**4. The Search for Meaning Occurs Through Patterning**
Intellectual Engagement
We automatically TRY to create connections between seemingly unrelated pieces of content. It reinforces the power of NARRATIVE, and reinforces the importance of the alignment of intent of the learner with that of the instruction.

**8. Learning Always Involves Conscious and Unconscious Processes**
Intellectual, Environmental and Emotional Engagement
This is a very holistic principle. We learn much more than we ever consciously understand. Most of the signals that are peripherally perceived enter the brain without our awareness and interact on unconscious levels (environmental.) Learners become their experience and remember what they experience, not just what they are told. And then, back on the job, everything comes together.

**7. Learning Involves Both Focused Attention and Peripheral Perception**
Intellectual Engagement
The learning is not only relevant and understandable IN THE MOMENT, but also when it is applied to the job. Creating immersive, authentic learning provides context where knowledge is used and is expanded upon, and learners interact with each other to make learning even more meaningful

**6. Every Brain Simultaneously Perceives and Creates Wholes and Parts**
Environmental Engagement
Perception is of the environment is critical to the ability to engage with it. A learner's capacity to perceive and act on contributions from others and the capabilities of the learning environment is the environmental factor of engagement – it's the difference between being lectured at and participating in a seminar where a learner contributes.

**5. Emotions are Critical to Patterning**
Emotional Engagement
To be able to successfully create patterns and connections between seemingly unrelated pieces of content, we need to create PSYCHOLOGICAL SAFETY by providing the learner a safe and meaningful forum in which contributions are recognized, peer esteem is derived, and contributions are valued.

**9. We have at Least ways of Organizing Memory – Spatial Memory and Role Learning**
Intellectual Engagement
Memory and recall are not directly related to engagement – however, they do influence potential contributions by the learner and increase confidence in the learning experience

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**10. Learning is Developmental**
Intellectual Engagement
We all learn better if our individual differences in experiences and knowledge are considered.

**11. Complex Learning is Enhanced by Challenge and Inhibited by Threat**
Intellectual and Emotional Engagement
The "challenge": The material must be perceived as within the capability of the learner, making the learner more confident. This emotional response leads to engagement with the material. However, if the material (or the environment) is threatening – learners are called out for wrong answers or the materials are perceived as beyond the capability of the learner, both emotional and intellectual engagement are reduced or eliminated.

**12. Every Brain is Uniquely Organized**
Intellectual, Environmental and Emotional Engagement
The unique nature of the brain means that the learning environment needs to be accessible to learners in multiple ways, and provide an abundance of opportunities to react and contribute in such a way that the interaction between learner and the environment is enhanced.

# Debrief Activities Because We Need Virtual Learning That Sticks



We know that learning only "sticks" after learners have a chance to apply what they've learned and then reflect on the experience. That's when curiosity is stimulated, and intellectual engagement is maximized. It aligns with adult learning theory. Including debrief activities for adults is especially important - when we know content is relevant and that our opinions are valued, we really start to pay attention.

Learning can occur in the virtual classroom. Each activity needs to be thoughtfully designed by engaging learners environmentally, intellectually, and emotionally.  But the best activity in the world won't result in learning transfer if we don't take the time to discuss the process and debrief the experience.

It is critical to conduct a thoughtful and meaningful debrief after practice activities. Here is a list of common, yet powerful, debriefing techniques that you can use in your virtual classroom. Try them all. Some are meant to debrief simple activities; some are more complex.

**Click to view and download the full infographic**

# Conclusion

As an industry, L&D has done a great job of pivoting from face to face to the virtual classroom. With literally no preparation, we went to 100% virtual delivery.

Many of the solutions adopted were expedient, met the short-term goal of getting people online together, but were less-than-optimal in actual learner outcome. While virtual instructional delivery adoption was certainly accelerated by the pandemic, it should now be the focus of learning and development professionals to enhance their instructional practice to revisit their approach and include a variety of instructional strategies that are effective and engaging for the learner, particularly in the virtual classroom, as it appears the impacts of the pandemic are still in effect around the globe.

Someday in the near term the pandemic, from all analysis, will become endemic, and we as an industry need to learn to re-focus on instructional solutions that address the learners needs longer term, and don't just get training done, but get it done efficiently and effectively. The InQuire Engagement Framework® provides a means to do that and provides a meaningful and measurable relationship between the instructional treatment, learner outcome, and organizational objective.

Now, it's time to go to the next level. Virtual training is here to stay, and we can all do better. By actively designing with the intention of engaging learners using this brain-science approach, and measuring the results, you'll see your virtual training evolve to be a critical and valued part of your ongoing learning strategy.

# Appendix

# About the Author Jennifer Hofmann

Jennifer Hofmann, virtual classroom and blended learning visionary, is founder and president of InSync Training, LLC. InSync is a global virtual consulting firm specializing in the design and delivery of engaging, innovative, and effective virtual learning. The company is a leader in the L&D industry in world-class virtual design, facilitation, and production. InSync delivers services using a proprietary virtual learning and engagement model called the InQuire Engagement Framework® which uses brain science best practices to ignite and sustain learner engagement.

Under Jennifer's expert leadership, Inc. 500|5000 named InSync Training the 10th Fastest Growing Education Company in the U.S. in 2013, the 20th Fastest Growing Education Company in 2014, and to their Inc. 5000 list for four consecutive years. Dell Women's Entrepreneur Network, Forbes Most Powerful Women Issue, The NativeAdVantage, and Goldman Sachs 10,000 Small Businesses Program have all recognized her entrepreneurial drive.

Jennifer has written, and contributed to, a number of well-received and highly-regarded books including: *The Synchronous Trainer's Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!: Tips, Techniques, and Ready to Use Activities for the Virtual Classroom, and Tailored Learning: Designing the Blend That Fits with Dr. Nanette Miner*. Her latest book, *Blended Learning*, introduces a new instructional design model that addresses the needs of the modern workplace and modern learners.

Jennifer frequently presents in-person and online for leading learning organizations including The Learning Guild, Training Industry, HR.com, and Training Mag Network. She serves on the Board of Directors for International Accreditors for Continuing Education and Training (IACET), supporting the accreditation InSync has maintained for 15 years.

Subscribe to Jennifer's blog Getting InSync (https://blog.insynctraining.com) and connect with her on LinkedIn for new content and timely insight.

# Brain-Based Activities that WORK
# in the Virtual Classroom

The following activities, including detailed multi-page leader guide instructions, can be found at the end of this eBook.  They are all grounded in brain-science, with a focus on learner engagement as described by our InQuire Engagement Framework®.

- **Activity 1 – Create a Marketing Funnel:** Create a marketing plan and elevator speech based on data you have never seen before
- **Activity 2 – Be a Hacker and Learn to Protect Your Assets:** "Hack" a bank account to maximize your haul, and protect your assets
- **Activity 3 – Win That Sale!** Work as a team over several weeks to win a large account
- **Activity 4 – Communicating with Legos:** Recreate a block image with only some people seeing the original and the creator only be able to ask questions
- **Activity 5 – Bring a Drug to Market:** Help all employees at a pharmaceutical firm understand what it takes for a drug to get to market

# Activity #1:
# Create a Marketing Funnel!

**Goal/Learning Outcome**

To introduce the concept of a "marketing funnel" (a sales model for turning leads into customers)

**Learning Challenge**

Learners must use data collected about their target audience to create a marketing plan and elevator speech for selling Apple AirPods.

**Audience**

First-year consultants from all over the world; up to 50 people in a virtual classroom who don't know one another

**Approach**

Learners work in small groups to develop a plan for marketing Apple AirPods to a target audience (class participants).

**Reflection/Debrief**

Learners examine the reasons behind the similarities and differences between each group's approach to the same data.

**Brain-Based Engagement**
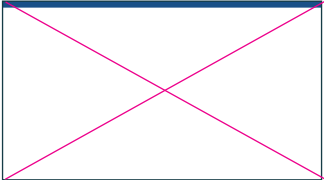
When presented with seemingly unrelated pieces of content, our brains automatically attempt to make sense of the information by creating connections between the different elements. This activity intellectually engages learners by allowing them to create their own stories in response to a set of data. It reflects the power of NARRATIVE and reinforces the importance of aligning instruction and learner intent.
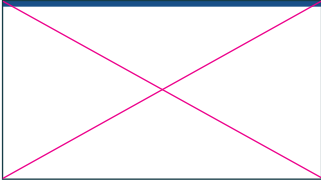
# ACTIVITY GUIDE: Create a Marketing Funnel!
## Virtual Classroom Platform: Zoom

| SLIDE | FACILITATOR | PRODUCER |
|---|---|---|
|  **Slide #1** **Activity Overview** | **SAY** For this activity, I want you to sit back and imagine that you work for a marketing firm and that you and your team are in charge of marketing for Apple AirPods. Your target audience is represented by the learners in this class. Your team's job is to create a marketing plan and elevator speech for selling AirPods to your target audience. Let's take a look at the steps you'll be following for this activity. | |
|  **Slide #2** **Activity Steps** | **DO** • Use spotlight tool to point out each step as you review it. **SAY** The first thing you need to do is gather data on your target audience. You'll do this by completing a quick marketing survey. Next, you'll meet in breakout rooms with your marketing team to examine the data from the survey and devise a marketing plan. You can use the web-sharing feature to research approaches before you decide on one. | |

| | | |
|---|---|---|
| | **SAY (continued)**<br><br>After you have devised a plan, you will record the plan and an elevator speech on the whiteboard and share your work with the main class.<br><br>We'll wrap up the activity with a debrief, when we can discuss what you learned during the activity.<br><br>All of these instructions are included in your workbook.<br><br>**DO**<br><br>• Check for understanding and answer any questions.<br><br>**SAY**<br><br>Let's get started with the survey. [Producer], will you explain the steps for completing the survey?<br><br>**DO**<br><br>• Wait for learners to complete survey before continuing.<br><br>**SAY**<br><br>Thank you for completing the survey. While [Producer] prepares the results, let's talk about the second step: meeting in breakouts with your team.<br><br>**DO**<br><br>• Post breakout groups in chat. | **DO**<br><br>• At facilitator's prompt, explain how to access and complete survey.<br><br>• When survey is complete, pull data into spreadsheet and prepare to share it with class.<br><br>• Notify facilitator when spreadsheet is ready to share. |

**SAY**

I have posted your breakout groups in chat. These are the people you will be working with to devise a marketing plan and an elevator speech for your target audience. When you get to your breakout rooms, discuss the results of the survey and identify potential approaches. Conduct whatever research you would like using the web-sharing feature.

**DO**

- Tell groups how much time they will have in their groups.
- Explain process for choosing a scribe to share out spreadsheet, web-browser, and whiteboard.
- Point out that each group needs to appoint a spokesperson to present ideas to main class.
- Ask producer to share out spreadsheet with the results.

**Placeholder for Spreadsheet Share-Out**

**DO**

- When producer starts breakouts, visit rooms to provide assistance as needed.

**DO**

- At facilitator's prompt, share out spreadsheet and explain findings.
- Transfer survey spreadsheet in class and instruct scribes to download it.
- Review instructions for getting into breakout rooms, if necessary.
- Explain timing and broadcasts to announce time remaining.
- Start breakouts and timer.
- Visit rooms to provide assistance as needed.
- When time is up, remind scribes to share whiteboards and end breakouts.

| | | |
|---|---|---|
| **Placeholder for Breakout Group Whiteboard Share-Outs** | **SAY**<br><br>Welcome back, everyone! We can't wait to hear what you came up with!<br><br>**DO**<br><br>• Have scribe from first group share out saved whiteboard while spokesperson reviews marketing plan and elevator speech.<br><br>• Ask learners from other groups to record their comments and reactions in their workbooks as they listen.<br><br>• Ask questions about how and why each group decided on their particular approach<br><br>• Repeat until all groups have presented.<br><br>**SAY**<br><br>Let's give everyone a big round of applause! After hearing your presentations, I know I would be pulling my wallet out to buy a pair of AirPods--if I didn't already have a pair!<br><br>It was interesting to hear the similarities and differences between your marketing approaches! Let's take a moment to explore that more. | **DO**<br><br>• Assist scribes in sharing out saved whiteboards as needed. |
| **Slide #3**<br>**Activity Debrief** | **SAY**<br><br>Take a moment to look back over the notes you took in your workbook as you heard the different groups present.<br><br>**ASK**<br><br>Were you surprised over the different approaches some groups took, even though you were using the same data? Give me a green check if you were surprised and a red X if you were not. | |

**DO**

- Allow time for learners to respond and comment on patterns.
- Call on volunteers with a red X to expound on their answer and invite others to respond.
- Call on volunteers with a green check to expound on their answer and invite others to respond.

**SAY**

You have made some interesting observations. Let's pull it all together now.

**ASK**

What was your main takeaway from this activity? Share your thoughts in chat.

**DO**

- Allow time for learners to respond.
- Comment appropriately and call on volunteers to expound.
- Be sure to emphasize the main point in the "LOOKING FOR" section below.

**LOOKING FOR**

The same data set can be interpreted in many different ways.

**DO**

- Reiterate main takeaway of activity.
- Thank learners for participating.

**DO**

- Annotate learner responses on slide as facilitator reviews them.

# Activity #2:
## Be a Hacker!

### Goal/Learning Outcome

To explore how a hacker thinks and emphasize the importance of actively monitoring personal accounts

### Learning Challenge

Using knowledge related to the strategies of successful hackers, learners create a plan for minimizing the risk that their personal accounts can be hacked in the future.

### Audience

Banking customers

### Approach

Learners complete an elearning scenario that challenges them to identify the key strategies of successful hackers. They then use this information to develop methods for safeguarding their own accounts.

### Reflection/Debrief

Learners use whiteboard to share one thing they will do differently to reduce their personal risk of getting hacked in the future.

### Brain-Based Engagement

In order to perform cognitive tasks like creating connections between seemingly unrelated pieces of content, learners need to feel a sense of psychological safety. This activity engages learners emotionally by allowing them to create their own experiences in an environment where individual contributions and peer esteem are encouraged and valued.
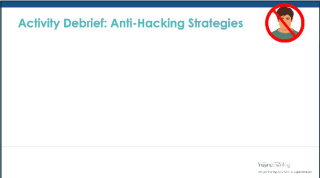
# ACTIVITY GUIDE: Be a Hacker!
## Virtual Classroom Platform: Zoom

| SLIDE | FACILITATOR | PRODUCER |
|---|---|---|
| **Slide #1**<br>**Activity Overview**<br><br>Activity Scenario: Be a Hacker! | **SAY**<br><br>As technology becomes more sophisticated and banking moves online, the risks for being hacked are greater than ever.<br><br>**ASK**<br><br>Who here has ever been hacked? I know I have! Give me a green check if you have been hacked and a red X if you have not.<br><br>**DO**<br><br>• Allow time for learners to respond and comment on results.<br><br>• Call on several volunteers to expound on their experiences and have them share the impact it had on them.<br><br>• Share recent statistics around the incidence of hacking and the effect that hacking has had on the banking industry.<br><br>**SAY**<br><br>For this activity, imagine that you're a bank account holder who's concerned over the recent rise in banking hacks. When given the opportunity to meet with a professional hacker, you jump at the chance to learn more about how he does it. You plan to use the information you gain to minimize your chances of becoming a hacking victim yourself.<br><br>Let's talk about how this activity will work. | |

**Slide #2**
**Activity Steps**

**DO**

- Use spotlight tool to point out each step as you review it.

**SAY**

The first thing you'll do is complete an elearning scenario, where you'll meet a professional hacker and learn the tricks he uses to maximize his haul.

When you return to class, you'll identify a habit you will personally change to reduce your risk of getting hacked in the future.

We'll wrap up the activity in a debrief, where you'll share your ideas with the class.

**DO**

- Check for understanding and answer any questions.

---

**Slide #3**
**Elearning Scenario**

**SAY**

Let's get started with the elearning scenario.

**ASK**

[Producer], will you explain how to access the scenario?

**SAY**

Thanks, [Producer].

This is a branching scenario, meaning that you will be given several options to choose from and will receive feedback on the path you choose. If you didn't choose the right path, you'll have a few additional opportunities to try again.

After you have successfully completed the module, please return to class and give us a green check to let us know you're back.

**DO**

- Explain how to access the elearning scenario and check for understanding.
- Add chat divider to separate topics.
- Paste the information below into chat.

**PASTE IN CHAT**

Click this link to access the elearning scenario: https://www.branchtrack.com/projects/9z5b3v8g

When finished, return to class and give us a green check to let us know you're back.

**DO**

- Check for understanding and answer any questions.
- Instruct learners to start the learning module.
- Wait for green checks and assist learners as necessary.

**SAY**

Welcome back! I hope you enjoyed the scenario!

**ASK**

I'm curious--how many of you were able to answer all the questions correctly without having to go back and try again? Green check if you had a perfect run; red X if you had to go back and try again.

**DO**

- Allow time for learners to respond and comment appropriately on responses.
- Share your own experience with the scenario.
- Call on several volunteers to expound on how they knew the answers and/or what surprised them.

**ASK**

What did you learn about strategies a hacker uses to steal as much as possible from accounts? Share your thoughts in chat.

**DO**

- Allow time for learners to respond and comment appropriately.
- Call on several volunteers to expound on their responses.

| | | |
|---|---|---|
| | **LOOKING FOR**<br><br>Once a hacker gets into your account, they take just a little bit out of your account each month so that you're less likely to notice and take action. This allows them to take more money over a longer period of time.<br><br>**SAY**<br><br>I'm glad you enjoyed that. Now it's time to hear what you're going to do differently from now on to reduce your risk of getting hacked in the future. | |
| **Activity Debrief: Anti-Hacking Strategies**<br><br>**Slide #4**<br>**Activity Debrief** | **SAY**<br><br>For our debrief, please claim a space on the whiteboard with your initials. Then share one habit you're going to change to keep this from happening to you in the future.<br><br>**DO**<br><br>• Allow time for learners to respond and comment appropriately.<br><br>• Call out similarities in responses.<br><br>• Ask several volunteers to expound on their responses.<br><br>**LOOKING FOR**<br><br>• Check account balance regularly to make sure nothing is amiss.<br><br>• Change your password regularly and make sure it's not something that can easily be guessed.<br><br>**SAY**<br><br>I don't know about the rest of you, but I'm ready to wrap up the lesson so I can get home and change all my banking passwords! | |

# Activity #3:
# Win That Sale!

### Goal/Learning Outcome

To learn how to sell a new piece of expensive, high-end technology

### Learning Challenge

Learners work with a team to develop and present a convincing sales presentation.

### Audience

Experienced salespeople

### Approach

Over the course of six weeks, learners build a strategy for selling their product to strategic buyers. They compete against other teams to design a plan, create a proposal, and deliver a sales presentation to win the sale!

### Reflection/Debrief

At the end of each session, learners share their reactions to the phase of the process they explored during the lesson and reflect on how it will affect their jobs moving forward. At the beginning of the following session, learners will evaluate submissions from the previous session.
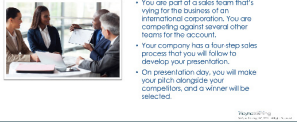
### Brain-Based Engagement

A learner's perception of their environment has a strong influence on their ability to engage with it successfully. It's the difference between a lecture-oriented seminar and a highly participatory event. This activity engages learners environmentally by requiring their active participation in an exercise that has no pre-determined results.

# ACTIVITY GUIDE: Win That Sale!
## Virtual Classroom Platform: Zoom

| SLIDE | FACILITATOR | PRODUCER |
|---|---|---|
| **Slide #1**<br>**Activity Overview** | **SAY**<br><br>For this activity, I want you to sit back and imagine that you are part of a sales team that's selling a high-end piece of technology and vying for the business of a big international corporation. Winning this account would be huge, not only for your team, but for the success of your company, as well.<br><br>But--you're not the only one pitching the business. There are several other reputable companies that are also competing for the account. Your pitch will have to be top-notch in order to stand out among the others.<br><br>On presentation day, your team will pitch your presentation alongside your competitors. The best presentation wins the account.<br><br>Fortunately, your company has developed a tried and true sales process that will help you create a dynamic pitch. Your hope is that, if you follow each step in the process, you will take home the prize.<br><br>**DO**<br>• Check for understanding and answer any questions.<br><br>**SAY**<br>Let's talk about how the activity will work. | |

**Slide #2
Activity Steps**

**DO**

- Use spotlight tool to point out each step as you review it.

**SAY**

We will spend each of the live lessons in this program focusing on a different step in the four-step sales process, which we'll talk about in a moment.
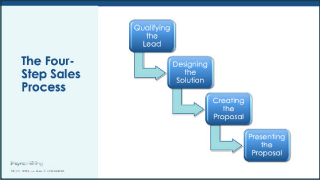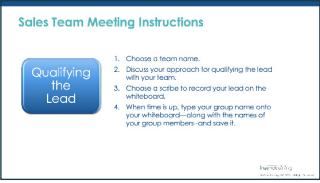
At the end of each lesson, you will meet in breakouts with your sales team to develop that phase of your presentation. You will be using the skills covered in the lesson to complete that step of the sales process.

At the end of your team meeting, you will submit your group's work to me for evaluation. I will choose a winner and announce it at the beginning of the next live lesson. We'll examine the positive qualities of that submission and analyze some of the other submissions for how they could be improved. Then we'll move on to the next step in the process. This is the way each lesson will work until you have completed each phase and developed your presentation.

The last day of the program is the big event. This is when you will pitch your presentation to a panel of invited guests (including sales managers and product owners). After all groups have presented, the panel will choose the winning presentation.

**DO**

- Check for understanding and answer any questions.

| | | |
|---|---|---|
| **Slide #3**<br>**Four-Step Sales Process** | **SAY**<br>Let's take a look at the four-step process to get a clearer idea of how you will develop your presentation.<br><br>**DO**<br>• Use spotlight tool to point out each step as you review it.<br>• Briefly explain each step in the process, what the "sales teams" will be submitting to the facilitator at the end of each lesson, and which lessons each phase will be covered in.<br><br>**SAY**<br>Today, our focus will be on Step 1: Qualifying the Lead.<br><br>**DO**<br>• Present content and activities related to Step 1 until learners are ready to practice with their teams in breakout rooms. | |
| **Slide #4**<br>**Sales Team Meeting Instructions** | **SAY**<br>Now it's time to meet your sales team members and get to work on developing the first phase of the presentation: the lead.<br><br>[Producer] has posted your teams in chat. You will work with this team in every lesson.<br><br>When you get into your breakout rooms, choose a name for your team. You'll be using that name from here on out to differentiate your submissions from others.<br><br>Then discuss the approach you're going to take to develop your lead and have a scribe to capture it on the whiteboard. That person will also be in charge of submitting it to me for evaluation after breakout groups are over. Instructions for this activity are in your workbook. | **DO**<br>• Post sales teams (breakout groups) in chat. |

**DO**

- Check for understanding and answer any questions.

**ASK**

[Producer], will you get us set up for the breakout rooms?

**DO**

- Visit rooms to provide assistance as needed.

**DO**

- Review instructions for getting into breakout rooms, if necessary.
- Explain timing and broadcasts to announce time remaining.
- Start breakouts and timer.
- Visit rooms to provide assistance as needed.
- When time is up, remind scribes to save whiteboards.
- End breakouts and assist scribes in transferring their breakout slides to the facilitator for evaluation.

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Process Debrief: Qualifying the Lead

**Slide #5
Activity Debrief**

**SAY**

We're not going to have your teams preset anything today. We'll share your work with the class at the beginning of the next lesson, when we'll announce the group with the best submission.

What I'd like to focus on instead is the process you just went through.

**ASK**

What about the process of qualifying a lead was different or surprising to you? What difference will that process make in writing leads in the future? How will you use this process in your current job? Take a moment to claim a square on the slide with your initials and share your thoughts with us.

**DO**

- Add chat divider to separate topics.

**PASTE IN CHAT**

What about the process of qualifying a lead was different or surprising?

What difference will that process make in writing leads in the future?

How will you use this process in your current job?

Claim a square on the slide with your initials and share your thoughts with us.

| | **DO** | |
|---|---|---|
| | • Allow time for learners to complete activity.<br><br>• Comment appropriately on learner responses as they appear.<br><br>• Call on several volunteers to expound on their responses and encourage comments from other learners.<br><br>• At the end of the discussion, thank learners for participating in the activity and move forward with the lesson wrap-up. | |

# ACTIVITY NOTES: Win That Sale!

The process outlined in the preceding activity guide is similar to the process that will be followed in the next three lessons (for each of the three remaining steps in the sales process). In the following lesson, for example, the process will begin again after the submissions from this lesson's sales teams are reviewed. The focus of the next lesson will be on designing the solution, the second step in the process.

In the final lesson, each team will present its pitch to a panel of invited guests, including sales managers and product owners. The panelists will evaluate each presentation as it pertains to the Four-Step Sales Process. At the end of the session, the winning team will be announced.

# Activity #4:
## Communicate with Legos
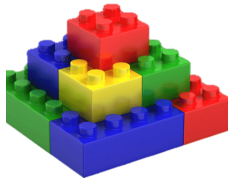
### Goal/Learning Outcome
To illustrate the need for clear communication, both listening and questioning

### Learning Challenge
One participant must recreate a Lego structure using just the information gathered from the questions of other learners.

### Audience
Anyone working in a new management/ supervision role; class size of no more than 20-24 people

### Approach
A group of two "supervisors" memorize a two-dimensional Lego formation. Learners then ask questions about the formation while one person attempts to recreate the structure on the virtual whiteboard.

### Reflection/Debrief
Learners compare the original structure with the replica and discuss the reasons behind their successes and frustrations. Then they share their main takeaways from the activity.
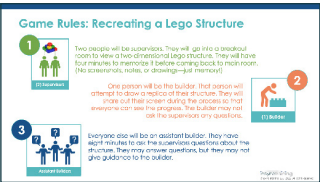
### Brain-Based Engagement
Learning involves both conscious and unconscious processes. For this reason, the learning experience is as critical to the learning as the content being taught. When back on the job, learners are able to connect the experience with the content. This is a critical process when learning communication techniques, which is the focus of this activity. It enhances all three types of learner engagement: environmental, intellectual, and emotional.
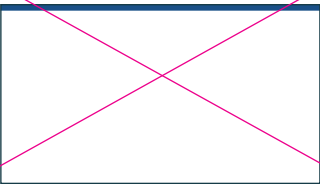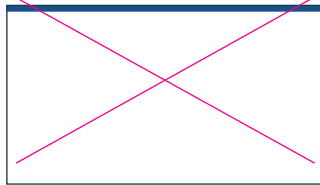
# ACTIVITY GUIDE: Communicate with Legos
## Virtual Classroom Platform: Zoom
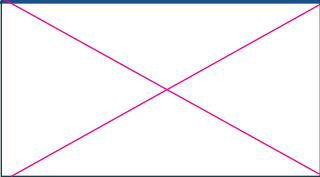
| SLIDE | FACILITATOR | PRODUCER |
|---|---|---|
| **Slide #1**<br>**Activity Overview** | **SAY**<br>For this activity, you're going to take part in a Lego building game.<br><br>**ASK**<br>How many of you have ever played with Legos? That's a toy that has withstood the generations; it was popular when I was a kid, and I won't tell you how many years ago that was! Green check if you've played with Legos before. Red X if you have not.<br><br>**DO**<br>• Allow time for learners to respond and comment appropriately.<br><br>**SAY**<br>This game will bring back some good childhood memories for many of you! Your challenge will be to recreate a Lego structure as closely as possible--without ever having seen it! We'll talk about how that will work in a moment. But first, let's take a look at the steps you'll be completing for this activity. | |
| **Slide #2**<br>**Activity Steps** | **DO**<br>• Use spotlight tool to point out each step as you review it. | |

| | | |
|---|---|---|
| | **SAY** | |
| | The first thing we'll do is play the Lego game. | |
| | When time is up we'll let you see what the original structure looked like so you can compare it side-by-side with the new structure. | |
| | And we'll wrap up the activity by exploring our takeaways from the experience. | |
| | **DO** | |
| | • Check for understanding and answer any questions. | |
| | **SAY** | |
| | All right! Let's talk about the game rules! [Producer], would you like to explain how the game will work? | |
|   **Slide #3**  **Game Rules** | | **SAY**  There will be three main roles in this game: the supervisors, the builder, and the assistant builders.  **DO**  • Use the information on the slide to review each role and the related responsibilities.  • Assign (or ask for a volunteer) to be the builder. Make sure the person is well versed with annotation tools.  • Explain that everyone else is an assistant builder.  • Check for understanding and answer any questions.  **SAY**  In just a moment, I will take the supervisors into a breakout room so that they can view the original Lego structure. [Facilitator] will lead everyone else in a discussion about the types of questions to ask. |

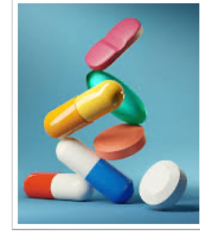| | | |
|---|---|---|
| | | **ASK**<br>Supervisors, are you ready to take a look at the structure? Give me a thumbs-up!<br><br>**DO**<br>• Start your breakout room when you get a thumbs-up from both supervisors. You will go with the supervisors to breakout room.) |
| | \*\*\*\*\*\*\*\*\*<br><br>*NOTE: The next two slides will be shown simultaneously. Follow instructions below for the facilitator (Whiteboard).*<br>\*\*\*\*\*\*\*\*\* | \*\*\*\*\*\*\*\*\*<br><br>*NOTE: The next two slides will be shown simultaneously. Follow instructions below for the producer (Lego Image slide).*<br>\*\*\*\*\*\*\*\*\* |
| **Placeholder for Lego Image (Producer's Group in Breakout Room)**<br><br>\*\*\*\*\*\*\*\*\*<br><br>*NOTE: This slide is a placeholder for the producer to use with the supervisors in the breakout room. Final slide should have Lego image pasted onto it.*<br>\*\*\*\*\*\*\*\*\* | | **DO**<br>• Introduce the two-dimensional Lego structure image to the supervisors.<br>• Give them four minutes to view the structure and ask questions.<br>• Remind them that they are not allowed to take screen shots, make notes, or draw anything. They must commit the image to memory.<br>• At the end of four minutes, end breakout and rejoin the class. |
| **Placeholder for Whiteboard (Facilitator's Group in Main Room)** | **SAY**<br>While [Producer] is showing the supervisors the Lego structure, let's brainstorm the type of questions that might give the best information for recreating the image.<br><br>**ASK**<br>Who wants to share some ideas? Raise your hand. | |

**DO**

- Allow time for learners to respond.
- Call on volunteers to share their ideas and comment appropriately.
- Ask for them to share their thoughts as to whether questions should be asked in a particular order and discuss.
- Capture ideas on whiteboard.
- When producer ends breakouts, stop the activity.

**LOOKING FOR**

- Whether the shape resembles anything
- Overall shape of the structure (square, triangular, odd)
- Number of Legos (height, width, depth)
- Color of Legos
- Size of Legos
- Total number of Legos used



**Placeholder for Builder's Whiteboard Share-Out**

**DO**

- While waiting for producer to get builder set up, instruct assistant builders to raise their hands when they want to ask a question, and instruct supervisors how to view raised hands in order.

**ASK**

Who's ready to get started?! Give me a green check if you're ready to go, or raise your hand if you have additional questions or comments.

**DO**

- Assist builder in sharing out a whiteboard.
- Alert facilitator when ready.

**DO**

- Allow time for learners to respond and address any questions or comments.

- Remind everyone of rules and of time limit.

- Ask producer to start slide timer.

**DO**

- Start timer at facilitator's prompt.

- Lower hands whenever necessary.

- Give learners verbal warnings when there are four minutes left and one minute left.

- When time is up, end activity and take screenshot of builder's whiteboard.

- While facilitator conducts poll, paste screenshot onto right side of "How Did You Do?" slide deck and prepare to share it out after the polling activity.

**ASK**

I heard a lot of great questions from you. On a scale of one to ten, how do you think you did? One meaning: the structure doesn't look anything like the original and ten meaning that it's a perfect replica. Supervisors, since you know what the original looks like, you can ignore the poll.

**DO**

- Launch poll and ("How do you think you did?" 1 = the structure doesn't look anything like the original, 10 = it's a perfect replica. Choices: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10)

- When learners have responded to poll, display results and comment on patterns.

- Remove poll at end of discussion.

**SAY**

Okay, drum roll, please ...

| | SAY | DO |
|---|---|---|
|   **Slide #4**<br>**How Did You Do?**<br><br>\*\*\*\*\*\*\*\*<br><br>*NOTE: This slide is in a separate deck and should be prepared beforehand with an image of the original Lego structure on the left side. Producer will post screenshot of builder's whiteboard on right side.*<br><br>\*\*\*\*\*\*\*\* | **SAY**<br>On the left here is the original structure, the one that the supervisors viewed in the breakout room. On the right is your rendition of the structure.<br><br>**DO**<br>• Facilitate a quick verbal discussion on the similarities and differences between the two structures. Have learners expound on the reasons behind these similarities and differences.<br><br>**SAY**<br>We had three different roles in this game. Let's hear what the experience was like from the perspective of each group.<br><br>**DO**<br>• Ask each group to share verbally what the experience was like for them (things that went well, things that were frustrating, etc.) and comment appropriately.<br>• Follow up with questions for each group about what accounted for their successes and frustrations.<br><br>**SAY**<br>It's interesting to hear your different perspectives on the experience. Now I'd like to hear what your main takeaway from the experience is. | **DO**<br>• Share out modified "How Did You Do?" slide. |
|   **Slide #5**<br>**Activity Debrief** | **DO**<br>• Share out main deck again.<br><br>**ASK**<br>Keeping in mind everything we have just discussed, what is the main thing that you took away from the activity? Claim a space on the slide with your initials and share your thoughts with us. | |

**DO**

- Allow time for learners to complete activity and comment appropriately.

- Draw attention to similarities in responses.

- Call on volunteers to expound upon their answers.

- Ask volunteers what they may start doing differently in their own jobs.

**LOOKING FOR**

- Communication is key. If you want a job done a certain way, you need to communicate your expectations clearly and thoroughly.

- Good listening and questioning skills enhance two-way communication and increase the odds that the job will be done as expected.

- When you don't ask questions (builder was not allowed to), you may miss critical information.

- Supervisors should invite questions so that they can ensure they have communicated the message clearly.

**SAY**

This activity did a great job of demonstrating the impact that communication has on the outcome of your project. Keep this in the front of mind when you're back on the job.

Now it's time to wrap up the lesson and talk about what's coming next.

# Activity #5:
# Bring a Drug to Market

### Goal/Learning Outcome
To educate employees at a pharmaceutical firm on the process for getting a drug to market

### Learning Challenge
Teams of five must analyze new data and make recommendations each week regarding when and how to bring a new drug to market.

### Audience
Employees of a pharmaceutical firm, including administrative, marketing, research, and finance staff

### Approach
Over a three-month period, teams of five analyze new data and use their knowledge of the Drug Development Life Cycle to decide when and how to bring a drug to market. Each team includes members that represent finance, marketing, research, administration, and sales.

### Reflection/Debrief
At the end of each session, learners discuss how their role influenced individual and group recommendations. At the beginning of the following session, learners will evaluate submissions from the previous session.
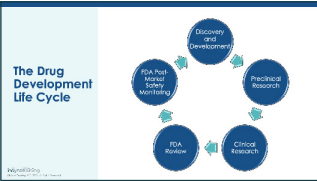
### Brain–Based Engagement
In order for true learning to take place, our brains require multiple ways to access and interact with our learning environment. This three-month activity includes a variety of different interaction types and capitalizes on the unique nature of our individual brains. It enhances all three engagement types: environmental, intellectual, and emotional.

# ACTIVITY GUIDE: Bring a Drug to Market
## Virtual Classroom Platform: Zoom

| SLIDE | FACILITATOR | PRODUCER |
|---|---|---|
| **Activity Scenario: Bring a Drug to Market**<br>• You work for a pharmaceutical company on a team of five people in charge of new drug development<br>• Each member of your team represents a different area of expertise, including finance, marketing, and research<br>• Based on new data received every week (budget, audience, and current research), your team must use the steps in the Drug Development Life Cycle to decide how and when (or whether!) to bring a new drug to market<br><br>**Slide #1**<br>**Activity Overview** | **SAY**<br><br>For this activity, imagine that you work for a big pharmaceutical company on a team with four other people. Each member of your team represents a different area of expertise: finance, marketing, research, administration, and sales.<br><br>Based on new data received every week, your team is charged with deciding how and when--or even whether--to bring a new drug to market.<br><br>To ensure that you make the best decisions around when and how to release your drug, you and your team will spend three months working through each step of the Drug Development Life Cycle.<br><br>There's obviously a lot at stake here. Your company would like to release the drug as soon as possible, but any rash decisions could have serious implications. So your job involves weighing the benefits of releasing the drug as quickly as possible against the risks of doing it without the proper due diligence.<br><br>**DO**<br>• Check for understanding and answer any questions.<br><br>**SAY**<br><br>Let's talk about how the activity will work. | |

**Slide #2
Activity Steps**

**DO**

• Use spotlight tool to point out each step as you review it.

**SAY**

We will spend each of the live lessons in this program focusing on the different steps of the Drug Development Life Cycle, which we'll talk about in a moment.

At the end of each lesson, you will meet in breakouts with your team to review new data and apply the step we covered that day as you move your drug through the development cycle. You will submit your group's work to me for evaluation. I will choose a winner and announce it at the beginning of the next live lesson.

We'll examine the positive qualities of that submission and analyze some of the other submissions for how they could be improved. Then we'll move on to a new topic. This is the way each lesson will work over the next three months as we make our way through the five steps in the life cycle.

On the last day of the program, you will present your final recommendations for your drug to a panel of invited guests (including sales managers and product owners). The panel will evaluate your recommendation based on the steps in the Drug Development Life Cycle.

**DO**

• Check for understanding and answer any questions.

**Slide #3
Drug Development Life Cycle**

**SAY**

Let's take a look at the Drug Development Life Cycle to get a clearer idea of the criteria you will use to base your recommendations on.

**DO**

- Use spotlight tool to point out each step as you review it.

- Briefly explain each step in the process, what the teams will be submitting to the facilitator at the end of each lesson, and which lessons each step will be covered in.

**SAY**

Today, our focus will be on the first step in the process: Discovery and Development

**DO**

- Present content and activities related to the first step until learners are ready to practice with their teams in breakout rooms.

**SAY**

Now it's time to apply the first step of the drug development process. You'll be working in breakouts for this activity.

The data you will be considering as you apply this step is located in your workbook on page X.

Take a moment to read over it and give me a green check when you're done.

**DO**

- Wait for green checks.

- Explain how they will be expected to apply the data as they apply the first step in the process.

- Check for understanding and answer any questions.

**SAY**

Your interpretation of the data may vary, depending on the role you play on your team. But every role is important, so be sure to listen to everyone's viewpoint.

| | | |
|---|---|---|
| **Pharmaceutical Team Meeting Instructions**<br><br>Discovery and Development<br><br>1. Choose a team name.<br>2. Review the data and share your thoughts on discovery and development from the perspective of your role on the team.<br>3. Choose a scribe to record your team's conclusion at the end of the discussion.<br>4. When time is up, type your group name onto your whiteboard—along with the names of your group members—and save it.<br><br>**Slide #4<br>Team Meeting<br>Instructions** | **SAY**<br><br>[Producer] has posted your teams and individual roles in chat. You will practice the same role and work with the same team through the rest of the program.<br><br>Take a moment to read over the details of your assigned role on page X of your workbook. Give me a green check when you're finished.<br><br>**DO**<br><br>• Wait for green checks.<br>• Check for understanding and answer any questions.<br><br>**SAY**<br><br>Now it's time to meet your team members and get to work!<br><br>When you get into your breakout rooms, choose a name for your team. You'll be using that name from here on out to differentiate your submissions from others.<br><br>Then you'll review the scenario and discuss the discovery and development step from the perspective of your expertise. When your group has decided on a recommendation, have a scribe to capture it on the whiteboard. That person will also be in charge of submitting it to me for evaluation after breakout groups are over.<br><br>**DO**<br><br>• Check for understanding and answer any questions.<br><br>**ASK**<br><br>[Producer], will you get us set up for the breakout rooms? | **DO**<br><br>• Post teams (breakout groups) in chat, along with the role/expertise of each group member. |

|  |  | **DO**<br>• Review instructions for getting into breakout rooms, if necessary.<br>• Explain timing and broadcasts to announce time remaining.<br>• Start breakouts and timer.<br>• Visit rooms to provide assistance as needed.<br>• When time is up, remind scribes to save whiteboards.<br>• End breakouts and assist scribes in transferring their breakout slides to the facilitator for evaluation. |
|  | **DO**<br>• Visit rooms to provide assistance as needed. |  |
| **Slide #5**<br>**Activity Debrief** | **SAY**<br>We're not going to have your teams present your work today. We'll share the submissions with the class at the beginning of the next lesson when we announce the group with the best submission.<br><br>What I'd like to focus on now is the role you played on your team.<br><br>**ASK**<br>How did your role influence your personal recommendations? If you played a different role, would your recommendations have been different?<br><br>What contribution did your role add to the group's overall decision? How would the group's decision have been different without your contribution? Find the column for your role and claim a space in that column with your initials. Then share your thoughts with us. | **DO**<br>• Add chat divider to separate topics.<br><br>**PASTE IN CHAT**<br>How did your role influence your personal recommendations?<br><br>What contribution did your role add to the group's overall decision?<br><br>Claim a spot in the column for your role and share your thoughts. |

| | **DO** | |
|---|---|---|
| | • Allow time for learners to complete activity.<br><br>• Comment appropriately on learner responses as they appear.<br><br>• Review responses one role at a time. Call on several volunteers to expound and ask learners with other roles to add their thoughts.<br><br>• At the end of the discussion, thank learners for participating in the activity and move forward with the lesson wrap-up | |

# ACTIVITY NOTES: Bring a Drug to Market

The process outlined in the preceding activity guide is similar to the process that will be followed over the course of the three-month program. In the following lesson, for example, the process will begin again after the submissions from this lesson's pharmaceutical teams are reviewed. The lessons will progress through the steps in the Drug Development Life Cycle. At the end of three months, each step will have been addressed and practiced.

In the final lesson, each team will present its recommendations for when and how (or whether) to bring a drug to market. A panel of invited guests, including sales managers and product owners will evaluate the recommendations as they pertain to the Drug Development Life Cycle and provide feedback at the end.

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