



# eTrain

credit union webinars

Get great training from eTrain webinars!

## **The Credit Union Learning Manager's Checklist for Effective Web Education**

Webinar technology introduces a “new” instructional style. Unlike traditional classroom-style seminars, webinars do not give attendees the advantages of making eye contact with the instructor, identifying their body language, and providing interactive activities.

How can the Learning Manager take on these challenges and ensure that participants get the most from the webinar? The attached checklists and activities will help the Learning Manager make every webinar an effective, educational experience!

## Preparation (1-30 days before the eTrain Webinar)

- Register online for the eTrain webinar at *www.ccul.org* or call 800.472.1702, ext. 6.

- Review instructions provided in your confirmation letter.

- The web site address, event number, and password for the visual presentation is:

\_\_\_\_\_

- The teleconference number for the audio presentation is:

\_\_\_\_\_

- The telephone number to call in case there is a problem is:

\_\_\_\_\_

- Invite participants to the webinar.

To get the most out of your eTrain webinar, make sure that you invite others to attend the presentation. Notify them with enough time to clear their schedules, arrange for department coverage, or to handle other issues.

- Review the program description to establish which staff members would benefit from attending the webinar. A suggested list of attendees can be found on the webinar flyer or on the webinar's online registration page.

- Notify all participants of the eTrain webinar's date, time, and location. Remember to allow about 15-20 minutes before the actual webinar start time to introduce the webinar topic and brief your audience on the technology and your learning expectations.

- You will receive the webinar handouts via e-mail at least one day before the program. If possible, print and distribute or e-mail the handouts to the participants ahead of time so they can review them.

- Prepare the technology and meeting space.

Most of the items on this portion of the checklist are "day of" items. However, testing your Internet connection and projection system with enough time to make adjustments and repairs is important!

Complete the following items:

- Room setup: make sure everyone can see projection
- Phone/speaker tested (speaker phone, in addition to the line used to connect to Internet Service Provider)
- Internet connection tested (56Kbps connection or better, Netscape 4.x or IE 4.x and above)
- Projection system tested (if needed)
- Screen (if needed)
- PowerPoint handouts printed for participants
- Additional handouts, if any, printed for participants
- Apply What You've Learned* handout (enclosed) printed for participants
- Pens/pencils available for participants (optional)

### **The Day of the eTrain Webinar (20-30 minutes before the program)**

Preparing your audience is important to ensure that you get the most out of the webinar. Make sure you spend some time explaining the technology, assigning roles, and prepping them for the topic. Use the following checklist to help you with this task.

#### **Introduce the Technology**

Welcome the group and ensure everyone can see the screen or monitor.

#### → **Possible script:**

- "Welcome, everyone! I'm glad you're here. We're going to be participating in an eTrain Webinar today. I'm going to cover a few things with you which will help all of you to be able to learn more from today's topic.
- The first thing I want to do is tell you a bit about what a webinar is and the technology it uses. A webinar is conducted with the trainer at a separate location. The visual component is a PowerPoint (or slide show) presentation viewed through a prearranged Internet connection. The trainer is connected to the audience via a telephone conference call.
- The audio portion (telephone) is transmitted via a speaker phone. Please let me know if I need to adjust the volume.
- The PowerPoint slides are being provided in a printed format, so that you can follow along, take notes and jot down questions.
- During the webinar you may hear a series of beeps. This indicates that other people are signing in or out of the call. Don't worry: these tones do not mean that we are being disconnected."

## ❑ Introduce the Topic

Be sure to preview the topic and description of the program with the participants. You can do this verbally, using a flipchart or a handout. You could also print off the program information from the League's website. If possible provide the handouts of the slides ahead of time to the participants.

## ❑ Establish Learning Expectations

This is an important learning activity which will set up the program and establish clear objectives for your participants.

### → Possible Script:

- "When you come to a webinar, you usually have questions you would like to get answered or you have situations you would like to handle better. And it's helpful if we think about those for a few moments before we begin, so we don't forget to get them answered as the session gets moving.
- We're going to write the questions or problems down and then we'll make sure we got them all answered. "
- (Either on paper, flip chart, white board, note the participants' questions. Save, as you'll return to this at the end.

## ❑ How to Get Questions Answered

The eTrain technology allows participants to type questions directly to the presenter. In order to achieve this effectively, assign a "Question Person" to be responsible during the presentation. This person will be responsible for muting and unmuting the telephone to prevent background noise from interfering with the audio portion of the conference call.

### → Possible Script:

- "We don't know exactly how this presenter will handle questions, but he/she will clarify that as the webinar begins. We need to determine in advance how we are going to best get our questions answered. Would someone volunteer to be the designated "Question Person?"
- During the webinar the "Question Person" will record questions we have and ask them of the presenter. You can also write them on a piece of paper and pass them to the "Question Person" during the presentation.
- Remember, be sure to get your questions answered.
- The "Question Person" should be seated close to the computer keyboard and telephone microphone to ensure that they can type or orally ask the group's questions.

### **Apply What You've Learned**

Provide copies of the "Apply What You've Learned" handout (enclosed) to participants with an explanation similar to the following.

#### → **Possible Script:**

- "It's important to be listening for answers to questions about the topic, ideas of how you can do things easier, or more effectively, or ways to serve our members better. Often, if we don't take the time to jot down what we thought was a good idea, or an important question, we simply forget, because there is a lot going on and being said.
- This handout has a place you can write down anything that comes up, such as a good idea, or a question, or something you might want follow up on.
- We'll take a few moments at the end of the webinar today to answer any questions you might have listed as well."

## **After the eTrain Webinar**

After the webinar is over, you will want to do some follow-up with the participants to ensure the most effective learning has taken place as well as to complete an evaluation for the presenter.

### **Group Discussion**

To encourage discussion, you may want to make a few points about some of the items presented or questions that were answered during the session.

### **Final Questions**

This is the time to pull all the loose ends together and ensure everyone knows where to go for follow-up questions they may have. It may take only a couple of sentences.

#### → **Possible Script:**

- "Does anyone have additional questions?"
- "Let's take a look at the questions we identified at the start of the session." (Review list; reinforce those that have been answered and ensure participants are satisfied with information provided. If not, provide time to clarify the information.)

### **Apply What You've Learned, Revisited**

The final explanation of how to use this form, for implementing or reviewing concepts and actions on the job.

→ Possible Script:

- “Let’s take one last look at our Apply What You’ve Learned activity. This list will help you implement ideas or things you heard today that you believe will help you do your job better. There may be some things you’ve listed that you need to talk over with a supervisor before making changes.
- Remember if you need any help with what you’ve learned today, please be sure to see your supervisor.
- Does anyone have anything they’d like to share that they think may be useful to others?
- Does anyone have any additional questions?”

❑ Complete the Online Seminar Evaluation

Please take a moment to complete the online evaluation that appears at the end of the program. It gives your League valuable feedback about whether the webinar met your training needs and expectations, as well as giving suggestions for future training topics and methods.

→ Possible Script:

- “Please take a couple of moments to complete the evaluation form. It will help me to plan future training topics and methods. Your input is important and valued. Signing your name is optional unless you want me to contact you.”

❑ It’s a Wrap!

Take a moment to thank everyone for their hard work, participation, and contributions which made this an effective learning opportunity.

→ Possible Script:

- “Thank you all for being here today and providing good input, asking questions, and making contributions to the session. Webinars such as this one can support what we do and provide an additional resource for serving our members more effectively.
- Don’t forget to use your Apply What You’ve Learned when you get back to work or ask your supervisor for assistance when needed.”

## Apply What You've Learned!

What did you expect to learn today, and what questions about the webinar topic did you want today's program to answer?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_

What ideas or things did you hear today that will help you do your work more easily or more effectively, or serve your members better?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_

Please list action items or questions you have that you want to follow up on later.

1. \_\_\_\_\_  
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2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_