GoToTraining
Best Practices

Introduction
While the tools and functionality built into the GoToTraining® solution are designed to make online training as easy as possible, the following guide was created to help you develop the skills we just can’t package. After all, just as owning a paint brush doesn’t make someone an artist, using GoToTraining doesn’t automatically make you a training expert. Most skills require study and practice before they become second nature – and even then, there’s always room for improvement and growth.

In this document you’ll find not only tips for using GoToTraining to your best advantage, but also best practices in general for course design, preparation, promotion, delivery and follow-up. In addition, we’ve included a checklist at the end that you can follow each step of the way as you conduct your training sessions.

Course design
When designing new or existing training for a virtual platform, always build it for the learner not the technology. Sometimes we get stuck on what the technology can or can’t do; design first, plan around the technology later.
Assessment
Collect the following information:

<table>
<thead>
<tr>
<th>Questions to ask</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target</strong></td>
<td>Who is the learner? (Consider skill level and generational influences.)</td>
</tr>
<tr>
<td><strong>Goal</strong></td>
<td>What task or behavior will the learner will be able to perform?</td>
</tr>
<tr>
<td><strong>Application</strong></td>
<td>Is the task or behavior applied to a software program, work process or to another person?</td>
</tr>
<tr>
<td><strong>Performance standard</strong></td>
<td>How will you know the task or behavior can be completed at an acceptable level?</td>
</tr>
</tbody>
</table>

Build modules
From the goal, work backwards to identify each task, then build the modules. Group one or more tasks into a module. Design each module to incorporate one or more learning techniques.

Keep the following examples in mind as you transfer learning techniques to an online training environment:

<table>
<thead>
<tr>
<th>Classroom</th>
<th>GoToTraining</th>
</tr>
</thead>
</table>
| Icebreakers             | • Launch a poll and share results  
                          | • Share a blank page, maze, word search; give attendees Drawing Tools  
                          | • Create a “meet and greet” using chat  
                          | • Launch a test – use chat to collect initial reactions |
| Lecture                 | When possible, use mixed media for the lecture:  
                          | • Live demos  
                          | • Guest speaker, subject matter expert  
                          | • PowerPoint  
                          | • Websites  
                          | • Applications  
                          | • Annotation with Drawing Tools |
| Discussions             | • Verbal (unmute attendees)  
                          | • Chat  
                          | • Handraising |
| Guided practice               | • Worksheets (added to Materials)  
|                              | • Give keyboard and mouse control to a learner  
|                              | • Pass desktop sharing to a learner  
|                              | • Encourage guidance/participation from other learners verbally or through chat  
| Skill application            | • Exercises (added to Materials)  
|                              | • Chat  
|                              | • Timer  
|                              | • Tests  
|                              | • Multiple training sessions (assignments in between)  
| Interaction                  | • Handraising  
|                              | • Polls  
|                              | • Chat  
|                              | • Verbal (unmute attendees)  
|                              | • Give keyboard and mouse control to a learner  
|                              | • Pass desktop sharing to a learner  
|                              | • Tests  
|                              | • Annotation tools  
| Testing knowledge            | • Polls (quizzing)  
|                              | • Tests (before, during, after) with or without timer  
|                              | • Question and answer through chat and unmuting attendees  
| Certification               | • Pre- and Post-Tests  
|                              | • Attendee Report and Analytics  
|                              | • Test Report  

**Tips**

- **GoToTraining Library:** Any documents, polls and tests you create can be stored in the Library for reuse.

- **Guest Speaker:** Including a subject matter expert for part of your training can add interest to the session. Your guest speaker can present solo or through an informal dialogue with you.
• **Skill Application:** Scripted role plays are a fun way for your learners to practice a specific behavior (or demonstrate a bad one). You can either create your own script or use one that is often provided with training videos. Add the script to the Materials page of your training. At the time of the exercise, assign roles and have learners read through the script as if they were auditioning for a reality TV show.

• **Interaction:** Build more interaction into your online training than you would have in a classroom setting. With today’s technology and multi-tasking, it is important to maintain the focus of your learners. Brief touches are all you need (see examples in the previous table) and keep them relevant to the training topic.

• **Guided Practice:** What better way to close the Performance Gap than to have learners practice a task directly from the comfort and familiarity of their desktop? Build active participation into your training by giving each learner keyboard and mouse control or the desktop sharing role to demonstrate their learning; other attendees can participate in the practice by encouraging/guiding each other verbally or through chat.

• **Online Games:** Interaction through games simply requires some creativity and thinking outside the box. Some examples:
  
  — **Treasure Hunt:** This can be created as pre-course work or presented during your training for a fun learning exercise. Good for introducing a software application or getting learners familiar with resources available to them after the training. Design a worksheet with items learners must search for either within a specific application, intranet or website.

  — **Puzzles & Brain Teasers:** Word searches, mazes and brain teasers can be presented through desktop sharing. Give learners Drawing Tools so they can solve them on screen.

  — **Bingo:** Challenged with attendees not paying attention? Create bingo game boards; each square on the board has a particular key learning or concept from the training. Email a game board to each participant. Attendees print the board prior to the session. Throughout the training, learners mark off the concepts on the bingo card. The first person to get Bingo receives either bragging rights or a gift card.
— **PowerPoint:** If you are a more advanced PowerPoint user, consider using the Custom Animation feature to design quizzes with moving parts or games like Jeopardy.

- **Testing Knowledge:** From your initial assessment for the course design, what did you determine the Performance Standard to be? Can it be measured through testing? Developing a pre- and post-test allows you to easily collect metrics to qualify the learning.

- Pre-tests are also an engaging way to introduce the training topics, set expectations or assess registrants’ skill levels before the training.

- **GoToTraining** includes the unique Master Test feature that enables organizers to view test results in-session and review them instantly with attendees; use it to address areas of weakness in real time.

- **Certification:** Be sure to include the requirements for certification in the training description (pre-course work, attendance, test score, level of participation, etc). Design your pre- and post-test so that you can qualify the learning that took place. After the training, generate the Test Report to verify test scores. To issue a Certificate of Completion, create a mail merge template (for example in Microsoft Word). Email a certificate to each learner; email addresses are listed in the Attendee Report.

**Sequencing**

Sequencing is an important step in instructional design that is often overlooked. Many of us tend to think in a linear fashion; however, certain topics and training audiences require a deductive learning approach. For example, if your target audience is tech savvy, the first module might be a guided practice, enabled by giving an attendee keyboard and mouse control.

The simplest way to sequence modules is to put each task on a sticky note. Move them around until you are satisfied with the order in which tasks or modules are best completed.
Pre-event preparation

Scheduling
Schedule your training well in advance (at least 30 days). Give attendees time to plan ahead. This also gives you and any guest speakers time to prepare and practice. Consider the following in relation to your target audience:

- Time zone
- Time of day/month
- Benefit of shorter and more frequent sessions

Tips

- **Training Description**: The more descriptive and specific you can be, the easier it is to get learners matched to the appropriate training session as well as interested in registering. Include target audience, length, instructors, guest speakers, performance outcomes, certification, competencies or pre-requisites (if any). What will attendees learn? What problem will be resolved? How will it improve their lives or daily tasks? Will it empower them, boost their confidence, improve performance, advance their career, save the company money, or give them the opportunity to learn from an expert?

- **Multiple Sessions (Recurring)**: Consider scheduling shorter and more frequent training sessions. This can positively affect retention – learners can apply skills and learning immediately to their job or daily life, then return to another session with feedback on outcomes and challenges. Alternatively, schedule short “check-in” sessions at 30, 60 or 90 days after the initial training.

Registration
Use your registration page to qualify attendees; the minimum information required is name and email address. However, what other information might be important for your learning database?
Tips

- **Create Your Own Questions:** Custom questions around skill level or comfort with subject matter enable you to fine-tune your training to that specific audience.

- **Limit Training Size:** Smaller groups offer greater interaction. Presentation-style training is good for large audiences. If you are expecting more than 40 people, a co-organizer (promoted during the training) is recommended to assist with chat, questions and managing the training event (see Practice and Refine).

- **Upon Approval:** Use this feature when you want to pre-qualify registrants; create specific custom questions and select Upon Approval. Registrants do not have access to Materials or pre-tests until they are approved.

- **Registration Report:** Run and review the Registration report. If you created custom questions, review responses to tailor the training to that particular audience. Check the registration numbers; a different size than what you were expecting could affect planned exercises and interaction, so you may need to tweak those.

Materials

What documents, exercises, worksheets or resources would you like your learners to review and complete prior to or after the live training? Are there any links you would like them to bookmark? If you are training them on a specific application or work process, do they need to install an application prior to the live session?

Tips

- **Pre-Course Work:** Assignments prior to the live session introduce topics, prepare learners and give flexibility in completing them. In addition, pre-course work can allow for more time in the live training for interaction and question and answer.
— **Example:** Customer Service Training – Require participants to interview ten people about what great customer service means to them, including examples of both excellent and poor customer service. Have learners report their findings at the beginning of the session. Use the examples for analysis and group discussion.

— **Example:** Effective Communication Training – On the Materials page, add a link to a short video clip depicting poor communication. Learners can view prior to the session; give them a worksheet to note observations and what they would do differently. Start your training with a discussion about the video clip. Two ways to add a video link to the Materials page: 1) Add the web link of an existing online video clip, 2) Upload a .wmv file, less than 300MB, to the My Recordings page of your account. Add the recording link as a web link to the Materials page.

- **Multiple Sessions (Recurring):** If you plan on having multiple sessions, consider adding assignments to the Materials page for completion in between sessions. This keeps the information fresh in learners’ minds and gives them the opportunity to apply learning directly after a session.

- **Manager Involvement:** Training is often effectively reinforced when managers are involved in part of the process. Consider an assignment that either involves the learner’s manager or simply encourages learners to meet with their managers after to discuss learning outcomes and changes they want to make.

**Polls**

There are a variety of ways to use polling during a live training. Keep in mind that anytime a learner clicks somewhere on the Viewer Window or the Control Panel, the GoToTraining application comes to the forefront of the desktop, thus directing the learner’s attention to the session.

Types of polling questions:

- Direct training flow – audience skill level, speed up/slow down
- Introduce a topic
- Quiz – brief questions after completion of a topic
- Check for understanding
- Grab audience attention
- Interaction – voting and just for fun

**Email notifications**

Since the Reminder and Follow-up emails can be personalized, you can create motivational subject lines (“Advanced Excel Training: One more day to complete assignments!”) and include specific details related to the training (“I’m available Tuesday-Thursday if you need coaching.”).
Tips

- **Reminder Emails**: Consider your audience when determining the frequency of reminder emails. Many audiences require only one reminder an hour before the training.

- **Follow-up Email**: After a live training, you can add documents or links to the Materials page which can be included as a link (see Materials for ideas). If you are planning to record your training, you can include the recording link in the text of the Follow-up Email.

Evaluation

We typically think of training evaluations as “smile sheets” – feedback used to support the status quo. While feedback on whether or not the learners liked you, your materials and even the sandwiches helps improve the learning experience, spend time on designing a quality evaluation form; take it up several notches and create questions that will allow you to begin benchmarking the impact of training on stakeholders, talent management and the business. Consider the following for evaluation questions:

- Instructor knowledge and engagement
- Ease of use of the learning tool
- Effectiveness of the course material
- How much was learned
- What percentage of the learning is applicable to job
- What percentage of the learning will improve job performance
- How the learning affects productivity, employee or customer satisfaction, sales, risk, cost, etc.
- Additional comments and feedback

Presentation decks

While desktop sharing gives you unlimited possibilities for an engaging training, trainers sometimes need to rely on PowerPoint for some or even all of the content.
Tips

- **Guidelines:** Use the 5-5 rule—no more than 5 bullets per slide with 5 words per bullet. Where possible, consider using images instead of words—they often tell a better story. Your slides should be talking points only, not a place to deposit all of your information; you want learners to listen to your presentation not read slides.

- **Transition Slides:** Create simple transition slides between ideas and topics; this helps learners make the transition between major themes. Transition slides also aid you in remembering your training flow such as “Poll,” “Test,” “Guest Speaker,” “Discussion,” etc.

**Practice and refine**

The success of your training event is greatly affected by practicing the timing, content, and delivery. This includes the learning tool you will be using; the more you familiarize yourself with the technical tool, the easier it is to focus on the content. Schedule at least one practice session before the live event; include any guest speakers and at least one person to act as an attendee. Engage in feedback to refine the training.

Tips

- **To schedule a practice session:** Copy your training and title it “Practice: XYZ Training.” Invite the guest speaker (if any) and someone to play the part of attendee.

- Run the practice session from the location at which you will be presenting at the time of the live event.

- Record your practice and review it for self-evaluation.

- Write out your timeline of the presentation and any notes you may have for yourself (see Training Plan Checklist).

- Scripting your training can help you organize your thoughts. However, it’s better to memorize the talking points than to read the script during your live session; we generally read faster than we speak.

- **Pre-scripted questions and answers:** Prepare a few “attendee” questions and responses. Use them if you need to encourage participation or fill in “dead air.”

- **Use your voice:** Online training requires you to use the power of your voice. This includes tone, inflection, variation, volume, speed and word choice. Think of your favorite media personality—an anchor person, talk show host or radio DJ; what elements do they use to keep you engaged when they speak? Be yourself; online audiences respond the most to authenticity. Sometimes it helps to stand up and use your hands as though you were speaking to a live audience.

- **Managing the Technology:** Know your technical skill level. If you are new to online training, keep your first training simple. Add in techniques/features as you become more comfortable with the technology. For example, your first few trainings may have hand raising as the only interaction; as you become more comfortable with the online environment, add in polls, then chat, etc. If you are
new to GoToTraining, allow time for learning the technology. Take advantage of the learning resources provided by GoToTraining’s On-Demand Support: www.support.gototraining.com.

- **Integrated Audio Best Practices**: You must join audio in order to be granted muting/unmuting capabilities.

  — Joining audio through VoIP: A USB headset is recommended. Make sure “Use Mic & Speakers” is selected in the Audio pane of the Control Panel. Click Audio Setup, select and test your Mic & Speakers devices. Mic and speakers devices that are too close to the phone or monitor can cause echo or feedback; you may need to move them. Laptop users should turn off the laptop microphone and use a USB headset instead.

  ![Audio Mode](image)

  — Joining audio through the telephone: Make sure “Use Telephone” is selected in the Audio pane of the Control Panel. Enter your Audio PIN as it appears in the Audio pane.

  ![Audio PIN](image)

  — USB Headset Adapter: A device such as a Plantronics USB Headset Adapter allows you to easily switch your headset from the phone to VoIP.

  — How audio starts: When you launch the training session, you and all attendees join unmuted and can hear each other; it is just like people trickling into a training room.
Entry and exit beeps will sound but can be turned off through the Audio pane. Depending on the size (background noise), target audience (do learners know each other?) and type of training (highly interactive? customer-facing?) decide if you want attendees to remain unmuted while you are waiting to begin.

— If you decide to mute everyone, communicate with attendees through chat or by sharing a slide indicating that everyone is muted. While you are waiting for everyone to join, encourage introductions through chat, launch a poll, share a slide on audio instructions or present an icebreaker.

— **Edit Audio:** If for any reason you want to change audio options, click Edit in the Audio pane. Attendees are notified of the changes to the Audio Mode.

### Promotion

Now that you have designed the perfect training, it’s time to promote it! Simply provide the registration link or Course Catalog URL through email, a calendaring tool, industry partner or post it to a website.
Tips

• Having a clear and compelling training title is the first step to enticing people to click the registration link. Next is the training description; be clear and specific about learning outcomes (see Scheduling). On occasion, incentives such as certification, compliance, subject matter experts or giveaways encourage registration.

• **Active promotions:** Consider which groups you can promote to and through. Direct invitations, newsletters and lists, and sales, marketing, and services teams all offer rich opportunities to get the word out. Additionally, social networking sites such as Twitter, Facebook or LinkedIn are good sources to add to your promotion plan. Within your organization, simply provide the registration link or Course Catalog URL through an email distribution, calendaring tool or by posting it to an intranet.

• **Passive promotions:** These take advantage of incidental traffic, such as visitors to your website. For example, you can leave a plug on your voicemail or hold message; include a link in your email signature; display table tents in your cafeteria; or include mailer inserts with invoicing or other regular correspondence. Contact industry partners associated with your training topic to promote through their websites and membership.

Event delivery

Start your training at least 30 minutes early. Give yourself time to gather your thoughts, breathe, review your notes, open any documents, websites or applications you will be sharing, select recording settings and welcome your guest speakers (if any).

Learning Techniques and the GoToTraining Organizer Control Panel (see also Build Modules)

The following diagram shows which parts of the control panel you could use to apply various learning techniques during your training session.

Tips

• Set multi-line phone systems to voicemail. Wireless devices from anyone unmuted, such as Blackberries and iPhones, can cause static, beeping and clicking. Therefore, it is recommended that you turn them off; remind any guest speakers to do the same.

• Close out of all applications you are not using for the training.

• Record your training so that you can evaluate it later, distribute it to learners for review or post it as an on-demand learning resource. When you end your session, simply upload a copy through My Recordings on your account; a link to the recording is provided for you to distribute through any online communication.

• **Housekeeping:** Provide an initial overview of the GoToTraining Attendee Interface (downloadable at [http://support.gototraining.com](http://support.gototraining.com)); familiarize learners with their Control Panel and how they can communicate with you. Include a picture of yourself so people can put a face to your voice.
Ice Breakers
• a, b, c, d, e, f, g, h, i
Lecture
• a, c, f
Discussion
• e, i
Guided Practice
• b, c, e, g, i
Skill Application
• g, i
Interaction
• b, c, d, e, h, i
Testing Knowledge
• h, i
• **Ground Rules:** Just because you are training online doesn’t mean you can’t set ground rules. Some examples are: Turn off cell phones and wireless devices, refrain from typing, mute phone lines, raise hand to be called upon and say your name before speaking.

• **Communicate:** Always explain silence or “dead air.” You might be reading through the chat, looking for a document or troubleshooting. Let your audience know what you are doing.

• **Manage Attentiveness:** The Attentiveness meter in the Dashboard pane gives you an idea of the overall attentiveness of your learners. A higher percentage in the red could indicate it’s time to redirect their attention. Any time attendees click the Viewer Window or Control Panel, the GoToTraining application (and your content) is brought to the forefront of the desktop. Interaction through chat, polling, hand raising, unmute audio, testing, materials or desktop sharing can easily bring the audience back on track.

• The Options menu also lets you manage learners’ focus. For example, allow “Chat with Anyone” during icebreakers and discussion but require “Chat with Organizers Only” during your lecture, assignments and testing.

• **Connect to Your Audience:** Use the Attendee List to connect with your learners. For smaller groups, welcome individuals by name. If you see the Attentiveness triangle, call on that person to participate in some way, for example, “Francis, what sort of challenges have you experienced when dealing with frustrated customers? Go ahead and type that into the chat and I will share it with everyone;” or “Looks like Francis and Elizabeth agree with that last statement.” Use hand raising for feedback on speeding up, slowing down, repeating instructions or moving on to the next subject.
• **Question and Answer:** The trick here is simply setting audience expectations of when and how you will be collecting and addressing questions. Plan ahead by thinking about the size of your audience and the timing of your training. Will you be taking verbal questions or directing everyone to the chat box?

• **Test Review:** The Master Test gives you the opportunity to instantly review a completed test. The overall test score is displayed along with each question and percentage answered correctly. Review privately or share with learners and address any areas of weakness in real time.

• **Timer:** Time in-session assignments, tests and breaks.

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**Post-event follow-up**

After the training, you can edit the Follow-up Email and the Materials page. Are there any additional resources, takeaways or assignments you want learners to access after the training? Or use the Follow-up Email to reinforce key learning. Generate the Test Report to evaluate learning effectiveness or to verify certification.

**Tips**

• **Upload Recording:** If you recorded the session, upload it to My Recordings. Include the recording link in the Follow-up Email or add it as a web link to the Materials page.
• **Evaluations:** Generate and review the Evaluation Report to improve or update content, the learning experience and to validate learning effectiveness.

• **Test Report/Test Report by Date:** The Test Report allows you to monitor learning effectiveness of a single training session. You might use the scores to confirm certification. The Test Report by Date allows you to examine learning effectiveness over the course of a specific date range. Check for areas of strength and weakness; look for patterns. When analyzing the scores and test answers, consider both the effectiveness of the test questions and the training design/delivery.

**Conclusion**

As we said at the start, running effective online training sessions takes a bit of know-how. We hope the best practices provided here, coupled with the GoToTraining toolkit, will help as you hone your online training skills with each course that you teach.

For additional information about using GoToTraining, please refer to our online support center at [http://support.gotomeeting.com](http://support.gotomeeting.com).
### Training plan checklist

**Training Title:**

<table>
<thead>
<tr>
<th>Preparation</th>
<th>Date</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create course outline</td>
<td></td>
<td></td>
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<tr>
<td>Guest Speaker: Confirm training date/time</td>
<td></td>
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<tr>
<td>Schedule the training</td>
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<tr>
<td>Check audio selection for the training (VoIP, Telephone, Both?)</td>
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<tr>
<td>Create Registration form</td>
<td></td>
<td></td>
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<tr>
<td>Add materials: files, links</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Tests: Pre-Test, In-session Test, Post-Test</td>
<td></td>
<td></td>
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<tr>
<td>Create Polls</td>
<td></td>
<td></td>
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<tr>
<td>Create Evaluation form</td>
<td></td>
<td></td>
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<tr>
<td>Set Reminder email</td>
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<td></td>
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<tr>
<td>Set Follow-up email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm organizer location (if other than current desktop): Confirm computer access and other technical requirements (i.e., system requirements, VoIP or telephone devices, popup blockers, etc.)</td>
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<tr>
<td>Schedule practice run</td>
<td></td>
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<tr>
<td>Develop presentation deck (content, housekeeping slide, agenda)</td>
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<td></td>
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<tr>
<td>Run practice session; make notes for live presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approve/Deny registrants (if using Upon Approval)</td>
<td></td>
<td></td>
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<tr>
<td>Promotion</td>
<td>Date</td>
<td>Check</td>
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<td>-----------------------------------------------</td>
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<tr>
<td>Add training to the Course Catalog</td>
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<tr>
<td>Create promotion plan</td>
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<tr>
<td>Email direct invitation</td>
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<td></td>
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<tr>
<td>Contact subject matter industry partners to advertise training</td>
<td></td>
<td></td>
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<tr>
<td>Post links on social networking sites</td>
<td></td>
<td></td>
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<tr>
<td>Post links on website</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Include link in email signature</td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery</th>
<th>Countdown</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have phone numbers and email addresses of any guest speakers</td>
<td>1 Hour</td>
<td></td>
</tr>
<tr>
<td>Locate final copies of all presentation materials</td>
<td>1 Hour</td>
<td></td>
</tr>
<tr>
<td>Start the training, join audio</td>
<td>30 Minutes</td>
<td></td>
</tr>
<tr>
<td>Co-organizer: Promote if necessary</td>
<td>30 Minutes</td>
<td></td>
</tr>
<tr>
<td>Mute all lines (including your own) while making last minute preparations</td>
<td>30 Minutes</td>
<td></td>
</tr>
<tr>
<td>Confirm any guest speakers have their presentation materials open and ready</td>
<td>15 Minutes</td>
<td></td>
</tr>
<tr>
<td>Close all applications not related to the training (i.e., email, IM, alerts)</td>
<td>15 Minutes</td>
<td></td>
</tr>
<tr>
<td>Turn off pagers/wireless devices (remind any guest speakers through chat)</td>
<td>15 Minutes</td>
<td></td>
</tr>
<tr>
<td>Optional: Share screen when ready and unmute lines</td>
<td>10 - 15 Minutes</td>
<td></td>
</tr>
<tr>
<td>Optional: Share a welcome slide, launch a poll, start an icebreaker, welcome attendees through chat or verball</td>
<td>10 Minutes</td>
<td></td>
</tr>
<tr>
<td>Optional: Perform a quick sound check with audience (“Before we begin, I want to make sure everyone can hear me. Please raise your hand if you can hear me loud and clear.”)</td>
<td>10 Minutes</td>
<td></td>
</tr>
<tr>
<td>Start Recording (move mouse on desktop to trigger recording)</td>
<td>When you begin</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Follow-up</th>
<th>Date</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload copy of recording (if recorded)</td>
<td>Before follow-up email date</td>
<td></td>
</tr>
<tr>
<td>Add any additional materials and links to Materials page</td>
<td>Before follow-up email date</td>
<td></td>
</tr>
<tr>
<td>Edit Follow-up email if necessary; add recording link if available</td>
<td>Before follow-up email date</td>
<td></td>
</tr>
<tr>
<td>Generate Evaluation report for review/analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate Test report for review/analysis</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>