



Virtual Facilitation with Diana Howles

Leading Learning Podcast Transcript for Episode 334

Diana Howles: [00:00:00] We can go through the motions and facilitate on a platform virtually with remote learners. But I always try to challenge and push people to be more excellent, and how can we do that?

Celisa Steele: [00:00:15] I'm Celisa Steele.

Jeff Cobb: [00:00:16] I'm Jeff Cobb, and this is the Leading Learning Podcast.

[00:00:25] Welcome to episode 334, which features a conversation with Diana Howles. Diana is an award-winning speaker, global virtual facilitator, and master trainer who brings 25 years of experience in the talent development field. Diana is CEO and co-owner of Howles Associates and author of *Next Level Virtual Training: Advance Your Facilitation*. Diana and Celisa focus on virtual training and talk about the capability model for virtual facilitators that Diana developed. They also get into Diana's approach to combining (or blending) live online and asynchronous online components, why she prefers the term "live mixed" to "hybrid," the importance of co-facilitation in live mixed situations, the value of learner agency and autonomy in live mixed learning, and specific practical tips, like when to use Web cams during live online learning, making the invisible audible, and announcing silence. If you deliver live online learning, as most learning businesses do, this episode is for you. Diana's experience, tips, and book can be great practical resources for you and your facilitators and instructors. Diana and Celisa spoke in October 2022.

Celisa Steele: [00:01:49] You're the author of *Next Level Virtual Training: Advance Your Facilitation*. And that came out in 2022, which seems like brilliant or serendipitous timing or perhaps both. Would you tell us a little bit about the origins of this book? When and why did you start work on it?

Diana Howles: [00:02:07] You know, when the pandemic hit, of course, the whole world was suddenly thrown into virtual training, and I had lots of experience working in this field. So I

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first started doing what we called back then Web conferencing, back in 2000. I had seen a lot of platforms come and go, and I just knew that if I could just really share with the world and help them be more equipped in this new virtual world, and so I started to really put down my ideas, and I noticed that there were some things missing in the field, for example, a way for virtual facilitators to grow in professional development. I had not seen a comprehensive chapter on how to be on camera. Usually there was maybe one or two pages in some of the existing works, and there really wasn't any dedicated resource on this idea of hybrid learning, where we have on-site and online learners together. And so I really thought, because of those gaps in our industry, this would be a great time to write this book to really help people be more effective online.

Celisa Steele: [00:03:16] I do think it's extremely helpful. And at the core of *Next Level Virtual Training* is a capability model. I have two questions I want to ask about that. First, and this is a little bit of an aside, but I would love to get your comments on the difference between a competency model and a capability model. And then, second, talk a little bit, if you would, about how you arrived at those eight key areas of expertise that are covered by the model.

Diana Howles: [00:03:45] Sure. That's a great, great question. And I'm sure our listeners have different ideas, too, of capability versus competency. I remember working on a competency model 20 years ago. So those competency models have been around for a while. The way that I like to look at it, Celisa, is I look at competence as the destination. We have arrived at full competence levels. And I see capability more as the journey. So our goal is to be fully competent. But capabilities talk about our growth as we try to get to that ultimate destination. So capabilities are where we are right now. It's this blend of our knowledge and skills, and they grow over time. So it helps us track that growth. And so that's why I really want to focus on capabilities, helping people be capable in these different areas. As you mentioned, the capability model for virtual facilitators has eight core areas of expertise. And when I started, Celisa, to be honest, it was really challenging work to think about what are the most important areas for virtual facilitators to know. And I started with sixteen. I based them on my own experience, research in the field, observations, input from trusted colleagues in the industry, and eventually whittled those down and got them down to maybe twelve or so and then landed on the eight. So it was very difficult work, lots of iterations, very iterative, but really a nice trajectory to help people on their development.

Celisa Steele: [00:05:35] Well, thank you for the distinction between competence and capability. That idea of destination versus journey, I think that's very helpful to think about. And then I

love to hear that you started with more and then had to whittle it down to the eight. Do you happen to remember anything that ended up on the cutting room floor?

Diana Howles: [00:05:52] Well, quite a few, but I do remember the names changing a lot too. And just lots of iterative work. At one point I remember I think we had “troubleshooting agility,” and I just looked at that, and I thought, “That seems a little awkward to say.” And so we changed it to “agile troubleshooting.” So even the names were changing a lot. They didn’t always have two words, but, as you know, Celisa, usually the product of really repetitive work and hard work is you come up with something that’s precise and you say, “That’s it!”

Celisa Steele: [00:06:27] Wonderful. So I’m thinking about the impact of the pandemic and how that pushed even laggards and holdouts to online learning. And I think it seems fair and accurate to say at this point that the majority of people have experienced live online learning. But I’d be curious to hear your assessment of where are we in terms of not just delivering live online learning opportunities but in designing and facilitating them to be effective? Are we at a tipping point? Are we past the tipping point? How would you describe it?

Diana Howles: [00:07:02] I love that question. It’s very insightful. I think that we’re probably at a place where everyone has obviously been introduced to these platforms, has had experience in these platforms, has used the tools available to them. We’re seeing more use of breakouts, for example. When we’re doing live animation or annotations, sometimes people are still a little fearful of using those kinds of tools. But where I think we’re not yet at, Celisa, is really effective design and really taking things to the next level, which is what I love about the book, *Next Level Virtual Training*, because we’re challenging people not just to use the platform but to do it in a very thoughtful way that’s designing for being able to have outcomes and change the way people, after the learning, change the way they perform at work or even in their fields of work. And so there are so many things that that we can do to really leverage more of the tools and then also how we design the workouts. So, when we put more thoughtful design into, if I want to have a really deep discussion, maybe I’m going to build in more reflection time. So more than just going through the motions, really being more thoughtful.

Celisa Steele: [00:08:34] And I know that when you think about designing live synchronous learning that you’re also thinking about ways to prepare learners for the live sessions and/or to follow up with them after those sessions. So you’re thinking about pre and post content. And so do you believe that single-session learning can be effective, or do you essentially always look to add pre or post content to live online sessions?

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Diana Howles: [00:09:04] Yeah. Short answer is I have seen those single sessions be effective. So we have seen really good outcomes from those. But the research is so clear that, when you have blended learning solutions, we have much better retention, much better application. So I do really try to always—and I hope our listeners do too—include some kind of prep work. So, whether they're looking at a video before we come together online—I just taught a class this week on behavioral styles, where we had videos for learners to watch beforehand. What I find is they come more prepared to class to have a good discussion. And that was our experience when we were in the live online class this week. And then of course post work. So we have that spaced repetition over time, which only reinforces learning. So what I like to do sometimes is the one by one by one. So one day after they do something—maybe it's an assignment. One week after they do something. One month after. So these reinforcements of spreading out our learning and using the live synchronous class as part of that blended solution creates much more effective learning long term.

Celisa Steele: [00:10:20] Wonderful. I think that idea of both the spacing and the reinforcement—so much research tells us how powerful that is if we really want to help learners take the knowledge and skills that we're giving them and really apply them and use them in their life and work. So it makes a ton of sense to me to think about that when you're thinking about the big-picture design of live online learning.

Diana Howles: [00:10:43] Exactly.

Jeff Cobb: [00:10:48] At Tagoras were experts in the global business of lifelong learning, and we use our expertise to help clients better understand their markets, connect with new customers, make the right investment decisions, and grow their learning businesses. We achieve these goals through expert market assessment, strategy formulation, and platform selection services. If you're looking for a partner to help your learning business achieve greater reach, revenue, and impact, learn more at tagoras.com/services.

Celisa Steele: [00:11:18] You mentioned hybrid learning earlier, and, for hybrid, this is where some learners are engaging in person, some learners are engaging online. And that seems fairly tricky, that you have to nail not just one but two delivery methods, and you have to get them right at the same time. So I would just love for you to share your thoughts on the pros and cons of hybrid approaches to learning.

Diana Howles: [00:11:45] Yeah, so I like to really think about hybrid learning as live mixed. I feel like the term hybrid has been overused. We have hybrid cars. We have hybrid systems.

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Some people think of blended learning, like we just discussed, Celisa, as hybrid. So it's been around a lot, and it can be confusing. So, to me, it warranted a fresh new term. And when you look at the context of that learning ecosystem, you see this mix of on-site and online learners together, and it is live. It's happening in real time. So that's why I call it live mixed. But as you suggest, Celisa, there are certainly many inherent challenges because we have double the technology. We can have multiple live situations going on at the same time. And higher education has really been a leader in this field. They've been doing this for a while. And you have the facilitator, of course, who is taxed with so many things to manage at once that the cognitive load for the facilitators is very high. And often our facilitators will say, you know, so exhausted at the end of that when they're managing it.

Diana Howles: [00:13:00] But I would say the good news, Celisa, is there are certainly ways that we can have effective live mixed learning. And I'm here to tell you that I certainly have seen that and have conducted that myself. But it requires strategies. So one strategy, for example, and I do talk about this in my book as well—I have a whole chapter dedicated to live mixed learning. But one strategy is, because there's so many things to manage at the same time, is partnering, partnering with a co-facilitator. So one of you is the lead. It could be the virtual facilitator is the lead or the on-site facilitator, but we have an anchor in each venue. This helps the learners as well. But there's two of you. And then I've even reached out to IT support. Sometimes I'll have it in the room with me because, if something goes wrong, you want it to be remedied right away. We're focused on the instruction and the facilitation, so it's nice to have that support. Or sometimes I'll have the tech support person just be there for the opening pieces or until we finish our breakout. So there are ways to really manage that classroom and help it be effective.

Celisa Steele: [00:14:16] I think that idea of co-facilitation makes a lot of sense. But, again, that does then up the need for preparation. You have to be able to coordinate with your co-facilitator if you're the one delivering that learning, and all of the prep that goes into doing that seems even more important than in a single-delivery-mode approach.

Diana Howles: [00:14:39] Absolutely. And one thing that I like to do, too, is we allow learners choice. So this leverages learner agency and their autonomy. They choose how they're going to show up in this venue. So they can choose I'm going to attend online, or they can choose to be there on site. And that also adds their investment in the learning and helps quite a bit for them to be pleased about them having some options. But what I've learned is that you want to make sure that they're committed. We had a bunch of folks register that we're going to be there in person, and then they actually showed up online. So I always say you can choose, but you have

to commit to the venue because then we plan appropriately. Usually those who choose to attend in person, they like that in-person energy. And so we leverage that and allow them to work together in in-person small groups for discussion, and then we have the virtual, those who are online, we have them work together in virtual breakouts. But then we bring everyone back, and we do a debrief together. I usually alternate too. So I'll call on somebody virtually, and then I call on somebody in person, and then I call on somebody virtually, and then in person. So really keeping it equitable as well.

Celisa Steele: [00:15:59] I'm so glad you added those details, in particular referencing learner agency. By giving them the choice, that is a real pro of a live mixed option.

Diana Howles: [00:16:12] Yes.

Celisa Steele: [00:16:13] So I am curious to get your thoughts on the use of video cameras during live online sessions and want to know what guidance you have. Seeing a video feed of a facilitator seems to me that it can have this humanizing, personalizing touch, but it could also be a distraction and maybe even contribute to cognitive overload for learners. So what are your thoughts on when and why to use cameras?

Diana Howles: [00:16:43] It's a really important question, and, in my book, I talk about this too, about how using the camera. I recommend it be used for purposeful connection moments. So we optimize our use of the Web cam because there are many benefits, and we can talk a little bit about that. The research studies are showing it's not so much that Web cams being on or off make a difference in learning outcomes. That seems to be a wash, but where we are seeing benefits, a Stanford study done in 2015 found that learners said that they felt an increased sense of social presence, which is so important to feel that from the facilitator, as well as an improved experience. So even though cameras being on may not necessarily improve learning outcomes, it is making a difference in their experience, which is so important, and their perception of this facilitator's presence. So, when we ask the question, should we use cameras? Yes, because those are really good benefits. And then, of course, Florida State University did a Web cam study in 2021 and found, too, that there was this increased sense of closeness and that people listened better. So the point here, though, is that we don't need the cameras on all the time.

Diana Howles: [00:18:04] Using them for purposeful connection moments. So when you have an introduction, when somebody is doing a role-play, a teach-back, when you're doing a large-group discussion, I usually stop showing visuals, bring everybody on camera—encourage them to be camera-ready, by the way, before the event—we have our discussion with our faces on

camera there. Or sometimes when we do a closing or if I'm telling a story that supports what we're learning, those are times where we want to see each other. But you bring up a great point, Celisa, about cognitive overload. Is it too much? Certainly when I'm showing a complex diagram, for example, we want to direct focus. If we have a camera on a facilitator or even the other learners, those are competing visuals. So that would be an example of extraneous cognitive load, which we want to reduce if we can. So what we do is, I'll tell people out loud, verbally, "I'm going to go off camera, and let's focus on this complicated diagram." And that's where we want our focus to be. So really being thoughtful about how we instruct and learn and then leveraging the camera when it's most optimal.

Celisa Steele: [00:19:24] That's great advice. I like this idea of purposeful connection moments and being aware of when those are and knowing that that can be a good time for use of the cameras. And it's also very helpful to have the research that you shared in terms of the fact that the use of cameras—or the non-use of cameras—doesn't appear to impact learning outcomes, but that it does have these other benefits that can come along with it. So that's all wonderful.

Celisa Steele: [00:20:00] And so we've touched on a few pieces of advice and points of consideration, but, given your depth and breadth of experience, I would love to get from you another tip or another piece of advice that you would offer listeners who are really looking to improve their virtual facilitation.

Diana Howles: [00:20:20] Oh, yes. One of my favorite topics to talk about. We can go through the motions and facilitate on a platform virtually with remote learners. But I always try to challenge and push people to be more excellent, and how can we do that? So some tips are—I talk about this in my book as well—but I have a strategy called "make the invisible audible." Make the invisible audible by talking your task. What I mean by that is, when we're in person and a facilitator is getting their slides ready and needs to switch to a different monitor, we don't need to make any commentary about what we're doing because learners can see in person what is happening in the room. What happens virtually is we're not used to explaining what I'm doing. Let's say there's a long pause, or something just happened. I lost my chat, and I'm trying to find it. So, instead of this awkward pause where learners can feel like, "Oh, did they lose my connection, or did I get disconnected?," I have facilitators talk their task. "Oh, one moment. I just need to bring up my other PowerPoint here." Or "Oh, I just need to go bring back the chat. I see that there." You make the invisible audible.

Diana Howles: [00:21:40] So that's one of the principles that I like to encourage everyone to do. And then, to play off this idea of when there is silence, as you know, Celisa, in the learning

field, and our listeners know, it's so important to have those spaces, those times where we can process and reflect, and sometimes—occupational hazard for those of us in education—sometimes we just keep talking. And so it's really important to have those spaces. But, again, in a virtual facilitation environment, if we have these long pauses, learners can feel like there's something wrong with the audio, or they got disconnected. So I call it “announced silence,” which just means we let learners know I'm going to be quiet for a little bit, and here's why. And so, for example, let's say that I was showing a complex diagram, and I wanted them to digest it first before we broke it down and unpacked it. I might say something like, “I'm going to be quiet for a few minutes here, and I'd like you to look at this diagram, and, when I come back, we're going to talk about what are the parts of it.” So they understand why we're quiet. I feel like that can be very useful for learning.

Celisa Steele: [00:22:59] I love those two tips, the way that you paired them up there, because, in the case of the “make the invisible audible,” it's about saying more than you might usually, and then, in the “announced silence,” it's about saying less but being clear about why you're saying less, and, in both cases, it's about letting the learners know why you're doing something or why something...

Diana Howles: [00:23:18] Right.

Celisa Steele: [00:23:19] So we always love to ask folks who come on the Leading Learning Podcast about their own lifelong learning. And so how do you approach your own lifelong learning? Do you have specific habits or practices or sources that you like to use in order to continue to grow professionally and personally?

Diana Howles: [00:23:39] Yeah, I feel like that's so important. We invest in others, and we're always helping others learn and grow. And so I feel like we have to do the same for ourselves. And so for me, Celisa, conferences have been a great source of inspiration. You see what's happening in the field. You see where we're going in the future. You get glimpses of what's coming around the bend. So I've been fortunate to be able to attend virtual conferences, obviously, during the pandemic and then, back in the swing of it, attending in person as well. And so those are just, I think, great places to be inspired and challenged and pushed beyond. We sometimes get in our comfort zones. And then the other thing I like to do is look at resources. So I do have favorite books, or I'm looking at those resources to think how I can improve myself. And then just a personal philosophy is I always feel like it's helpful to understand the learner's perspective, and that informs what we do as educators and facilitators. So, back when I was doing a lot of public speaking, I used to go to the back of the auditorium in

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the physical room and sit in the back row before the event, and I just envisioned what it would be like for a person in the audience to see that perspective when I was on stage speaking, let's say. And then, when I'm on stage speaking, I remember what it was like to be in that back row and look forward. So you almost see two perspectives at once, which takes some training to do, but it can be done. And so I feel the same way about virtual facilitation. I attend virtual classes as a learner. I go into a breakout as a learner in different situations to help my own virtual facilitation be better. So you really walk in the shoes of the learner, and you'll observe all sorts of things that then help you be more effective when you yourself are facilitating them.

Celisa Steele: [00:25:46] Thank you for sharing that, and I love that idea of putting yourself in the learner's perspective—literally.

Jeff Cobb: [00:25:58] Diana Howles is CEO of Howles Associates and author of *Next Level Virtual Training: Advance Your Facilitation*. In the show notes for this episode at leadinglearning.com/episode334, you'll find the visual of the virtual trainer capability model that Diana discussed. You'll also find links to her book, the Howles Associates Web site, and Diana's profiles on LinkedIn and Twitter.

Celisa Steele: [00:26:24] At leadinglearning.com/episode334, you'll also see options for subscribing to the podcast, and we would be grateful if you would subscribe if you haven't yet, as those subscriptions give us some data on the impact of the podcast.

Jeff Cobb: [00:26:37] We'd also be grateful if you'd take a minute to rate us on Apple Podcasts or wherever you listen, especially if you enjoy the show. Celisa and I personally appreciate reviews and ratings, and they help the podcast show up when people search for content on leading a learning business.

Celisa Steele: [00:26:53] Lastly, please spread the word about Leading Learning. At leadinglearning.com/episode334, there are links to find us on Twitter, LinkedIn, and Facebook.

Jeff Cobb: [00:27:03] Thanks again, and see you next time on the Leading Learning Podcast.

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