The virtual facilitator checklist

Most virtual facilitators and producers recognize the need to prepare backup plans, just in case something unexpected happens. I equate being prepared to the way an Olympic athlete prepares for the games. It may seem like extreme preparation to some; however, it is taking the time to do everything you can do to be your best.

This checklist is designed to help virtual facilitators and producers prepare for an event in the way a world-class athlete would prepare for one.

To use it, place a checkmark next to the items that are entirely true for you. Then add up the number of checks in each section, totalling all checks for a final score. The scoring key is at the end.

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VIRTUAL CLASSROOM SOFTWARE

☐ I know the full extent of capabilities that the virtual classroom software has.

☐ When logged in as the host, I know what every button and every menu command does.

☐ When logged in as the presenter, I know what every button and every menu command does.

☐ When logged in as a participant, I know what every button and every menu command does.

☐ I am aware of all unique features of the virtual classroom software (for example, how many breakout groups can be used at one time).

☐ I know what file types are supported by the virtual classroom software's file-sharing feature.

☐ I have tested every feature and activity that we will be using in the virtual classroom during my training event

Subtotal ___

COMPUTER

☐ I have a reliable computer or laptop that I will use to deliver virtual training.

☐ I have a second reliable computer or laptop that I will use as a "sidekick" when delivering virtual training.

☐ I have another backup reliable computer, laptop, or tablet that I can use as a backup to my main or sidekick computer to deliver virtual training.

☐ All software, drivers, and plug-ins necessary to deliver virtual training are fully installed on all my primary and backup computers.

☐ All my devices and backup devices are powered on and ready to go prior to the start time of my virtual training event.

☐ All my devices and backup devices are fully charged and can run from battery power if needed.

Sub total ___

INTERNET

☐ I have a solid high-speed Internet connection in the location where I will be delivering virtual training.

☐ I have a backup Internet connection available in the location where I will be delivering virtual training.

☐ I have a second backup Internet connection available in the location where I will be delivering virtual training.

Sub total ___

TELEPHONY

☐ I have reliable telephone service that I will use when delivering virtual training.

☐ I have a backup telephone connection that can be used if needed (i.e., my main telephone is a landline and my backup telephone is a cell phone).

☐ I have a second backup telephone connection that can be used if needed (i.e., my main telephone is a landline, my backup telephone is a cell phone, and my second backup uses a different cell service provider).

☐ I have a compatible hands-free headset to use with my telephone.

☐ I have a backup compatible hands-free headset to use with my telephone.

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☐ My telephone and all accessories I use have a clear sound connection (i.e., I can be clearly heard at all times when speaking).

☐ All backup telephones and accessories have a clear sound connection (i.e., I can be clearly heard at all times when speaking).

☐ My primary telephone headset is fully charged prior to the start of the virtual training event.

☐ All of my backup telephones are fully charged prior to the start of the virtual training event.

Sub total ____

TRAINING FILES

☐ I have a printed copy of every training file associated with the virtual training event (facilitator guide, participant workbook, saved poll questions, etc.).

☐ I have a second printed copy of every training file associated with the virtual training event.

☐ I have an electronic copy of every training file associated with the virtual training event that can be easily accessed from my computer.

☐ I have an electronic copy of every training file associated with the virtual training event that can be easily accessed on every backup computer, even if the Internet connection is down.

☐ I have an electronic copy of every training file associated with the virtual training event that can be easily accessed from any computer with an Internet connection (i.e., stored on an accessible website).

Sub total ____

TRAINING EVENT

☐ I have all web links for my virtual training event, including host, presenter, and participant links if they are different.

☐ I have all event passcodes, including host, presenter, and participant codes if they are different.

☐ I have all teleconference details, including moderator and participant codes.

☐ I know all the teleconference commands for moderators (e.g., *21 to activate breakout groups).

☐ I know all the teleconference participant commands (e.g., *6 to mute and *7 to unmute an individual telephone line).

☐ I have all logistical details, including web links, passcodes, and teleconference information, printed out prior to the virtual training event.

Sub total ____

FACILITATOR SUPPORT

☐ I have technical support from the virtual conferencing company who will assist with all technical details of the virtual training event.

☐ I have a backup technical support who could fill in for the technical support if needed.

☐ I have another facilitator or trainer who could fill in for me at the last minute if needed.

☐ I have a second backup facilitator or trainer who could fill in for me at the last minute if needed.

☐ I have a technology specialist available to assist participants behind the scenes.

☐ A technical support person who is knowledgeable of the virtual

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classroom software and teleconference service is on-site or available at every location where participants are located.

Sub total ___

PARTICIPANTS

☐ I know the participants' full names and job positions prior to the virtual training event.

☐ I know the length of time participants have been with their organization.

☐ I know the length of time participants have been in their current role.

☐ I know the biggest challenges the participants have related to the training topic.

☐ I know the questions that participants will have related to the training topic.

☐ I know whether participants have talked with their direct supervisor about the training topic.

☐ I know whether participants will be held accountable for what they learn.

☐ I have personally spoken to or exchanged messages with each participant about the training event.

☐ I have verified that participants have completed all prerequisites or pre-session assignments for the training topic.

Sub total ___

Grand total ____

SCORING KEY

60 Fantastic! Enter your name on the Extra-Prepared Facilitator All-Star List!

50–59 Excellent! Consider helping other trainers learn from your preparation efforts.

40–49 Congratulations! You are extra prepared to deliver virtual training.

30–39 You are prepared but have room for improvement. Select a few areas where you can improve your preparation.

20–29 You are on the verge of preparation. Identify the next five items you can add to your virtual delivery preparation.

10–19 You have started to prepare and have opportunity to improve. Select 10 items from this checklist that are most important for you and make an effort to add those to your list.

0–9 Ask an experienced virtual facilitator for assistance in getting started.

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