

## **On-Premise Virtual Classroom Solution: Benefits and Lessons Learned**

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### **Background**

Our company established a relationship with KnowledgeNet approximately three years ago. As a vendor, KnowledgeNet provided off-the-shelf learning events to our associates. In doing so, complying with our security and architectural structure, secured T1 lines were installed as well as content servers to provide these events. The offerings were both on-demand as well as scheduled live online training events. The events were typically IT in nature and targeted a limited area or skill set. As we moved forward with the live online offerings, we realized the potential for providing this type of learning environment to our enterprise was enormous.

### **On-Premise Solution-Requirements**

The next logical stage in this evolution was to develop custom material, specific to our company and test it. Two learning events were developed and delivered by KnowledgeNet. One event was geared towards our sales force and their staff; the other toward employees. Both were considered a success due to no major technical problems, the intuitiveness of the tool, and the measurable transfer of knowledge.

After two successful tests, we felt it was time to create a business case based on our needs as an enterprise. In doing so, specific requirements were needed to justify the continuance of this effort; what were our challenges that would affect our business goals? A project was established to address our needs as an enterprise as well as how this solution would fit into our learning strategy.

Our first objective was to identify our audiences. Based on the audience and their needs as a learner, what were the business requirements crucial in fulfilling this need. We created processes to illustrate the interaction the learner would have with this new learning environment. We also listed the technical requirements needed to ensure its usability within our environment. During this time, we continued to test within our environment to extract any technical issues this technology might have.

As we completed the planning process; we initiated relationships with several other vendors that provided on-premise solutions. During this time, we had discussions relating to their business model and how it could integrate into ours. Representatives also visited companies who had already established and implemented solutions.

Based on the planning work and discussions we had with other vendors, we felt it was time to start the Request for Proposal process. This process asks key questions of the vendors covering topics such as financial stability to topics covering technical requirements. This process will establish which solution will potentially fit our needs. Currently, we are still in the RFP stage.

## **Change Management**

Getting the word out was our next item on the agenda. We knew up front this was going to be a difficult change in mindset for our associates. This was a new way to learn. We created a communication plan to market this solution covering topics such as lessons learned, ROI, and best practices. This information was primarily gathered from outside sources due to our lack of experience, but did include results from our previous tests.

Demonstrations were offered to most of our business areas, not only at our corporate locations, but at our zone sites as well. We encouraged active participation during the presentations. The presentation was created to enhance and showcase all the crucial features the technology had to offer. The buy-in factor was essential.

## **Business Challenges/Goals**

So, what does this all mean to our organization? How does this affect our approach to learning? The virtual classroom environment provides synchronous (live) on-line courses utilizing virtual facilitators to improve the efficiency and effectiveness of learning events.

Efficiency is gained as learners are able to access the courses through our organization's Intranet without leaving their desks. Effectiveness increases through collaboration between the students and facilitators. The collaboration is enabled by the virtual classroom tool and the telephone, adding the often-needed social and interactive portion of learning, unavailable in traditional e-learning events.

An enterprise-wide direction for virtual facilitation is needed in order to meet pressing business needs, reduce redundancies, enhance efficiencies, and increase effectiveness of virtual learning events. In today's environment, our employees need to learn new skills more quickly and more frequently to do their jobs effectively than at any time in the company's history. Due to the critical business need to retool employee skills rapidly, options must be explored to maximize transfer of knowledge and skills, while being respectful of the learner's time.

## **The Virtual Classroom Environment**

The virtual classroom is an environment which provides synchronous on-line courses utilizing virtual facilitators to improve the efficiency and effectiveness of learning events. It is similar in many ways to web-conferencing, although there are significant differences. The differences are such that different approaches should be taken with each in order to leverage their respective strengths. Failure to recognize the differences and address the environments separately, especially with regards to development and facilitation, has led to less than optimal results for other organizations.

The virtual classroom environment is an attractive option for many reasons. For learners, there is no travel. The learning event is delivered to the desktop. Content is delivered via text and images on the computer for the visual learner, audio via telephone for the auditory learner and via simulations/shared applications for the kinesthetic learner. Facilitators are available for questions immediately. The social interaction element is reintroduced and higher transfer rates of knowledge are achieved.

For trainers, also, there is also no travel. The learning event is delivered from a local studio or from the desktop. Facilitators can check for understanding and speed up/slow down as appropriate. In this environment, co-facilitation is common, so duties relating to delivery can be shared between facilitators

## **Building a Facilitation Structure and Process**

Many training shops in the industry have implemented virtual classroom solutions. Among the implementers of this technology and industry experts, there are many philosophies on best practices with regards to content development and delivery. The primary commonality between the successful implementers is a facilitation team who is talented, well trained, equipped and supported. A quote from one expert is, "A good virtual facilitator can take mediocre content in PowerPoint and make it an engaging learning event. A mediocre facilitator will take even the best content south quickly. In the virtual environment, there's no room to 'wing it.'"

In our organization's experience, quality facilitation has been the key to successful virtual events. When looking at delivery technologies such as IDL's, NetMeeting and others, the effectiveness of the session hinges greatly on the quality of the facilitator. In surveys and focus groups with our learners, many have commented on the lack of engagement, interaction and effectiveness of training delivered by facilitators who do not have the skills or desire needed to deliver training virtually.

Based upon industry lessons learned and best practices, as well as our own experience, an enterprise-wide virtual classroom facilitation model has been developed to reduce or eliminate the redundancies and increase the efficiency and effectiveness of the virtual classroom environment.

Our organization's enterprise-wide facilitation plan is composed of 5 primary pieces. They include:

- Facilitation model
- Facilitator identification and selection
- Facilitator training
- Facilitator support
- Facilitator equipment

The facilitation model will take a departure from traditional facilitation models in many ways. The most significant of these will be introducing the concept of "facilitators without boundaries."

While facilitators will often partner with others to deliver training in their respective zone or department, they will also partner with other facilitators to deliver training events in other zones or departments. Through such partnerships among the facilitators, you can achieve a truly enterprise-wide perspective, meeting a greater number of needs utilizing existing resources.

As with any major shift in the way of doing things, change management is usually an issue for the first weeks or months. Once the new way of doing things is explored and benefits are discovered, the new model is not only adopted, but preferred by many over the traditional model. Based upon other organizations' experiences, the new model should be fully adopted as a viable learning intervention within the first 6-12 months, given proper support from management and facilitators alike. To be clear, the virtual classroom is intended to be used as an additional means of reaching learners, not as a total replacement for other delivery methods such as classroom or IDL.

In order to build an effective cadre of facilitators, industry best practices repeatedly demonstrate identification and selection of associates with the required skills, abilities and experiences is crucial. When identifying and selecting candidates for virtual facilitation, emphasis must be placed on different skill-sets than the skill-sets emphasized for classroom facilitation. Due to the nature of the work, more weight should be placed on teamwork, interpersonal skills and communication. Technical abilities, while important, rank lower on the list of needed skills than facilitation and teamwork skills.

There are many reasons why the emphasis must shift. Due to the nature of this environment, facilitators must emote positive attitudes and high energy to make learning events successful. The reason for this is that since a facilitator can not be seen, the voice will be the primary means of conveying the message. In traditional classroom training, the facilitator can rely on non-verbal communication to modify the verbal message. In the virtual classroom, the facilitators do not need to be subject matter experts (SME) on the content they are presenting. They instead must focus on facilitating the session with another facilitator or SME who does know the content. Also facilitators must be exceptional in their ability to understand, interact, and collaborate with individuals they may not know personally. In some cases, facilitators may not have the opportunity to meet face to face with those they are presenting with, but will still need to establish relationships in order to provide effective learning events. Due to the “newness” of the virtual classroom as well as change management issues, there will be instances where answers are not readily apparent. Facilitators will have to work with others to find or develop solutions to challenges they experience, again, in a virtual environment.

There are two primary facilitator roles identified: “Lead Facilitator” and “Facilitator”. While the roles will evolve a little differently in each zone based upon needs, at the core Lead Facilitators will be the primary contact for facilitators in each zone and will also represent their zone at a monthly coordination meeting. These meetings will be leveraged to share best practices, lessons learned and troubleshoot challenges each may face. Lead Facilitators will also be involved in decision making at the enterprise level with regards to content, scheduling and coordination of virtual classroom events.

In order to assure facilitators are adequately and consistently trained on the equipment they will be using, the processes and methodologies associated with the virtual classroom and effective virtual facilitation techniques, a one week “facilitator boot camp” is offered at our Corporate Office. The training presented is required before a facilitator can use the tool in their own environment.

Some other organizations have rushed to train several facilitators in anticipation of requests that never came to fruition, and trained facilitators were unable to use their skills. The organizations invested time and resources in an ineffective way and looking back, most would have approached training at a more gradual pace based on needs. Since it is anticipated that each zone’s needs will be somewhat different, by training facilitators in waves, time can be taken to carefully evaluate the needs of each zone so that appropriate allocations of resources can be made in the subsequent rounds of training.

Once facilitators have completed the training and are “certified” to begin facilitating sessions, a coach (or coaches) will be assigned to them. The coach will observe the facilitator practice sessions and class delivery. The coach will provide feedback and present development opportunities as appropriate. The role of the coach is to help each facilitator develop their own style and increase their effectiveness in the virtual environment. Coaches will also be an available resource for facilitators to contact regarding hints, tips, best practices etc.

During this stage of implementing an on-premise solution, developing our facilitation structure and processes is crucial. Having the right skill set is essential in ensure the success of this environment. Once the facilitation plan is implemented and stable, our next steps will be to re-enforce the instruction design aspect. Instruction design in our organization is specific and deliberate. Our process centers on the use of reusable learning objects. Processes created to deal with this environment will be a re-enforcement of our current methodology. Virtual classroom in our environment is in its infancy and growing stronger every day. As we grow with this technology, so will our knowledge.

### Biographical Sketches

**Jeff Burger**, of State Farm Insurance Companies, has worked in learning and development most of his 16 years at State Farm. Currently, Jeff is an eLearning analyst in the Learning and Development Department at State Farm. One of Jeff's many responsibilities is to research and evaluate new learning technologies. Currently, Jeff is leading the effort to implement an on-premise virtual classroom environment.

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**Rob Stogsdill**, ChFC, State Farm Insurance Companies, focuses on collaboration technologies in the learning environment, including Communities of Practice and the Virtual Classroom. Rob established, facilitated, and coordinated State Farm's eLearning Consortium in its first two years of operation. Rob is currently working towards building an effective and efficient cadre of facilitators for State Farm's virtual classroom environment.

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