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Guidelines for running synchronous sessions

Using a synchronous tool requires careful planning to ensure that all aspects of the design, scheduling, delivery and management of an event produce successful results. Even though many synchronous tools are easy to use, good preparation will result in a far more successful session, especially for those who are not using the tool on a regular basis.

The guidelines below were based on experience in helping a number of novice synchronous session leaders. They also serve as a reminder for those who are experienced, and may tend to leap straight in without planning!

Design the Session

Decide on the purpose of the session. Is it to be for:

- Information transmission
- Brainstorming/creative idea generation
- Discussion
- Decision-making, voting
- Education on a specific skill or application
- Some other purpose?

How does it fit into a bigger, overall programme of learning or development? Are your design ideas suitable for the synchronous medium, and for your audience?

Determine how many people will be involved. A session to make people aware of a subject can be broadcast to a large audience; a discussion should be limited to fewer than 10 people.

Which specific tools will you need to use? Are you going to give a presentation involving PowerPoint slides, make use of an application, or any of the special tools provided with your synchronous product?

Timing is critical. Novice session leaders always underestimate the time a session will take and overfill the agenda. Discussion takes time, and often a good session involves a fair number of questions and answers. If you are not an experienced session leader, estimate the time then halve your content!

Schedule the Session

Book the session well in advance and remind people at regular intervals as the date nears. Synchronous sessions should be treated the same as critical meetings which cannot be missed.

Ask the audience to find a quiet place from which to participate. Ensure the session facilitator has a quiet room booked.

If it is the first time for many participants, book the session to start half an hour before the real start time. Use that half hour to test access and use of the tool by the participants. Even if the participants are regular users it is worth allocating 10 minutes as login/test time before the session.

Warn your Help Desk or support staff that there may be additional calls during the beginning of the session. Novice users in particular may need additional help and guidance with testing out the features of the tool before the session begins. It is important that any individual issues do not take up valuable time allocated to the majority of people in the actual session, and that they are transferred to someone who can focus on helping.

Plan the Agenda

Prepare an agenda, which lists items with timings and priorities. Aim for a maximum of no more than 1.5 hours for each session, and preferably less than that. Make your very first session much shorter (up to 45 minutes). Put high priority items near the beginning of the agenda.

Break the session down into separate chunks. By mixing activities you will retain the interest of the participants. Include a number of activities where the students have to contribute actively.

Make any individual presentation less than 7 minutes long. This time is about the maximum that people can concentrate in a passive way. If you have more than one presentation segment, insert a discussion or other session between presentations.

Allow sufficient time for introductions, questions, interactive elements and closing remarks.

Issue the agenda in advance, as well as clear instructions on any preparation the participants will have to make prior to the session commencing.

Provide an 'etiquette' document if needed, to guide participants on behaviour and expectations for their contribution to the session.

Prepare the Content

Keep your first session short and simple. Once you and the audience are familiar with the technology and its uses then you can move to more complex sessions.

Make graphics simple and easy to read. Screen resolutions may vary amongst the participants. Complex slides take longer to download, and if the critical messages are not in the graphics, don't use them. Elaborate company background images are particularly large but with little added value.

Do not display large volumes of text. Limit any text to no more than half a page, and ensure it is at least 12 point font, preferably larger.

Practice your session, especially if any aspect is new or complex. It is important to check the timings of these segments, and allow for the fact that there may be many questions during the live session. If possible practice complex activities in a realistic as possible situation, with one or two other participants located at different physical sites.

Invite guest speakers to provide variety and interest for the audience. A guru on any subject will provide a highly interactive and valuable session. It is advisable for the expert to have a training session prior to the event, or to be located with someone who is familiar with the tools, so that he or she can focus on the content of the session.

Send out some preparatory work for the participants. Ask them to come with 3-5 questions on the subject, a number of brainstorm ideas, a summary of an opinion on a document, or a priority list of discussion items. It will help to ensure participation is active and includes most members of the audience.

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Run the Session

Provide a warm welcome and mention participants by name or location. If numbers and time allow, let participants introduce themselves.

Stick to your agenda. If students are having technical difficulties that cannot be resolved before the session starts, refer them to Help Desk or other support.

Provide a quick review of the tool and your expectations of the students before you start.

Speak clearly and in a normal voice. Make sure you are the correct distance from the microphone. Do not rush. Pause frequently. One of the most common problems encountered in these sessions is caused by excessive speed, the facilitator talking too quickly and/or rushing through the material. Do not use acronyms that the participants may not understand, and take care over your use of language which might offend. Keep instructions clear and concise. Repeat them in a different format if needed.

Be aware of distractions which could affect the quality of the transmissions, such as external noise, moving away from the microphone, rustling paper, tapping the table. If you are using video, then make sure there are no distracting visual images in view.

If side conversations are allowed, ensure that a 'microphone off/mute' feature is used.

Poll the audience for feedback frequently. If you have a large audience, you may want to ask for questions by group/location.

Make sure you mention names of participants, so they feel included. Ask students to introduce themselves by name before making a comment; if they do not, make sure that you name them when you reply.

Allow for a 1-second delay in transmission to the audience. If you are combining audio and visual images, make sure that you leave enough time for them to appear synchronised at the receiving end. Introduce items in general terms verbally, announcing your actions, whilst allowing time for the images to appear visually. If possible, arrange to download large files to the clients before the session begins.

Do not interrupt speakers unless it is necessary. Recognise that due to transmission delays, interruptions may occur at inappropriate times.

Keep the session on track and keep an eye on the time.

Close the session formally with an item such as survey or vote on effectiveness, and/or a decision on next steps.

Review

Once the session is over, assess and review it. Share your experiences with other facilitators and document plans for improvement for future sessions. Each session can act as a rich source for learning and contribution to best practice. If you have recorded any of your session, you may be able to use the recording to help others learn synchronous session facilitation skills.

Use telephone or written surveys to ask the participants for more extensive feedback than you may have received during the actual session. Ask more open and probing questions to gain in-depth responses.

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And finally…… prepare for your next session.

In summary:

Think about design	• Define the purpose • Analyse the audience • Work out timings
Schedule	• Book well in advance • Find facilities • Educate and test
Determine the agenda	• Plan timings and priorities • Insert active events • Determine any preparation, expectations or pre-work
Prepare the content	• Create simple, effective content • Have a dry run to practice
Run the session	• Provide a welcoming environment • Stay on track • Manage and work within the parameters of the technical environment • Poll for feedback frequently
Review	• Review the session • Gather in-depth feedback • Incorporate feedback into best practice