Teach in Your Pajamas: Becoming a Synchronous e-Trainer

BY KAREN HYDER

I taught Act! 6.0 last week to sales people from a software development firm in Virginia. It was a great group, and everyone enjoyed the class. I used PowerPoint slides that came with the courseware, we brainstormed on the whiteboard, and we discussed specific questions and product uses.

This class was a lot like other classes I’ve taught — except that I was home in my pajamas and my students were in offices scattered around the country. No, it wasn’t one of those “go to work in your underwear” dreams. I was teaching a synchronous online course.

I’ve been a road warrior for nine years and have taught technical and soft skills courses in thirty-two states and eleven countries. Distance learning has always appealed to me, but I didn’t believe the technology could ever re-create the learning relationships I build in a classroom every day. I feared that the interface would seem sterile and cold and that my students wouldn’t participate.

But I found that all collaboration software uses simple tools like a whiteboard and markers, text chat and PowerPoint slide display. These are tools that I already use in the classroom. I quickly mastered the details of the collaboration product chosen by the client. Soon students in Virginia were able to see me demonstrate synchronization as I dragged a mouse across my screen in New York. I taught concepts, asked questions and gauged students’ progress online, and my students participated!

To prepare for the virtual session, I adjusted my instructional methods and practiced with the tools. I also modified some basic communication techniques. For example, in a physical classroom, I have the benefit of seeing a student’s body language. If a student looks discouraged, I can walk over and see what’s hap-

Continued on next page
pening on his desktop. Online, I can’t see how people look, but I can see student status indicators that they can set, asking me to speed up, slow down or clarify.

By making simple adjustments to the way I communicate with learners, I have transformed myself into a synchronous e-Trainer.

**How it worked**

Using only a browser, students and I attended our virtual classroom on PlaceWare’s website in the same way we would go to any other URL. I had considered using other, similar products like Centra or WebEx, but in this case the client chose PlaceWare.

Using PlaceWare, my students were able to see my bulleted and graphic slides and my whiteboard drawings. They watched me demo the software procedures I performed on my machine. In PlaceWare, the audio portion of the course — that is, my voice and those of the students — can be handled with a simultaneous conference call. Some software applications use Voice over IP (VoIP) technology where voice is transferred over the Internet making use of the microphone and speakers on each user’s PC. Either way, participants see and hear the same thing at the same time and can participate as they would on a conference call.

Unlike conference calls, interfaces like Centra, PlaceWare, InterWise, Messenger, LearnLinc, Blackboard and WebEx provide standard training and communication tools like those used in a bricks and mortar classroom. Trainers can incorporate effective instructional methods and still appeal to a wide variety of learning styles. Some examples of the tools available are:

- **Slide or file display** to show students PowerPoint slides or other files.
- **Whiteboard** to brainstorm a list of ideas.
- **Tools access** to share the ability to use tools and functions of the online interface with students or other trainers.
- **Peer-to-peer chat** to get students to connect with other students.
- **Student/trainer chat** to allow sidebar Q & A.
- **Instant feedback** to confirm the appropriateness of the pace and the content.
- **Polling** to gain consensus or perform quick learning assessments.
- **Annotation** to focus students’ attention on a specific area of the screen.
- **Multimedia content** to show .avi, Flash or other movies.
- **Live demos** to show participants how the software functions as the trainer performs the actual clicks.
- **Group web surfing** to navigate to a website then give students access to interact directly with the site.
- **Over the shoulder** to coach students on their performance as you peek at their screens.
- **Application sharing** to take control of a student’s machine to coach them through keystrokes or to fix a problem.
- **Record and playback** to save the audio and video portion of the session for review and reuse.
- **Integrated telephony and VoIP** to communicate verbally with students on a conference call or over the network connection.
- **Video integration** to see AND hear your students.
- **Testing and grading** to create tests and quizzes, and to keep track of assignments and grades.
- **Session registration and reporting** to allow students to sign up for a course online, to track registrants and generate automatic confirmation and connection information and to track attendees participation including login and logoff times.

**Tools to facilitate online training**

Let’s take a look in detail at some of these tools — how they are used, what the experience is like, tips and tricks, and examples from actual practice.
**Slide or file display**

*How it’s used:* You can use slides to help organize your content and manage the flow of ideas. Use of this visual tool also provides something to look at. Bulleted lists, graphs, photographs and screen shots help participants follow along. You can also show sample documents created in Word or Excel or HTML.

*What it’s like:* PowerPoint. In fact, most products let you use the PowerPoint slides you already have.

*Tip:* I also like to include slides with just one question to get people thinking and talking. I may show the bullet points from the courseware on the very next slide, but I don’t display it until I’ve had some input from the group.

*Example:* “What types of data does Act! 6.0 track for each record in a database?”

**Whiteboard**

*How it’s used:* Encourage students to share ideas and comments through brainstorming. Ask questions, and type their responses on the whiteboard. This promotes interaction, validates student input and provides clarification for others who may not have heard the answers. You can also use the whiteboard to sketch your visual aids.

*What it’s like:* It’s like writing on the whiteboard in your physical classroom, only better because this data can be saved and reused later.

**Tools access/sharing**

*How it’s used:* As trainer, you are responsible for leading the session and managing the flow of information. Therefore, you also control the interface that all online participants see. You can display files, annotate important points and create quizzes or polling slides. Students can contribute verbally, but cannot control the tools. You, or the training coordinator who sets up the session, can select the access level for each of the invitees so that two or more trainers can take turns delivering. There are also options that give all participants (almost) equal control.

*What it’s like:* Team teaching. When you need to share the stage, you have to make agreements about who will cover which portions and when you’ll switch roles.

*Example:* Tap into your resources and invite an expert to share their insight with the class. Logging into an online session is a much smaller commitment than attending a class in person.

*Tip:* To ensure smooth transitions, be sure your co-presenter roles, like time limits, are defined and agreed upon in advance.

**Peer-to-peer chat**

*How it’s used:* Chat is designed to give participants direct access to each other via text messaging thus providing a forum for side bar conversations and comments. You

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**TABLE 1: Collect relevant information about learners ahead of time.**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Responses from coordinator</th>
<th>Sample student response</th>
<th>Sample student response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is the audience?</td>
<td>They are primarily sales, but also sales admin, marketing, managers, etc.</td>
<td>I am sales manager for the Eastern region.</td>
<td>Sales.</td>
</tr>
<tr>
<td>What do they know already?</td>
<td>They’ve been introduced to the product and have it installed. Some use it a lot, some not at all.</td>
<td>I’ve been using contact management software for six years. I’ve had this for three weeks.</td>
<td>Outlook. Two years.</td>
</tr>
<tr>
<td>What do they expect from this training session?</td>
<td>Some are self-taught; they want to fill in the gaps. Others want a structured look at how to use the product and a chance to try it and ask questions.</td>
<td>I’m just using it the way I used the old software. I’d also like to understand more of the email functions.</td>
<td>More on email and contact management.</td>
</tr>
<tr>
<td>How does the organization see this group using the product?</td>
<td>Day-to-day.</td>
<td>It is my lifeline to my clients and my leads. I spend five hours a day using it.</td>
<td>All contact information in one place.</td>
</tr>
<tr>
<td>Experience using a browser and accessing websites?</td>
<td>Yes</td>
<td>Yes</td>
<td>Five years.</td>
</tr>
<tr>
<td>Synchronous online learning experience?</td>
<td>Yes/No/Some</td>
<td>Yes. InterWise for three or four meetings.</td>
<td>Yes.</td>
</tr>
<tr>
<td>In which product?</td>
<td>InterWise, PlaceWare, WebEx, others.</td>
<td>InterWise</td>
<td>LearnLinc, BlackBoard in school.</td>
</tr>
<tr>
<td>What do they most need to learn?</td>
<td>They think it will help clarify things they are struggling with.</td>
<td>I don’t need to start at the beginning. I just need to know how to be more efficient with the mess I have right now.</td>
<td>How to keep track of the huge amount of client information I have.</td>
</tr>
</tbody>
</table>
What is your role in your organization?

Sales
Marketing
Customer service
Management

FIGURE 1 A polling slide helps build interaction.

Can also create “break out” sessions where students work through a scenario and report their results to the group.

What it’s like: It reminds me of passing notes in third grade, but is ideally used for course-relevant side conversations, similar to coffee break comments.

Example: Nudging your coworker in the ribs saying, “Hey, we could’ve used this to solve that problem that came up last week.”

Tricks: Some products allow you to turn off the Chat feature to avoid inappropriate use.

Student/trainer chat

How it’s used: Students are able to direct questions and ask for clarification without interrupting the flow of the class. Simply type your response back to the student.

What it’s like: Parking questions — that is, setting questions aside with the intent of answering them later. You can manage the content and sequence efficiently by not addressing every question immediately.

Trick: If you need to keep the session moving along quickly, invite a fellow trainer or subject matter expert to moderate the Chat questions on your behalf.

Tip: Give a basic intro to how chat works and encourage students to ask questions of you or of the moderator without having to un-mute the phone, or share comments like how they might apply the new skill or use the feature at work. When you receive a question that is relevant for the whole audience, read and answer it aloud and acknowledge the person who asked.

Instant feedback

How it’s used: The comment I hear most from trainers about teaching online is that they miss being able to connect with students by observing behavior and asking “How’s it going?” Students can change an option on their screens to alert the trainer to slow down, speed up, or clarify.

What it’s like: Observing body language that indicates a student needs help. It also reminds me of a flight attendant call button.

Example: You can say, “I see a red indicator telling me someone needs clarification on that last section. Are there specific questions I can answer?” Or send a chat message offering assistance.

Tip: Request the use of the instant feedback to check in with the group. “Please change your status indicator when you finish the exercise.” This is sometimes called an on-the-fly poll.

Trick: Some online interfaces also have an over-the-shoulder function so you can look at what’s happening on any learner’s machine.

Polling

How it’s used: An easy way to create interaction is to display a polling slide that students can respond to. (See Figure 1.) A poll usually consists of a question and two to six possible answers. You can create a poll prior to the session or just when you need it. Once it’s displayed, students can respond by clicking on the option of their choice. The interface will display the percentages of the responses and, in some cases, how each participant responded.

What it’s like: Quizzing, gathering opinions, quick needs analysis.

Tip: Plan and create polls in advance to build meaningful lesson introductions and evaluations.

Example: “What is the most important benefit of using Act! 6.0?” Offer typical responses, such as, “A. Staying organized. B. Sorting leads by region.” Discuss additional benefits verbally.

Trick: Use a polling slide about every ten minutes to build interaction.

Annotation

How it’s used: You can create impact using annotation tools by drawing arrows to a particular object on the screen, circling or underlining words or adding text on-the-fly.

What it’s like: The coach showing the offensive and defensive play.

Tip: If your mouse drawing skills are limited, create a slide with the graphic partially completed. Click on the slide when you’re ready to use it and simply make annotations.

Multimedia content

How it’s used: You can vary your instructional methods and engage student interest by showing .avi, Flash or other action clips.

What it’s like: Filmstrips, VHS tapes, or demos.

Example: Use clips from Help files, marketing materials, portions of asynchronous training tools or your own examples.

Tip: Keep the clips short and highly relevant. Like TV, we tend to surf to the next channel if we aren’t interested in this one.

Live demos

How it’s used: Show participants how the software functions as the trainer performs the actual clicks. (See Figure 2 on page 5.)

What it’s like: Using a projector or big TV screen to walk through the steps before students try on their own.

Example: Touring complex dialog boxes.

Tip: Ask for student’s verbal participation. “Why would you want to keep track of this contact’s ID/Status?”

Group web surfing

How it’s used: Like demonstrations, group surfing lets you move around on your machine, displaying what you see on your screen to your students. When you navigate to a website, each student can interact directly with the site.

Example: Want students to complete an
FIGURE 2 Live demos are useful for demonstrations.

online form? Take them to the URL and drop them off. They will be directly linked.

What it’s like: Being a tour guide in a brewery and providing samples to visitors.

Tip: It’s possible to snap wandering students back from the web and into your session with a single mouse click.

Over-the-shoulder/application sharing

What it’s like: If you’ve ever worked on a help desk, you know that there are times when it would be particularly useful to be able to see what the caller is trying to explain.

How it’s used: Programs with sharing features let you glimpse a student’s screen to coach his performance or reach right through the interface and make adjustments on his PC once he’s given you permission. Teams can view and make changes to shared files.

Example: This is an excellent way for me to provide technical support to my in-laws over-the-shoulder when deciphering the “whooziewhatsit,” and “thingamajigger” breakdowns from a hundred miles away.

Tip: Assure participants they can take back control and end the share access at any time.

Integrated telephony and VoIP

How it’s used: Manage the group conversation on a conference call — uses a regular phone, and/or an over-the-network communication using a microphone and speakers or headset.

What it’s like: A conference call.

Tip: Provide call etiquette information as part of the invitation. Ask each participant to state his or her name before asking questions or making comments.

Trick: Plan questions to ask to build interaction. When you ask a question, wait twelve seconds for a response. The reason for this is that it takes students three seconds to realize a question has been asked, three seconds to think of an answer, three seconds to get the courage to answer and three seconds to turn “Mute” off and answer. You’ll be amazed at what a difference waiting longer after questions can make.

Example: “What data points would you want to collect that Act! does not already have a field for?”

Video integration

How it’s used: Callers see each other on screen and both sound and image are transmitted. If you want to see multiple participants, just change channels.

What it’s like: Star Trek. The images are much smaller than the View Screen on the Bridge, but the idea is the same.

Tip: Keep the focus on the learning not the production.

Trick: If you’re going to be seen AND heard, show students your supportive-customer-service face, rather than your “diligent-typist-who-needs-new-prescription-lenses” face. (Also, you may not want to be seen actually wearing pajamas!)

Record and playback to save the video and/or audio portion of the session

How it’s used: To digitally capture a visual and/or audio record of the session for review or reuse.

What it’s like: Videotaping your class with the camera focused on the slides and demos.

Tip: This recording can be added to a website and used asynchronously.

Testing and grading

How it’s used: Formalize your evaluation process by generating, administering and scoring quizzes and practice exams and by tracking student assignments.

What it’s like: My third grade teacher’s grade book.

Tip: Make a note of every question your students ever ask in this course. Start with that list when writing test questions.

Session registration and reporting

How it’s used: Need to track ROI? Automate training administration? Find out who’s attending online sessions and who isn’t?

What it’s like: School transcripts. You can find out which courses this student has taken, test scores, and completed assignments.

Tip: To better prepare students for an online session, attach a customized agenda, online etiquette and pre-course assessment tool directly to the automated confirmation email.

Trick: Many learners need help applying what they have learned in class back at work. Follow up with previous students to offer additional support and training opportunities.

Example: See “Needs Analysis” below.

Preparation

If things are to go smoothly during the session, you will need to do some advance work. This consists of a bit of needs analysis, adapting your content to fit the audience and the circumstances, thinking about the instructional methods you will use, and inviting the students to the class.

Needs analysis

Before I began my Act! 6.0 training preparation, I found out some relevant information about the students; what they know and what they want to know. (See Table 1 on page 3.) Initially, I gathered this information from my client, the training coordinator. This information helped me get a sense of the situation, but didn’t provide hard examples. Later, I attached a pre-course survey file to an e-mail asking each participant questions about his skills and motivations.

Adapt content

When my client asked me to deliver two, two-hour sessions on Act! 6.0 for her remote sales staff, I ordered a courseware product designed for instructor-led classroom training. The course has six lessons and is intended for a full day so I had to make some hard choices about what to cover and how. I didn’t believe that going faster or simply asking the students to type would be a good idea.

To keep students interested, I focused training on what they most needed. The surveys indicated that most students had already used contact management, but not in Act! 6.0. I scanned the course workbook for content on these subjects and planned sixty minutes of activities focusing on contact management features, differences and shortcuts including Contact Activity Lookup and Active Libraries. I planned thir-
ty minutes on email with Outlook integration and some practice time. Part of delivering online is respecting the time available. It’s not “Cover everything you can,” but “cover important content well in the amount of time you have.”

Choosing instructional methods

Some of your traditional classroom methods will work, with a few tweaks.

Introduction to the interface

Students had mixed experiences with online tools, so I opted to do a quick tour of PlaceWare features and how to use them.

Introducing participants using the Whiteboard

Just the same way that cold calls can feel unfriendly, unwanted and, well... cold, online training sessions can feel strange, too. I wanted my learners to interact with the others on the session, by encouraging introductions at the beginning. I created a slide with all participant names. When we logged into the session, I started by saying “I’m Karen calling in from Rochester, NY” and typed Rochester next to my name. (See Figure 3.) I asked each student to take turns stating his name and where he was calling from as I typed their location. Others were able to connect the voice with the person and have a chance to feel somehow connected, even if from thousands of miles away.

Photos of the instructor and other participants help people connect, too. (See Figure 4.)

Latecomers quickly get up to speed as they see who’s already on the call. Once you’re finished double check that extras haven’t joined.

Using questions and annotations

A PowerPoint slide presentation came with the Instructor’s version of the Act! 6.0 courseware. One slide lists all the reasons to use a contact management tool. Knowing that many students are already familiar with the concepts, I didn’t want to bore them by just showing a slide. I created a new slide with just one question on it. Then I planned what their answers might be.

1. What are some of the advantages of using a collaborative contact management tool?
   • Easier to forward leads with all relevant contact information
   • Track interaction between our admin, marketing and sales staff
   • Help marketing see demographics and trends
   • Build client relationships

When I came to that slide in my presentation (see Figure 5 on page 7), I used the annotation features to list students’ verbal input. Their responses were what I expected and set a firm foundation on which to teach new features. I could confirm that all students had a sense of why they might use the tools before I moved on to demos.

Demos

I planned a live demo of my own screen to show the process of adding a new contact. As I performed the demo, I asked students to suggest next steps and commented on what they might include in a variety of default fields. We discussed improvements in this version and handy features.

Independent practice activities

Next, I asked students to complete the procedures on their own PCs following the steps in the courseware workbooks and asked that they change their seat indicator to the color green to tell me when they had finished.

Status indicators/Polls

When all seats were displayed in green, I showed a polling slide to ask students if they thought the features of the new program were an improvement over what they were using. Ninety percent agreed.

Interaction

For the email lesson, I wanted them to send a client lead to another user. I pointed them to the attachment I sent with the course agenda that provided instruction and one other user’s email address. They were also instructed to copy me. While they practiced, I observed and replied to them.

Invitations

When you create a meeting you can complete an online form and create an automatic invitation to all participants via email. (See sidebar on page 2) At that time, a classroom is designated and a Passcode is automatically generated. In some applications the conference call number and ID and Passcode are also generated.

Along with the connection information, you may also want to let students know what to expect from the sessions. Send an agenda with time estimates, pre-course
What are the advantages of using a collaborative contact management tool?

Share leads
Track contacts made
Watch demographics and trends
Support client relationships

FIGURE 5 Use questions and annotations together.

How can I send an email to all the contacts that expressed interest in our winter promotion?

M.B.

FIGURE 6 Invite students to keep in touch.

work and online etiquette. Topics to address:
- URL for logon and number for dial-in.
- Make suggestions to improve their environment — sound, comfort.
- Use a headset.
- The difference between Mute and Hold.
- Do not disturb signs.
- Time zone notations.
- Home office suggestions.
- Who to call for help if you can’t get access to the call.
- Attach prep work, course outline or anything they need to read or print ahead.
- Suggest they get a pen and take notes in the workbook.
- Handouts.
- If necessary remind them to download appropriate files to access the training URL. If you have multiple presenters, they also may need additional files.

Followup

Much of our learning takes place after training when we attempt to apply concepts to practical situations. When we completed the session, I reviewed what I had done and considered improvements I would make next time. I sent an evaluation form to the participants asking for feedback and to find out what worked for them. I also used the email to remind them of key points covered in the session. Finally, I invited them to contact me with their questions as they encountered them.

Several students replied with real-life scenarios and asked how Act! 6.0 might be of use. (See Figure 6.) I forwarded my reply to all the session participants.

Recommendations

Compare vendors and products to find tools that will suit the needs of your organization and students. Consider bandwidth requirements, downloads, security, ease of use and audio transmission options.

If you typically meet your students in a physical classroom and rely on white boards, PowerPoint slides and eye contact to deliver your material and connect with your students, a move to web-delivered, synchronous training is a major shift. By listening to learners’ needs, planning questions and activities, and using the variety of instructional tools available in synchronous tools like Centra, InterWise and PlaceWare, you can create real learning experiences in a virtual environment. The pajama option is yours.

AUTHOR CONTACT

Karen Hyder has spent her career finding ways to improve the adult learning experience. Delivering train-the-trainer programs for Ziff-Davis Education, Corporate Learning Ltd. (UK) and OM-Tech Learning, Karen has taught thousands of trainers, subject matter experts, sales and support staff how to incorporate effective training strategies into their personal delivery styles. The result: program graduates with Microsoft Certified Trainer (MCT) and CompTIA Certified Technical Trainer (CTT) status. And they still remember what they learned in class.

Karen’s firm, Kaleidoscope Training and Consulting offers presentation and training skills improvement programs, technical trainer certification, course development and delivery, and synchronous online training sessions. Contact Karen by email at karen@karenhyder.com

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