



Training a Remote Workforce Job Aid

Even though your financial institution is likely changing how you conduct business and serve your accountholders, employees and leaders still need to continue learning. According to an article on [edsurge.com](https://www.edsurge.com), here are some tips for conducting training for a remote workforce. Check with your technology department for which options will work best for your financial institution.

Video Conference – The simplest way to convert an instructor-led course (or ILT) is using a webcam. It's not the best way to train online, but it is the easiest. Choose a tool such as Zoom, Skype, GoToMeeting, etc. One tool, [Kahoot!](https://kahoot.com), is offering a free version for distance learning.

Shorter is better – Holding someone's attention during ILT can be a challenge, and it's even more of a challenge when the training is remote. Your training needs to be concise.

Blended Learning – Use a blended learning approach when training a remote workforce. In addition to video conferencing, allow learners to research topics, read an article online, schedule appointments with other subject matter experts, create quizzes, etc.

Don't forget to press record – Whatever tool you use, record the session. Someone won't be able to make the session. This is one of the huge benefits of remote learning: being able to access the material when it's needed most.

Be careful of what's lurking in the shadows – If you are recording a training session, check the lighting so you (or another presenter) isn't in the shadows. Lighting is important. There's no need to make your videos worthy of an academy award, but the lighting should also not be a distraction. Join the session early and make sure the lighting is how you want it.

A recent poll recommends polls – Many online platforms have built in polls or surveys to help keep employees engaged. These can be built out ahead of time or created during the session. Texting or other direct message tools can also create more opportunities for engagement.

Be prepared – Things will go wrong. The technology won't work. Sue in accounting won't be able to log in. Bob in HR can't hear you. It will happen. The best approach is to prepare ahead of time. Send out the materials ahead of time. Let participants know that it will be recorded. Offer several sessions to make it convenient for your learners.

Be patient – We are all being challenged with how to serve our accountholders and employees. Do the best that you can with what you have. Ask your employees what they need. Sometimes the best training is a simple job aid and a word of encouragement at the bottom. We will get through this together.