



# Training Your Staff (On the Fly) to Work Remotely

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(Stephen)

Note: an outline of what we plan to speak about is in the notes section for each slide.



## About Us



(Both)



## What We Are Covering Today

- Overview of training, plus general tips and takeaways.
- Learning styles and how we can target them.
- Specific tools of the trade for remote training.
- Discussion from the community about which tools they're using and how.
- Specific challenges of remote training and how to address them.
- More discussion / ideas from the community.
- Two case studies: a state-wide training initiative, and a rapid-response remote training effort.



(Stephen)

- Feel free to put questions in the chat throughout.
- There are lots of spots for everyone to ask questions and give input.
- During those times feel free to unmute and chime in, or just send your thoughts via chat and we'll read them out.



## What We Are *Not* Covering Today

- How to pick new technologies.
- How to do the rest of the hard work of rolling out new technologies (testing, iteration, working with vendors).
- How to enforce policies, both old and new.



(Stephen)



# About Training In General

(Stephen)



## The Importance of Training (Now and Always)

- Culture change, culture maintenance.
- Ongoing cultural practice and shift.
- Training is change management.
- Show how tech will help.
- Right now, change is rapid and not optional.



(Joanne)

- I'll talk later on about my experience with culture change using technology.
- Don't just think of it as skills-based. Think of it as culture change (or even culture maintenance).
- Not a one-time thing, but an ongoing cultural practice and shift.
- Training is change management.
- People will adopt new technology when they see how to use it and how it will help them.
- Change management is particularly important now: change is rapid and not optional.



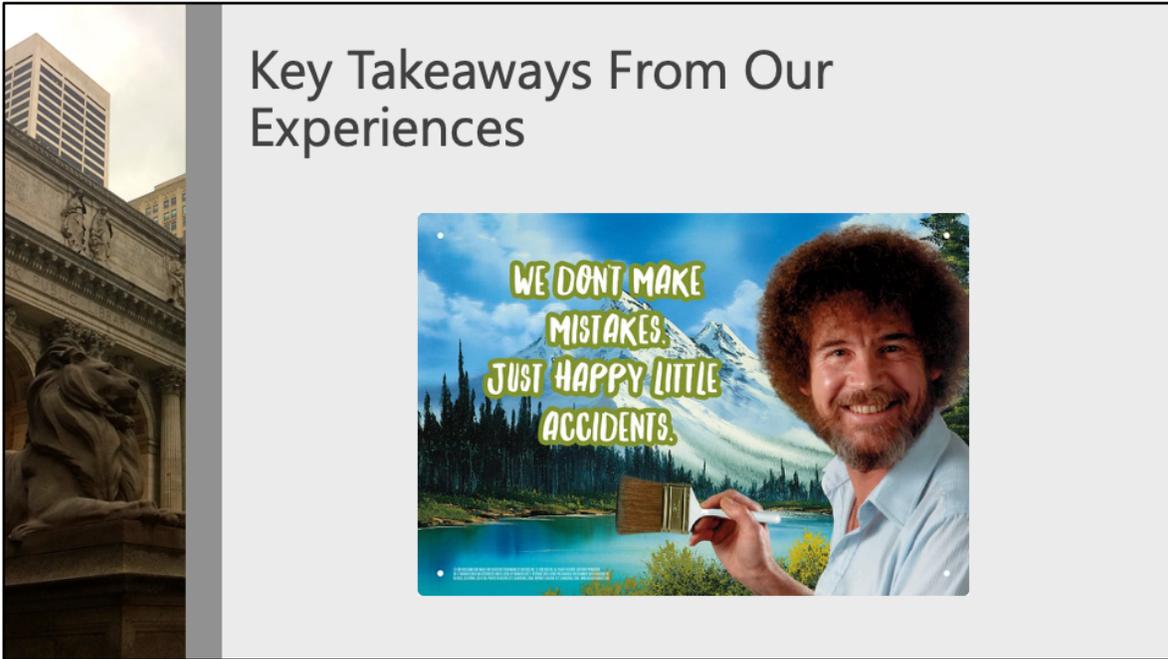
## Training is not just for new technology

- New policies.
- New norms/expectations.
- Catch-up on old technology!
- Catch up on existing policies!
- Best practices/modeling good behavior.



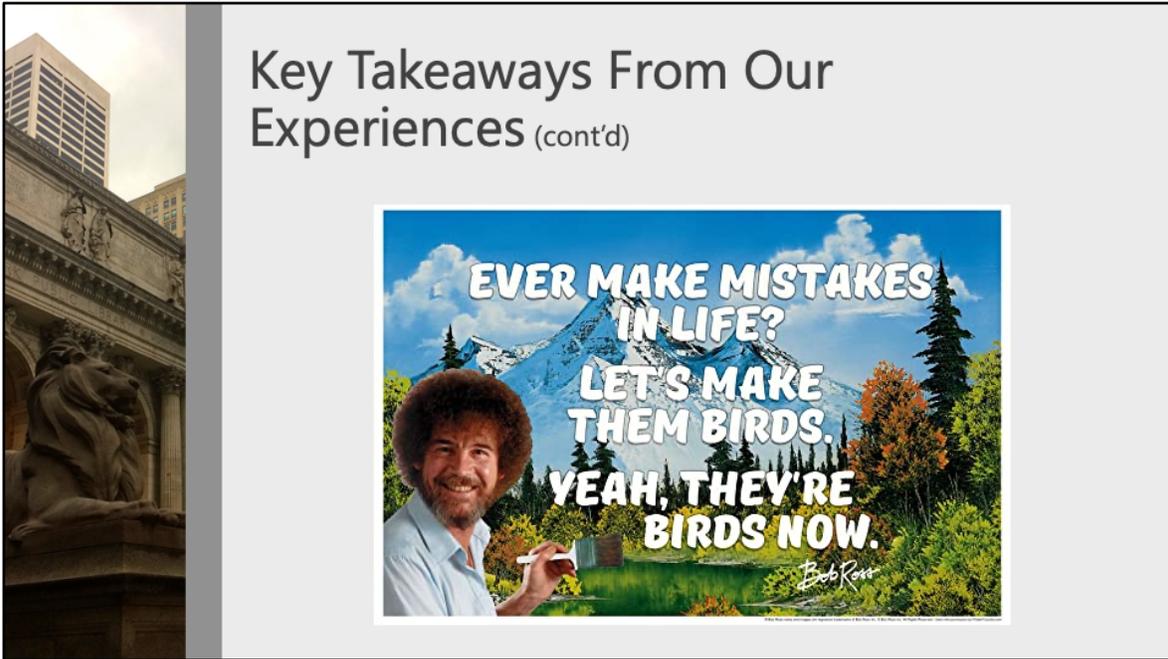
(Stephen)

- A lot of tech trainers stop thinking about training after they've rolled out a technology.
- Every time you're going to ask folks to do or remember a new thing, that's a training question.
- Ask yourself: is the email I just sent out adequate training for the thing I'm asking people to do?



(Stephen)

- People have a lot of trouble remembering a live training / video unless they take great notes (which you can't control) or have materials (which you can).
- People will create their own "guides" if you don't do it for them; self-created guides can be helpful (so adopt them!) or not helpful (so preempt them).
- Managers have to get directly involved in watching whether training is working, reporting back, and highlighting needs for individual follow-up.
- Some will think the best practices do not apply to them because they are managers, been there a long time, smarter than everyone, etc.



## Key Takeaways From Our Experiences (cont'd)

(Joanne)

- People will blame the technology if they're not trained and then refuse to use it. Need to address people's anxieties as you go.
- You have to meet people where they are, and bring everyone along. We need to be patient, take the extra time, offer very intro-level demonstrations and modeling.
  - Sometimes when we are rolling out new technology there is the tendency to say well you have no choice, you have to learn this. And while that might be true – saying that only increases some people's anxiety. It's important to acknowledge that change is difficult and it can be natural to feel the way they do. It's also important to empower people – you know they can do this – you have faith in their abilities and you are walk the path with them as they go.
- Either create new, or revisit existing, policies: work from home, "bring your own device" policies, security. Consider if they're adequate, if they still matter, or if you need new ones.
  - In terms of policies – try to reinforce good practices and policies while training people.



## An Overview of Learning Styles

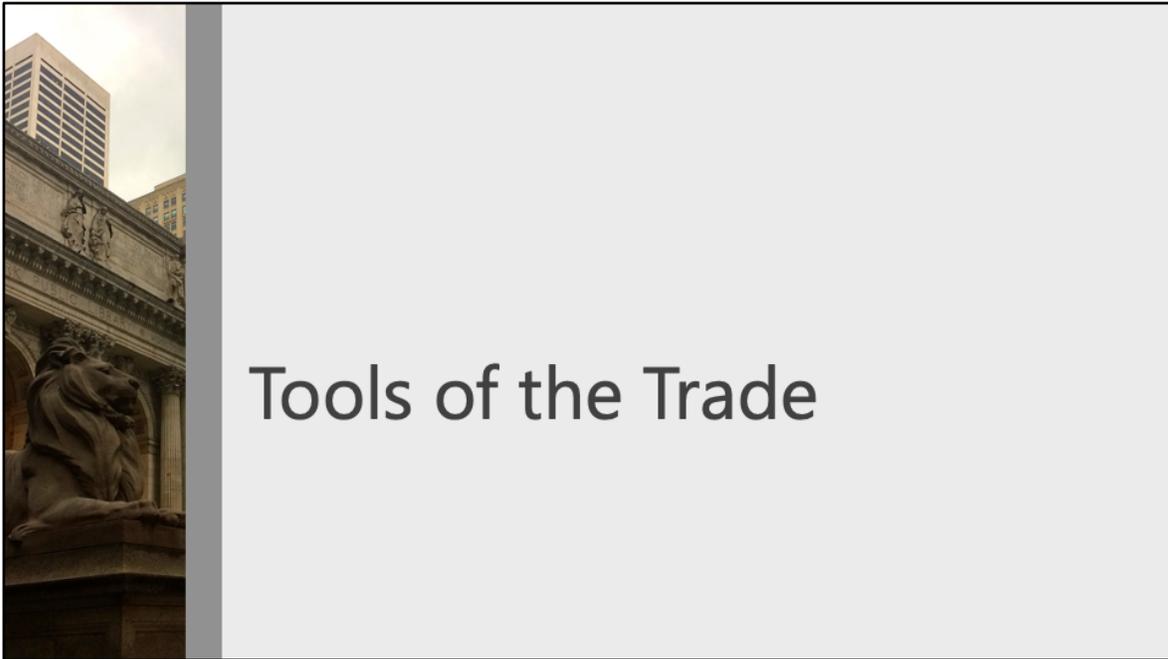
- Learn from lecture and demo (aural/visual).
- Learn by doing (kinesthetic).
- Learn from repetition/practice (kinesthetic+).
- Learn from interpersonal interaction (social).



"In praise of 'colorful' libraries" flickr photo by sniggie  
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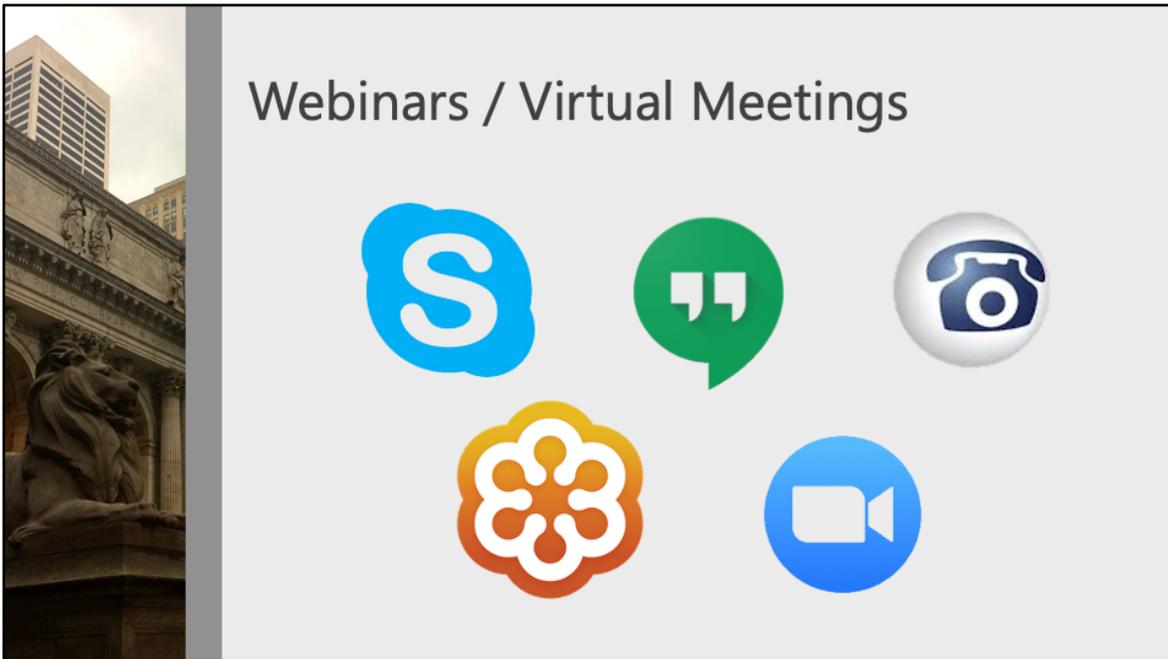
(Stephen)

- Different from the traditional models (e.g. VARK) because the content isn't just "knowledge," it's skills.
- The best approach, which we'll cover in detail in a bit, gets at all these different styles. Consider doing inventories within your teams of different peoples' learning styles.
- Learn from lecture and demo (aural/visual):
  - Visual outranks aural by a lot; safe to not tailor your training to this group alone.
- Learn by doing (kinesthetic):
  - Most people! Your power users/early adopters especially.
- Learn from repetition/practice (kinesthetic+):
  - Job aids/guides for specific situations, plus reminders on best practices.
- Learn from interpersonal interaction (social):
  - In the 80-20 model, these are the ones that will take 80 percent of your time.



(Stephen)

- We'll introduce specific technologies and methods we use.
- We'll talk about our experience, then open up after each one for others to share their experience, challenges and successes, with each.



(Stephen)

- Target learners: aural and visual
- Not bad for things that are extremely simple and will mostly be self-explanatory.
- If it takes more than a few (mostly intuitive) steps, a webinar alone isn't useful.
- Best conceived of as the one time you know everyone will be there; use it as the hub for disseminating materials, announcing best practices, etc.
- Also useful if treated more as brainstorming than lecture.

Joanne: the language I use to think about this

Anyone have thoughts on what works and doesn't for webinars?

## Guides, Cheat-Sheets, Job Aids, etc.

**Sharing Reciprocal Discovery with the DAs**

1. Open your OneDrive folder, labeled "OneDrive - The Bronx Defenders", on your computer. You should be able to find this folder in any File Explorer window. On Windows 7, it will be in the "Favorites" area of the sidebar (below, left). On Windows 10, OneDrive will have its own entry on the sidebar (below, right).

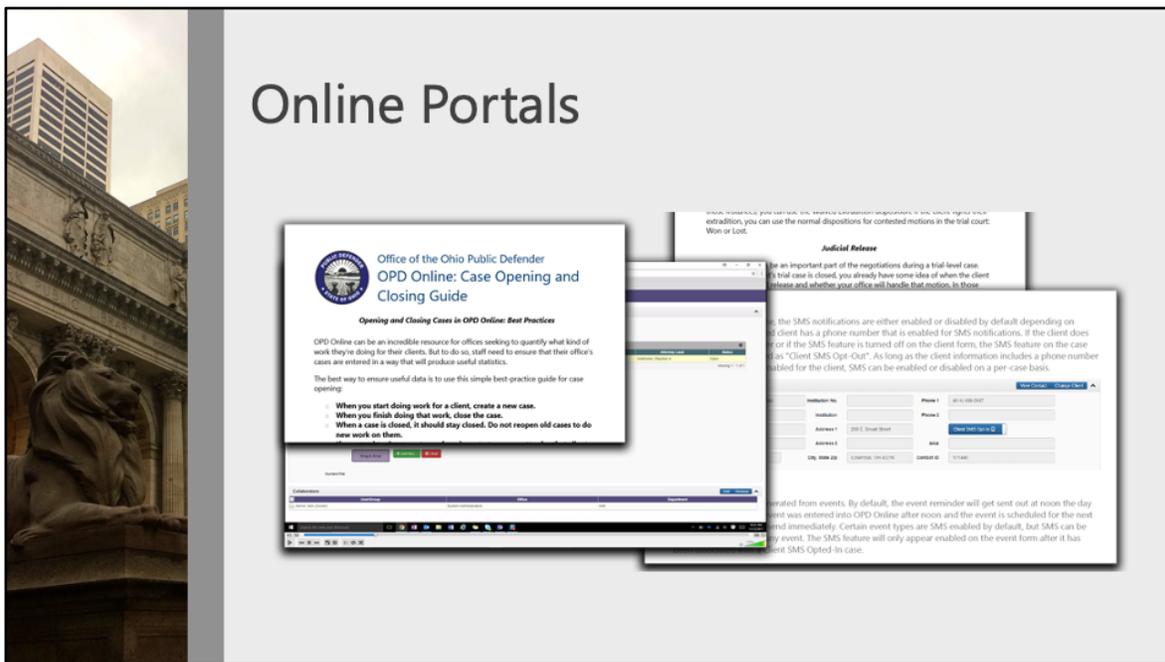
**IMPORTANT: clicking "Submit" does not save your time entry. Your entry is not saved until you click either "Save and Close" or "Save" at the top of the form.**

2 Revised 06/22/2017

(Stephen)

- Target learners: kinesthetic and kinesthetic+
- A one-page (or similar) bullet-by-bullet description of how to do the thing people need to do.
- Usually good for discrete repeated tasks (e.g. how to create a calendar meeting with conferencing, how to log into the remote server, etc.).
- These take on a life of their own (printed, stored locally, etc.) so be cautious of writing something you know you'll have to change / update (e.g. beta versions of processes etc.).

Anyone have suggestions or struggles while preparing and disseminating these?



(Stephen)

Case study covers this more in depth later.

- Target learners: all! That's the beauty of it!
- Can organize all of your training materials / overview guides into one place.
- Can often use existing technologies (e.g. you already have helpdesk software, intranet, etc... just post there).
- Use a variety of training methods even on the portal: guides, step by steps, demo videos, etc.

Anyone use one of these? Struggles / successes?



## One-On-One Instruction

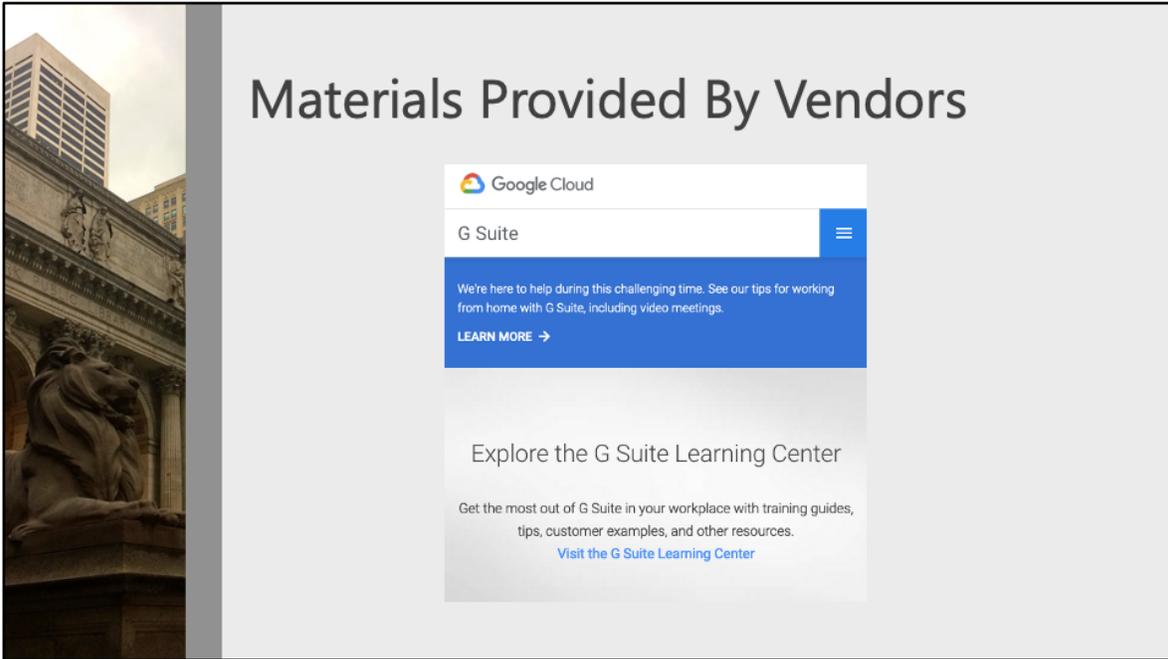


"Computer Lab" flickr photo by Listen Up! <https://flickr.com/photos/listenup/309937342> shared under a Creative Commons (BY-NC-SA) license

(Joanne)

- Target learners: social. Some people care more about the content and some care more about the environment – Some people learn better through social and interpersonal contact (recall earlier learning styles slide).
- Often conducted by IT staff.
- Also in a traditional setting these would be done by the person's neighbors; that's not an option anymore.
- Need to purposely and actively create these moments / interactions instead.
- Set aside times, have helpdesk get in the habit of scheduling screen share time for tickets of a certain type, etc.
- Again, 80-20 rule: 80% of your work is on 20% of your problems.

Anyone providing this now? Struggles / successes? What are you doing in your organizations to help people move forward with the technology?



(Stephen)

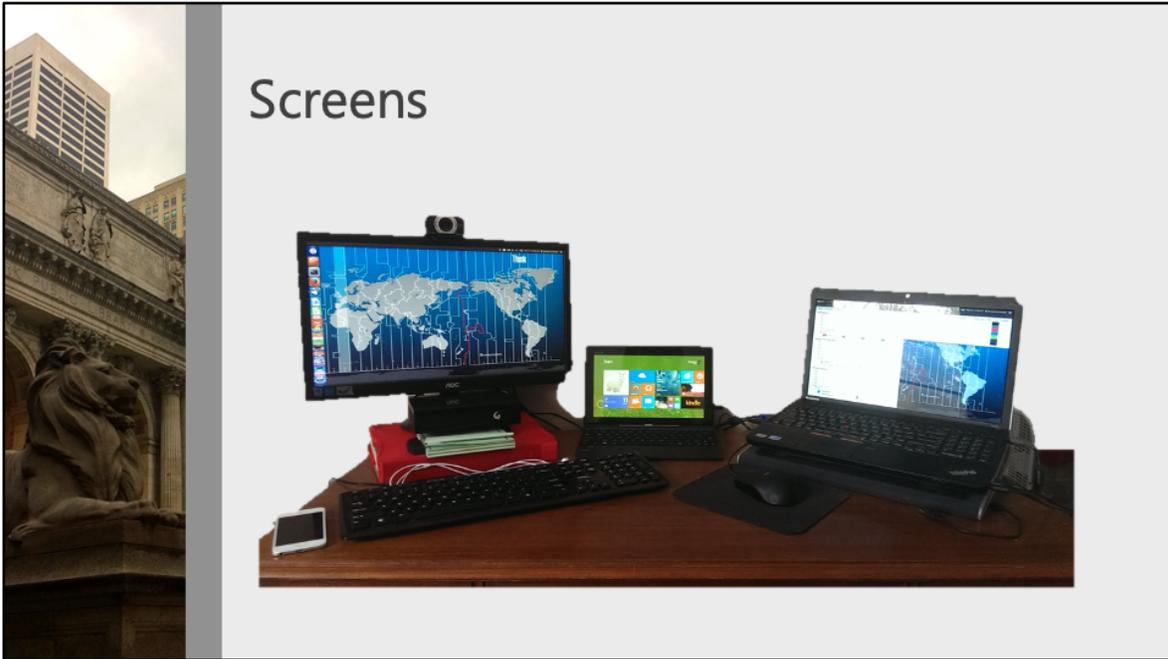
- Target learners: all!
- Google suite has lots of materials, lots of really basic intros, etc.
- Most technologies will have web-based materials.
- Some vendors will do training FOR you (Lexis e.g.).
- You should still review the materials / sit in for trainings to correct things that are specific to your needs.

Anyone providing this now? Struggles / successes?



## Specific Challenges in the Current Environment

(Stephen)



(Stephen)

- Best training modules have someone hear / see what you're doing and do it themselves while watching.
- Presumably many users don't have two screens at home.
- Deliberately explain how to switch screens, instruct people to use multiple devices.

Anyone have ideas?



## Reaching folks who are resistant or traditionally opt out of tech advances



(Joanne)

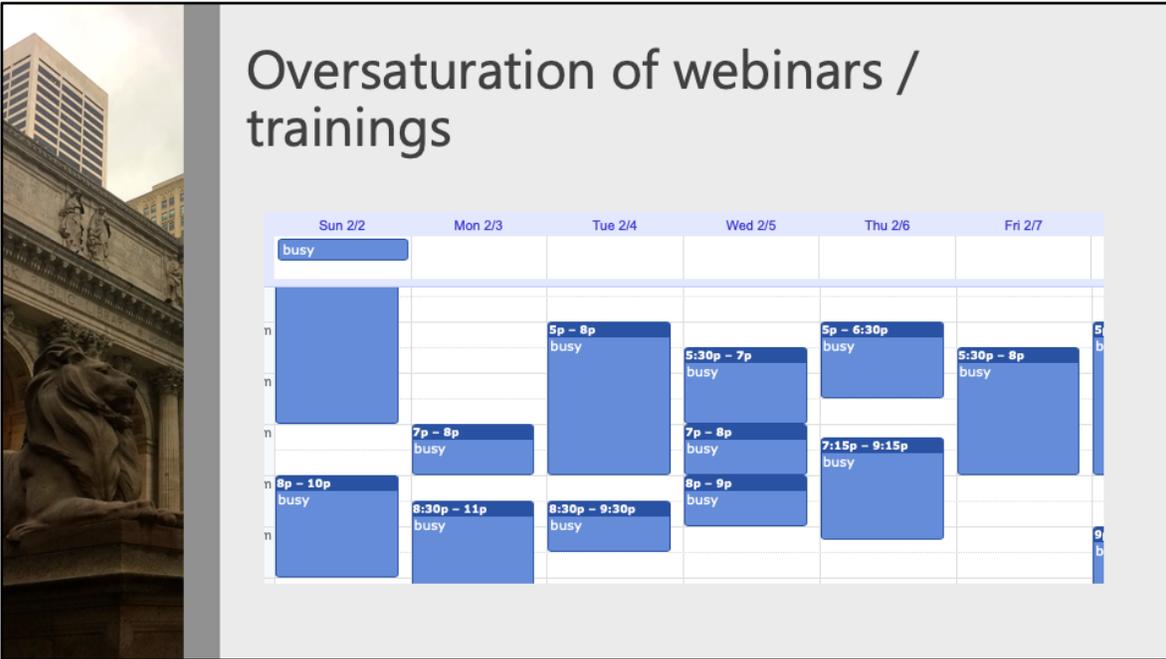
- Going to be even more important to reach this group when there's a lot less wiggle room (e.g. booking calendar wrong means there's no video conference).
- Managers (and super users!) should model best behavior
- Managers should actively gently remind people when they need it.
- Good news: these folks will resist a lot less in this environment.
- Go slow, start from the absolute basics.
- Train in small groups, be clear about who the session is targeting.
- Don't assume people know how to do the basics: access the program, log in, basic functions.

Anyone have ideas?



(Joanne)

- In an ideal world, you would test every meeting before you have it, and not five minutes before, the day before.
  - If you can't test in advance, just be prepared to calmly troubleshoot on the spot. Stay calm – that will help everyone.
  - Learn your software, put together guides for those running meetings.
- Anyone have ideas?



(Stephen)

- Carefully consider who needs to use what technologies. Don't train people on things they won't need.
- Target training at users.
- Smaller training programs with more specific content so people know which ones they're supposed to attend.

Anyone have ideas?



## Learning as we go



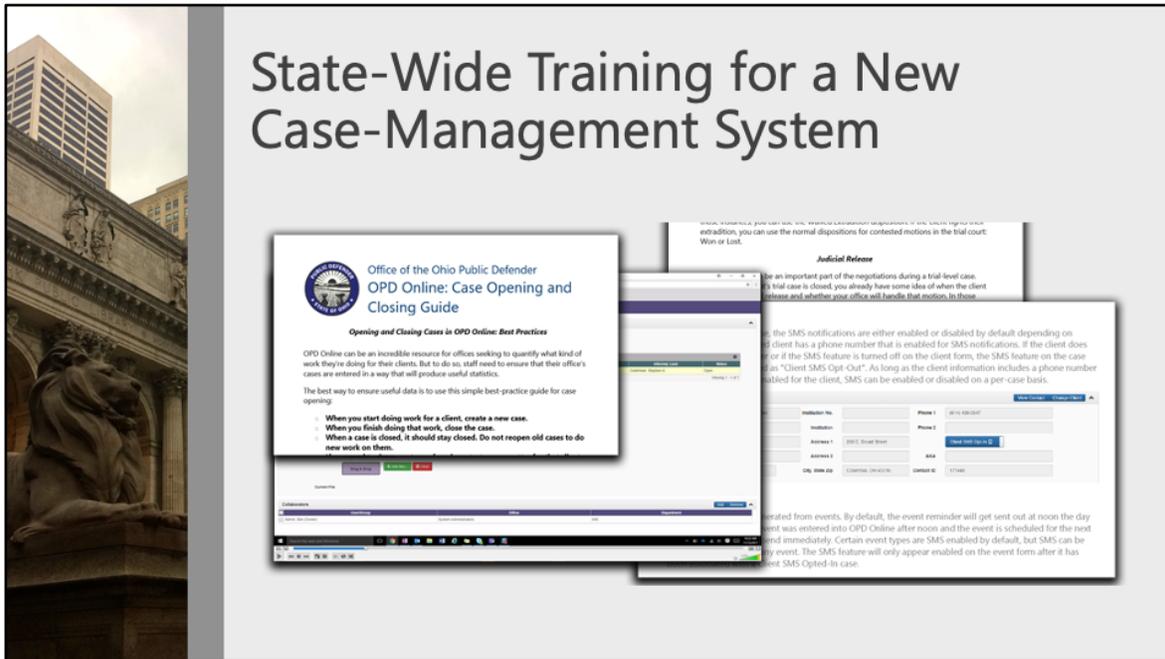
"Wingwalkers" flickr photo by Blue Hour Admiral <https://flickr.com/photos/bluehouradmiral/9239509703> shared under a Creative Commons (BY-NC) license

(Joanne)

- Or building the plane while flying.
  - Don't be afraid to admit you don't know how something works yet.
  - Follow up with info after you learn it.
  - Can't sacrifice speed for perfection, so still move fast, and cover your basics first.
  - Repeat the basics: don't be afraid to offer the same sessions multiple times to small groups.
- Anyone have ideas?



(Stephen)



(Stephen)

- Overview:
  - We designed an entirely new case management system and were rolling it out to every office in the state.
  - We would be able to visit, but maybe only once or twice.
  - Provide training almost entirely remotely.
- Goals:
  - Get people started as quickly as possible.
  - Catch super-users and help them experiment with more advanced features.
  - Demonstrate the value of the product even to tech-averse people.
- Methods
  - Initial training:
    - Webinar / video format.
    - Also handed out a quick-start guides.
    - Introduced people to a “training environment,” a space where they could experiment without fear of breaking anything.
    - During training, showing the new possibilities from using the tech

- (clean charts, stats, management tools, etc.).
- Had “computer lab” sessions, where people just opened the application, followed along, asked questions.
  - Ongoing training:
    - Comprehensive training portal, had sections for each part of the application.
    - Also had guides on how to do specific things (e.g. set up a view to show all open cases by type).
    - Also had best practices and some documentation of the philosophy of the system (e.g. what counts as a case, etc.).
    - Training portal made it easy to grow as new needs / new docs surfaced. The time we spend thinking about structure really paid off.
    - As requested, follow-up Q&A and spot trainings, including advanced features that made life a LOT easier. Often well-attended.
  - Trouble spots:
    - Monitored data inside the system to see if anyone was missing any key training aspects.
    - Reached out to heads of the offices to talk about trouble areas.
    - Then coordinated training, in conjunction with the people they already knew and trusted (supervisors, office admin, etc.).
    - Often a panic in the last week before implementation when people realized they didn’t have a choice; remained open to even beginner sessions for target groups (e.g. “more seasoned attorneys”) right up until release and soon after.



(Joanne)

- Before Covid:
  - Goals for the project before Covid:
    - Accessing tools and documents when working remotely (was not the top priority).
    - Work collaboratively on shared resources, online documents, etc.
    - Communicate across locations (ten offices in seven counties).
  - The approach pre-Covid:
    - Clean-up cluttered work, curate libraries, test the structure.
    - Address individual anxieties.
    - Create systems and create organizational policies for keeping those systems useful.
    - Include technology leaders as well as tech resistant staff and integrate them into the process.
    - Evaluate - Request and integrate training feedback; revise and add trainings based on feedback
    - Overall training goal: over multiple months, train people in small groups and one-on-one. Meet people where they are and bring

- everyone along.
- Where we stood:
  - Finished building out the platform.
  - Started planning in-person trainings, had conducted some early training on two aspects of the tech.
  - People were only using the tools if they absolutely had to. No widespread adoption.
- After Covid:
  - Some changes to the plan:
    - Priorities shift: remote work now top priority. Sharepoint was the life-raft.
    - Communication still a top priority, isolation and siloing an even bigger risk now.
    - Time: no time to test, iterate, clean up, curate.
    - No ability to travel to offices to meet people.
    - Speed is now the top priority. Get people comfortable as quickly as possible; they need to be comfortable to work.
  - New strategies:
    - Still prioritizing meeting people where they are.
    - Virtual training using Teams to get people collaborating. Made sure people could see and hear the training.
    - Reached 165 people quickly; went office-by-office and program-by-program; have now trained everyone.
    - Now that everyone is on Teams, working on Sharepoint trainings
    - First reiterating things already trained in the old world to make sure people have the same basic knowledge, then training on new areas, then creating practice area libraries that are up and running to provide navigation trainings.
    - We will still evaluate. We will do surveys and we will ask for feedback. We will incorporate that feedback and provide additional training and modifications. We are also continuing to troubleshoot.
  - Good news:
    - Everyone is going to get trained, even the most tech-resistant staff. Not optional anymore!
    - Lots of opportunities to see where people actually are: one user did not know what a “browser” was.
    - Lots of opportunities to see people exceed their limits: That same person is now managing our e-fax process and using Teams.
    - Another tech resistant person has fully converted and even taught me a solution I was not using.



# Questions/Discussion

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