



The Trainer's Guide to



GoToMeeting

by LogMeIn

Brought to you by



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How to Use This Guide

This guide is designed to provide technical tips & tricks and best practices advice for virtual training conducted via GoToMeeting. It is suggested that you use this guide to help enhance your understanding of the GoToMeeting platform, gain confidence in your facilitation skills, and improve upon the learner experience.

While the tips & tricks in this guide are invaluable, they will not provide you with a complete training experience. For access to a bank of hundreds of virtual (and in-person) training activities go to www.soapboxify.com. Soapbox is an all-in-one presentation creation tool that allows you to enter some basic information about your training (length, audience, objectives) and in a matter of minutes will provide you with a complete facilitator guide, slide deck, handouts, and activity instructions. Sign up today for a free 10-day trial to experience how Soapbox will revolutionize your training programs.

Basic Feature Overview

Usability

For best results in all training sessions conducted using the GoToMeeting platform, Organizers and Co-Organizers should download the GoToMeeting desktop app and enter GoToMeeting using a Chrome browser. For the best Participant experience, recommend that session Participants access the meeting using a Chrome browser.

Session Roles

Organizer

The organizer is someone who has a GoToMeeting account and who schedules and manages the sessions. This person has control of the meeting controls, recording feature, and when a meeting can end. Before a meeting begins, the Organizer can designate other people to be Co-Organizers. When a session begins the Organizer is assigned the default Presenter. However, the Organizer can assign other people to be Presenters or Co-Organizers at any time during the session.

Co-Organizer

A Co-Organizer has all the same access and in-session features as the organizer. The only difference is that they cannot access the post-session tools such as reports. If you are utilizing a Producer during your session, you should designate them as a Co-Organizer.

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Presenter

In GoToMeeting, the Presenter is the person who is sharing their screen. They do not need a GoToMeeting account, and they will have limited access to tools during the session. It is easy to pass the role of Presenter from person to person during a session.

Webcam & Voice

Overview

The most basic features of GoToMeeting are the webcam and voice features. Participants are prompted to enable their microphones and cameras upon logging into a meeting. Every participant has the option to mute/unmute at any time as well as the ability to turn off/on their camera at any time.

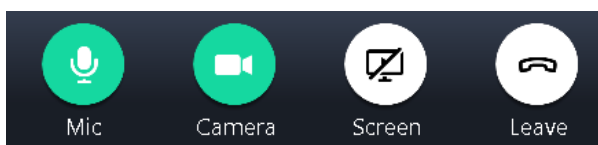
Adult Learning

Adult learners need multi-sensory learning experiences. For virtual instructor led training (VILT) this means asking your Participants to enable their cameras during training sessions. Also, adult learners need to be involved in their learning, which includes planning learning experiences with feedback and interaction, both of which are most effective on camera.

Limitations

When logging on, Participants may be prompted to choose their audio source or enable their webcam.

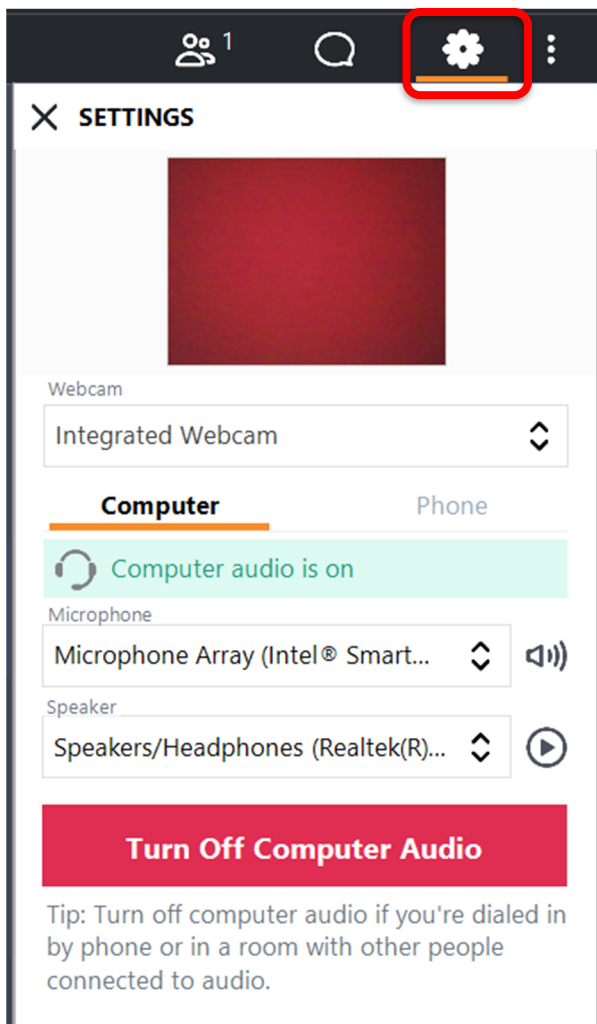
How to Turn Your Webcam/Voice On and Off



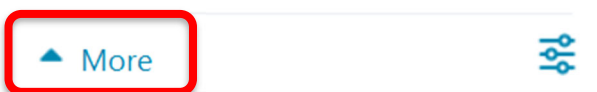
Presenter/Organizers/Participants

You can use the Control Panel buttons at the bottom of your screen to easily mute/unmute yourself (the microphone button). If the microphone is crossed out it means you are on mute. If the microphone is green it means you are not on mute. You can also use the control panel buttons to easily turn your webcam on or off (the camera button). Green means your webcam is active.

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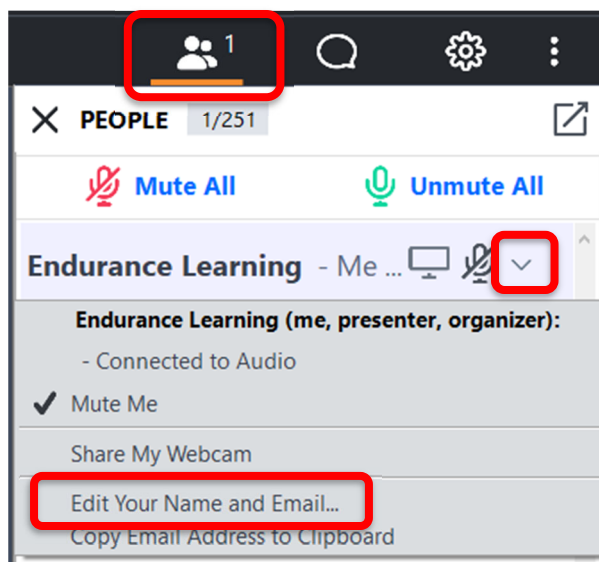
**Presenter/Organizers/Participants**

You can also control your webcam and audio using the *Settings* (gear) tab in the top right corner.

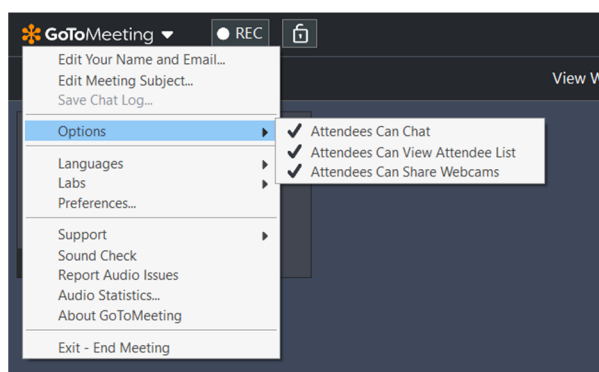
**Presenter/Organizers/Participants**

There are additional audio options available by clicking the *More* button on the *Settings* tab.

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**Presenter/Organizers/Participants**

You can edit your display name by clicking the *Attendees* (people) button in the top right corner, and then selecting the down arrow next to your name.

**Organizer/Co-Organizers**

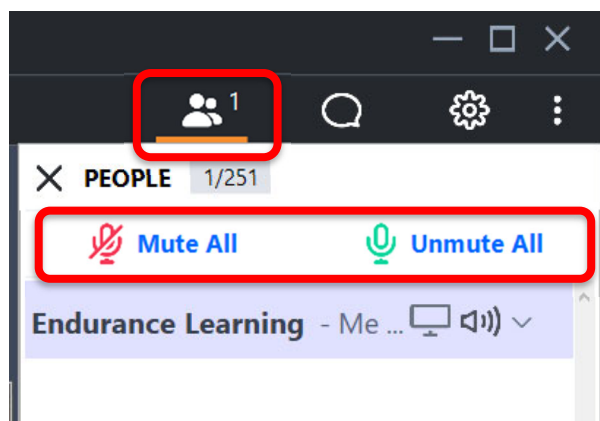
To enable or disable the use of participant webcams:

In the top left corner, click the drop-down arrow. Select *Options*. Select or de-select *Attendees Can Share Webcams*.

Mute All

The Organizer has the ability to mute all participants. This is helpful to enable as people are signing in to hide loud background noises. Furthermore, for meetings with a larger number of participants (10+), it is best to mute all participants while the Presenter is speaking so that everyone can hear. While the Organizer or Co-Organizer can mute one or all participants, each participant retains the ability to unmute themselves at any time.

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**Organizer/Co-Organizers**

Click the *Attendee* (people) tab in the top right corner. Mute all or unmute all by using the buttons at the top of your participants (people) list.


**Organizer/Co-Organizers**

Mute a single participant by clicking the sound (speaker) button next to their name.

**Organizer/Co-Organizers**

Unmute a single participant by clicking the microphone button next to their name.

Best Practices

-  **Ask people to turn on their cameras.** At the start of your session, ask your Participants to turn on their cameras. Provide a brief explanation of why you are asking them to do so.

Back-Up Plan

If the webcam and/or voice are not working, try signing off GoToMeeting and back in again. If that does not solve your problem, try a computer restart.

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Screen Share

Overview

Screen sharing is another feature that is easy to use and can be used in a variety of ways to enhance learning. Screen share can be used to present PowerPoint slides, show a webpage or video, or to show a document.

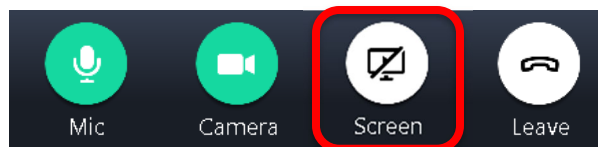
Adult Learning

Adult learners need learning experiences that appeal to all their senses, including delivery techniques that meet the needs of audio, visual, and independent learning preferences. Using the screen share feature is one important method through which you can engage your learners.

Limitations

The Organizer must make a Participant a Presenter for them to have screen share abilities. Chrome users will be prompted to complete a one-time download of the screen sharing extension to share their screen. Firefox, Linux, or Chromebook users will need to login to a GoToMeeting account in order to screen share. For mobile participants to have the ability to screen share, they will need to access the meeting through the GoToMeeting mobile app.

How to Screen Share



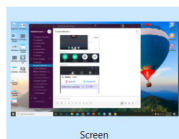
Organizer/Presenter

Click the screen sharing (screen) button on the control panel at the bottom on the screen.

Share my screen

×

Screen Applications



☒ Clean screen ⓘ

Clean screen: Shows active applications only. Does not display background images or the lower portion of the screen where the taskbar normally displays.

☐ Skip Preview

Share your main screen by default. You can change this any time in Preferences.

Share


Cancel

Organizer/Presenter

Select to share your whole screen or just a certain application. You can also click the box to share a *Clean screen*, which shows the active application only.

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Best Practices

-  **Share only the application that you want participants to see.** GoToMeeting gives you the ability to pick the application that you want to share when you screen share. Sharing only that application takes away possible distractions such as a desktop background photo or multiple open applications.

Back-Up Plan

It is a good idea to share all of your materials with your Producer prior to the start of the session so that they can take over screen sharing a PowerPoint or document in the event that you have technical issues in trying to screen share. It is also a good idea to have back-up activities in mind if your planned screen share does not work. For example, if you are planning to show a video but you cannot get the video to play, you could instead tell a story that drives home the same point.

Chat

Overview

Chat is a basic feature of GoToMeeting that all Participants have access to regardless of their device. Participants can chat with the entire meeting group or privately chat with individual people within the meeting group.

Adult Learning

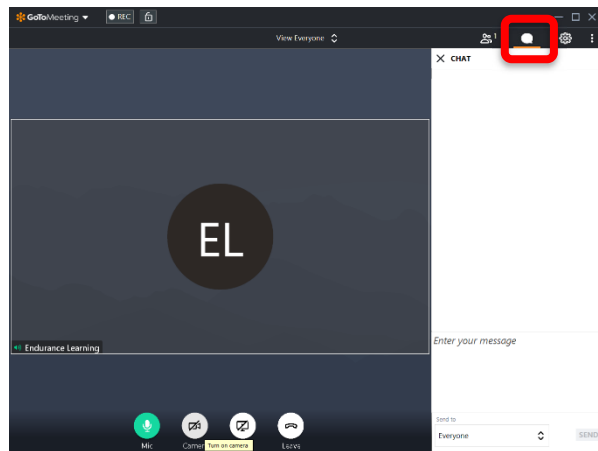
Chat is a great tool by which to allow adult learners to actively and practically participate in their learning experience in order to learn by doing. Presenters can ask questions for Participants to share how they can apply their learning to their lives. Further, the chat feature allows Participants to practice and be involved in the learning experience through feedback and evaluation.

Limitations

If for some reason you do not want Participants to be able to chat, the Organizer can disable the chat feature. Keep in mind that it is helpful for Participants to be able to privately chat message the Producer with any technical issues, so it may be useful to keep this feature enabled with most audiences.

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🖱️ How to Chat



Organizers/Presenters/Participants

The chat room is accessible through the *Chat* (speech bubble) tab in the top right corner.



Organizers/Presenters/Participants

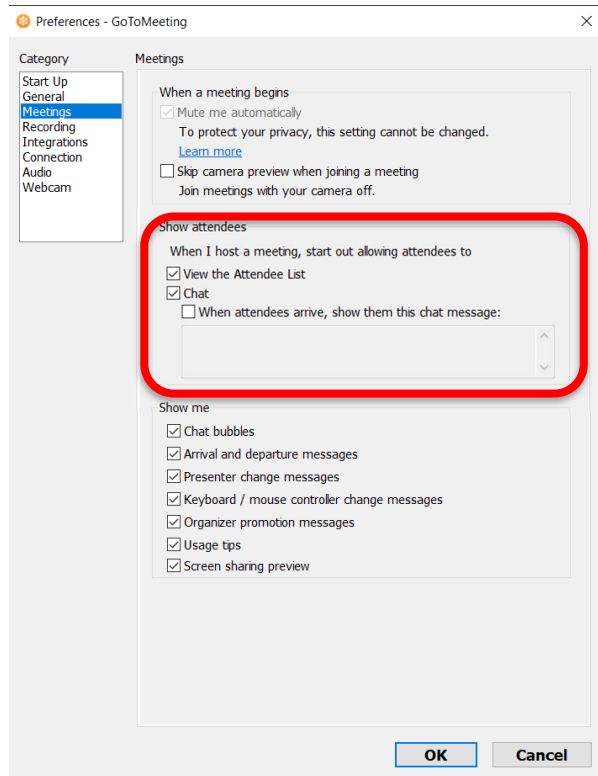
You can choose to send your messages to the entire audience or the Organizer(s) only.



Organizer/Co-Organizers

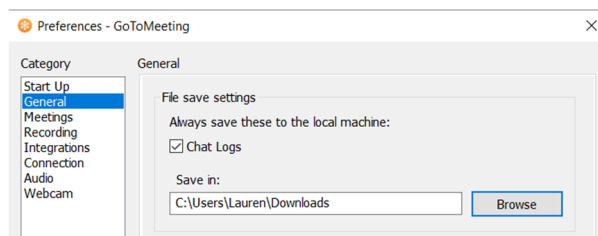
Access additional chat settings by clicking the *Settings* gear, and then the *Preferences* button in the bottom right corner.

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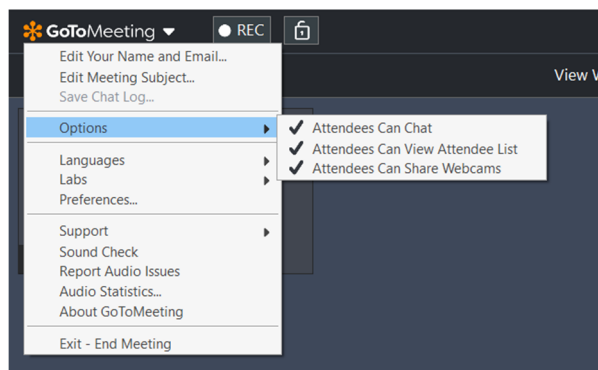
Organizer/Co-Organizers

In the *Meetings* category, you can disable participant chat. You can also schedule a chat message to automatically display when participants enter the meeting room.



Organizer/Co-Organizers

In the *General* category, you can select to automatically save the chat log from each meeting to your computer.







Organizer/Co-Organizers

You can also enable/disable chat function by clicking the drop-down arrow in the top left corner, selecting *Options*, then selecting or deselecting *Attendees Can Chat*.

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Best Practices

-  **Explain to Participants the difference between group chat and private chat.** If you have both of these features enabled, be sure to explain to Participants that there is a difference between the group chat section and the private chat section. Nothing is quite as awkward as a message going out to the group that was meant to be private.
-  **Tell people to private chat the Producer with technical questions.** Technical difficulties can really cloud up the group chat window and take away from the purpose of your session. At the start of your session, tell participants to private chat the Producer with any technical problems they may encounter during the session.
-  **Have your Producer manage the chat room.** It is best practice to have your Producer manage your chat room instead of having the Presenter attempt to do so. When asking a question to the group, tell Participants that you would like them to respond in the chat window. After a few moments, ask your Producer to share aloud some of the things that Participants shared within the chat window. This gives the Producer the ability to read responses while the Presenter is talking. The Producer can then filter out responses that should be shared aloud to the group. This is especially important with large groups when the number of responses coming into the chat window will be numerous.
-  **Save your chat logs.** It is a great idea to enable GoToMeeting to save your chat logs. After a meeting has concluded, you can use these logs to follow up with participants, answer additional questions, or as a mechanism by which to take attendance or rate participant engagement.

Back-Up Plan

If chat isn't working for some reason or you are feeling overwhelmed by the amount of talk in the chat window, you can always unmute some or all Participants and ask people to verbally respond to questions or to elaborate on something that they shared in the chat window.

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Handouts

⚙ Overview

While using GoToMeeting, you will need to screen share any handouts during the meeting and share copies of the handouts outside of the platform (email) before or after the session. There is not a mechanism by which to share documents within the platform, and the GoToMeeting chat room does not support file sharing.

🔍 How to Share

Prior to a VILT session you need to consider how you will be sharing copies of your handouts:

Sharing beforehand via email. There are a few possible downsides to this method:

- Participants might not attend your session if they receive the handouts in advance.
- Participants could not receive the email or not get it prior to the session, causing a struggle during the session to get everyone on the same page.

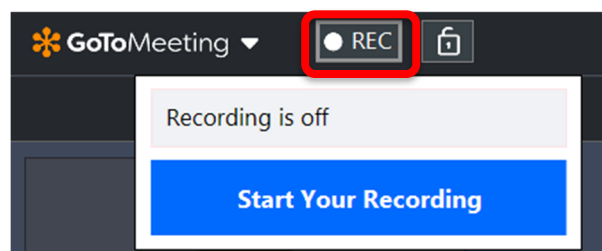
Sharing after the session via email. You may decide to share your handouts for the first time after the session. If you pick this method, it is a good idea to combine a session evaluation with your post-session handouts email.

Record the Session

⚙ Overview

GoToMeeting allows the Organizer or Co-Organizer the option to start or stop a recording of the session. Recordings can be saved locally or to the cloud. Organizers may decide to share a link of a session's recording with participants after the session by sharing the URL.

🔍 How to Record



Organizer/Co-Organizers

In the top left corner, select the *Record* button. Click to start your recording.

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Take Attendance

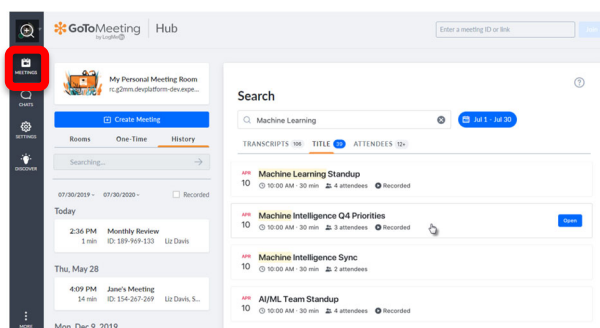
Overview

The meeting Organizer will have the ability to review a meeting history after the session. This history will include a list of attendees.

Limitations

Co-Organizers or Presenters will not have access to meeting history functionality. Occasionally participants will participate in a session under a username that is not discernible to the meeting Organizer. One way to combat this is to take the time at the beginning of your session to ask participants to edit their username.

How to View Attendance



Organizer

In the GoToMeeting hub, select the *History* tab. Select your desired meeting to view the attendees list.

Back-Up Plan

If you are concerned that the report will not be an adequate way to take attendance, ask participants to chat share their names at the start of the session as a means of taking attendance. Remember to save your chat log as a record if you decide to use this method.

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Producer Role







Overview

The Producer is the unseen Presenter. Their job is to take care of the administrative and technical aspects of the session to free up the Presenter to focus on content delivery. It is important to select your Producer carefully. A successful Producer is one who knows the platform well, who has the technical expertise to be able to help Participants who are having problems, and someone who can jump into the role of Presenter in the event of a technical problem.

Job Responsibilities

- ✓ **Answer chat questions.** It is important to keep an eye on the chat box during the session and to respond to questions or help requests, as necessary.
- ✓ **Record your session.** If you would like to have your session recorded, it should be the responsibility of the Producer to make sure they enable the recording feature at the start of the session.

Best Practices

-  **Practice.** The most important thing for a successful session is for the Presenter and Producer to practice together. Ensure that all features are enabled and set up, and run through the entire presentation together to ensure that each person knows their responsibilities during the session.
-  **Be on hand as a back-up Presenter.** In the event that your Presenter has an unstable internet connection or has a computer crash, it is important to have the slides and lesson plan pulled up on your own computer and ready in the event that the Producer needs to jump in as the Presenter. Make sure that you understand the learning objectives and activities in order to continue the session if your Presenter experiences technical difficulties.
-  **Be on camera.** Best practice is that the both the Presenter and Producer will be visible on camera.
-  **Introduce the Producer and explain their role at the start of session.** It is important that Participants are introduced to the Producer at the start of the session and told that they should reach out to the Producer if they need help at any point during the session.
-  **Tell Participants how to contact the Producer if they need help.** The best way for Participants to reach out to the Producer with technical problems is through a private chat message.
-  **Check-in with your Producer periodically during your session.** It is easy to get into the flow of presenting and forget to check-in to make sure that everything is going alright. Make a point to check in with your Producer periodically throughout your session. You may choose to do this verbally or through a private chat message.

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Structure

Pre-Session Activities

People will always arrive at the session early. It is a good idea to have something for Participants to do when they arrive at your session. This gives Participants the opportunity to get comfortable with the tool and can also be a means by which to share content. Possible activities may be playing a trivia slide deck or doing a pre-session activity such as answering questions or playing a game.

Starting Your Session

- ✓ **Begin with “housekeeping” items.** To set expectations and help Participants get comfortable with the tools being used. You can use icebreaker or anchor activities as a means by which to teach Participants how to use a tool in order to accomplish this seamlessly.
- ✓ **Include breaks as necessary.** If your session is to exceed one hour, you may need to consider adding a break. Add breaks to VILT sessions as often as you would to an in-person training session. You may consider planning for “working breaks” prior to a breakout session or activity using the annotation tools. Ask Participants to prepare for the activity prior to taking their break. This will provide for an opportunity for people who need more assistance to get it while not holding up the session.

Post-Session

It is best practice to send out an evaluation after your session. This is also a good opportunity to send out handouts or resources that were shared during your session.

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Practice

Pre-Session Checklist

Prior to starting your practice session:	
<input type="checkbox"/>	Send your meeting invite <ul style="list-style-type: none"> • Pay careful attention to the settings that you pick for your meeting
<input type="checkbox"/>	Check your meeting settings <ul style="list-style-type: none"> • Do you want to disable private chat? • Do you want to save the chat log? • Do you want to automatically broadcast a chat message to participants as they enter the session?
During your practice session:	
<input type="checkbox"/>	Test your microphone and camera <ul style="list-style-type: none"> • Presenter: Can your Producer see and hear you? • Producer: Can your Presenter see and hear you?
<input type="checkbox"/>	Launch your slides <ul style="list-style-type: none"> • Can your Producer see them? • Can you view your slide notes?
<input type="checkbox"/>	Decide how you are sharing your handouts <ul style="list-style-type: none"> • If sharing handouts prior to the session, add them to the meeting invite.
<input type="checkbox"/>	Run through your entire session <ul style="list-style-type: none"> • Is the timing correct? Do you need to cut or add anything?
<input type="checkbox"/>	Discuss with your Producer what their responsibilities are for each activity <ul style="list-style-type: none"> • How will you communicate with one another during the session? • What are the back-up plans if something goes wrong? • Where do you anticipate people struggling with the technology? How can you be prepared to alleviate some of this stress?
<input type="checkbox"/>	Share the lesson plan and slides with your Producer so that they can take over in the event of a technical disaster

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- ✓ Get specific instructions for how to deliver virtual training
- ✓ Plan only activities that work well on the platform you are using
- ✓ Shorten your training design time by up to 75%!
- ✓ Focus your sessions with fresh activities that are tied directly to your objectives
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