

The endorsed and proven methodology of Real Colors delivery continues to be a session facilitated by a live instructor, in a classroom environment, with live participants; however, it is possible to deliver Real Colors in a virtual environment.

A Roadmap to Virtual Delivery of Real Colors

April 2020 - Version 3.0

Aaron O'Connell,
Director of Learning and Development
aconnell@realcolors.org
602-452-5518

Allison Hetzel
Director of Sales
ahetzel@realcolors.org
602-452-5501



Introduction

As a Certified Real Colors Facilitator, you've undoubtedly witnessed the power of Real Colors and its far-reaching impact on the participants in your workshops. If you've ever noticed a participant experience an "ah-ha moment" during your session as a result of self-discovery (Personalized Discovery Learning) you know that participant has internalized highly valuable and personally relevant information. You already know that much of your role as a Certified Real Colors Facilitator is to create as much room and opportunity for personal and professional discovery for your participants as possible. Part of the power inherent in Real Colors is how participant's curiosity is stimulated throughout the session. The level of collective curiosity among the group could even be a gauge of how successful your Real Colors session was. These are some of the reasons the endorsed and proven methodology of Real Colors delivery continues to be very traditional - a session facilitated by a live instructor, in a classroom environment with live participants. As you consider delivering Real Colors in a virtual environment, the keys to success are your abilities to re-create as much of the traditional delivery environment in the new virtual environment as you can.

It is impossible to ignore the movement toward virtual delivery as a viable and cost-effective option to deliver content. In-person delivery of Real Colors is the best methodology, but we recognize this is not always possible, for a wide array of reasons. The good news is that it is possible to deliver Real Colors in a virtual environment with positive outcomes. To assist Certified Real Colors Facilitators in their delivery of Real Colors in a virtual environment; this "roadmap" provides a guide of considerations and best practices. From all of us at Real Colors, we wish you great success as you move to include a virtual delivery method to your toolbox!



Delivery of Real Colors in a Virtual Environment has Several Unique Benefits

- Virtual delivery of Real Colors opens up the possibilities for delivery to audiences who previously could not access a Real Colors workshop.
- In today's workforce, time is precious. By having the flexibility to break Real Colors into two sessions you are able to fit a Real Colors workshop into tight schedules.
- Virtual delivery is a comfortable and familiar training model for new generations entering the workforce.
- If an organization uses Real Colors in onboarding across multiple sites, they will no longer have to wait for a large group at a single site. The virtual option will let them work across sites which will have the secondary benefit of breaking down silos across remote locations.
- Virtual training is budget friendly in that it does not require travel by participants or a facilitator.
- Real Colors workshops allow teams who are connecting virtually to quickly get to know each other and learn what may have taken them years to learn in virtual meetings without Real Colors.
- Real Colors builds trust and understanding in a virtual environment – something that is hard to create otherwise.

Initial Points to Consider Before Transitioning Real Colors to Virtual Delivery

The endorsed and proven methodology of Real Colors delivery continues to be a session facilitated by a live instructor, in a classroom environment with live participants; however, it is possible to deliver Real Colors in a virtual environment with positive outcomes. Ask yourself: What will you do with your current technology and means of communication to re-create as much of the traditional delivery experience in a virtual environment that will enhance retention and create a positive experience for your participants?

Delivery of Real Colors in a virtual environment requires each participant receive their own Real Colors assessment in advance of participating in the workshop. Ask yourself: How will I ensure each participant receives their own Real Colors assessment prior to the workshop?

Areas of consideration facilitators must be aware of and account for the following limitations common in virtual delivery of content. (Each of these areas will be explored in greater detail on the following pages):

- **limited group interaction** (How will you encourage and support participants' engagement and interaction during the virtual Real Colors session?)
- **much of the communication process is nonverbal and virtual environments may limit participants' ability to view nonverbal communication** (How will you ensure both facilitator and participants can see and hear everyone's verbal and nonverbal communication throughout the virtual Real Colors session?)
- **limited ability for facilitation increases the probability the session will become a lecture which is almost the worst-case scenario when delivering Real Colors in any setting** (How will you ensure you maintain your role as a facilitator and not slip into the role as lecturer?)
- **limitations with technology or problems with technology** (How will you minimize the limitations of your technology and be prepared for problems that might arise during the virtual session on your end or for the participants?)



Choose the Method of your Virtual Real Colors Delivery (2 options)

1. Deliver entire Real Colors session as if it were a live facilitator led session, following the Real Colors Certification Handbook, in a duration of 3 to 4 hours.
2. Break Real Colors into two shorter sessions:
 - a. Deliver (Real Colors Part I) Intro, Icebreaker, History, and Scoring (60 to 90 minutes) following the Real Colors Certification Handbook as your guide.
 - b. At a later date or time, deliver (Real Colors Part II) brief introduction/icebreaker/review then follow-up with the Brightening and Conclusion (90 to 120-minute) following the Real Colors Certification Handbook as your guide.

Successful Delivery of Real Colors in a Virtual Environment Includes the Following

- A dynamic web-based platform that replicates as much of a live facilitator led session environment as possible. (We have experienced positive results with both Adobe Connect and Zoom. We currently use Zoom because it has created better outcomes for us.) WebEx may also be a good platform option to use, as well.
- Easy to use breakout rooms with “whiteboard” and annotation capabilities – ideally the breakout room allows for full audio and video capabilities for each participant in the breakout room.
- A platform with strong audio and visual components that allow the participants to easily see and hear each other during the entire session.
- A well-designed slide presentation (“PowerPoint”) and other visual and audio tools.
- Time for the facilitator to become proficient with the engagement tools the web-based platform provides prior to delivery.
- Practice, practice, practice.

Pitfalls and Mitigation Strategies

A break down revisiting the identified “Area for Consideration” and outlining solutions or mitigation strategies to assist facilitators in overcoming these potential problem areas is shown on pages 4-6. As always, the Real Colors team is available to help troubleshoot these or other areas of concern you come across.



Pitfalls and Mitigation Strategies *(continued)*

Area for Consideration	Possible Solutions
<p>limited group interaction</p>	<p>This point is not unique to a virtual session delivery. Participant engagement is always a concern; no matter the setting.</p> <p>This area for consideration speaks directly to facilitators making attempts at re-creating the traditional live facilitator-led class in a virtual environment. Video capability is key so facilitators can see what the participants are doing at all times – just like crossed arms and a dismissive gaze are cause for concern in an in-person setting, it is the same concern virtually. Requiring participants keep their video running for the entire session is a best practice. Participants and facilitators should all be able to see and hear each other throughout the entire virtual session.</p> <p>Strategies to Increase Engagement in a Virtual Setting:</p> <ul style="list-style-type: none"> • Create a strong introduction where every participant shares information about themselves (favorite hobby, favorite food, their superpower, etc.) This is especially important for groups unfamiliar with each other. • Create a strong supportive learning environment. This begins with your earliest communication about virtual Real Colors classes and continues all the way through your virtual session. Be positive and express excitement in your messaging/communication. Use specific words/phrases that appeal to each Temperament. Share the session objectives early and often – be specific (I.E. Participants will communicate more efficiently using the shared common language of Real Colors). Share the ground rules for the session that apply to everyone (I.E. time expectations, other technology expectations, participation is “mandatory”, video must remain on for the entire session). • When participants are fully aware of expectations and feel safe, they will engage. If you’re recording the session, tell them early and often. Inform them who will have access to view it later. It is best practice to record your virtual delivery to review and critique your own performance. • Direct questions to specific participants using first names. Since you won’t have name tents, ensure everyone’s name is clear on your virtual platform when someone speaks. This may require them to edit their name when logging in; make sure you know how to instruct them to do this. • Become comfortable with silence. When you ask a question, expect an answer. Just be sure the silence is not because the participants do not understand what you are asking them. In general, expect wait times to feel longer in a virtual setting – to you the time may seem extensive but to the participants it does not. • Become comfortable with your platform’s engagement tools (chat, polling, whiteboards and annotations, whiteboards, Q & A, etc.) and show the participants how to use these tools for themselves. Once participants become comfortable with the virtual environment, they will engage. • To the degree possible encourage participants to close any other browser windows and applications on their system. Encourage cell phones be turned off or placed in another room during the session. Participants should be entirely present and focused on the content and not checking their phones, checking email, working, or browsing the internet at any point during the session. https://www.health.harvard.edu/blog/keeping-your-smartphone-nearby-may-not-be-so-smart-2017080212163



Pitfalls and Mitigation Strategies *(continued)*

Area for Consideration	Possible Solutions
<p>much of the communication process is nonverbal and virtual environments may limit participants ability to view nonverbal communication</p>	<p>Ideally, your virtual platform and internet infrastructure will allow participants the ability to keep their cameras and microphones turned on during the entire session. It is beneficial if your platform allows audio and video to follow the participants into the breakout rooms with full functionality. As an organization, we at Real Colors adhere to this best practice and would encourage you to do the same, if your platform allows this.</p>
<p>limited ability for facilitation and increased probability session becomes a lecture (almost the worst-case scenario when delivering Real Colors)</p>	<p>Real Colors is designed to be a highly engaging facilitator led session. Participants should do the vast majority of the talking during any Real Colors session – it should never feel like a lecture. Participants generally want to share insights, experiences, and ask questions throughout the session. Allow participants permission to do what they naturally want to do by creating specific opportunities for discussion and encouraging participants to engage during those times. A facilitator’s ability to ask thought provoking and insightful questions is a huge asset. Be prepared and know what questions to ask and when to ask them – these questions should partially be focused on meeting the learning objectives for the session. Facilitators should always spend more time asking questions and listening to responses and less time talking. The virtual environment is great for facilitators who use lots of notes as they facilitate – you can spread out all your notes on your desk and no one knows your little secret! Learn to become comfortable with participant silence – just be sure their silence is not because they do not understand what you are asking or they don’t understand what to do.</p> <p>Do not allow your visual aids (most likely a version of PowerPoint slides) to be your crutch. Don’t be the facilitator that simply reads aloud every word on every slide of their presentation. We’ve developed a PowerPoint presentation for our virtual delivery of Real Colors – we are more than happy to share what we’ve created! It is also available in our Real Colors Facilitator Resource Library found on our website: realcolors.org</p>
<p>limitations with technology or problems with technology</p>	<p>Most of the problems or limitations with technology are out of your control, as a facilitator. Things sometimes just happen (platform or internet crashes, technology fails or does not work properly, etc.)</p> <p>So, being flexible and maintaining the ability to roll with these sorts of challenges will serve you well. Have a plan “B.”</p> <p>Have a helper at the ready who can help mitigate or correct technology challenges for you and/or the participants.</p>



Pitfalls and Mitigation Strategies *(continued)*

Area for Consideration	Possible Solutions
<p>requirement that each participant receive their own Real Colors Assessment in advance of participating in the workshop</p>	<p>This requirement can add additional difficulties on facilitators as it adds a step to their preparation. The team at Real Colors can help you with this or you can do it on your own. Facilitators will need to fulfill and ensure each participant receives their Real Colors Assessment in advance of the virtual workshop. Participants may not attend a virtual Real Colors Workshop if they do not have their assessment.</p> <p>We are aware of facilitators who do virtual sessions as part of their new hire onboarding experience. The Real Colors instrument is just one more thing in the package they send out. Similarly, if you only have 1–2 remote employees who will participate virtually, this is a great opportunity to send them a care package. Working in an office affords benefits like access to office supplies, happy hours, and birthday celebrations on a regular basis. This would be a great time to send your remote colleague something from the “main team” at the office to make the feel included.</p> <p>Facilitators should instruct participants NOT to open their assessments until instructed to do so during the virtual workshop. You can place a sticker on the assessment that everyone has to break together or put it in an envelope they all have to tear open together, during the session and at your invitation. Providing the assessment to participants ahead of time is a requirement. This comes at some risk, however. If participants were to open and review their assessment in advance, they might believe it is unnecessary to attend the virtual session, “because they read the book and know everything already” or create preconceived notions about the meaning of each color. Do not allow this fallacy for any of your participants.</p>



Delivering Real Colors in a Virtual Environment

When it comes to the actual delivery of Real Colors in a virtual environment your best guide continues to be your Real Colors Certification Handbook. The Real Colors model of delivery that has served you so well in the past, remains the same when delivering in a virtual environment. Please trust the delivery model. Major modifications are not necessary to create an outstanding virtual Real Colors experience for your participants. Creating strong visual aids and consistent written and verbal instructions are absolutely necessary for virtual delivery of Real Colors – so some modification may be necessary, depending on what tools and resources you already use.

Additional modifications will also be necessary and are outlined in the table on pages 7-9.

Possible Modifications to Delivery of Real Colors in a Virtual Environment	
Introduction to Real Colors	<p>Everything you would say during your opening and Introduction of Real Colors during a traditional delivery is appropriate during a virtual delivery.</p> <p>You want to create a strong introduction where every participant shares information about themselves (favorite hobby, favorite food, their superpower, etc.) This is especially important for groups who are unfamiliar with each other. Create a strong supportive learning environment. This begins with your earliest communication about your virtual Real Colors classes and continues all the way through the virtual session. Show the participants how to use the tools available to them. When participants are fully aware of expectations and feel safe, they will engage.</p> <p>One modification to make here pertains to the Icebreaker exercise. Many Icebreakers do not work well in a virtual environment; however, you definitely want to facilitate an Icebreaker. Consider using the “Would you Rather” exercise in a virtual session. Use your platforms polling tool and give your participants the choice of two options. Once everyone has made their selection display and share the results of the poll to everyone. Taking each option one at a time, ask participants to share their rationale for the choices they made. Do this a few more times. Transition into your discussion of Preferences.</p> <p>The history portion of your delivery might be made to be more engaging with the use of technology, if you get a little creative. Visuals are always a great addition – display a picture of the theorist as you briefly mention their contribution to Temperament Theory. You could consider assigning some reading to various participants and they could read a brief summary of each theorist to the entire group – if they know ahead of time they will have to participate, they are more apt to stay engaged during the session.</p>
Participants examine the pictures on the cards and rank them	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>Since you can't walk around and make sure they are recording their scores correctly, rely on the PPT to guide them on where to record their scores.</p> <p>Use your learning platform's tools for them to indicate when they are done scoring so you know when to move on. This is where people who do this quickly will get bored and distracted by email or their phone. If they finish early, provide a constructive activity for them to do – send you a private chat; check out a certain feature on the platform, etc.</p>



Delivering Real Colors in a Virtual Environment *(continued)*

Possible Modifications to Delivery of Real Colors in a Virtual Environment	
Participants explain their impressions about the pictures to a partner and discuss the order of their cards	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>This could be facilitated as a large group discussion.</p> <p>One modification for this portion of your delivery could be to utilize the breakout rooms and randomly assign participants to one of the rooms to hold this conversation. Keep these groups small – less than 5 in each breakout room.</p>
Participants read the descriptions on the back of the cards and rank them	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>Since you can't walk around and make sure they are recording their scores correctly, rely on the PowerPoint to guide them on where to record their scores.</p> <p>Use your learning platform tools for them to indicate when they are done scoring so you know when to move on. This is where people who do this quickly will get bored and distracted by email or their phone. If they finish early, provide a constructive activity for them to do – send you a private chat; check out a certain feature on the platform, etc.</p>
Give Color Survey	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>When you start this section, explain how to take the survey and score it at the beginning so they can score the entire survey and assessment and not have to wait if they are fast readers/decision makers; tell them you will roll into an extended break after the scoring is complete and they need to be back, ready for the next part at a specific time (allow roughly 30 minutes from the start of the survey to the end of the break). They MUST give you their scores, most likely, in the chat BEFORE leaving for break.</p> <p>The most difficult time of the entire virtual delivery of Real Colors happens right here. Coming to know what each participant's Primary Color is and getting them placed in the correct breakout room is tricky. Select a platform tool, most likely the chat, have each participant input their Primary Color and score. This break allows you and your helper to organize the large group into the four Primary Color Groups and assign them to the correct breakout room. When break is over, offer your Instructions to the Brightening Exercise and with a click of a button everyone quickly finds themselves in a breakout room with their Primary Color peers.</p> <p>As the facilitator, you should not take a break in case someone has a question. By not taking a break, in the event a participant has a problem with scoring or with their math you are available to help walk them through how to correct their assessment.</p>
Discuss the meaning of the "Total Row"	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>When everyone is back after the break, explain the "Total Row."</p>



Delivering Real Colors in a Virtual Environment *(continued)*

Possible Modifications to Delivery of Real Colors in a Virtual Environment	
<p>Separate participants into breakout rooms by color for the Brightening experience</p>	<p>Before separating the group into their primary color breakout rooms, everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>You will absolutely use breakout rooms for the Brightening exercise. Having other Certified Real Colors Facilitators or other colleagues with Primary Colors scores of 35 or higher for each color to serve as the Reality Check for each Primary Color Group is one modification you might make. You will absolutely want to enter each breakout room to offer assistance, only if needed, and observe each group's process and progress. In each breakout room, each group will utilize the whiteboard and annotation tools to create their visual aids. Before closing the rooms, be sure to grab a screen capture of each visual aid. This way you can share to the entire group the visual aid created as they talk about it.</p> <p>As each Primary Color group discusses their process and visual aid, share the screen capture you took earlier with the entire group.</p> <p>Facilitate your Brightening debrief in any manner appropriate for the group. Be sure to allow participants the opportunity to ask questions of their own to each group.</p>
<p>Closing</p>	<p>Everything you would say during this portion of your Real Colors traditional delivery is appropriate during a virtual delivery.</p> <p>A strong closing is to provide an opportunity for the participants to apply what they've learned during the session. For example, assign each Primary Color group their opposite color and instruct them to provide three appropriate examples on how to start an email to a person of their opposite color. (As a reminder, Reds are opposite of Greens and Blues are opposite of Yellows.) A simpler conclusion could be asking each participant to type in the chat two positive things they appreciate about every color.</p>

