



# Virtualizing Your CME Activity: Lessons Learned

In order to assist in the shift to virtual education, the CPDA Section has created a list of lessons learned from pivoting from a live, in-person meeting to a virtual format. These considerations may be helpful when planning virtual educational activities, either as a live broadcast held online (internet live course format), posting content that is available for credit for up to three years (internet enduring format), or hybrid virtual formats (“Other” format, with a blend of both live broadcast and enduring content).

## Identify the types of educational programming that may translate effectively in a virtual format.

The pandemic resulting from COVID-19 resulted in a large number of people using this time to maximize online learning. In this new learning environment, consider which types of educational formats are the best fit for a virtual format. Rather than trying to simply convert your complete live meeting into a virtual setting, identify the intention of your program, and design the educational offering accordingly. Especially for the pilot year of a virtual program, this may involve selecting certain sessions from the live meeting to present virtually (i.e. panel discussions, video-based modules, and didactic sessions) or reducing the amount of content to ensure a cleaner pivot. These considerations will be crucial during the vendor selection process (discussed below).

## Logistics - start early!

Think through the logistical aspects of your educational program as soon as you make the decision to virtualize. Should you pre-record content, stream it live to your learners in real-time, or offer it as a hybrid format (live streaming of content which is later available to learners after the initial broadcast)? What is your backup plan if there is a technological glitch or if a speaker drops out from participating? Will you have an international audience? If so, how will you schedule live components to factor in time zones? What is the last date you will accept presentations from speakers, and what are the consequences if a speaker fails to submit by the deadline or wants to make a change to their work the day of your activity? Will there be a registration fee? Making these decisions early in the process will help reduce last-minute glitches and allow ample time to focus on the instructional design and quality of content.

## Be thoughtful about learner engagement and interactivity.

Once you have determined logistical considerations, consider adding an interactive component to increase learner engagement. Examples include a live Q & A between learners and presenters, concurrent live chats, breakout rooms with small discussion groups, moderated Twitter chats, gamification (competitive gaming), word cloud questions, flipped classrooms, audience response/polling systems, and so on.

## Know (or get to know) your audience.

Information about what learners want from virtual formats is evolving, and factoring in your learners’ needs is central to any successful educational activity, regardless of its format. After making the decision to virtualize, surveying your target audience may help in determining how to best structure your virtual activity. Include questions related to fees, length of time they would like to access to content, length/types of preferred sessions, whether interactive components are sought after, and so on to incorporate what your learners would



benefit from when planning your virtual activity. This will also help guide the vendor selection process, and assist in finding a system that will fulfill what your learners are expecting from your educational activity.

## Evaluate!

In addition to conducting a needs assessment survey while planning your pivot to a virtual format, start thinking about what you will want to receive learner feedback about after your educational activity. For instance, would you want to collect session-level or global data from the educational activity as a whole? Will you want to employ a longitudinal approach to evaluating whether the activity improved patient care two months after learners' participation and then again six months later, for those changes that may take longer to occur? Although this piece may seem most pertinent after your activity ends, this is a key piece in the planning stages when selecting a vendor that will be able to accommodate your evaluation model.

## Vet and select a vendor to fit your needs.

Allow ample time to review and vet vendors according to your instructional needs to ensure that the system can support those strategies. While "demo fatigue" may set in if there are several options, clearly communicate your requirements and carefully consider the features each present when making your final decision. Include representation from across the planning spectrum during vendor selection (i.e. marketing groups, IT, educational representatives), and provide details about other systems (i.e. registration, internal membership database) with which the vendor will have to integrate. Create timelines that your vendor must adhere to regarding important internal deadlines (posting content, testing, registration, etc.) to ensure accountability. Be mindful of vendors' bandwidths (for example, if they are working with several other meetings at the same time, which could limit the resources available for your activity), and their staff and support options before, during, and after your educational activity. Consider your learners' needs assessment feedback as well as their optimal user experience, and ask the vendor to offer ideas and solutions toward that goal. Think through what your ideal vendor would do (registration, editing/collection of content, retrieving disclosures, credit claiming, evaluation, etc.) and include each corresponding requirement in your request for proposal (RFP), if deciding between multiple vendors. Ask vendors for access to a previous meeting site and request references from other groups who utilized the company for their educational activity, for further insight on their ability to deliver a successful product.

## Create a communication and support plan both internally and externally.

In addition to developing a marketing/communication plan to convey information about the educational activity to learners, create a communication plan with the vendor regarding assistance and support throughout the planning, development, and launch of the activity. Delineate responsibilities between the vendor and your team(s) accordingly (i.e. help desk, IT support). Allow sufficient time for training between the vendor and your team to troubleshoot before, during, and after the educational activity as needed. It may also be helpful to design another plan for communicating with speakers/presenters about the process, expectations, and key deadlines related to their role in the virtual activity. This may include FAQs and other resources related to engaging learners, do's and don'ts when filming a presentation virtually, and instructions on uploading their sessions. Finally, create a communication plan for internal stakeholders (various groups that may be involved including marketing, IT, customer service, content creators, etc.) to clearly outline tasks and expectations.

## Be creative!

Departing from a traditional live meeting mold provides an opportunity for innovation and reactivity in educational programming. Lean into and learn from the challenges to allow growth from traditional approaches to new ways of making the educational experience meaningful.