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INTERACTIVE ONLINE EXPERIENCE (IOE) PLANNER WORKBOOK

A guide to help you design your interactive online experience from ideation to delivery to evaluation, filled with worksheets, examples, and checklists.

Letter from the CuriostyBased Team

Dear Learner,

Welcome to CuriosityBased's course on designing interactive online experiences. This workbook is crafted to complement your learning journey, providing practical tools and insights to enhance your skills in online experience design.

Through this course, we aim to equip you with the knowledge to transform online meetings into dynamic, engaging, and meaningful experiences. As you delve into the content, you will explore techniques to foster authentic connections and creativity in virtual settings. Our goal is for you to emerge as an innovator in online interactions, capable of creating environments where collaboration and curiosity thrive.

This journey is about more than learning new skills; it's about redefining the way we connect and communicate in digital spaces. We hope that by the end of this course, you will feel confident and inspired to design online experiences over Zoom that are not only effective but also enjoyable and memorable for all participants.

We're excited to have you on board and look forward to seeing how you apply these concepts in your unique contexts. Whether you're facilitating workshops, leading team meetings, or hosting educational sessions, the strategies and tips in this workbook are designed to elevate your approach.

At CuriosityBased, we view curiosity as a practice that enhances our capacity for empathy, inclusion, and effective communication. This course is a testament to that belief. By embracing the principles and practices shared here, you'll not only enhance your own skills but also contribute to a more engaging and collaborative online world.

Wishing you a rewarding and insightful learning experience,

The CuriosityBased Team

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Module 2: What to Ask Yourself Before You Design

Video 1: What is Your Topic?

What is the topic of your interactive online experience?

Video 2: What is the Function and Purpose of the Online Experience?

What is the function and purpose of the interactive online experience? *(Check all that apply)*

☐ <u>To educate and/or inform</u>: To help the participants learn something new, acquire new skills, gain knowledge, or to stay informed.

☐ <u>To build connection and community:</u> To help foster a sense of community among the participants, which will go a long way in building trust and creating a sense of belonging.

☐ <u>To stimulate creative thinking and ideas:</u> To inspire people to think innovatively with the activities presented in the online experience. It can include imaginative problem solving and facilitate collaborative brainstorming.

☐ <u>To gather input and opinions:</u> To tap into the diverse perspectives of the participants to get their insights. It can be used later on to inform decisions, to inform projects, and discussions.

☐ <u>To empower:</u> To give participants the resources, the tools, so that they can gain confidence and make their own decisions that will help improve their lives.

Note: There can be other functions and purposes for an interactive online experience besides these. These are just the ones that CuriosityBased will review with you for the purposes of this digital course.

Additional functions and purposes

Video 3: What Type of Experience Do You Envision?

What type of interactive online experience do you envision?

☐ A forum/focus group: A discussion platform for participants to share their opinions and ideas about a particular topic. This serves the function of gathering opinions and input.

☐ A workshop: A hands-on experience for the participants to learn and practice new skills or knowledge. This serves the function of educating and empowering.

☐ A lecture: Where one person is presenting information to an audience and they are not interacting with one another. This serves the function of educating and/or gathering information.

☐ A networking event/social experience: Give participants an opportunity to interact and get to know one another to build relationships. This serves the function of building a sense of community and connection.

☐ Q&A (aka Question and Answer): This is between an interviewer and an interviewee or a panel talking about a specific topic. This serves the function of educating and stimulating creative thinking and ideas. And if there's open Q&A from the audience, it can also serve the function of gathering input and opinions.

Note: There are other types of interactive online experiences besides these. These are just the ones that CuriosityBased will review with you for the purpose of this digital course.

Video 4: Setting Objectives and Expectations

Learning objectives of your interactive online experience

Expectations of your interactive online experience

Tip: To help set expectations, CuriosityBased also likes to state what we will NOT do during our online workshop.

What participants will NOT DO or GAIN in your interactive online experience *(optional)*

Video 5: Keeping Your Participants' Needs in Mind

What is the most important thing your participants want from your interactive online experience? *(check all that apply)*

- ☐ To be educated and/or informed
- ☐ To build connection and community
- ☐ To be stimulated through creative thinking and ideas
- ☐ To gather input and opinions
- ☐ To be empowered

Do the participants' wants and the purpose of your interactive online experience align?

- ☐ Yes
- ☐ No

If they don't align, what can you do to make them aligned?

Is your interactive online experience going to be open to the public or private (e.g. for a specific club or organization)?

- ☐ Public (open registration; anyone can join)
- ☐ Private (closed registration; for a particular client or group)

How well do the participants know each other?

Not Well At All — Slightly Well — Moderately Well — Quite Well — Very Well

How well do YOU know the participants?

Not Well At All	Slightly Well	Moderately Well	Quite Well	Very Well

How comfortable do people feel when talking in all-group/big-group settings?

Not Comfortable At All	Slightly Comfortable	Moderately Comfortable	Quite Comfortable	Very Comfortable

How familiar are participants with the content of your interactive online experience?

Not Familiar At All	Slightly Familiar	Moderately Familiar	Quite Familiar	Very Familiar

How likely are the participants to do prep work for your interactive online experience?

Very Unlikely	Unlikely	Somewhat Likely	Likely	Very Likely

How tech savvy are the participants?

Not Tech Savvy	Slightly Tech Savvy	Moderately Tech Savvy	Tech Savvy	Very Tech Savvy

Video 6: Duration

Duration of your interactive online experience:

_____

Module 3:
Common Mistakes
& Constraints
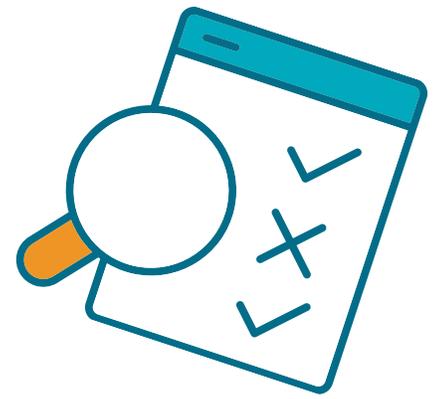
__Fill out after you complete this module__

In this module, you will reflect on constraints and limitations you might have with creating your interactive online experience. We pose what we believe to be the most important questions you should ask yourself. Afterwards, there are other optional questions you can ask yourself to further reflect on your constraints and limitations.

As a note, you might not be able to answer some/all of these questions at the moment, and that's ok. You can always come back to this section later on when you learn more about what your interactive online experience entails. You can also answer the following questions in any order you like. This is just the order Dr. Julie Pham talks about in the digital course.

Budget Constraints

Important Questions to Ask Yourself

Your estimated budget for your interactive online experience: _____

What aspects of the interactive online experience are you prioritizing with your budget?
(e.g. Video conference platform, tech tools, outside support, etc.)

How do you evaluate how you are getting the most out of your budget?

People Bucket

Do you have the resources/budget to pay people?

☐ Yes

☐ No

☐ It depends (If you check this box, write down below what it depends on)

Can you recruit a volunteer or an unpaid intern?

☐ Yes

☐ No

☐ It depends (If you check this box, write down below what it depends on)

Equipment Bucket

What do you have budgeted for when it comes to equipment for your interactive online experience? (e.g. web camera, lightning, microphones, etc.)

What kind of quality of interactive online experience does your audience expect?

Technology Bucket

What software do you have a budget for?
(e.g. which Zoom plan you can get, online interactive tools, etc.)

Other Questions to Ask Yourself

- Can your budget accommodate an increase in participants or additional sessions in the future without exceeding your financial limits?
- Have you thoroughly reviewed the pricing structures of platforms and tools to uncover any hidden fees, such as transaction charges, data overages, or premium feature costs?
- Have you allocated a portion of your budget for unforeseen circumstances, technical issues, or emergency expenses that may arise?

Technology Constraints

Important Questions to Ask Yourself

Tech Tools

What's your typical audience size? _____

How do the participants like to interact?

What's the typical duration of your interactive online experience? _____

Based on the above questions, what kind of Zoom platform will you need? (click on the hyperlink to see more details about each plan)

☐ Free version
☐ Paid version: Zoom Meeting
☐ Paid version: Zoom Webinar

Tech Savviness

How tech savvy are you (the facilitator)?

○━━━━━○━━━━━○━━━━━○━━━━━○

| Not Tech Savvy | Slightly Tech Savvy | Moderately Tech Savvy | Tech Savvy | Very Tech Savvy |

What do you have to do in order to prepare yourself, tech-wise, for your interactive online experience?

How tech savvy are your participants?

○————○————○————○————○

| Not
Tech Savvy | Slightly
Tech Savvy | Moderately
Tech Savvy | Tech Savvy | Very
Tech Savvy |

What do you have to do in order to prepare your participants, tech-wise, for your interactive online experience?

Other Questions to Ask Yourself

- How interactive and engaging are the features offered by the platform and tools? Will they enable the level of participation and interaction you want to achieve?
- Is the video conferencing platform and the tools you plan to use compatible with various devices and operating systems that participants might be using (e.g. computers, tablets, smartphones?
- Are you prepared for potential technical glitches or delays that could impact the schedule? Do you have contingency plans in place?
- Are the chosen platform and tools accessible to participants with disabilities? Do they support features like screen readers, closed captions, or alternative formats for materials?

Time Constraints

Important Questions to Ask Yourself

How long is your interactive online experience?_____

How much time do you have to design your interactive online experience?_____

Other Questions to Ask Yourself

- If you have support, how much time do they have to dedicate in and outside of the interactive online experience?
- Have you considered the time zones of your participants and chosen a suitable time that accommodates the majority?
- How will you allocate time for different segments of your interactive online experience, such as introductions, content delivery, interactive activities, discussions, and Q&A sessions?
- Have you factored in sufficient time for each activity to ensure smooth transitions and prevent rushing through important content?
- How much time do you have to dedicate to pre-session preparations, such as setting up equipment, testing the platform, and organizing materials?
- How much time do you have to dedicate to your debrief session, such as sending post-session materials, evaluating feedback, etc.?

Constraints Based on Participant's Needs

Important Things to Consider

What do the participants need? Here are some things to consider:

- How tech savvy are they?
- How much time and effort will they need to learn how to use the platform and tools?
- Are there any disability needs you need to consider?
- Are there participants that should be/should NOT be grouped together?
- What is the best way to communicate with your participants?
- What are their learning styles?

Module 4: Creating Interaction in Your Online Experience

Video 2: Types of Activities

What types of activities are you doing to use in your interactive online experience?
(Check all that apply)

- ☐ Ice breakers
- ☐ Discussions
- ☐ Silent reflection
- ☐ Learning games
- ☐ Brainstorming and creative idea generation

- ☐ Information and feedback gathering
- ☐ Role-playing
- ☐ Chat response
- ☐ Breakout rooms

Video 3: Breakout Room Discussions

Answer the following questions if you're going to use breakout rooms.

What types of breakout room activities will you do to support the purpose of your interactive online experience?

Can the breakout rooms activities be self-facilitated?

- ☐ Yes
- ☐ No
- ☐ It depends (If you check this box, write down below what it depends on)

How much support can you actually have?

☐ Just me

☐ I will have someone to help me

☐ It depends (If you check this box, write down below what it depends on)

```
[                                                              ]
```

How many people will participate in this interactive online experience?_____

What are the time constraints?

☐ The interactive online experience has a hard stop and start

☐ The interactive online experience is more open-ended

Do you want to prioritize mixing up different people or building deep connections within a small group of people throughout that interactive online experience?

☐ Mixing up different people

☐ Building deep connection within a small group of people

How many people do you think you want to have in each breakout room?_____

How long will the breakout rooms last (this can be a range of time)? _____

Will you hop around in the breakout rooms or will you stay in the main room?

☐ I will hop around the breakout rooms

☐ I will stay in the main room

How will you communicate the breakout room instructions? (E.g. A follow along packet via chat or email, broadcasting instructions via the chat or breakout rooms)

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[                                                              ]
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Do you want to build in debrief time after they come back from the breakout session?

☐ Yes

☐ No

☐ It depends (If you check this box, write down below what it depends on)

How will people get assigned to the different rooms?

☐ Pre-assign people to breakout rooms

☐ Randomly assign people to breakout rooms

☐ Manually assign people to breakout rooms

☐ Have participants opt into the breakout rooms themselves

Additional Notes

Warm-Up (Preparing the participants; warming them up to have a deeply engaging experience)	
Main Workout (you can challenge the participants a bit; where the experience gets deeper and more engaging)	
Cool Down (time for participants to reflect on what they just experienced)	

Video 5: Rituals
What rituals do you want to add to your interactive online experience?

Module 5:
Making Your Interactive Online Experience Accessible & Inclusive

Video 1: Significance & Accessibility Considerations

Here are the accessibility strategies we talk about in this digital course:

- Closed captions
- Screen-reader-friendly material
- Materials in multiple formats
- Clear and simple language
- Different modes of participants
- Breaks

**Write down notes on how to make your interactive online experience more accessible.**

Video 2: Inclusion Strategies

Here are the inclusivity strategies we talk about in this digital course:

- Inclusive language
- Make opportunities for all voices to be heard
- Being mindful of different cultural context
- Create a safe and respectful environment
- Check your biases
- Ask for feedback

Write down notes on how you will make your interactive online experience more inclusive.
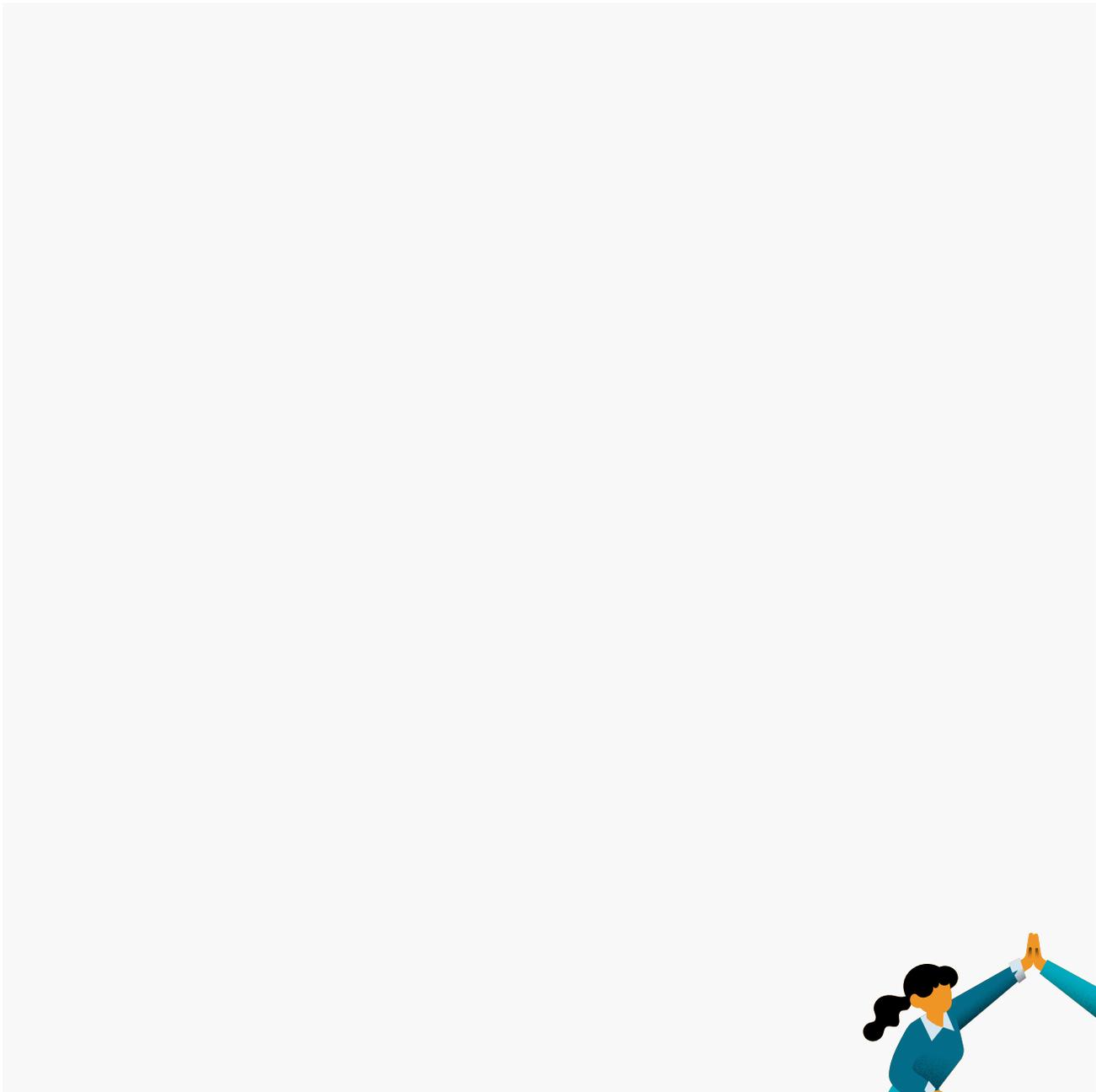
Module 6:
Basic Tools to Design Your Interactive Online Experience

Additional Notes

Module 7:
Deep Dive Into Tech

Video 1: The Basic Setup

Make sure you have the following for your interactive online experience:

- ☐ Reliable internet connection
- ☐ Camera
- ☐ Lighting
- ☐ A microphone (or at least having good audio)
- ☐ Dual monitors (highly recommend)

Additional Notes

Video 2: Video Conference Platform

What video conferencing platform do you plan on using?

- ☐ Zoom
- ☐ Microsoft Teams
- ☐ Welo
- ☐ Google Meet
- ☐ Other: _____

Additional Notes

Video 3: Polling Tools

Do you plan on using any polling tools for your interactive online experience?

☐ Yes

☐ No (If you checked "no", move onto the next section, "Video 4: Chat Function")

☐ It depends (If you check this box, write down below what it depends on)

If you plan on using any polling tools, what tool(s) do you plan on using? _____

How will you use the polling tool(s) in your interactive online experience?

Additional Notes

Video 4: Chat Function

Do you plan on using the chat function for your interactive online experience?

☐ Yes

☐ No (If you checked "no", move onto the next section, "Video 5: Collaboration Tool")

☐ It depends (If you check this box, write down below what it depends on)

How will you use the chat function in your interactive online experience?

Additional Notes

Video 5: Collaboration Tools

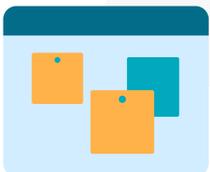**Do you plan on using collaboration tool(s) for your interactive online experience?**

☐ Yes

☐ No (If you checked "no", move onto the next section, "Video 6: Music & Video")

☐ It depends (If you check this box, write down below what it depends on)

If you plan on using collaboration tools, what tool(s) do you plan on using?

How will you use the collaboration tool(s) function in your interactive online experience?

Additional Notes

Video 6: Music & Video

Do you plan on using music and/or videos for your interactive online experience?

☐ Yes

☐ No (If you checked "no", move onto the next module)

☐ It depends (If you check this box, write down below what it depends on)

How will you use music and/or video in your interactive online experience?

Additional Notes

Module 8:
Plan the Interactive Online Experience

Video 2: What to Do Before the IOE

Before the Run Through

Check off the boxes when you have that material ready to go.

Then you can write the details of your interactive online experience in the boxes.

1) Check the details of your interactive online experience

☐ Time of interactive online experience (remember about the time zone of your interactive online experience)

☐ Date of interactive online experience

☐ The video platform link and/or phone number to the interactive online experience

Other

2) Check the materials of your interactive online experience

☐ Script

☐ Run of Show

☐ Deck

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

3) Check your participants

- ☐ # of participants you will have
- ☐ What type of communication you are going to have with your participants (directly or indirectly; email, text, eventbrite, etc.)
- ☐ Names of the participants & their email addresses
- ☐ Participants to put together in breakout rooms
- ☐ Participants to avoid putting together in breakout rooms

4) The prep email *(You will write the email itself in Module 9 of this workbook)*

When are you going to send out your prep materials?

5) Plan for support

The Run Through

Have you...

- [ ] Confirmed the roles and responsibilities of you and/or your support?
- [ ] Done a tech check?
- [ ] Made sure the instructions and prompt questions you plan on sharing with the participants are clear?
- [ ] Read through the entire script to check for flow?
- [ ] Checked your deck?
- [ ] Check through the entire script in general?

When are you planning on doing your run through and for how long?

The Day of the IOE - Preparation

What are you going to do to make sure you are ready for your interactive online experience?

The Prep Time Immediately Preceding the IOE

Have you...

☐ Set aside at least 15 minutes for a prep session for your interactive online experience?

☐ Included anyone that is going to support you in the prep session?

Checklist of what you need to do during your prep session right before your interactive online experience:

☐ Enable the waiting room

☐ Make sure your mic is working

☐ Make sure your sound is clear

☐ Make sure your sound level is good

☐ Check your camera

☐ Check your lighting

☐ Check your background

☐ Look presentable

☐ Do a tech check

☐ Do a sound check

☐ Make sure all of your links work

☐ Take a quick look at the agenda

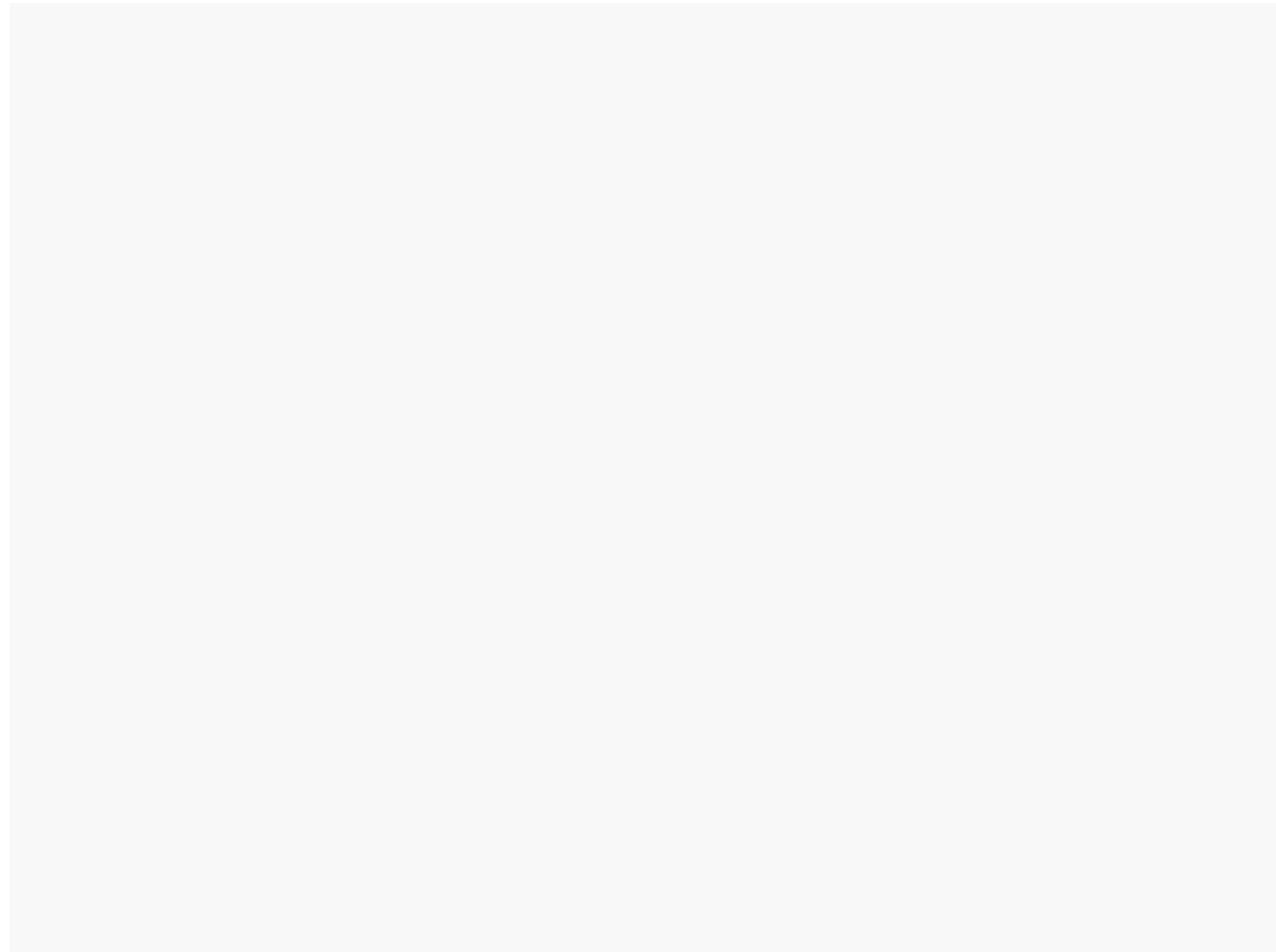☐ Quick review of the deck

Additional Notes

Video 3: What to Do After the IOE

The Debrief Session

Reflect on...
- What went well during your interactive online experience
- What didn't go well during your interactive online experience
- What you will change in the future with your interactive online experience
- Review the results of any feedback from participants

The Post Session Communication

Make sure to include the following:

☐ Links to additional resources

☐ An attachment to a takeaway document

☐ A link to the feedback survey

More details on what to include in your post session communication in Module 9

Then, close access to all shared documents (if you need to do so).

Module 9: Communicating with Participants

Video 1:
Communicating With Participants Before an Interactive Online Experience

Below is a checklist of what to include in your prep communication.

- ☐ Basic Information
    - ☐ Title of the interactive online experience
    - ☐ Who is going to be facilitating it
    - ☐ The day of week and date it will take place
    - ☐ The start and end time
    - ☐ What time zone you are operating in
    - ☐ Link and call-in numbers to the video conferencing platform
- ☐ Agenda
- ☐ Preparation instructions (e.g. links to readings, surveys, prompt questions)
    - ☐ Indicate if it is mandatory or not
    - ☐ If you have prompt questions, indicate how participants are going to be sharing the answers to them
- ☐ Contact information

How are you going to send this prep communication?

- ☐ Direct communication with the participants = contacting the participants myself
- ☐ Indirect communication with the participants = contacting the participants through someone else (if you are doing this, make sure to format it in a Word doc or PDF to send to them)

When are you sending this prep communication?

Below is a checklist of what to include in your post communication.

☐ Address anything that came up during the session that you want people to remember

☐ Address something you forgot to talk about

☐ A takeaway document

☐ Additional outside resources or attachments

☐ Recording link to the interactive online experience

☐ Any documentation (e.g. poll results, notes, photos, etc.)

☐ An invitation to join a community/group

☐ Keep communication channels open

☐ Suggestions on how participants can continue to benefit from what they experienced and learned in your interactive online experience

☐ Getting feedback

How are you going to send this post communication?

☐ Direct communication with the participants = contacting the participants myself

☐ Indirect communication with the participants = contacting the participants through someone else (if you are doing this, make sure to format it in a Word doc or PDF to send to them)

**When you've included everything you need in your post-IOE communication,
send it out to your participants as soon as possible.**

Additional Notes

Module 10:
Facilitation & Supporting Roles

There are no prompt questions in this section.
This is just a space where you can write down any notes about the material in this module.

Additional Notes

Module 11:
Evaluating and Improving Your Interactive Online Experience

Video 1: Evaluating Yourself

What went well?

What did not go well?

What will you try next time?

How did the success of your interactive online experience measure against your stated objectives?

How was your execution as a facilitator? (e.g. How did I handle participants' questions? How well did I manage my time? How did I deal with unanticipated changes?)

If you had non-participants during your interactive online experience, what did they say about your execution of it?

Additional Notes

Video 2: Evaluating Participant Feedback

How are you going to gather participants' feedback? (Check all that apply)

☐ Open Invitation

☐ Group Debrief

☐ Feedback Interview

☐ Survey

☐ Other:_____

**Once you know how you're going to gather your feedback,
go to the section that corresponds with that mechanism.**

If you are doing an open invitation...

When will you invite people to do so? (e.g. at the end of the interactive online experience, in the post-interactive online experience communication, etc.)

If you are doing a group debrief...

How much time will you allocate during your interactive online experience to collect this feedback?

If you are doing a feedback interview...

How are you going to ask participants for an interview?

☐ Prearrange the interview

☐ Ask for volunteers

☐ Offer free or reduced registration fee in exchange

☐ Other:_____

Notes

If you are doing a survey...

What are you going to evaluate in the survey? (Check all that apply)

☐ How participants felt about the session

☐ What participants thought about your execution and delivery

☐ The participants progress or achievement towards the stated objectives

☐ The impact of the interactive online experience on the participants

☐ Other:_____

Notes

Brainstorm questions you want to ask your participants in your feedback survey.

What you are going to evaluate	Types of Questions
How participants felt about the session	
What participants thought about your execution and delivery	
The participants progress or achievement towards the stated objectives	
The impact of the interactive online experience on the participants	
Other	

What kind of tool will you use for your feedback survey? (e.g. Survey Monkey, Microsoft Forms, Qualtrics, etc.) _____

How long is your survey going to be? _____

When will you administer the survey?

Additional Notes

Video 3: Analyzing Participants' Feedback

What common themes and patterns are emerging from the participant feedback?

What strengths do your participants identify in the interactive online experience?

How does this feedback support or detract from the purpose and objectives of the interactive online experience?

What does the participant feedback reveal about their own understanding of and preparation for the interactive online experience?

How are participants' personal preferences influencing their feedback?

Additional Notes

Video 4: Making Improvements

Based on your evaluation and participants' feedback, what is the nature of the changes you are making to your interactive online experience? (Check all that apply)

- ☐ Managing expectations
- ☐ Updating your text and/or instructions
- ☐ Create a new way of communicating something
- ☐ Changing the timing
- ☐ Rearrange the order in which the activites take place
- ☐ Change your facilitation or presentation style
- ☐ Update your visuals
- ☐ Change the activities

How will you prioritize making these changes?

- ☐ Easiest to hardest
- ☐ By the resources you have
- ☐ Through "Low-Hanging Fruit" = what is going to have the most positive impact and the least work

Additional Notes

Create your timeline of how you will make your changes below:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Additional Notes

Write down how you will evaluate the progress of the changes you've made.

Change you've made	Progress of this change

Other Resources

If you're curious about what else CuriosityBased have to offer outside of this digital course, take a look at our free and low-cost resources. For more, visit curiositybased.com/resources

White Paper: What is Curiosity
Free

LinkedIn Newsletter
Free

Weekly Newsletter
Free

Leadership Book Lists
Free

7 forms of respect® Crash Course Your 20-Minute Guide to Asking for the Respect You Want
Free

7 forms of respect® Digital Course Your Personal Guide to Breaking the Miscommunication Cycle and Transforming Your Relationships
$50-$150

7 Forms of Respect® Book
$15.99

7 Forms of Respect® Minibook
Free

7 Forms of Respect® Quiz
Free

YouTube Channel
Free

Difference Between Learning & Training Video
Free

7 Forms of Respect® Video Scenarios
Free

7 Ways Team Leaders Can Practice Curiosity Video
Free

The Power of Practicing Curiosity Video
Free

Thought Reframes YouTube Shorts
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7 Forms of Passiveness Video
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