



CARTA Method 2.0



A minimalist approach to designing and delivering LIVE
remote learning courses that sustainably provide
high levels of participant involvement



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Author: Marian Stirbescu

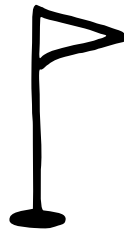
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Introduction

What is the CARTA method?

CARTA is a method to design and deliver remote training sessions in ways that maximize the participants' active involvement.

By “remote training” we mean a course format that is supported using video, audio, and specific remote technologies for synchronous interaction with the course participants. This format is complementary to the traditional e-learning and online learning formats that offer participants access to sets of documents, pre-recorded videos, or other types of individual activities, they can consume at their own pace (that is, a-synchronously), in the absence of a trainer or educator.

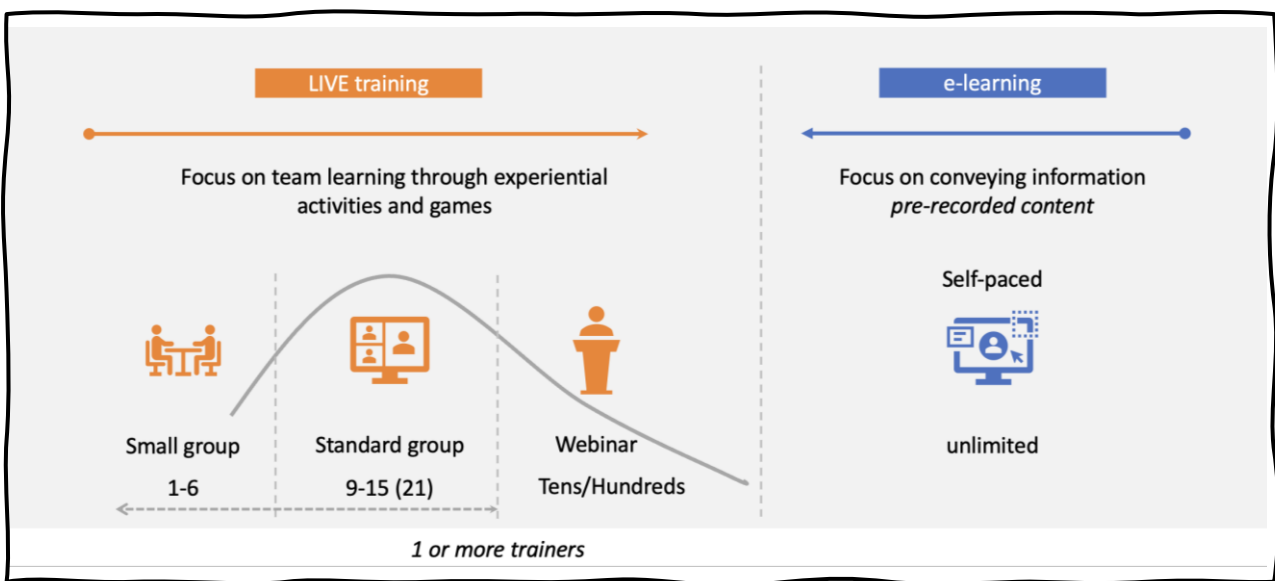


Figure 1 – Live training vs e-learning

Certain elements of this method have been employed in past years, but the consolidation into a single form—the current one—was achieved thanks to the experimentation and the positive feedback received in 2020 by Axioma Solutions' remote training team.

The team was able to successfully deliver more than 120, 2-day online sessions during a very tough period for the whole training industry worldwide.

Successful practices of the past have been preserved, refined, and validated in cooperation with other trainers from various activity domains who delivered remote sessions within local and global companies.



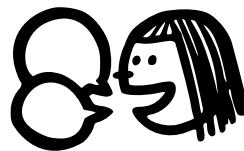
Why need a dedicated method for remote training?

Let's take a look at the problems and opportunities.



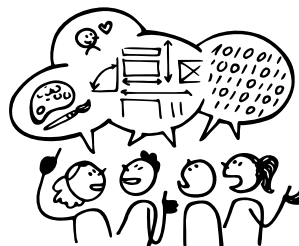
As a participant

- Some participants may miss the enjoyment of traditional training
- Feeling not engaged and skeptical about the effectiveness of remote delivery
- Many of them report that online they received low value or even a mediocre experience
- It could be boring to offer your attention to a “talking head”, somebody that relies entirely on lecture



As a trainer

- You may accept that online delivery could lack the quality you usually offered when delivering in-class sessions.
- You may feel at a disadvantage as you don't possess yet the knowledge and the tools to replicate the in-class experience online.
- You would like to enjoy the opportunities offered by the new approach and grow your reach.



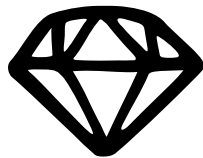
The general public perspective

Managers, sponsors of learning initiatives, and clients, in general, acknowledge that the pandemic has accelerated the adoption of remote training (5+ years) by many organizations.

Nowadays, organizations across the world can see that this form of delivery with a trainer interacting synchronously with a group over Zoom has its clear advantages:

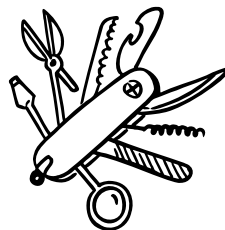
- Better budget spending with zero accommodation and travel costs frees financial resources to develop even more employees
- Greater flexibility in organizing training groups using a schedule of 4 to 8 hours

As a consequence, they expect trainers to be able to deliver the same learning program both in-class and online, following a reasonably similar schedule of training activities and aiming at similar results.



CARTA Acronym

Collaborative, Adaptive, Remote, Training Activities



The components of the method

The method has the following components:

- The CARTA manifesto, the method's pillars, values, and principles
- The process of delivery for remote training (i.e., strategies for participant involvement, roles, process steps, types of activities, content transformation, and adaptation)
- Remote learning best practices
- Library of activities, developed by the training community, organized and published by us.

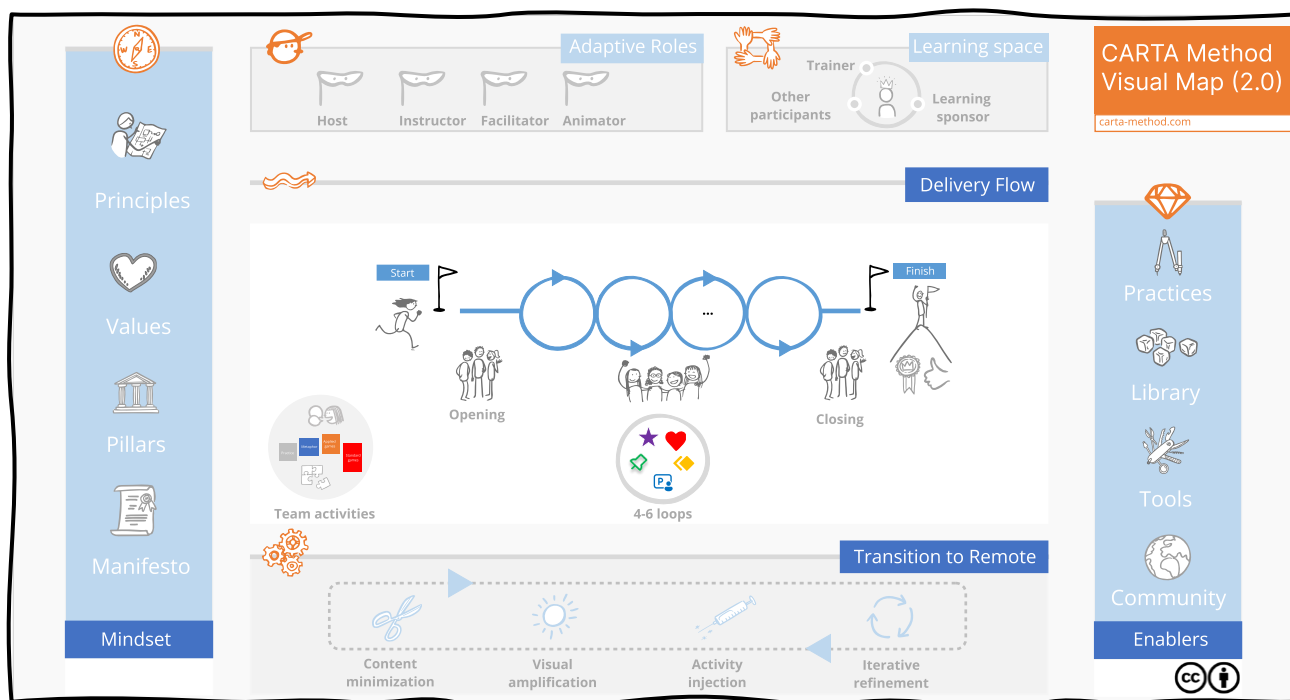


Figure 2 – CARTA Method Visual Map

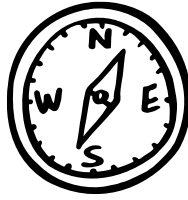


CARTA Manifesto

We design, deliver, and facilitate remote and in-classroom training programs that enhance the value of the learning experience.

By working to deliver courses remotely for the employees of various organizations, we observed the following aspects:

- Although remote learning generally is more difficult in the initial stage than in-classroom learning, the former results can be similar, if not superior to the latter once the trainers have mastered the requisite techniques and tools.
- There are strong economic reasons that motivate training clients to prefer this method to the traditional way of delivery (in class). These reasons concern especially the decreased budgetary expense per trained participant, the flexibility of the educational format and group organization, as well as the possibility of balancing course attendance and effort required at one's workplace.
- This new approach improves access to learning by creating fresh opportunities and by eliminating geographical barriers and the constraints tied to travel planning and social distancing.



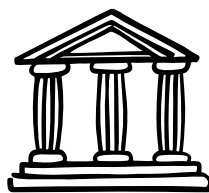
Credo

“We believe that it is our duty to offer a practical method for designing and delivering remote courses, thereby promoting the development of this new form of learning”

A change in the trainers’ ways of thinking and attitudes is necessary for success within the new format. In particular, the following ideas need to be adopted:

- Most of the training activities traditionally delivered in the classroom can be modified and adapted to the remote format.
- Training-specific techniques and skills are transferrable online and are as important for the successful delivery of remote training sessions as for the effectiveness of in-classroom teaching.
- Proficiency in the use of digital technologies (e.g., videoconference apps) is necessary to assure the success of remote delivery.
- Any user of an internet browser can enjoy a memorable learning experience by attending remotely delivered training sessions.

“Being part of a new community of remote training professionals, we assume the goal to inspire and support others in attaining professional mastery, to the benefit of training consumers around the world. The pillars of remote delivery, the CARTA values, and principles guide our work towards this goal”



Pillars of remote content delivery

In our view, the success of the new remote delivery methods relies on four key pillars:

1. Good knowledge of the specific domain
2. Digital technology savviness
3. Mastery of training delivery
4. Adequate mindset



CARTA values

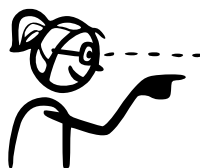
Our active engagement in remote content delivery and the productive interaction with course participants made us realize that we have been guided by the following values:

- **Peer learning:** people learn better in groups. Each participant influences the others' learning experiences, whether or not they are aware of it.
- **Adaptability:** trainers and content creators consistently strive to adapt content to the profile of the audience and the specifics of the learning initiative
- **Intentional flow:** adherence to, or preference for, the utilization of a standard delivery process
- **Respect** for the course participants: accepting the fact that each participant finds themselves at a particular stage on their learning path, that they have personal learning preferences, and that they have their own, pre-formed definition of success concerning learning.
- **Value through engagement:** put the right effort into maintaining the participants engaged



CARTA working principles

Remote training programs creators may guide themselves by the following principles:



#1 Focus on the participant

The state of openness to the course participants' needs is essential to the learning process. The course participants are responsible for their educational progress, but it is mainly the trainer's responsibility to transfer the knowledge and ensure skill growth. The learning process is also supported by the sponsors of the learning initiatives, co-trainers, and fellow co-trainees. Whenever you put the participant in the centre of the experience you have a great chance of achieving openness to learning.



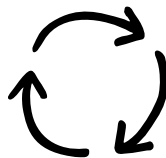
#2 Positive mood and low tension

Reduced psychological tension yields learning opportunities. To promote states of low tension the course participants need to get to know one another as well as their trainer and productively relate to the subject matter.



#3 Compensation principle

When kinesthetic elements are few or absent, they will be compensated by audio and visual elements (for a diverse and amplified experience).



#4 Interchangeability

Beyond the specifics of each kind of content, there is a set of reusable activities that can be included in various online courses after being minimally adapted. The designers of learning activities will invest time and creativity to conceive them in generic and reusable forms.



#5 Content minimization

The remote delivery of courses needs the content transmitted in “presentation” or “lecture” format to be minimized and the content to be converted for usage in practical activities. These practical activities must represent a significant percentage (65–75%, if not more) of the total duration of a course.

Content minimization is the first step in turning traditional content into remotely deliverable content.



#6 Individual engagement

To compensate for the participants' initially reserved attitude, which naturally narrows their engagement, the trainer will allot time to involve each of them in course activities.

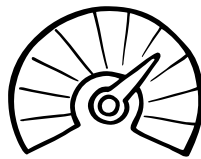


#7 Tolerance

Although we encourage trainers and course participants to interact freely, even spontaneously, we understand that one or more participants may ask others to respect their boundaries (i.e., in terms of privacy and public exposure).

Trainers should be open to the unfolding of training activities even in situations where course participants wish minimal visual interaction (e.g., if webcams are turned off).

We openly accept and respect the occurrence of these cases.



#8 Complete content

The content created by the participants can be disseminated through a variety of software tools. This content is complete only when the results of the participants' activities are readily available for consultation by the participants.



#9 Value realization

The participants will seldom spontaneously understand the value received through the remote training course. The session leader must set up activities that enhance the understanding of this value among all the participants.

Activity debriefing supports this principle. (For instance: how is this course going to help me? What are its valuable components in my view? How do I prioritize my preferences?)



#10 Structured process

The usage of a structured delivery process yields results that are significantly better than those mediated by the trainer's charisma only.

It is easier to learn by following a clear method than by immersion in an environment imbued with the trainer's personality.

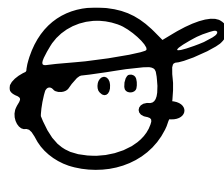


The delivery Process

A good delivery process could be implemented by:

- clearly embracing responsibilities by the trainers
- paying attention to the activity types that generate engagement
- following an intentional training delivery flow
- creating a good learning environment
- constantly improved based on feedback.

Assuming responsibilities



You need to wear different “hats” to fulfil your role as a trainer.





 Organizer Host	 Teacher Instructor	 Facilitator	 Animator
Opening, closing Creates the setup Gives instructions and administrative details Ensures compliance with the rules	Provides information Develops abilities Provides clarification Uses own expertise to define solutions	Facilitates team collaboration (process) Encourages experience sharing Helps with expressing emotions & perceptions	Maintains the energy level Increases the engagement level Sets and maintains the pace Responsible for well- being

Figure 3 – Trainer’s roles

Creating engagement strategies

To set up a course with a high degree of interactivity and practicality, remote training program creators will design activities that employ some of the approaches below:

- Ask participants to **Do Something**
- Create opportunities for them to **Interact with others**
- Stimulate **Creating, Discovering, Exploring, and Making Connections**
- Reserve time for **Individual reflection**
- Run **Games or applied games**
- Assign the role to **Observing others**



From the simple practice of concepts to using games

The four categories of practical activities that we recommend in CARTA are the following:

- A. The simple practice of learned notions, concepts, and techniques
- B. Using **metaphors** in practice (pretext, image, story, role-playing, case study, etc.)
- C. Using **applied games**: several activities specific to known games are intertwined with the objective of a certain practical activity; integrating games in a practical activity intensifies the dynamism, interaction, and communication of the latter, and increases the level of energy associated with the kind of integrated game
- D. Using **standard games**: they are useful to restore energy levels, engagement, connection, and communication within teams

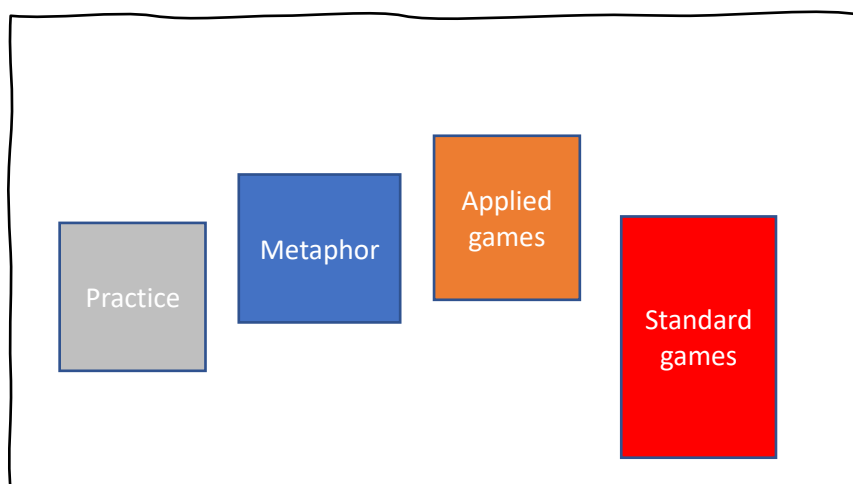
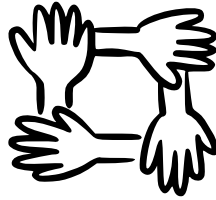


Figure 4 – Levels of engagement by activity category



The learning space

To attain learning objectives, the stakeholders involved in the training process need to play their part.

- **Participant** – active involvement in knowledge acquisition and skills development
- **Sponsor of the learning initiative** – ensuring the right resources and enough time for training
- **Trainer** – pursue the principles of CARTA, apply delivery techniques, adapt content for online delivery
- **Designer** – i.e., the person who designs activities and arranges them in a learning flow that maximizes the value offered to the participants.



Delivery flow

Online training needs more flexibility in terms of duration and sequence of content delivered. That's why we lean toward a loop-based approach instead of the traditional content block approach.

The delivery process comprises three main phases:

1. Session Opening
2. Delivery
3. Session Closing

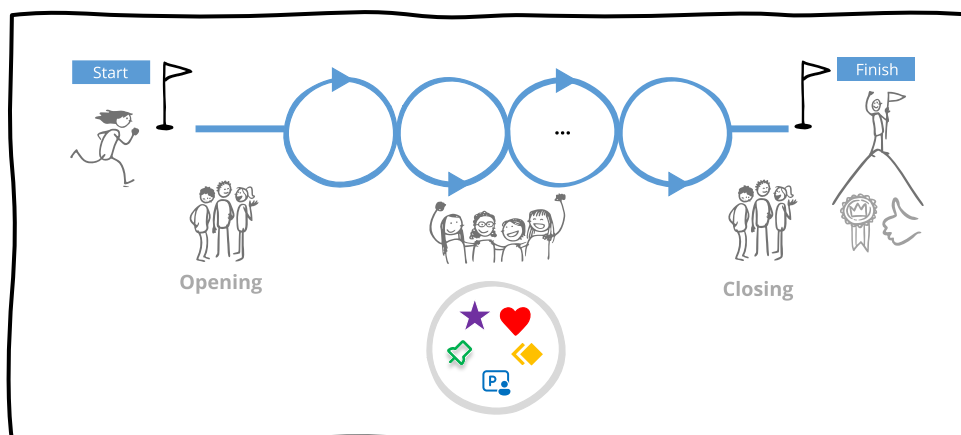


Figure 5 – CARTA delivery flow

The course delivery per se is to be made iteratively, in delivery loops containing a set of essential activities. The creators of training material and the trainers themselves can organize the delivery sequence for each loop as they see fit. The presence or absence of such activities makes it possible to evaluate the training session's effectiveness later.

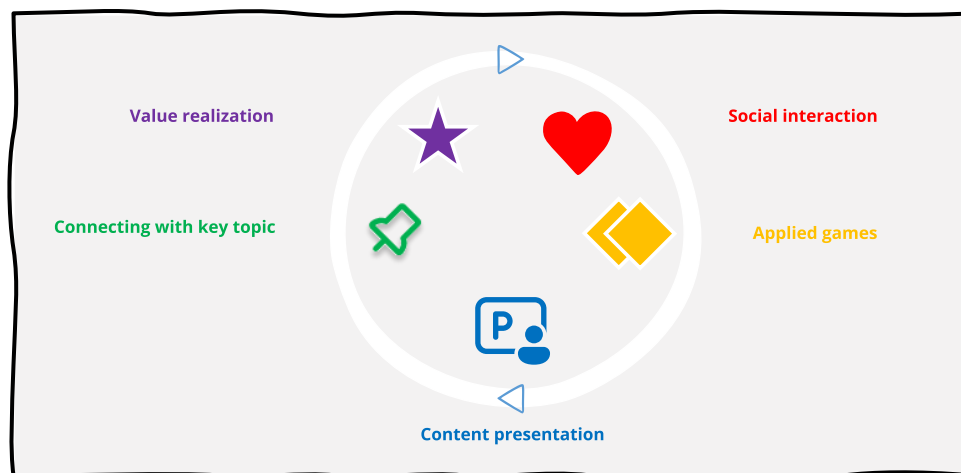
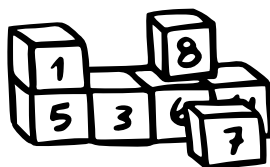


Figure 6 – Activity types



Types of reusable activities

Those who deliver courses remotely need to be confident that the kinds of activities they employ will generally have the expected effect in terms of the emergence of a good learning environment, a smooth, stress-free interaction with the group, the attitudinal opening of the participants, the participants' realization of the offered value and the upkeep of their energy levels.

The practice has demonstrated that the activities included in the table below are reusable, interchangeable, and highly adaptable—after minor adjustments—to a large range of courses, from Soft Skills to technical or specialist training.

Type of Activity	Why?	Comments & examples
Connecting participants (among themselves and with the trainer)	This activity reduces stress, stimulates openness, and puts people in “learning mode”	Introducing oneself in pairs or individually, interviewing, collecting expectations
Defining expectations and work rules	Participants are given the chance to express their expectations, while the session	Collecting ideas on a tablet or virtual board

Type of Activity	Why?	Comments & examples
	leader can clarify or confirm the possibility of the fulfilment of these expectations	
Relating to the main subject matter	A component of the first loop, this is the first learning activity	Brainstorming on contrasting topics
Content delivery	This activity consists of the transfer of knowledge to participants, and usually is the main reason for setting up the course	In simplified/ minimal format, using 3-4 slides for each idea or message
Game-like activities and debriefing	They support experiential learning	4 types of activity
Social interaction	It gives participants the chance to heighten the human factor within the group learning framework	
Value realization	It stimulates the expression of perceptions, the evaluation of the experience gains, and the projection of scenarios for the future utilization of skills and knowledge	Personal rankings, the level of usefulness to office activity, the thermometer technique, the level of newness



Transition to remote training delivery

To make a successful transition there are several factors to take into account:

- Follow a process to transform the content
- Use a checklist to validate the effectiveness and efficiency of the transformation
- Embrace the new way of thinking
- Develop abilities to use digital training technologies
- Modify the activities and adapt the content to the new kind of delivery
- Experiment and refine the content until it reaches the level of quality that you desire while making sure you can employ the method's structure to deliver it
- Embrace proven practices



The process of modifying the content for remote training

Transformation logic

“Any activity that proved its value in a class teaching environment will be modified, adapted, or replaced for usage in the new training delivery medium.”

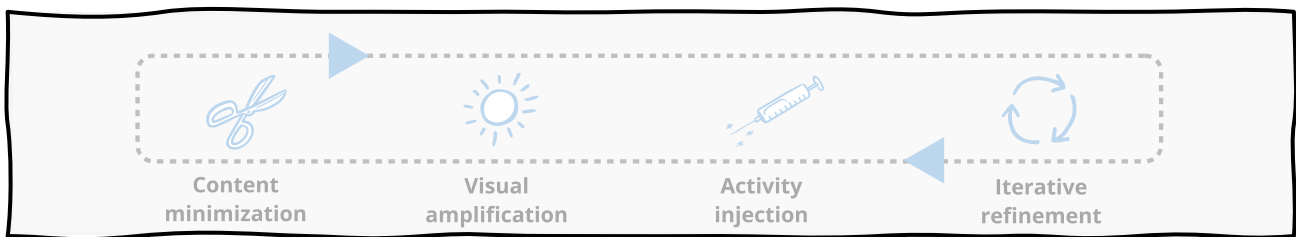


Figure 7 – Transition of the content to remote delivery format

How to validate content transformation



Step	Checklist
Content minimization simplifying the content while fully satisfying the participants' need for information.	<p>The target recommended for content reduction is 1-2 hours for a 2-day in-class course.</p> <p>The trainer is assumed to be capable to present topics, ideas, messages, and supporting information in a coherent discourse.</p>
Visual amplification the content is redefined visually, for a deeper impact.	<p>After minimization and visual amplification, trainers could effectively deliver the content of a 2-day in-class course in a 1.5-2-hour webinar.</p> <p>Participants who are exclusively introduced to the material of the presentation normally show an understanding of the content that is consistent with the initial intention.</p>
Addition of practical activities to increase participant's involvement	<p>Method-specific reusable games and game-like activities have been added to the minimized content.</p>
Delivery and refinement the content is delivered remotely and is refined based on the participant feedback and in keeping with the observation of the level of engagement and the degree of success in reaching the proposed teaching goals.	<p>Content and delivery forms come in updated versions and thus have results that are superior to the previous versions.</p>



The desired ratio of practical activities

By following these guidelines, you can transform the content of your traditional training session to achieve the desired ratio of practical activities from the total training duration of 65-75% (thus minimizing the lecture time).

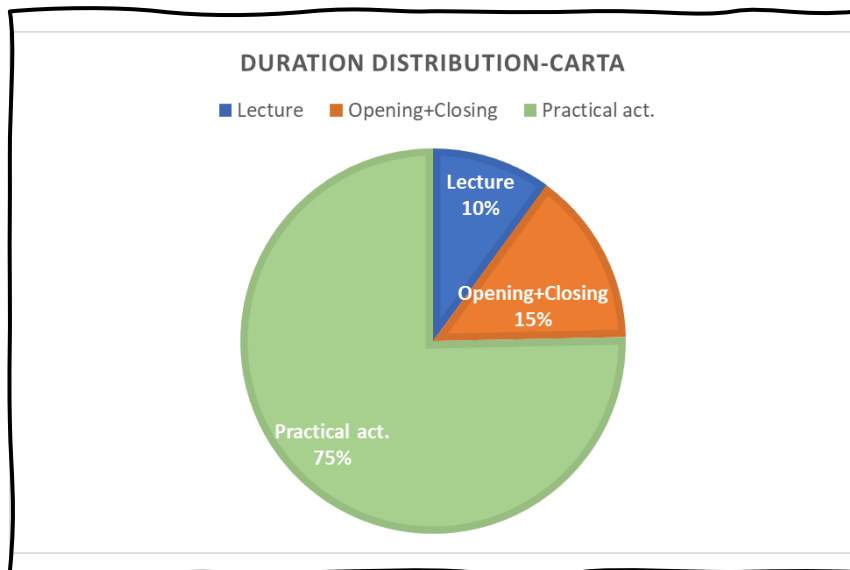


Figure 8 – Illustrative target of the practical activity's percentage



Remote training – Best practices

Opening

- Micro Instruction on how to use Zoom, MS Teams, or other similar platforms
- Open cameras
- Opening sequence (1h+)
- Socializing, small talk, empathizing (min 10 min)
- Increased individual engagement

Content

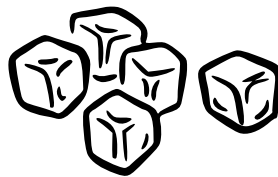
- Activity slides with signalling (duration, key activities, which document/platform will be used)
- A maximum of 3-4 slides per idea/message, with amplified visuals
- Content transformation: 3-4 days of effort for a 2-day training course

Flow

- Connecting with the topic (context/contrast activity)
- Movies with written debrief questions
- Extended debriefing by involving all the participants
- Delivery in 4/8-hour sessions
- Printed workbook, mailed to participants
- Activities for value recognition

Working in teams

- Team activities and games: 2-4 activities within 4 hours
- Coordinator and observer roles implemented within each team
- Additional trainers, co-trainer, training assistant
- Dedicated software solutions for team activities



CARTA Library of training activities

The CARTA method is freely offered to all trainers for usage as a guide and source of inspiration, and to the benefit of all participants in remote training sessions. Instructors and facilitators are free to use any set of the method's components or the method as a starting point in adapting traditional, in-class taught training to a new format that better addresses the needs of the present.

We encourage anyone who wishes to freely contribute to the CARTA project to do so by helping with the development of a library that supports the application of the CARTA method.

The minimal requirements for a contributor's activities are two:

- the activities will refer to a specific category in this guide.
- the activities will be licensed under Creative Commons with Attribution 4 or higher



How can I contribute?

If you wish to contribute voluntarily to the dissemination of the CARTA method guide, you can choose to do any of the following:

- Distribute the guide to anyone whom you have reason to think will benefit from using the CARTA method.
- Invite interested people to the CARTA workshops. Let us know if you need help!
- Translate this guide into a language of international circulation and allow us to revise the translation before publication.
- Bring to our knowledge any writing errors that you notice in the text.
- Contribute to the expansion of the library of remote training activities.
- If you are using CARTA as a method for remote course delivery, please mention that you are following CARTA principles and practices and link to our website.
- Join our “CARTA Practitioners” group at this address:
<https://www.linkedin.com/groups/12491773/>

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Credits

Roxana Grigoras - Romanian version proofreading, organizing CARTA open sessions

Mihai Constantinescu - encouragement, coaching, organizing first CARTA sessions

Cristian Stirbescu - Romanian version proofreading, experimenting during technical courses delivery

Adrian Badea - feedback, experimenting during leadership, sales, and soft-skills training courses delivery

Nicoleta Raduta - feedback, proofreading, coordinating translations, experimenting during soft-skills training courses delivery

David Minchin - feedback, English version proofreading

Sorin Cantor - supporting CARTA webinars and experimenting with online teambuilding activities

Coco Material - for providing free quality illustrations

Peter Kulcsar - Hungarian translation (v.1.3.6.1)

Mircea Dron - German translation (v.1.3.6.1)

Luciana Stirbescu - Spanish translation (v.1.3.6.1)

Nicoleta Marin - French translation (v.1.3.6.1)

Stefan Cojocaru - American English translation (v.1.0)

