

# Tools to Go “Paper-less” for PLRB Presenters v. 1.0

## *Part I: Active Engagement in a Paper-less Environment*

*This article is a two-part series that provides you with the tools you need to actively engage your audience in your presentation. In doing so, it also explains how to rely less on paper materials and more on technology for handouts and note-taking. We strongly encourage presenters to integrate these concepts into their presentations—active learning plus technology—to provide a lively and well-rounded learning experience.*

With new technology developments and the introduction of apps in PLRB educational Conference presentations, how should presenters “adjust” in this new environment? We are seeking to eliminate lots of hard-copy handouts in our presentations, but retain the active participant engagement that has highlighted our educational sessions, past and present. We want to design sessions that best accomplish our educational goals in this new environment. We want to engage our participants with shared learning that works best with adult learners. We want to avoid presenter-focused lectures and instead offer audience-focused learning of new knowledge and skills to bring about better claim outcomes. How much change do we anticipate in our presenters’ work? How can we accomplish this?

We do not believe that the change has to be dramatic; instead, we need to thoughtfully move toward this new learning environment with some minimal adaptations and maximum creativity. The following are some tips or suggestions for designing your educational session. Adapt them as they make sense in your specific program.

*“...we need to thoughtfully move toward this new learning environment with some minimal adaptations and maximum creativity.”*

### **Think Electronically**

As you are putting together your course title, learning objectives, and outline, think about how you can creatively achieve your objectives in this new world of electronic devices. PLRB staff will post most session materials on our website and the PLRB Conferences App several weeks prior to each Conference. Registered attendees will be able to access, download, save, and print most of your course materials, including PowerPoint presentations, worksheets, white papers, etc., before they arrive. If you have certain documents that you do not want published before the event (such as suggested answer sheets for workshop questions), let us know and they will be posted after the Conference.

Think about how attendees will participate in your class. Currently, we are seeing more and more attendees working on their devices (mostly cell phones, some tablets or laptops, and only a few taking paper notes). We expect the number of attendees who actively participate with either cell phones or tablets to rise going forward. You can even check with attendees as your class begins to confirm the approximate percentages of people operating with various devices or no device at all.

In the past, the largest and bulkiest handouts provided were PowerPoint slide collections and white papers, often citing a large number of cases associated with specific topics. Right behind those documents were actual insurance policies, including a substantial number of endorsements. In the future, we still wish to utilize these types of documents in-class, except now these documents can be included in the PLRB Conferences App or online at PLRB.org. Attendees often like to take notes associated with specific PowerPoint slides and save that material for later access. Now attendees may take notes directly within the Conference App on their mobile device, or through a third-party app that provides additional note-taking features (such as highlighting, drawing, and embedding comments on each page of the handout). See [PLRB Electronic Device Note-Taking Guide](#).

When participants actively take notes, they are better engaged with your content, and the educational benefits increase. You might remind attendees how they can take notes as you begin class, either with the “Take Notes on Handout” feature of the Conference App, or by downloading and editing individual slides or other documents directly through a third-party app such as Adobe Acrobat Reader. With the new Conference App, attendees can efficiently send these documents and their notes to others during or immediately following your class. This has the added benefit of immediately sharing your presentation materials with a far wider audience than was possible in the past.

### **Gather Data**

You might want to start your session with a few polling questions of the audience to gauge their experience level with this subject and adapt your presentation to their level. Currently, our Conference App does not have a feature to administer polling questions or solicit audience questions during the presentation. We are considering several options, and this feature may be coming very soon. For the time being, you can take a quick poll of your audience by raising hands and come up with a general picture of where your audience stands.

### **Provide a Roadmap**

You can also present a general overview of what you intend to cover (adults like to know where they are going with training, rather than simply following passively in the direction the instructor has laid out). You can frame the problem or issues with the group. Why is this a relevant and compelling topic? How large or significant is the problem? Why should they spend the next 90-120 minutes exploring this topic with you? What can they expect? This is also a good time to solicit some of their specific questions or needs, and hopefully cover a number (or all) of their issues or questions. Refer back to their specific questions or concerns periodically throughout the session. You can also return to these issues at the conclusion of the program.

### **Follow the Learning Objectives**

Learning Objectives are critical; they are what we are “selling” at PLRB Conferences. At the end of each course, attendees should be able to demonstrate the skills and knowledge set forth in the Learning Objectives. This helps ensure that we are delivering tangible benefits in our advertised courses.

### **Keep it Structured**

Break down your content into meaningful sections and parts. Address things in an order that makes sense. Maintain clear structure to your program. Adults generally like order in their learning.

### **Mix it Up**

Use a variety of activities in your program, just as you would in any educational setting.

### **On a Technical Note...**

Internet access in the classroom is an area of concern in this new environment. Some hotels and convention centers currently offer free Wi-Fi service in their classrooms. Some offer it only in common areas, i.e. hallways, but not classrooms. Some charge on a per-attendee basis or charge the group overall. With our Conference App, attendees who have previously downloaded key materials for your course can easily access them in the classroom with or without internet service.

There may be an issue with internet connectivity or performance if at a certain point your students are all asked to download large documents, such as policies or lengthy papers. Other than that, there should be no problem with attendees using the App to access all critical documents for the course (either via Wi-Fi or their own device's data plan). Before every Conference, PLRB will communicate with both presenters and attendees and inform them of the setup and Wi-Fi capabilities for that particular location. We believe that this situation of Wi-Fi access and use in each hotel or convention center will progress in a direction that provides more open and cost-effective solutions. We will monitor this trend closely and share what we learn with our members and affiliates.

In sum, we find ourselves in a transition period with regard to educational presentations. Just as with other transitions in the past (shift to computerized claim adjustments for example), the transition towards a paperless educational environment will evolve in its own time and course. Presenters can help pave the way to the future of education by encouraging attendees to embrace new technology and incorporate it into their learning environments.

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**Meaningful activities.** PLRB encourages our presenters to use meaningful activities as often as practicable. Here are a number of activities that make good sense for our meetings:

1. Case studies. Our attendees learn from case studies where theory is put into practice with a variety of claim scenarios. This form of application learning is very popular with participants. Invite them to work in small groups, or work alone with some examples, or do both. Variations are generally appreciated. Think about dividing the group into two: one group arguing one solution, while the second group argues the opposite. Vary the length of these case studies. Make some long and detailed, while others can be short and specific challenges.

2. With case studies involving analysis of certain facts and particular insurance coverages, think about breaking the entire policy into parts or sections, “digestible bites” rather than long, complex coverage analysis examples. There may be times when you want to use the entire policy, but there are also times when you can save attendees time by focusing your exercise to narrower sections of coverage. You can use your PowerPoint slides to help in this situation, highlighting specific portions of text.
3. Challenge your audience up-front with a compelling, realistic set of questions or tasks. The closer your challenge is to what adjusters actually do on the job, the better. Attendees always appreciate it when activities or tasks closely relate to or mirror what they encounter on the job.
4. If you use PowerPoint slides, build in activities for audiences at appropriate intervals. Make them part of *active*, rather than *passive* learning. Example: Create audience questions with open space throughout the presentation and capture audience comments and answers right on that blank slide or two. Use these exercises to invite the audience to creatively solve a problem together. Have one of the co-presenters serve as “scribe” to capture the audience’s participation on these slides. You can then update the slides following the presentation and send the updated slides to your attendees. This is a great way to continue the dialogue in the days and weeks that follow the live session.
5. Think about creating job aids for and with attendees, or edit various types of claim letters, or work through claim calculations from start to finish. These become important takeaways following the live Conference or meeting.
6. Annotated outlines. Provide attendees with a short document that outlines the information to be covered. Leave certain parts blank, encouraging participants to fill in the additional information as the class proceeds. This type of active learning produces much stronger results.
7. In some of our classes, we find attorneys or engineers often including long articles with highlights of multiple cases and court rulings. Instead of a passive document, consider organizing these cases into meaningful categories (such as majority cases, minority cases, and other rules to consider). Bunch things together so attendees can focus on what is most important. If three cases are most important, highlight those three cases in a significant way. Help attendees come away with meaningful conclusions whenever possible, even if it requires a little work for the attendees to apply the facts of their case to the law of their jurisdiction.

8. The use of charts or graphs is often effective. Ask attendees to work individually or in groups to analyze this data.
9. Walk the audience through a loss, using photos that help tell the story. Use key documents in the same way. Stop periodically and have attendees respond, or formulate next steps or strategies to particular challenges.
10. Use short videos or great illustrations, including diagrams, to launch a discussion. Examples: Use a video showing how a roof can be repaired to generate sharing among the group, or use an excerpt from an actual claimant deposition to generate learning and discussion. You need to make sure you have the legal right to use these types of videos. If possible, please redact information about the actual video subject. We want to use these types of resources ONLY for educational purposes and do not seek to identify the subjects involved.
11. Present an itemized bill for repairs or treatment protocol to generate analysis or discussion. Ask them, "What problems do you see in these bills or documents?" Keep in mind that the figures in these documents should be used as educational examples only; we do not wish to suggest certain fixed price points.
12. Use photos or illustrations of damage or injury and invite attendees to analyze the issues based upon these primary resources. Example: Show various slides with building problems in construction and invite attendees to make a list of the problems they see. Work some individually, and some in small groups.
13. Present three possible definitions or descriptions of a term. Poll the audience- which is most accurate? Why?
14. Invite the group to create a list of questions and issues they want to investigate more fully, after providing a brief description of a claim scenario.
15. In working with experts in a particular claim, have attendees make two lists of things they routinely do, or things they avoid, to achieve success.
16. List claim resolution techniques from attendees and compare it with a list generated by a previous group. This is an important validation exercise.
17. After reviewing lots of detailed information, set up a summary exercise where the group draws conclusions or decides on major points together. Let the group draw its own conclusions, rather than simply hear those of the speaker.

18. With PowerPoint slides, leave some information out of various slides and ask attendees to fill in the blanks on their own throughout the presentation.
19. After talking about a subject, such as good faith claim handling, test the audience with a series of short example scenarios and ask for their assessment. Then share actual case scenarios that involved the same issues.
20. Create a job aid with the group, one they will want to share with colleagues. Example: What questions should be asked when investigating a typical slip and fall claim?
21. To highlight a particular area of importance in your presentation, have the audience actively take notes with you. Tell them what to circle or highlight, or what words to fill in the blanks, as you annotate your slide.
22. Have the audience or a volunteer occasionally read a definition or passage out loud. This helps the audience focus on a particularly important topic, and helps them participate more actively.
23. Instead of asking for questions at the end, review the course by going over previous audience questions raised, or learning objectives or major points considered, etc.
24. Create a simple exercise where groups are provided with two sets of damage assessments (one from an insurance adjuster, one from a public adjuster for example). Have the groups work together to reconcile the differences and resolve the claim. This type of exercise can help students develop problem-solving skills for scenarios they may likely encounter.
25. If your session topic lends itself to props that may be helpful for attendees to see, touch, smell, pass those props around to engage in discussion. Examples: Pass around small sections of shingles with varying degrees of hail damage to engage attendees in a discussion on causes and possible coverage for loss. Or, pass around photos of water damage scenarios.
26. Have your audience respond to questions by raising their hands or colored objects, or respond digitally (not currently available via the Conference App, but third-party apps may also be an option).

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## Part II: PLRB Electronic Device Note-Taking Guide

**NOTE:** The terms “iOS” and “Android” refer to particular operating systems used for mobile devices (such as smartphones, tablets, etc.), similar to how the “Windows” operating system is used on many desktop computers. For the purposes of this guide, we will use the term “iOS” to refer to any electronic device manufactured by Apple, Inc., and the term “Android” to denote electronic devices using Google’s Android operating system.

### Overview

There are two basic options for electronic device note-taking at PLRB Conferences:

- In-App note-taking (PLRB Conferences App)
- External note-taking (any third-party app)

### In-App Note-Taking v. External Note-Taking

#### In-App Note-Taking

You may take notes directly within the PLRB Conferences App for any of the following categories:

- Sessions/Events
- Presenters
- Exhibitors
- Handouts
- Floor Map

The benefit of using this application is that it is a *one-stop-shop* for all of your handouts and notes. You may easily email a comprehensive list of every note taken within the Conference App at any time using a single “Email All Notes” feature.

However, the “Email All Notes” feature does not include corresponding handouts. Each note is listed in text-format, categorized by title and page number (where applicable). Depending on your device, it may also be accompanied by a snapshot of the handout page for reference. You may email handouts separately and incorporate your notes as you so choose. The notes and handouts are only available within the App so long as the App remains open for each Conference.



Android



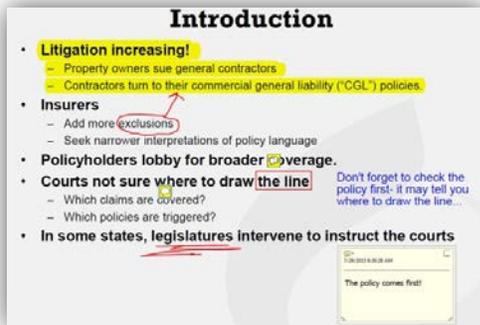
iOS

## External Note-Taking

Alternatively, you may take notes on any PDF handout using an external application such as Adobe Acrobat Reader.

The benefit of using an external application such as this is that it allows you to view and print the notes for each handout directly embedded within the handout pages. It may also contain additional note-taking features such as the ability to highlight and draw.

However, each PDF must be downloaded and saved individually to your personal device or cloud network. There is no single feature that will email the notes taken for all handouts in text-format.



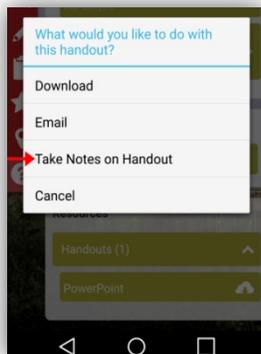
## In-App Note-Taking

### PLRB Conferences App

If you have not already done so, download the PLRB Conferences App onto your device. It can be found in your device's app store (such as Google play for Android users, or iTunes for iOS users). Search for the term "PLRB Conference." Alternatively, you may navigate to <http://www.plrb.org/>. You will be provided with a login and password to access certain features for each Conference once available.

### Notes on Handouts

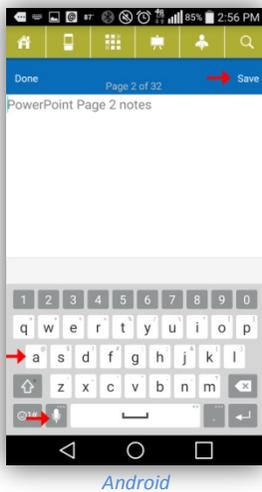
- Select the handout you wish to annotate (found under "Dashboard" → "Sessions & Events" → [your session] → "Resources" → "Handouts" for example).
- You will be given a menu of options similar to the below. Select "Take/Edit Notes on Handout."



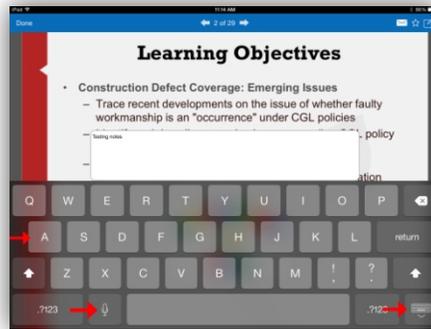
- Each page of the handout has its own menu option for notes, located in the top right-hand corner of the screen. Click “Take/Edit Notes on Handout” to add or review your typed notes for that page.



- Depending on your device, you may enter notes using the device’s QWERTY keyboard or speech-to-text service. Click “Save” or exit the screen to append these notes to that page in your handout.



Android



iOS

### Notes on Sessions

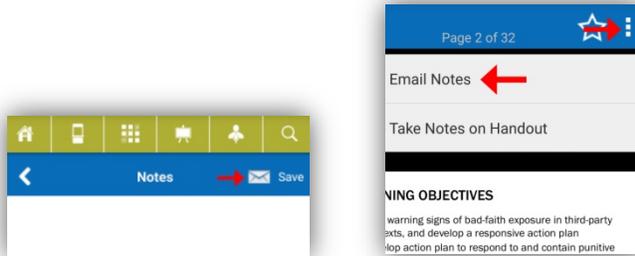
- Select the session you wish to annotate (found under “Dashboard” → “Sessions & Events” → [your session] for example).
- Click on the pencil icon in the left menu panel.



- Type in your notes (as described above in *Notes on Handouts*). Click “Save” to append these notes to that session.

### Emailing Notes

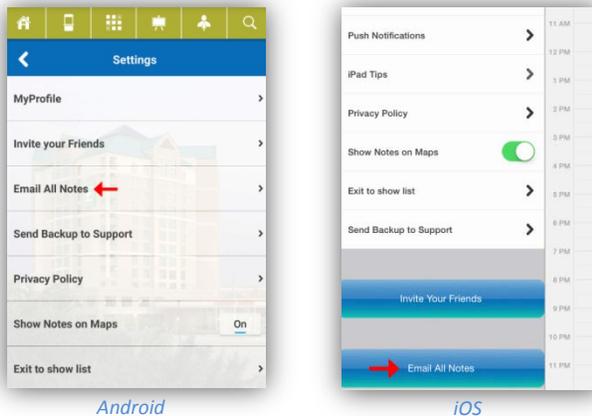
- You may email the notes you have taken for a *particular* session at any time after saving by selecting the “Email Notes” option (examples below).



- Or, you may email *all* of the notes you have take within the App with a single “Email All Notes” feature. From your Dashboard, click the settings gear icon.



- You will be given a menu of options similar to the below. Select “Email All Notes.”



- The App will default to your device’s preferred email application, where you may email the notes to yourself and others.
- Once received, you may opt to print your notes directly from the email on your computer, or you may copy and paste the text into your own editing application or handout.

## External Note-Taking

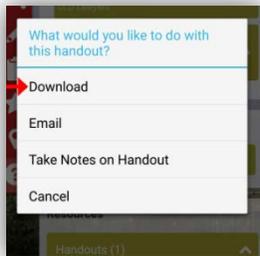
### **Adobe Acrobat Reader**

If you choose to take notes outside of the PLRB Conferences App, it is recommended that you utilize a PDF viewer/editor such as Adobe Acrobat Reader. If you do not already have this application installed on your device, you may download it for free. It can be found in your device's app store (such as Google play for Android users, or iTunes for iOS users). Search for the term "Adobe Acrobat Reader." Alternatively, you may navigate to <https://get.adobe.com/reader/>.

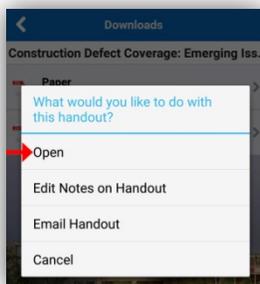
### **Taking Notes**

If you do not already have a copy of the session handout on your device, see the *PLRB Conferences App* section above for instructions on how to download the PLRB Conferences App and access session materials.

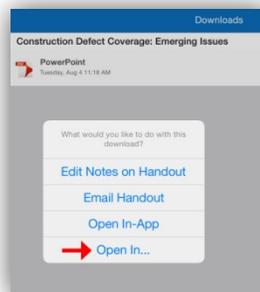
- Select the handout you wish to annotate (found under "Dashboard" → "Sessions & Events" → [your session] → "Resources" → "Handouts" in the PLRB Conferences App for example).
- You will be given a menu of options similar to the below. Before you may add notes to a handout using an external app, you must first download a copy of the file. Select "Download" from the menu, or simply email a copy to yourself.



- If you opted to download the file within the PLRB Conferences App, you will now see a copy of the handout in the "Downloads" folder on your Dashboard. Click on the appropriate handout and select "Open/Open In..."

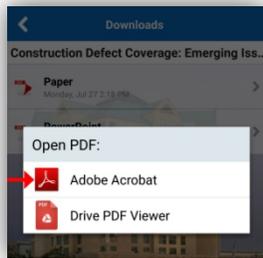


Android



iOS

- You should see the option to open the handout via the Adobe application (or other app of choice). Select this option.



Android

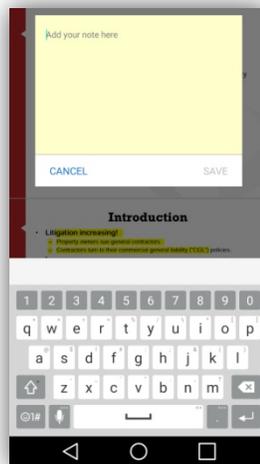


iOS

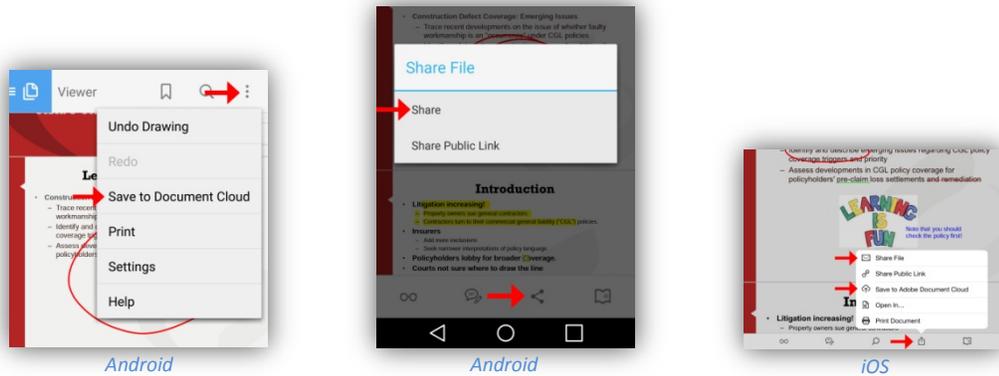
- You may access the note-taking functions of Adobe Acrobat Reader through the “Comment” feature, located in the menu at the top left-hand-corner or bottom of the screen.



- You may select from a variety of note-taking tools in the bottom menu. Make your notes accordingly.



- When you are ready, you may choose to save your annotated document to your device or cloud network. Or, you may share your document via email or other method.



- NOTE: Because your PDF document is edited in an external application, your notes cannot be saved to the “Downloads” folder in your Conference App Dashboard.

### Printing Notes

- Adobe Acrobat Reader offers several note-printing options, described in detail on the application’s website: <https://helpx.adobe.com/acrobat/kb/print-comments-acrobat-reader.html>. Some options include printing a summary of comments for each page separately, or printing the comments embedded directly within the pages.