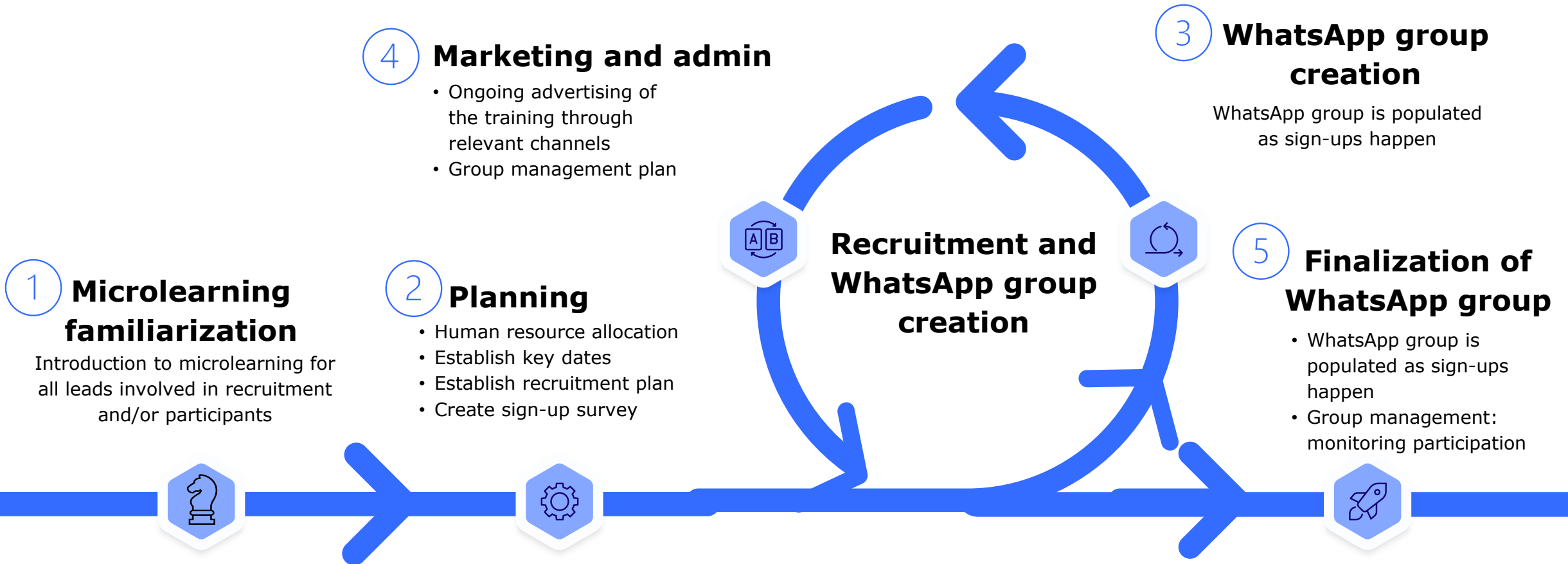


DIY WhatsApp-based microlearning

**A step-by-step guide to conducting
training using WhatsApp**

Recruitment and training group creation



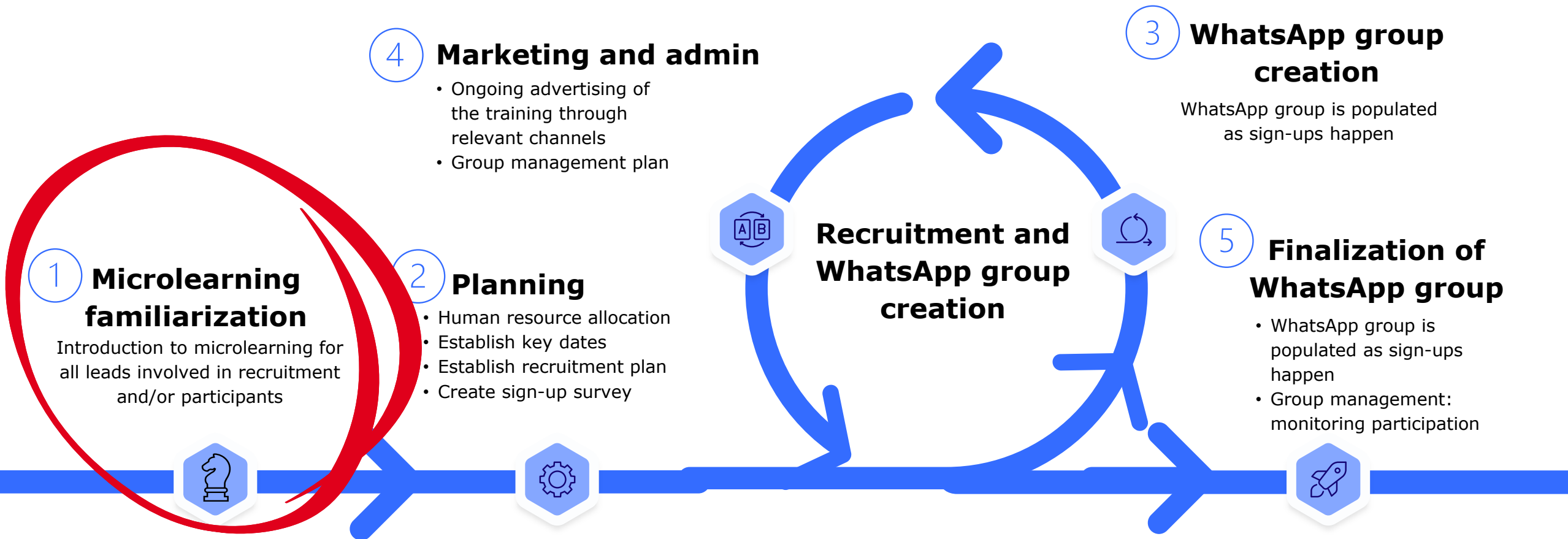
Contents

- **Part 1:** Introducing the training Slides 4-19
- **Part 2:** Planning to run a training group on WhatsApp Business Slides 20-41
- **Part 3:** A step-by-step guide to creating a training group on
WhatsApp Business Slides 42-57
- **Part 4:** Marketing and admin Slides 58-68
- **Part 5:** Finalizing groups and monitoring participation Slides 69-76
- **Part 6:** Running the training Slides 77-99

Part 1

Introducing the training

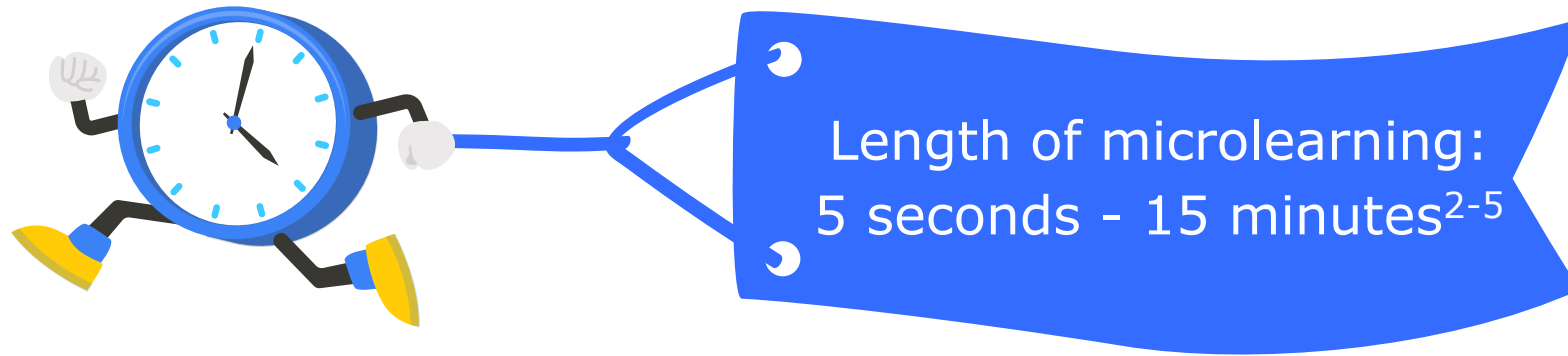
Recruitment and training group creation



What is microlearning?

“Microlearning deals with relatively short, small learning units and short-term focused activities.”

Theo Hug¹

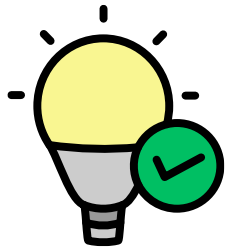


Essentially, microlearning is learning delivered in **bite-sized nuggets**, often via a **mobile device**, allowing quick, easy and engaging access⁵⁻⁸.

1.Hug T. In: Microlearning Conference 2005: Learning & Working in New Media Innsbruck, Austria, 2006. 2.Jahnke I, Lee Y-M, Pham M, et al. Technology, Knowledge and Learning 2020; 25: 585-619. 3. Díaz Redondo R, Caeiro Rodriguez M, López Escobar JJ, et al. Multimedia Tools and Applications 2021; 80: 1-31. 4. Denojean-Mairet M, López-Pernas S, Agbo FJ, et al. Smart Learning Environments 2024; 11: 46. 5. Taylor A and Hung W. Educational technology research and development 2022; 70: 363-395. 6.Buchem I and Hamelmann H. Microlearning: a strategy for ongoing professional development. 2010. 7. Alias NF and Razak RA. Interactive Learning Environments 2024: 1-21. 8. De Gagne JC, Park HK, Hall K, et al. JMIR Med Educ 2019; 5: e13997. 20190723.

What is microlearning?

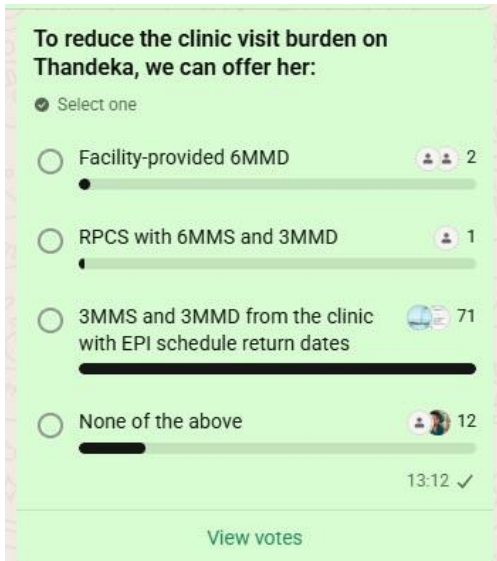
Buchem and Hamelmann's⁶ five design principles clearly illustrate microlearning for ongoing professional development:



1. **Format:** Small, easy to read, standard output type
2. **Focus:** Clear, based on one topic or idea
3. **Autonomy:** Self-contained, no need to look for further information
4. **Structure:** Has essential elements, such as topic or URL
5. **Addressability:** A single resource or reference

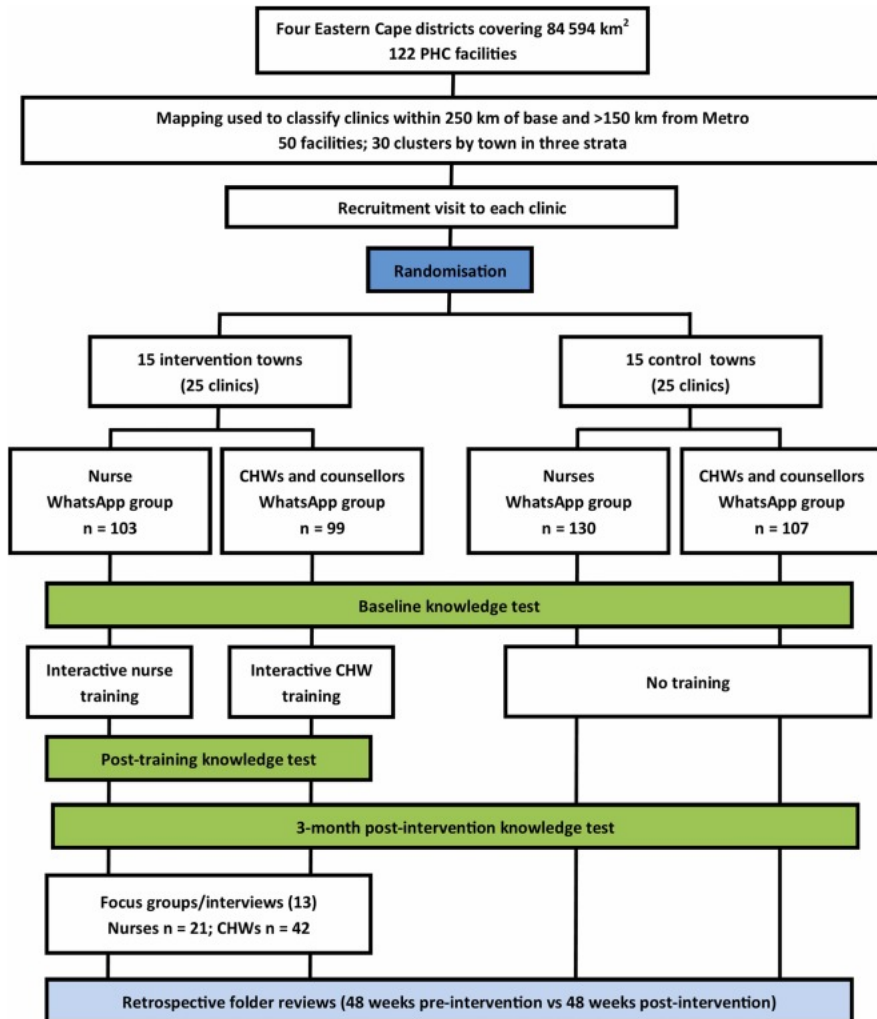
6. Buchem I and Hamelmann H. Microlearning: a strategy for ongoing professional development. 2010.

What is WhatsApp-based microlearning?



- WhatsApp groups of healthcare workers training together
- Short sessions: 10-15 minutes
- Sessions are text-based
- 2-3 learning points delivered predominantly as cases
- Polls to encourage interaction
- Short period (2-4 minutes) open to allow comments/questions
- JPEG and voice-note summaries of lesson

Evidence to support WhatsApp-based microlearning



Setting

50 clinics in four predominantly rural districts in the Eastern Cape

Participants

Nurses and community health workers (CHWs); in-person recruitment

Outcome measurements

Uptake and participation; change in knowledge; change in client care; usability

Data collection

Online questionnaires; WA analysis; focus groups; retrospective folder reviews

A Mixed Methods, Cluster-Randomised Study Protocol to Design and Test WhatsApp Group-Based HIV Microlearning for Rural South African Healthcare Workers

International Journal of Qualitative Methods
 Volume 23: 1–15
 © The Author(s) 2024
 DOI: 10.1177/16094069241284205
journals.sagepub.com/home/ijq

Results

“I think WhatsApp-based training is convenient and easy to use for everyone.” (Nurse, focus group)

Uptake

79% of nurses and **76%** of CHWs agreed to participate.

Participation

After two weeks, **96%** of nurses and **88%** of CHWs had read the lessons.

98% said they would participate in this kind of training if it were held weekly all year.

Improved knowledge

Statistically significant improvement in knowledge between the intervention and control arm after three-month follow-up



Effectiveness and uptake of WhatsApp-based HIV microlearning for healthcare workers in remote South African clinics: A pragmatic, mixed-methods, cluster-randomised trial

Briony Sue Chisholm^{a,*}, Lovemore Mapahla^{b,c}, Carl Lombard^{c,d}, Marc Blockman^{a,e}, Catherine Orrell^f

^a Division of Clinical Pharmacology, Department of Medicine, Faculty of Health Sciences, University of Cape Town, South Africa

^b The Modelling and Simulation Hub, Africa, Department of Statistical Science, University of Cape Town, South Africa

^c Division of Epidemiology & Biostatistics, Department of Global Health, Faculty of Medicine and Health Sciences, Stellenbosch University, Cape Town, South Africa

^d Biostatistics Research Unit, South African Medical Research Council, Parow Valley, Western Cape, South Africa

^e Desmond Tutu HIV Centre, Institute of Infectious Disease and Molecular Medicine and Department of Medicine, University of Cape Town, South Africa

Improved client care

Increased correct client care by 21% (95% CI 10%-32%; $p < 0.001$) in the year after the training



“WhatsApp is best!” Acceptability and feasibility of WhatsApp-based HIV microlearning for healthcare workers in remote South African clinics: A pragmatic, mixed-methods, cluster-randomised trial

Briony Sue Chisholm^{a,*}, Melissa Laura Wallace^b, Marc Blockman^a, Catherine Orrell^b

^a Division of Clinical Pharmacology, Department of Medicine, Faculty of Health Sciences, University of Cape Town, South Africa

^b Desmond Tutu HIV Centre, Department of Medicine, Faculty of Health Sciences, University of Cape Town, South Africa

Using WhatsApp-based microlearning for 6MMD training

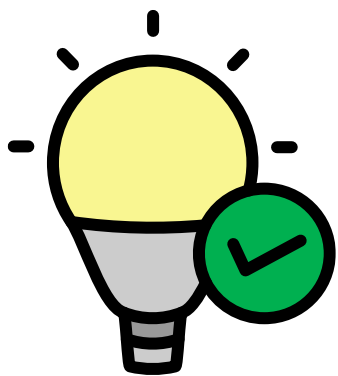


August 2025

Phased introduction of 6MMD in South Africa at select facilities: Phase 1 (1 August 2025); Phase 2 (1 September 2025); countrywide (1 April 2026)

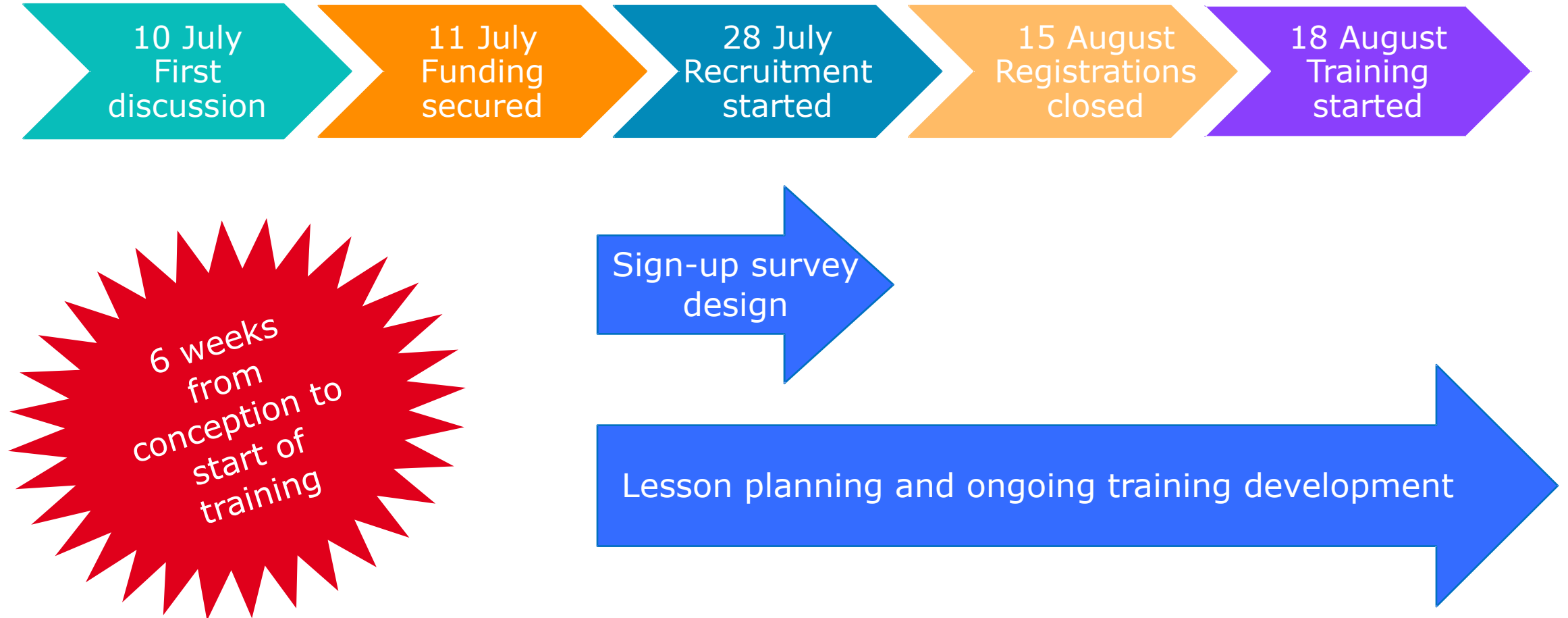
Challenges

- Short timeline
- Limited virtual training
- Facility-level support from implementing partners reduced (funding cuts)



WhatsApp-based microlearning as an add-on to the virtual training

WhatsApp-based microlearning: Quick implementation, 2025



IAS WhatsApp-based microlearning approved to augment NDoH virtual single session 6MMD training

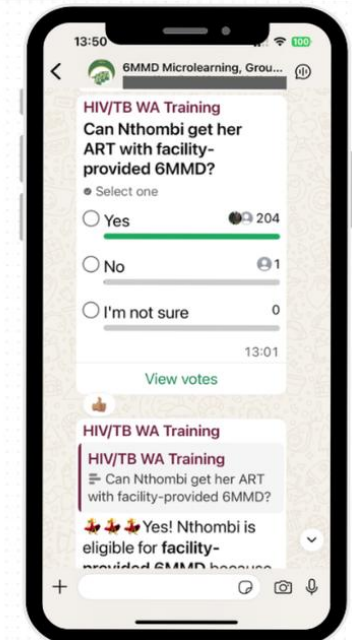
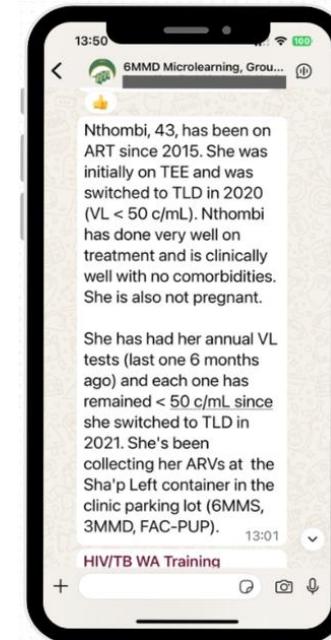
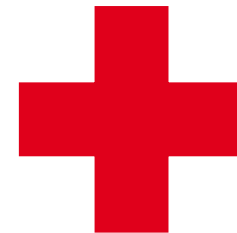
ORIENTATION/CAPACITY BUILDING SESSION ON 6 MMD IMPLEMENTATION




6MMD IMPLEMENTATION TRAINING

NATIONAL DEPARTMENT OF HEALTH

WEBINAR SESSIONS (29-31 JULY 2025)



WhatsApp-based microlearning facility-based 6MMD module developed, validated and approved by NDoH

A	B	C
Lesson	 <p>6MMD Microlearning</p>	Topic
1		Introduction to WA learning; objectives; key definitions/acronyms
2		6MMD eligibility: VL
3		6MMD eligibility: VL, choice
4		RPCs
5		6MMD eligibility: NCDs
6		6MMD eligibility: pregnancy
7		6MMD eligibility: children
8		Summary of important points: eligibility; 90-day pill bottles; benefits
<p>Plan 1 Intro 2 Eligibility VL 3 Eligibility VL choice 4 RPCs 5 Eligibility NCDs 6 Eligibility Preg & Post-natal 7 Eligibility Kids 8 Summary</p>		



health

Department:
Health
REPUBLIC OF SOUTH AFRICA

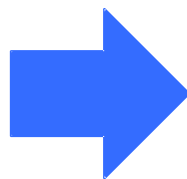


Recruitment and sign-ups



Sign-up

SurveyMonkey survey



2,285 participants signed up
over three rounds.

Group 1



834

sign-ups for training
starting on 18 August

Group 2



701

sign-ups for training
starting on 15 September

Group 3

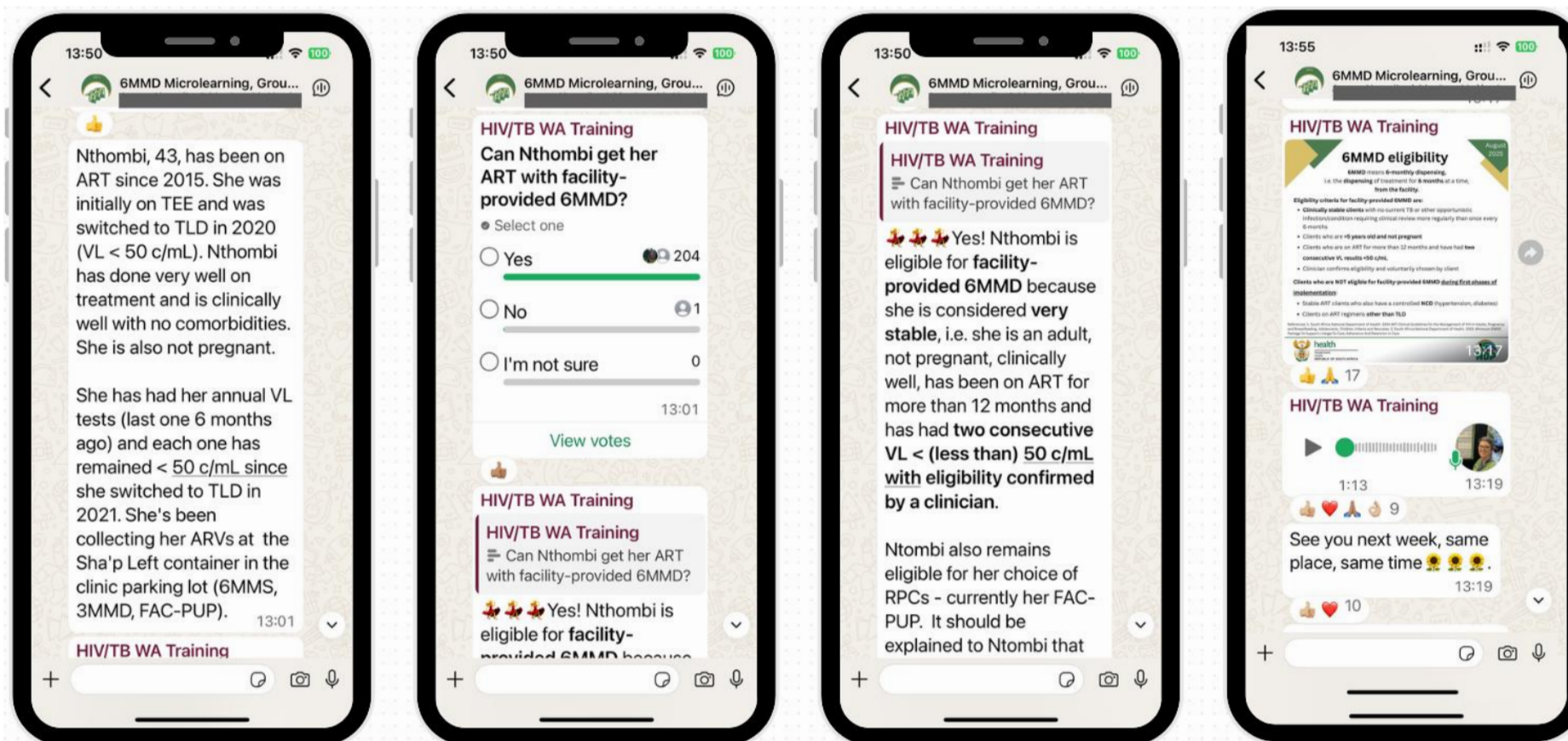


750

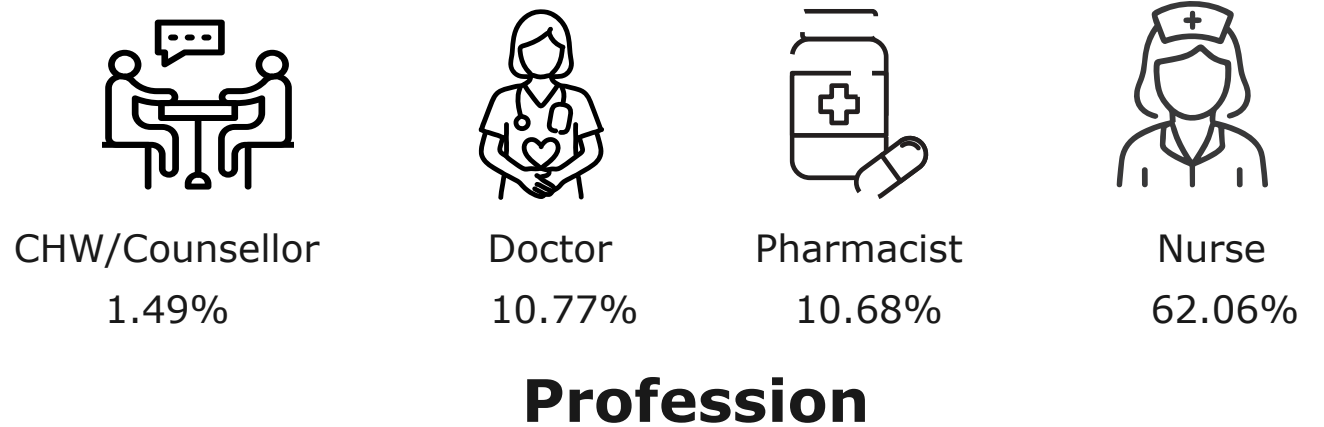
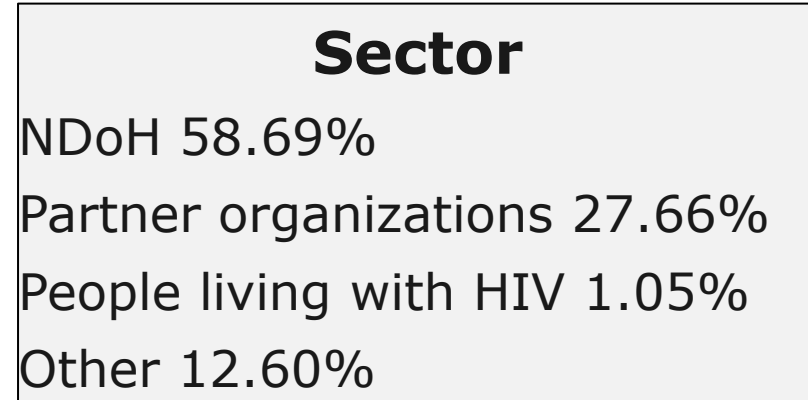
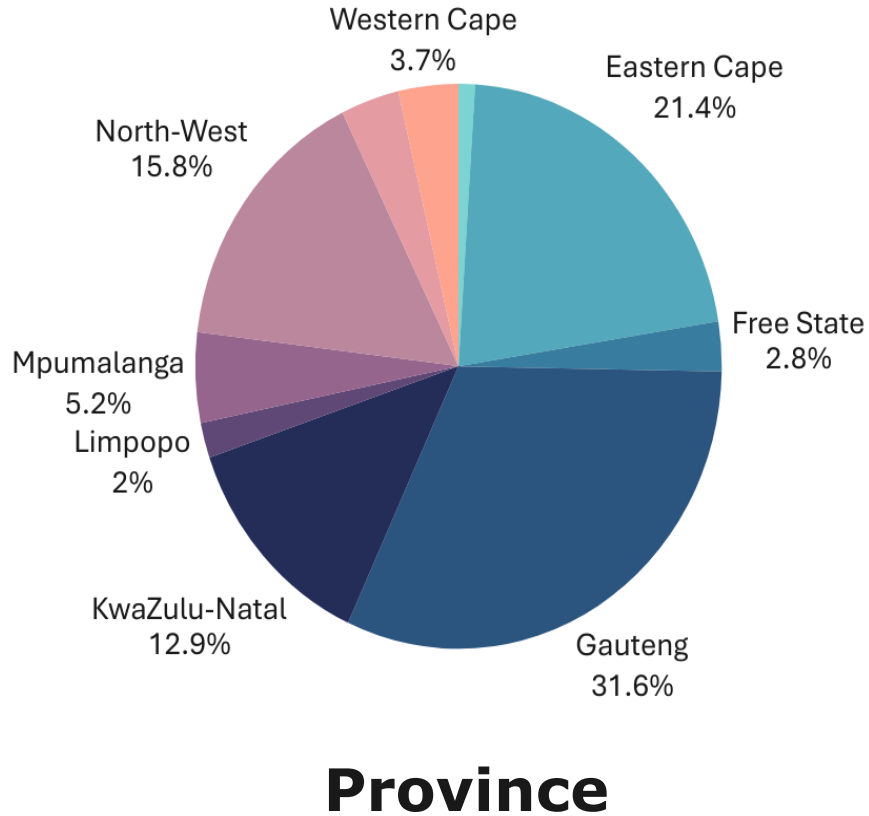
sign-ups for training
starting on 1 October

WhatsApp-based microlearning to augment online 6MMD training

Weekly lessons for 8 weeks: 10-15 minutes at 13:00



Participant demographics (combined)



Participation (groups combined)

Measured using WhatsApp "blue ticks" at three timepoints

- "Live"/within 1 hour
- Within 24 hours
- Within a week



	Live/1 hour		24 hours		1 week	
	Average	Range	Average	Range	Average	Range
Session 1	67.14	64.8-69.3	91.55	88.4-93.5	95.38	92.9-96.6
Session 2	56.97	51.3-61.3	86.63	85.4-88.8	92.26	90.2-93.6
Session 3	51.96	44.3-61.4	83.77	82.2-85.9	91.30	88.6-92.7
Session 4	53.68	49.5-57.7	81.35	80.6-82.4	89.44	88.1-90.3
Session 5	47.24	42.1-51.5	79.10	78.3-79.7	87.15	85.7-88.4
Session 6	49.31	46.9-51.8	79.00	78.5-79.5	86.45	85.0-87.8
Session 7	44.11	42.3-46.6	75.27	73.9-76.0	85.85	85.4-86.4
Session 8	51.09	45.6-54.5	78.40	76.3-80.0	84.93	84.0-86.2

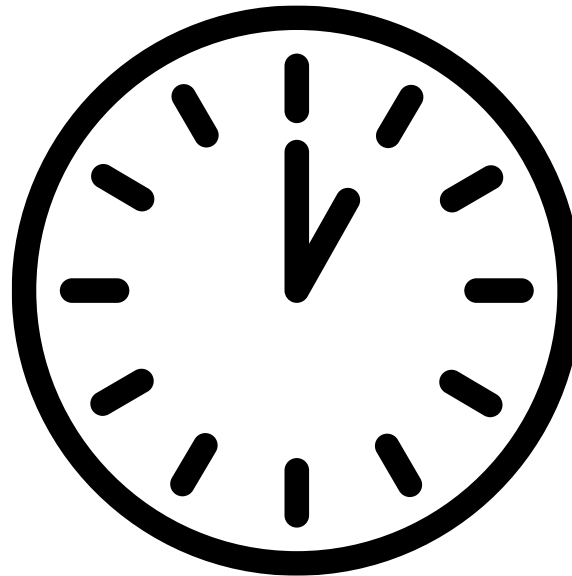
Participation (groups and sessions combined)

52.7%



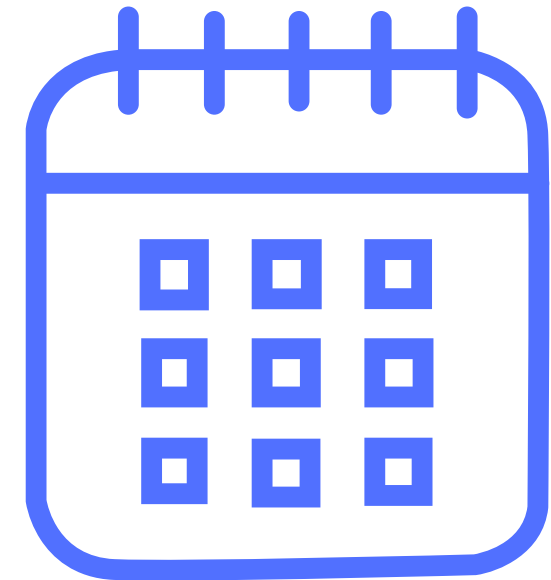
Read lessons in "live" session/within 1 hour

81.88%



Read lessons within 24 hours

89.10%

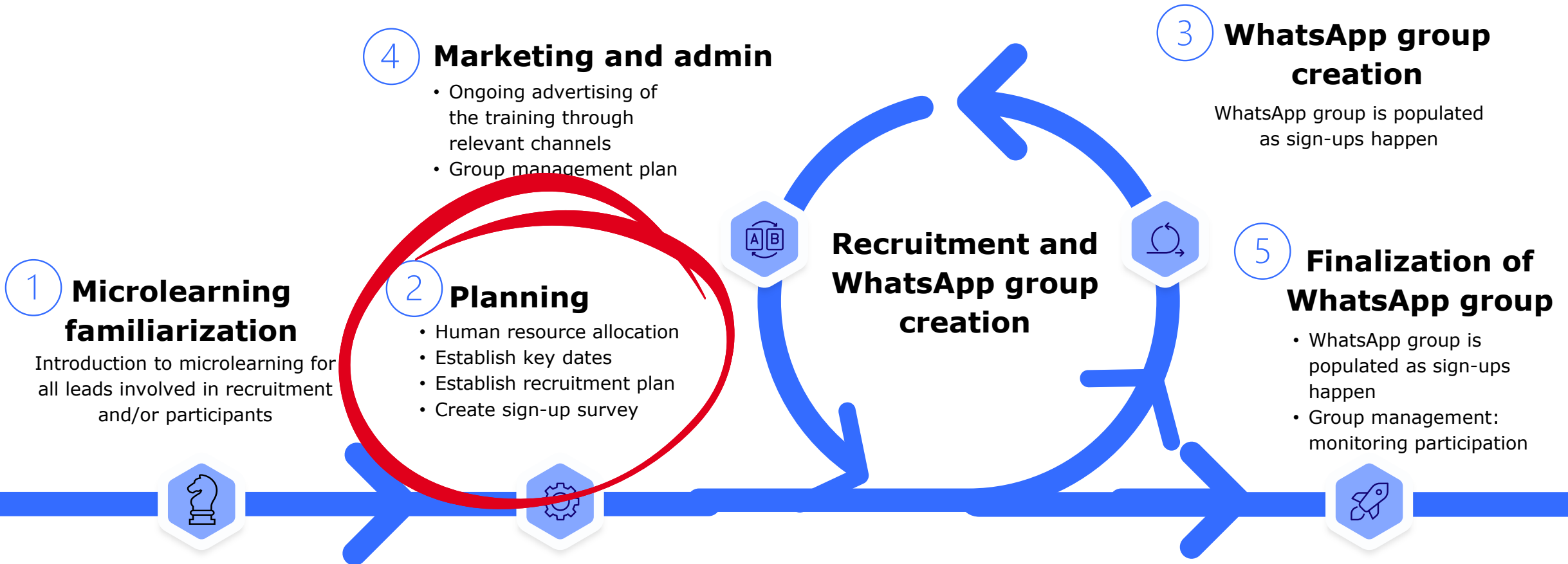


Read lessons within a week

Part 2

Planning to run a training group on WhatsApp Business

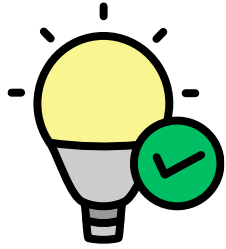
Recruitment and training group creation



In this section

- **Step 1:** Assemble the crew Slides 23-25
- **Step 2:** Establish key dates Slide 26
- **Step 3:** Establish marketing and recruitment plan Slide 27
- **Step 4:** Create a sign-up survey Slides 28-29
- **Step 5:** Creating a survey in SurveyMonkey Slides 30-41

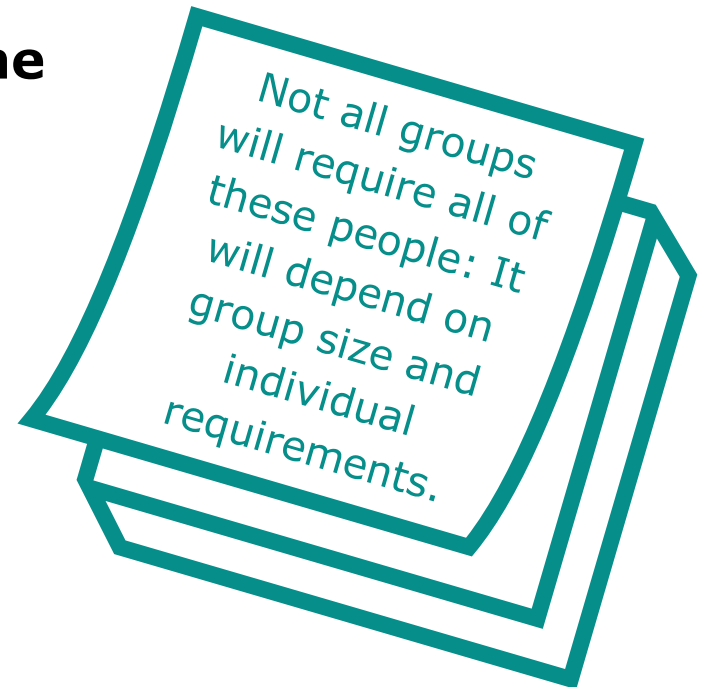
Step 1: Assemble the crew



Start planning as **early** as possible, preferably a **minimum of 8 weeks** before the training starts.

Key human resources to consider when planning the training:

1. Facilitator and moderator
2. Administrative assistant(s) for sign-ups
3. WhatsApp admin(s) in the group
4. Tracking participation



Step 1: Assemble the crew

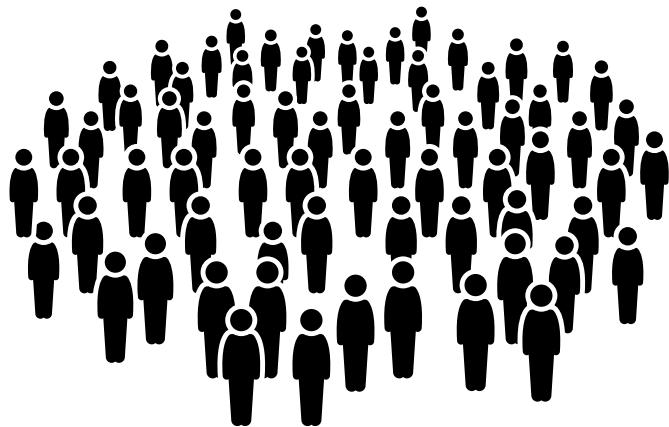
1.1 Facilitator and moderator: Questions to answer

Who will **facilitate** the training (deliver the messages)?

Is it necessary to have a **moderator/second facilitator**?

Who will **answer questions** in the training?

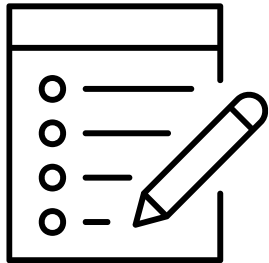
Will questions be discussed with a subject expert and **answered later**?



A second person (facilitator) is optimal. It is recommended for groups >100.

Step 1: Assemble the crew

1.2 Administrative staff: Questions to answer



Is a sign-up survey needed?

This will depend on what info you need from participants (if any) and how controlled you want the group to be.



WhatsApp admin(s)

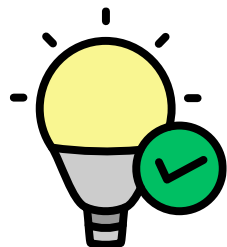
It is advisable to have at least two people as admins in a group.

If a sign-up survey is needed:

- Who will design the sign-up survey?
- Who will collect responses?
- Who will add participants?

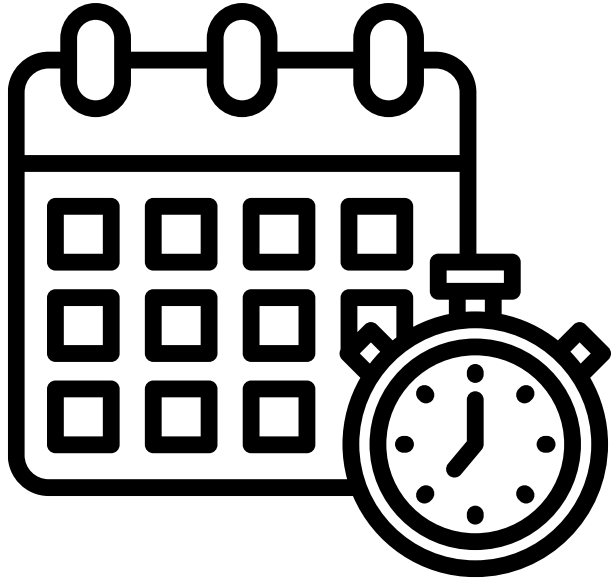
Important considerations for WhatsApp groups:

- Whose number will be used for the training? 💡
- Who will create the WhatsApp group?
- Who will the admins be?

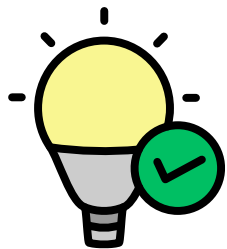


Training needs to be done in WhatsApp Business to ensure that the facilitator has control in sessions (see Part 3). It is recommended that a separate phone number (i.e., not a personal number) is used, especially in bigger groups.

Step 2: Establish key dates



1. When will the training happen?
2. When will **registration** open and close?
3. What **day(s)** will training take place?
4. What **time** will training take place?



Take the workdays of the participants (who will be part of the group) into account and choose a time that will be best for the majority.

Ideally, ask participants themselves.

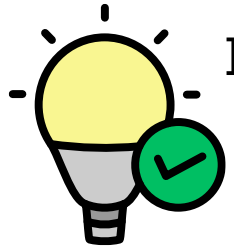


Open registration: 5 January
 Close registration: 16 February*
 Training starts: 2 March

Training
 Mondays at 13:00 from
 2 March to 20 April

*Always give a closing date, but allow people to join to the end – we want to welcome everyone.

Step 3: Establish marketing and recruitment plan

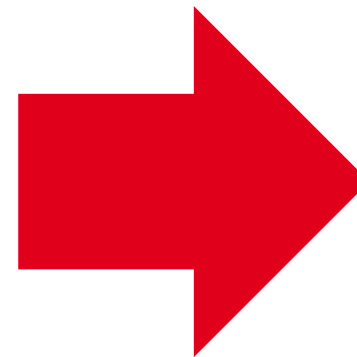


If you are running a training group, you ideally want everyone who will benefit from the training to join.

Cast the invitation net wide and make it easy to join.

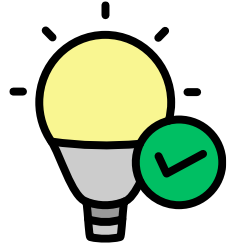
Key questions to answer:

1. Who are the target participants?
2. How can you contact those people?
3. Do you need to create an invitation or message to send?



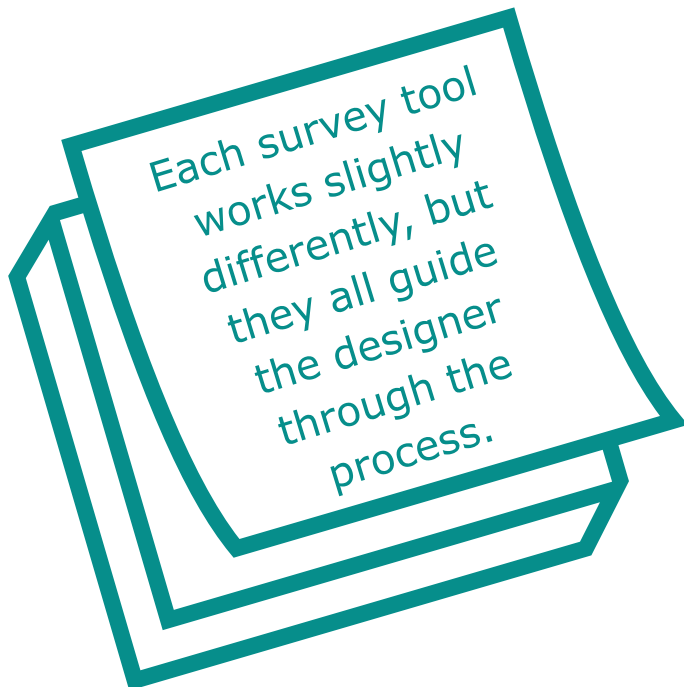
Decide on a simple recruitment plan.

Step 4: Create a sign-up survey



Only do this if you need participants' details to track each one's participation and/or to have tight control over groups. Each extra step may discourage people from joining.

Numerous survey-making tools are available online, including:



[SurveyMonkey](#)

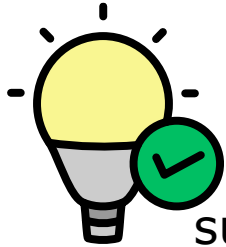


[Google Forms](#)



[Surveyplanet](#)

Step 4: Create a sign-up survey



If designing a survey, follow Edward Tufte's summary of achieving survey design excellence:

*"Ask the **simplest, clearest** questions in the **shortest time** using the **fewest words** on the **fewest pages** and, most importantly, ask **only what you need to know.**"¹*



Questions that can be included in the survey

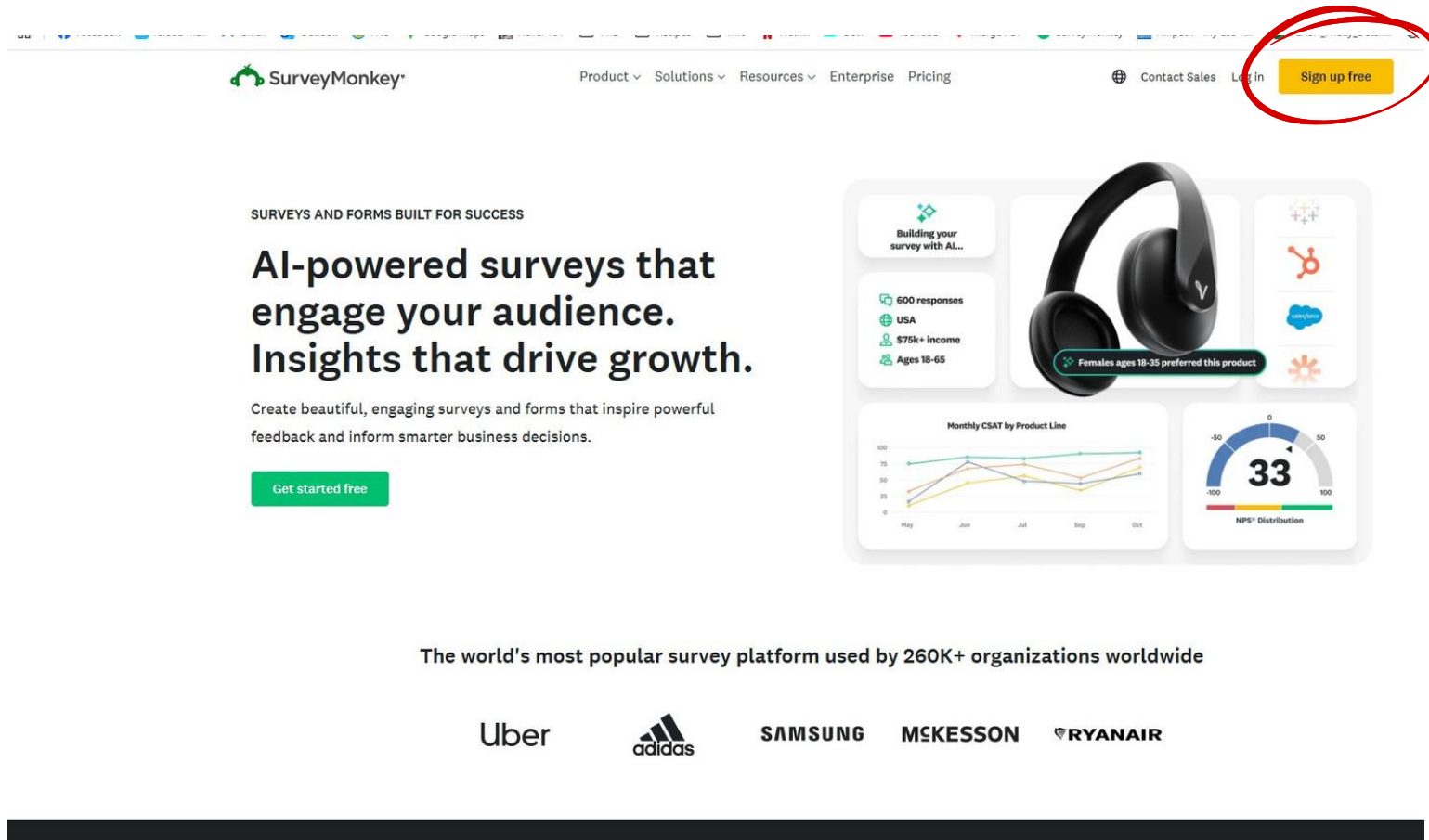
- Consent to participate and/or data to be used for reporting
- First name/surname
- Age
- Gender
- Phone number with WhatsApp
- Email address
- Profession/cadre
- Country/province/district/town
- Facility
- Sector (public/private)
- Years of clinical practice



Important note: If you collect people's personal details, be aware of the POPI Act.

1. Tufte E. The visual display of quantitative information. Cheshire, CT, USA: Graphics Press, 1999.

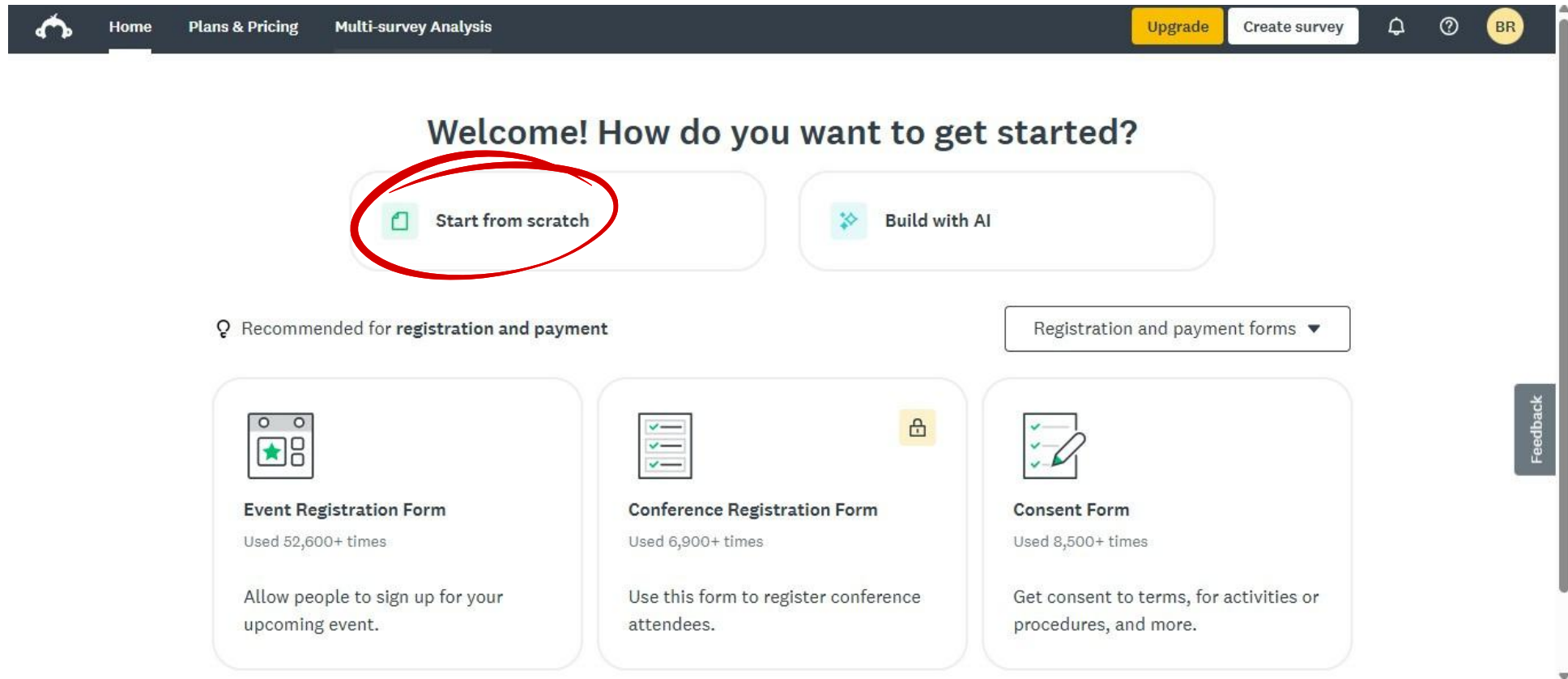
Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.1 Open SurveyMonkey using the link: <https://www.surveymonkey.com/>.

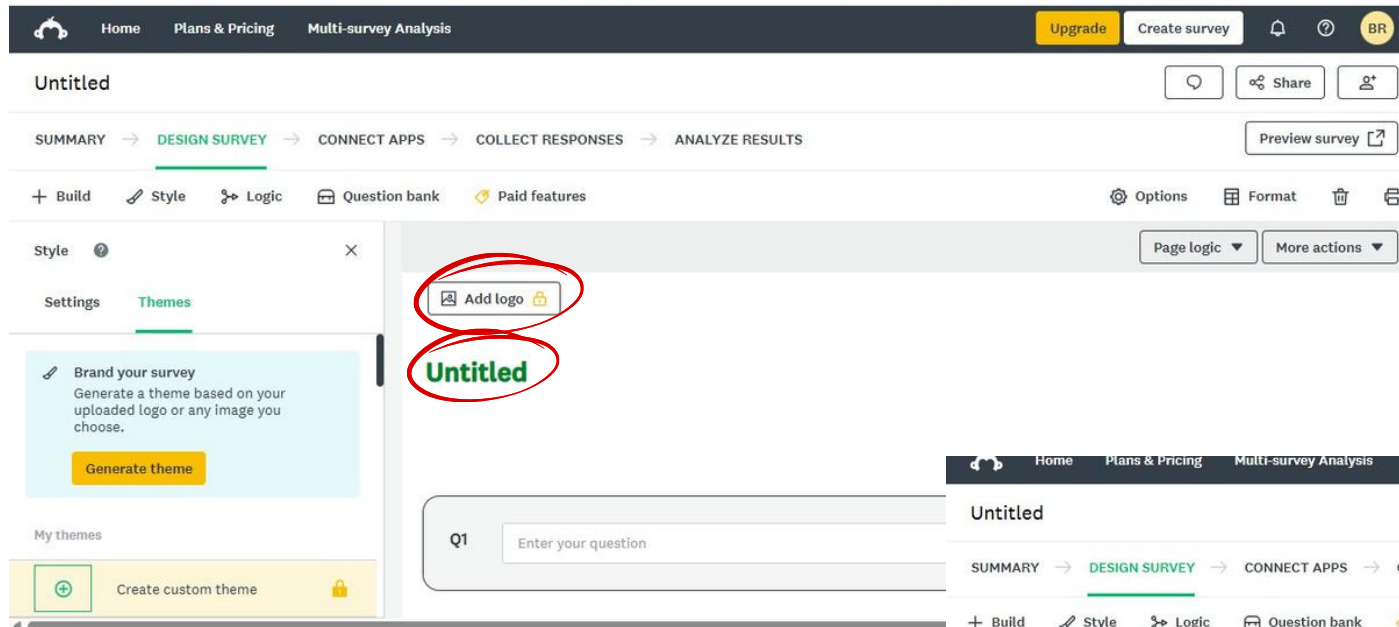
5.2 Click on "Sign up free", create a free account, and answer the sign-up questions.

Step 5: Step-by-step guide to making a survey in SurveyMonkey



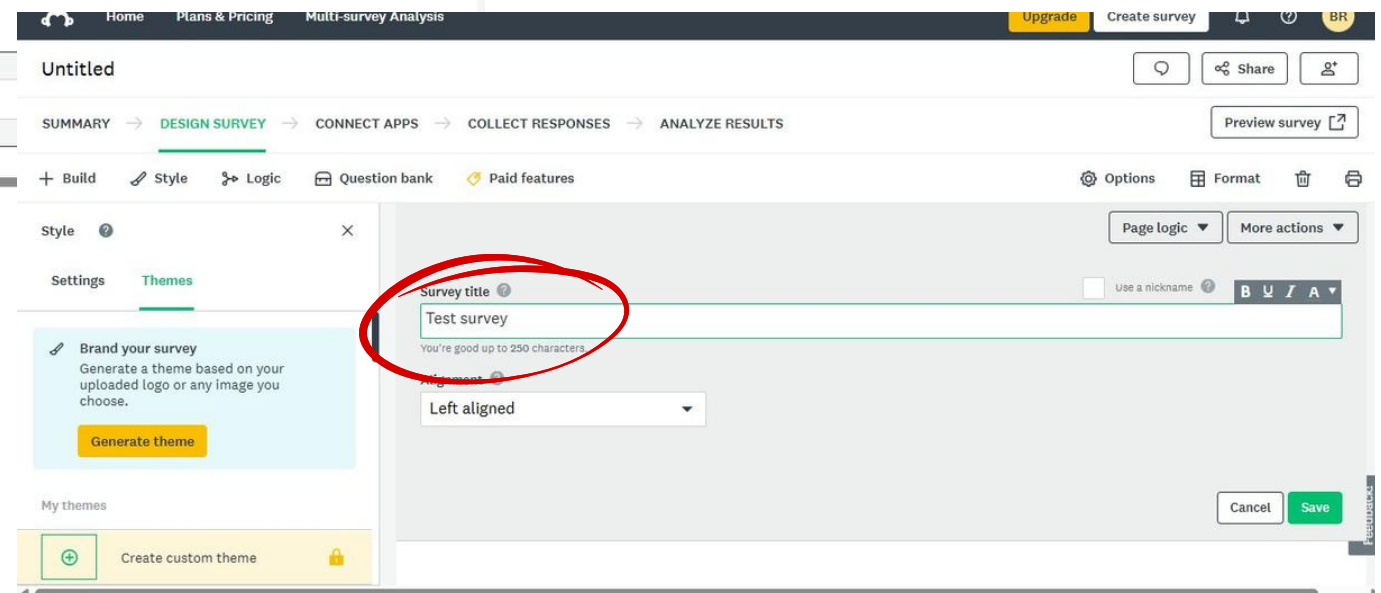
5.3 Click on "Start from scratch", and a new blank survey will come up.

RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey

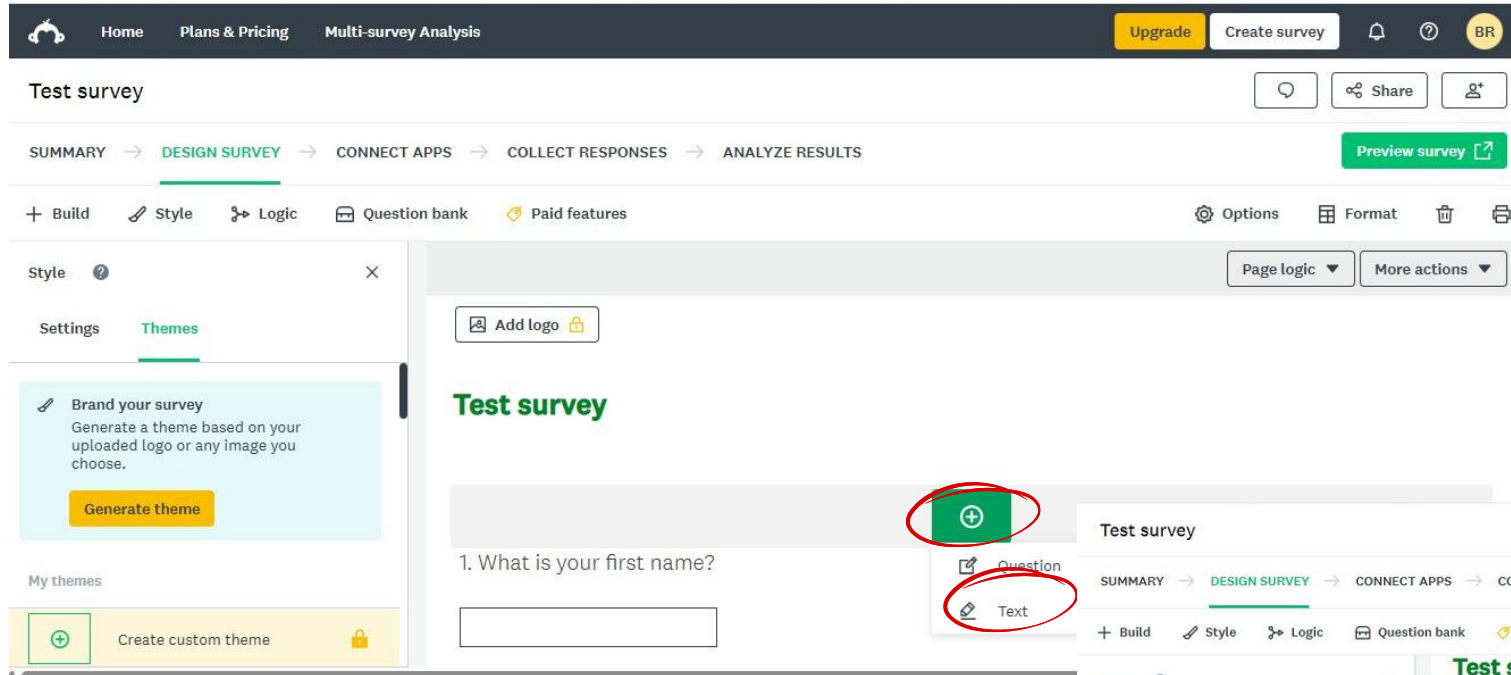


5.4. Add a logo, if you wish, by clicking on "Add logo" and choosing one from your own images; then click on "Untitled".

5.5 Give the survey a title; click "Save".

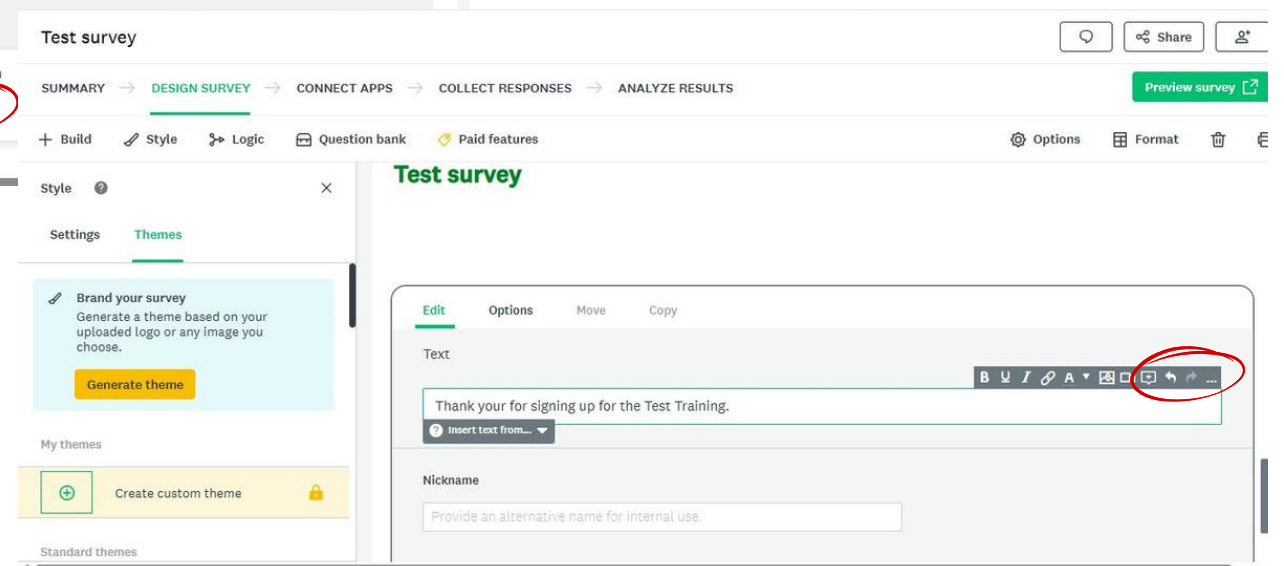


RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey

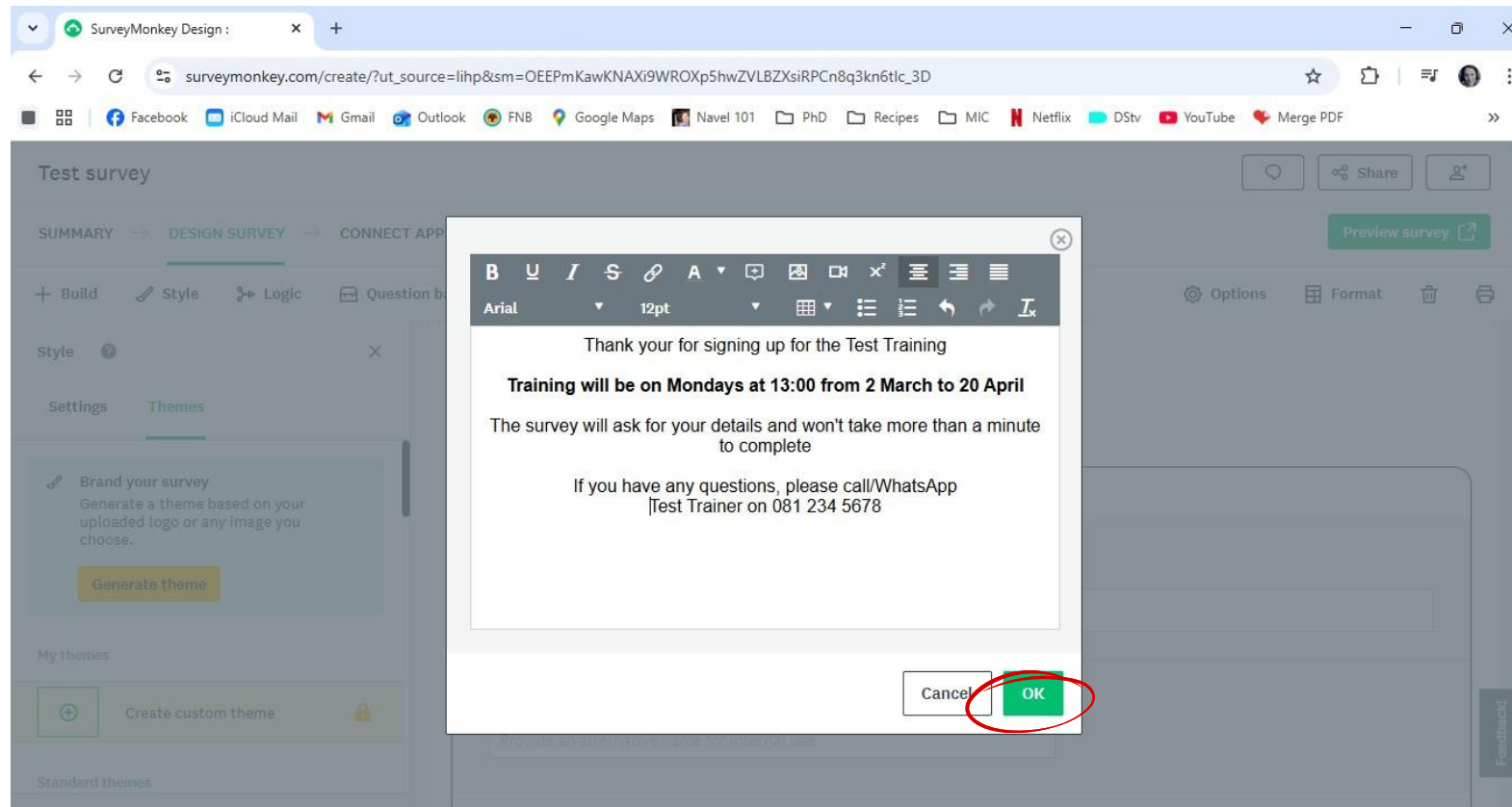


5.6 Add a welcome note by clicking on “+” and then “Text”.

5.7 Add a text welcome note with details of when the training will happen. You can use editing tools by clicking on “...”

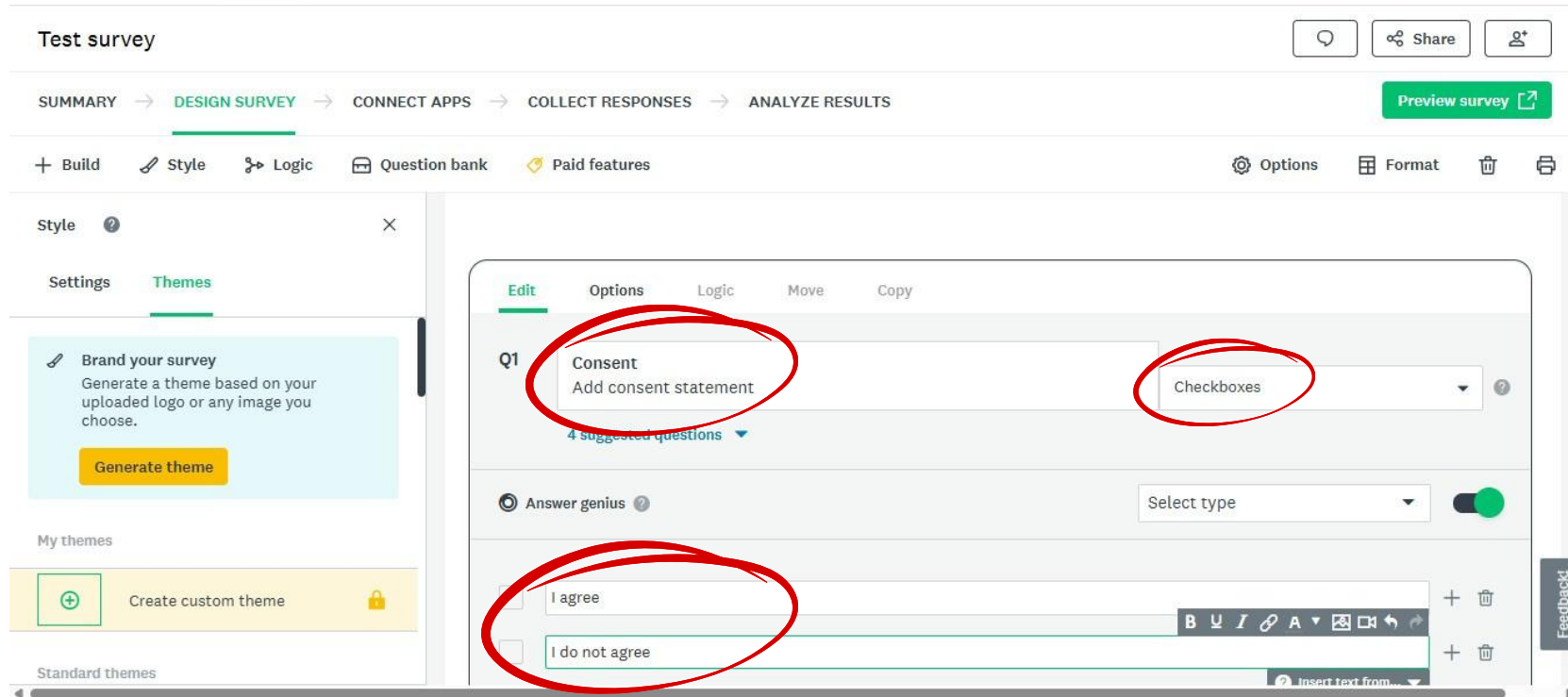


Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.8 Edit the welcome note as you wish; click "OK" and then "Save".

RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.9 The first question is about consent; click on “+” and then “Question”.

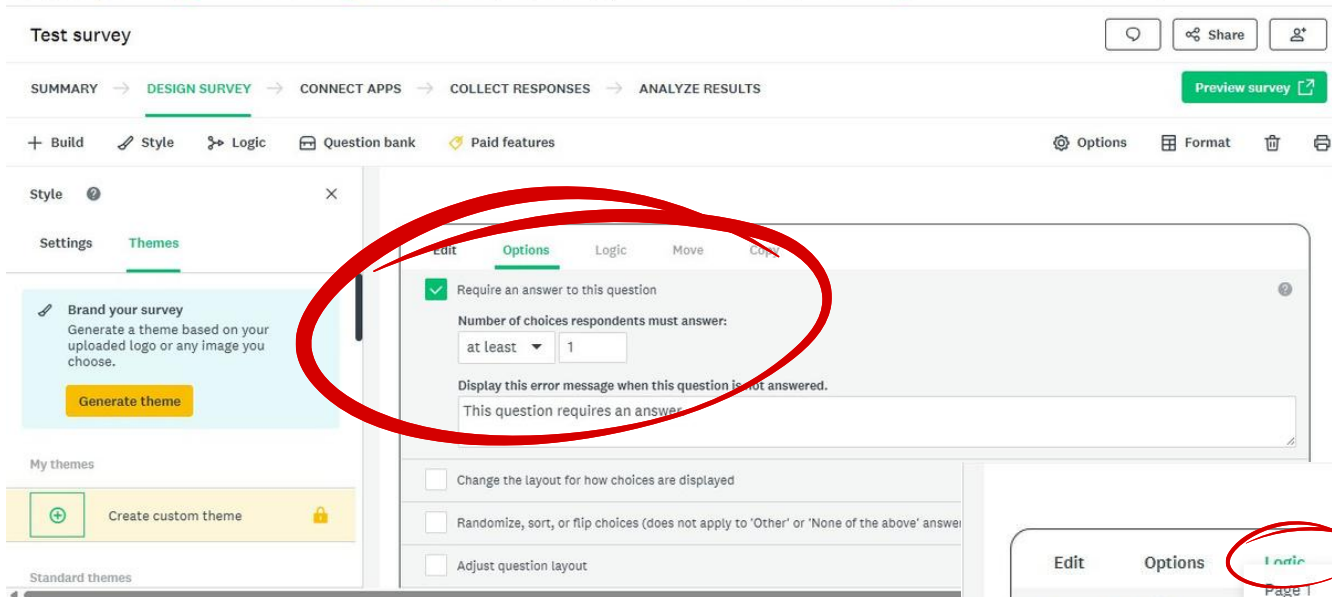
5.10 Type the consent statement as the question. Choose “Checkboxes” from the dropdown list. Add “I agree” and “I do not agree” as answers. Click on “Save”.



Consent

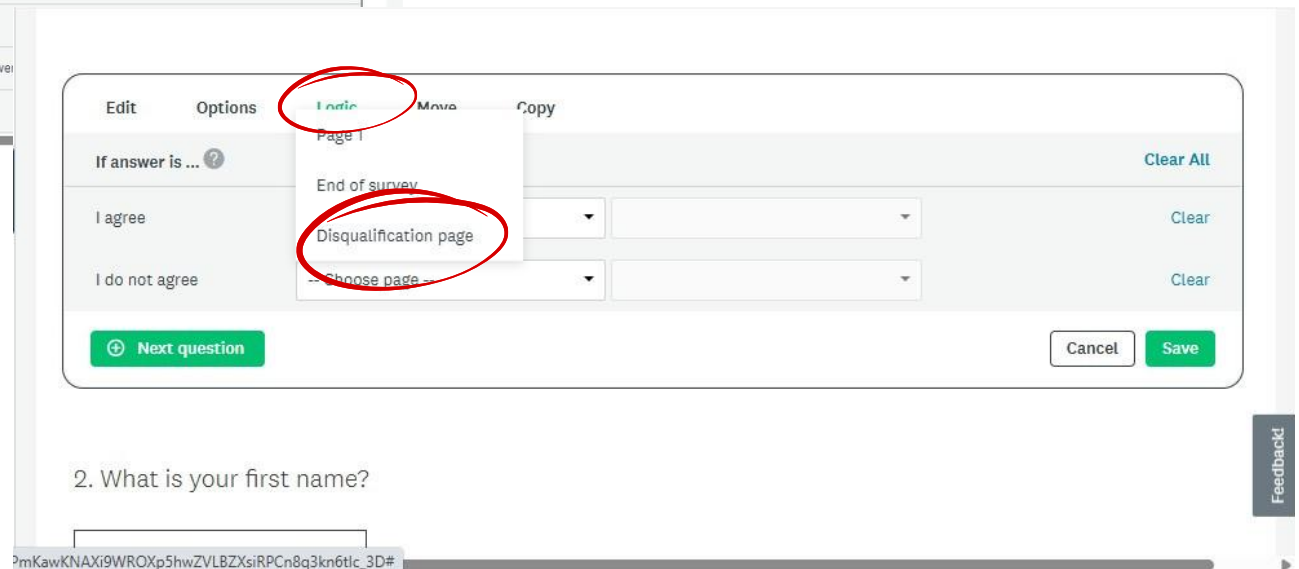
By completing this survey, you consent to share your details with the service provider. These details will be used only for reporting purposes. Any publications resulting from this training will use anonymized data.

RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey

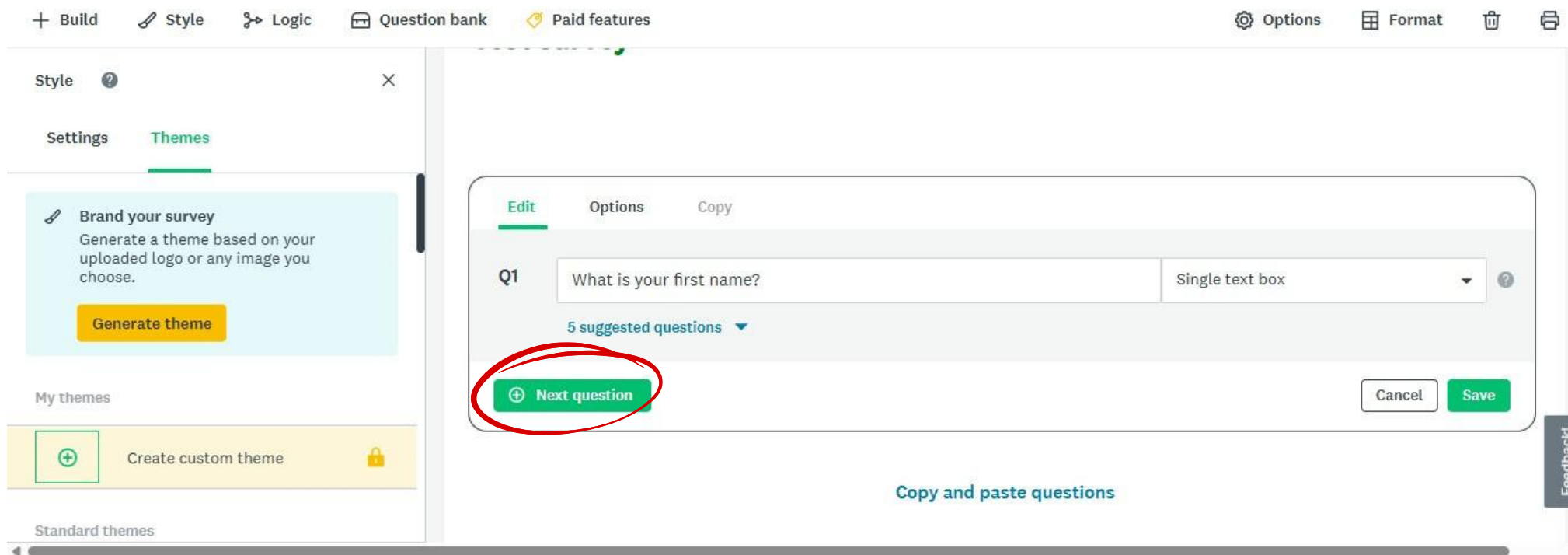


5.11 Click on "Options" and tick the box that says "Requires an answer to this question". Click on "Save".

5.12 Click on "Logic"; click on the dropdown list next to "I do not agree"; and choose "Disqualification page". Click on "Save".



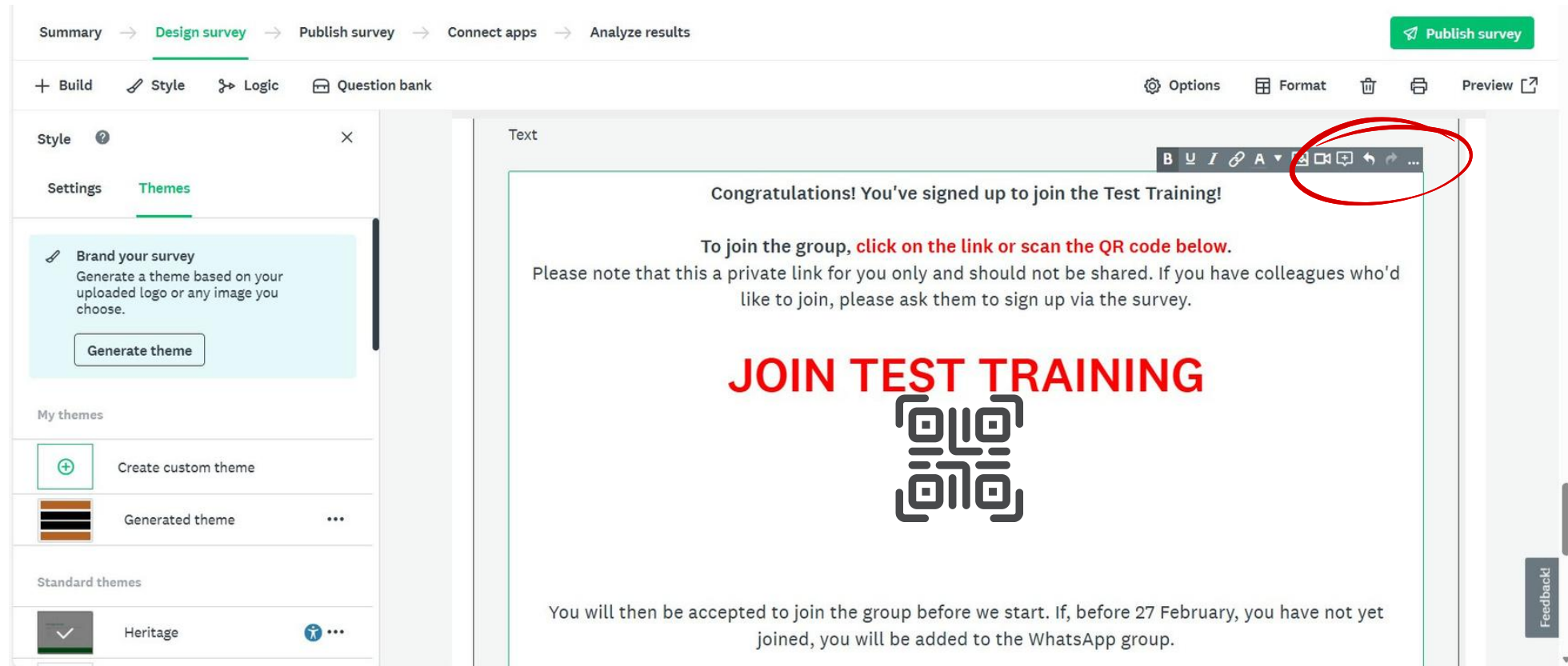
IAS Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.13 Add all the questions you want to have in the survey: Click on “+” and then “Question”. Pick the type of answer you want from the dropdown list and add answers. Click on “Save”.

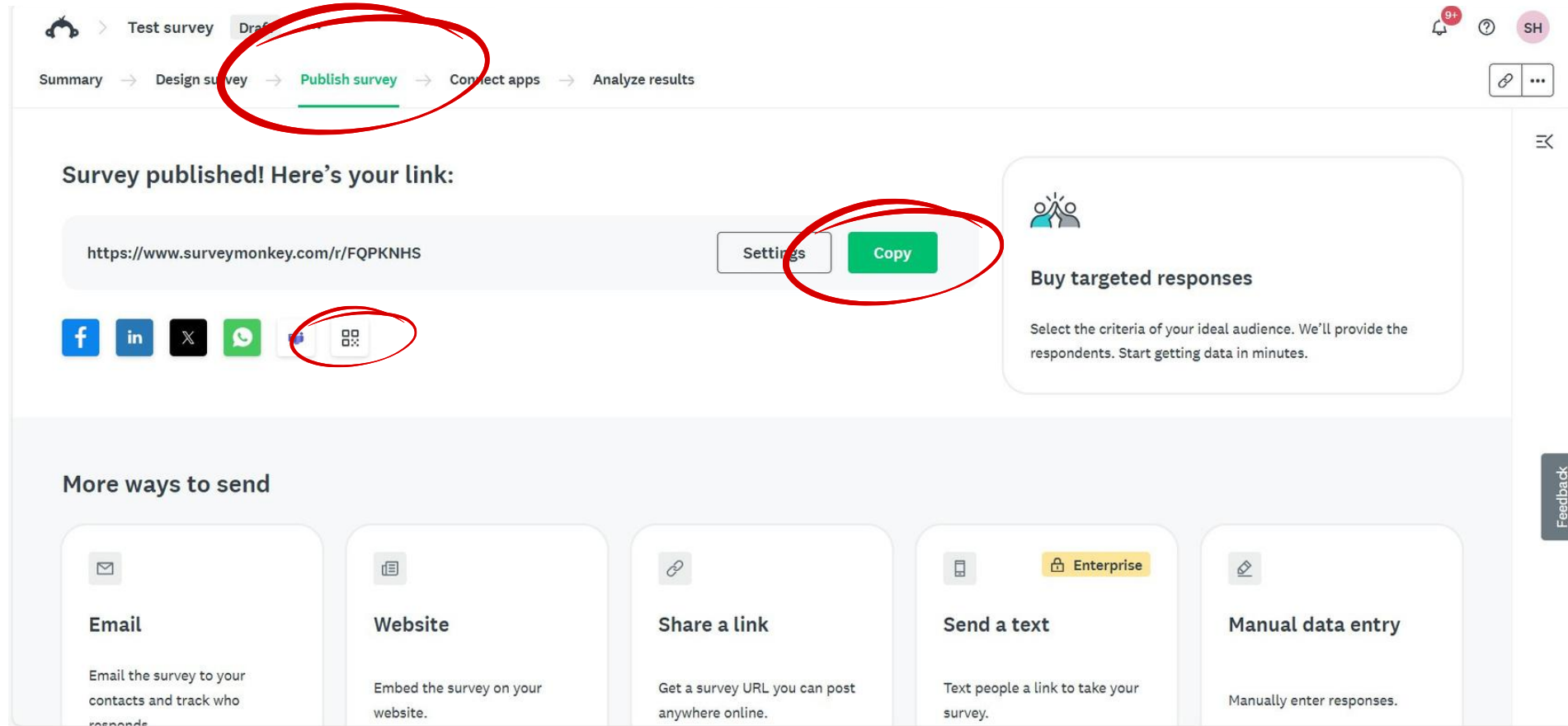
5.14 If you want a question to be compulsory, click on “Options” and then check the box, “This question requires an answer”. Click on “Save”.

Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.15 Create a final text box, which should include the link and QR code to join the WhatsApp group. Click on "+", click on "Text", and do as you did for the welcome note. To get full editing options, click on "...", and then click on "Save".

Step 5: Step-by-step guide to making a survey in SurveyMonkey



5.16 Publish the survey by clicking on “Publish survey”. From this page, you can copy the survey link and QR code to add to an invitation or send to potential participants.

RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey

The screenshot shows the SurveyMonkey interface for a survey titled 'Test survey'. The navigation bar includes 'Summary', 'Design survey', 'Publish survey', 'Connect apps', and 'Analyze results'. The 'Analyze results' button is circled in red. Below the navigation bar, the 'Individual responses' tab is selected and also circled in red. On the right side, the 'Export' button is circled in red, and a dropdown menu is open showing 'New export' as the selected option, which is also circled in red. The main content area shows a table of responses with columns for Status, Last modified, Time spent, Collector, IP address, and Q1: Cons. The table contains one row with the following data:

	Status	Last modified	Time spent	Collector	IP address	Q1: Cons
1	Complete	2026-02-17 15:05	00:55	Web Link 1 (Weblink)	165.165.174.186	I agree

5.17 To download the sign-ups, click on "Analyze results", then "Individual responses", then "Export", and finally on "New export".

RIAS Step 5: Step-by-step guide to making a survey in SurveyMonkey

The image shows two parts of the SurveyMonkey interface. On the left is the 'Export Survey Data' dialog box. It has a title bar with a close button. Below the title, there are two radio buttons: 'Question summaries' (unselected) and 'Individual responses' (selected). Under 'File format', there are four buttons: 'XLS' (selected), 'CSV', 'SPSS', and 'PDF'. Under 'Columns', there are two buttons: 'Condensed' (selected) and 'Expanded'. Under 'Cells', there are two radio buttons: 'Actual answer text' (selected) and 'Numerical value (1-n)'. At the bottom, there is an 'Include' section and two buttons: 'Cancel' and 'Export'. The 'Export' button is circled in red. On the right is a data table with columns: 'Time modified', 'Time spent', 'Collector', 'IP address', and 'Q1: Cons'. The first row of data shows: '16-02-17 15:05', '00:55', 'Web Link 1 (Weblink)', '165.165.174.186', and 'I agree'. Above the table are buttons for 'Add new column', 'TABLE', and 'SINGLE'. Below the table is a 'Feedback' button. A dark notification box at the bottom right says 'Your export is complete' and 'Export files will appear under EXPORTS for 14 days'. It has a 'Download' button circled in red and the filename 'Data_All_260217.zip'.

5.18 Click on "Export". The file will download. Open the file in downloads. You can then open the Excel spreadsheet in the folder.

Part 3

A step-by-step guide to creating a training group on WhatsApp Business

Recruitment and training group creation



In this section

- **Step 1:** Download WhatsApp Business Slide 46
- **Step 2:** Open WhatsApp Business and follow prompts to register Slides 47-48
- **Step 3:** Creating a group in WhatsApp Business Slides 49-53
- **Step 4:** Adding people to the group Slides 54-55
- **Step 5:** Making admins Slide 56
- **Tips and tricks** Slide 57

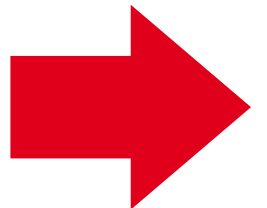
Why WhatsApp Business?



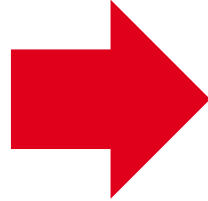
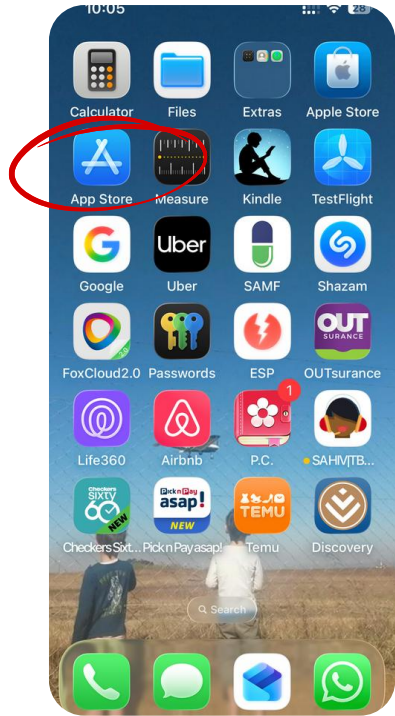
WA Business allows tighter control in groups:

- Admins can control who joins groups, who can send messages, and when.
- Admins can delete messages – for everyone – sent from any participant, e.g., messages that do not protect client confidentiality or irrelevant messages.

Let's start from the beginning

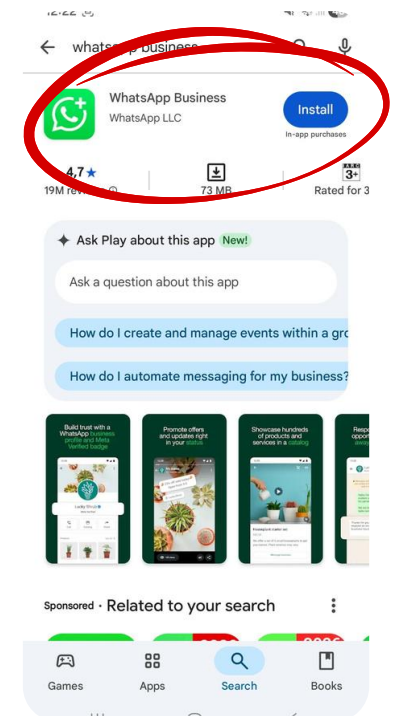
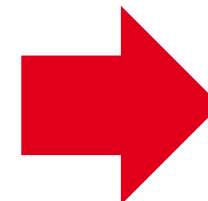
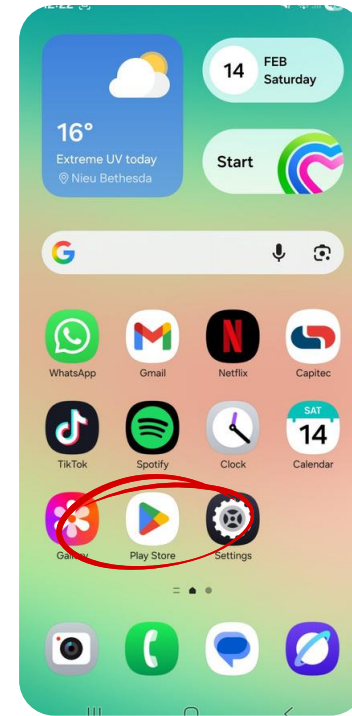


RIAS Step 1: Download WhatsApp Business



iPhone (App Store)

On your home screen, click on "App Store". Search for WhatsApp Business and click on the "Download" symbol.



Android (Google Play)

On your home screen, click on "Play Store". Search for WhatsApp Business and click on "Install".

Step 2: Open WhatsApp Business and follow prompts to register

1 Welcome to WhatsApp Business

App Store

Agree & continue

2 Confirm phone number

Use a different number

3 Enter your phone number

Next

Note: You can't use the same phone number for WhatsApp Business and WhatsApp. Two options:

1. Get a second number (SIM) and use that for WhatsApp Business (most phones can have two numbers). [iPhone example](#)
2. Change your own number to WhatsApp Business (it works the same). [Android example](#)

1 App permissions

Play Store

2 Welcome to WhatsApp Business

Agree & continue

3 Enter your phone number

Allow

4 Enter your phone number

Next

5 Verified

Continue

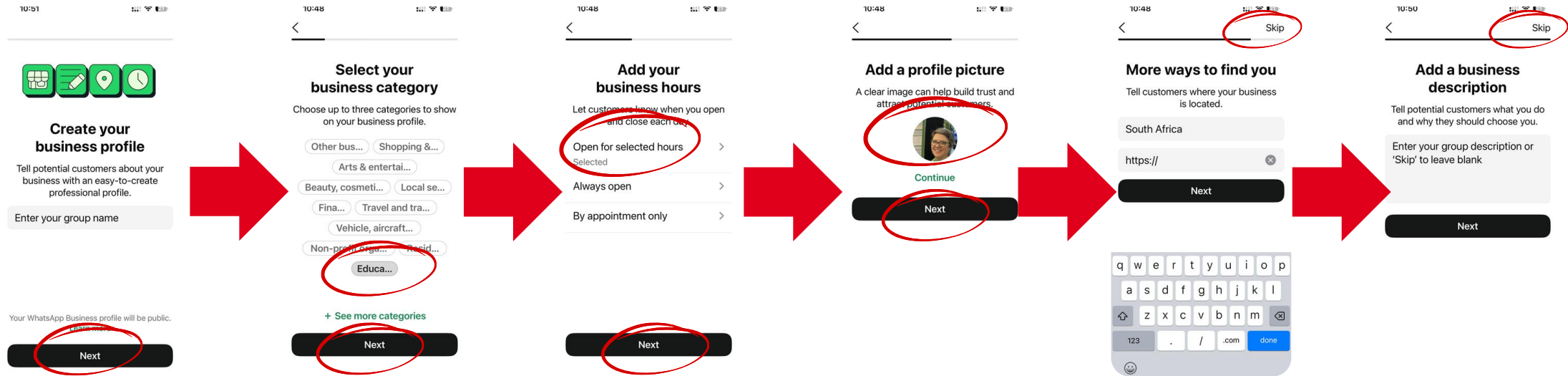
6 Contacts and media

Not now

7 Restore your chats

Restore

Step 2: Open WhatsApp Business and follow prompts to register



Create business profile.

Enter your name and click "Next".

Select business category.

Pick "Education" and click "Next".

Add business hours.

Select an option and click "Next".

Add profile picture.

Select a picture if you want to; otherwise leave blank. Click "Next".

Add website.

Add if you want to, and click "Next". Otherwise, leave blank; click "Skip".

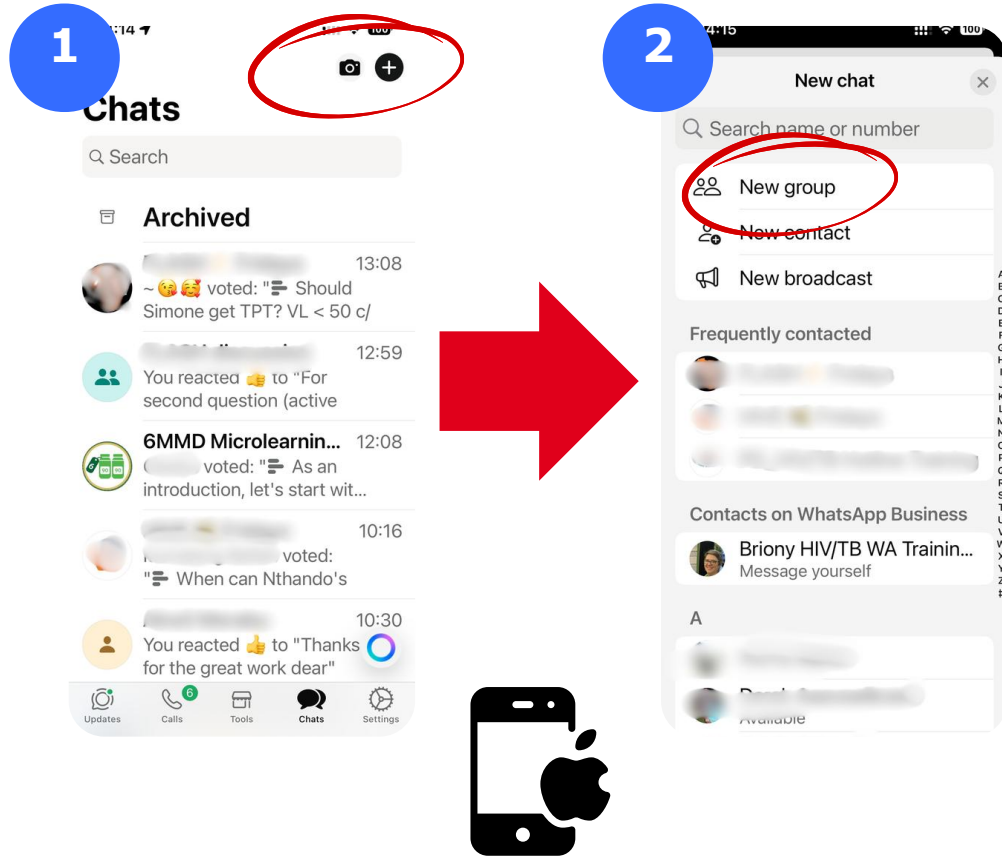
Add business description.

Add if you want to, and click "Next". Otherwise, leave blank; click "Skip".



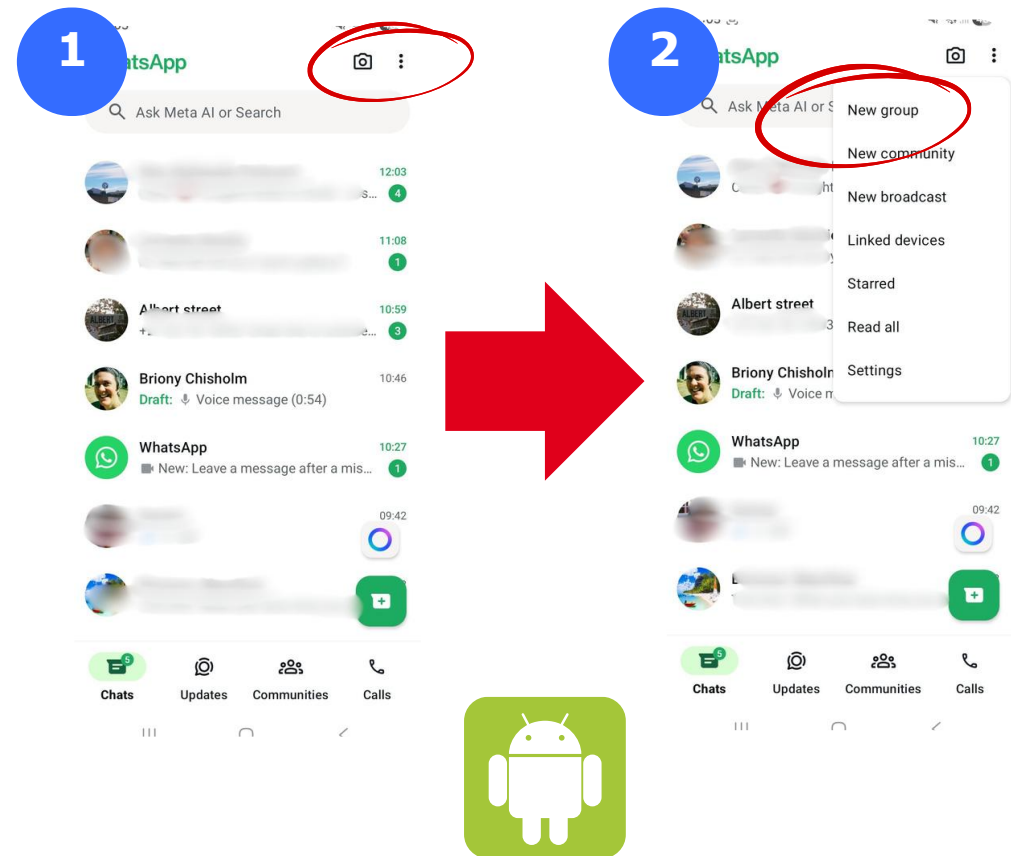
You are now registered and can move on to creating a group for training.

Step 3: Creating a group in WhatsApp Business



3.1 Add new group (iPhone)

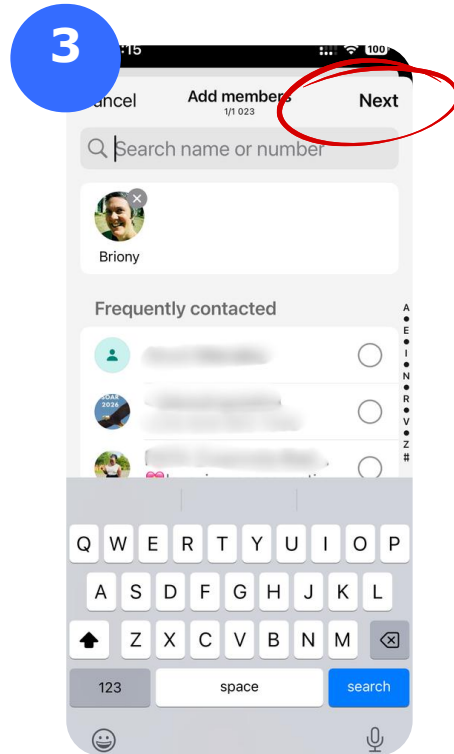
Click on "+" (top right); then click on "New group".



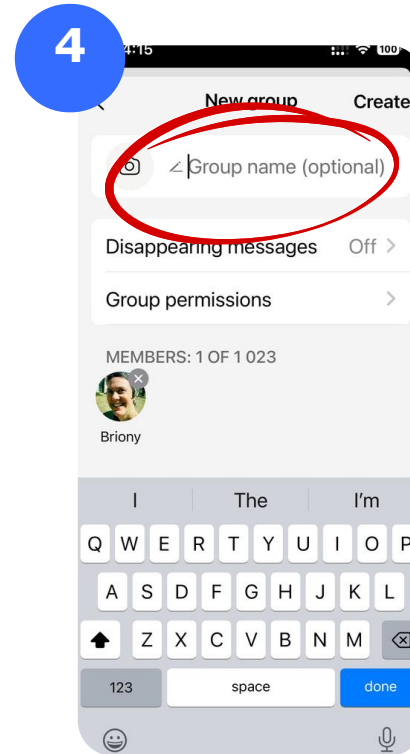
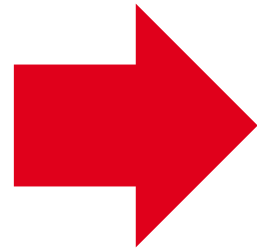
3.2 Add new group (Android)

Click on three dots (top right); then click on "New group".

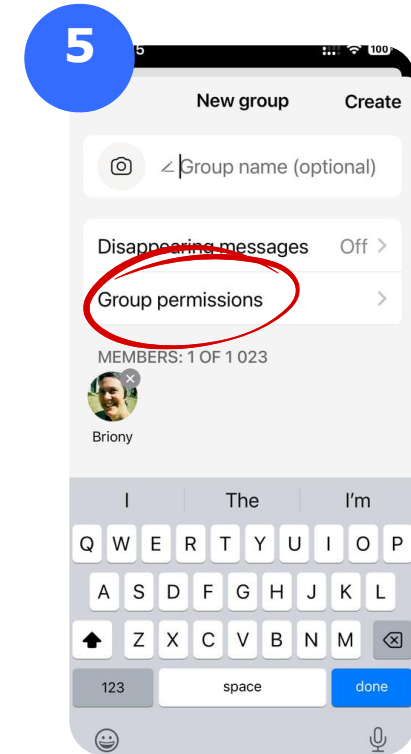
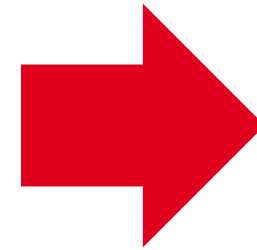
Step 3: Creating a group in WhatsApp Business



3.3 Add members
 Add people who will be in the training group; then click "Next".
 If nobody has joined yet, just click "Next".

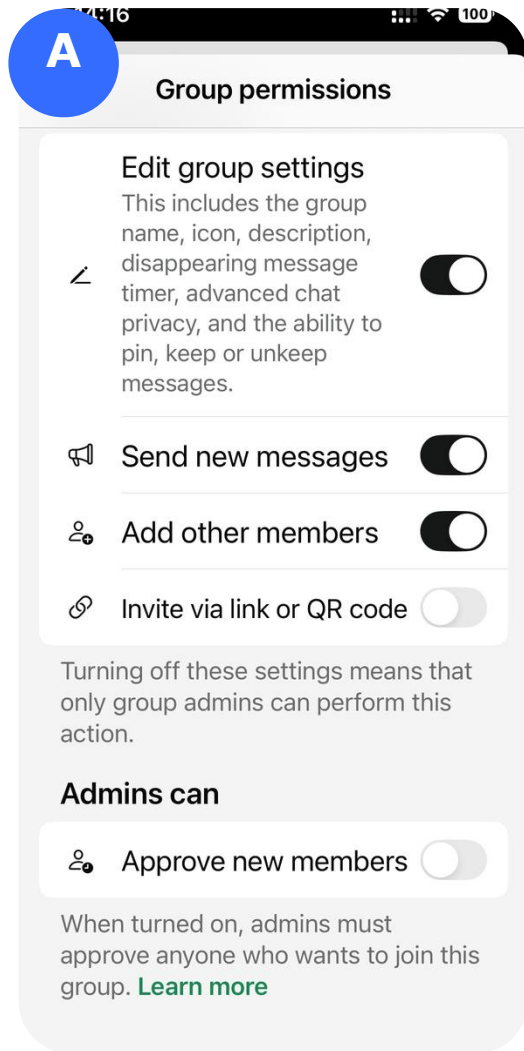


3.4 Name the group
 Name the group something easy to recognize, e.g., **Test Training Group**.



3.5 Group permissions
 Click on "Group permissions".

Step 3: Creating a group in WhatsApp Business



3.5 Group permissions

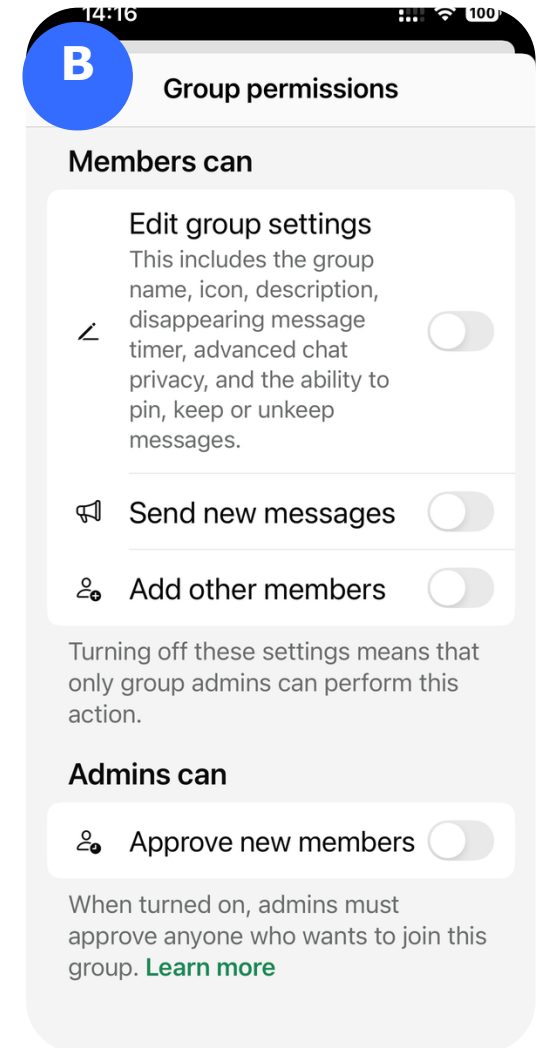
Choose the permission settings you want for your group.

Edit group settings: If left **on** (Image A), ALL group members can alter settings. It is preferable to turn this **off** (Image B).

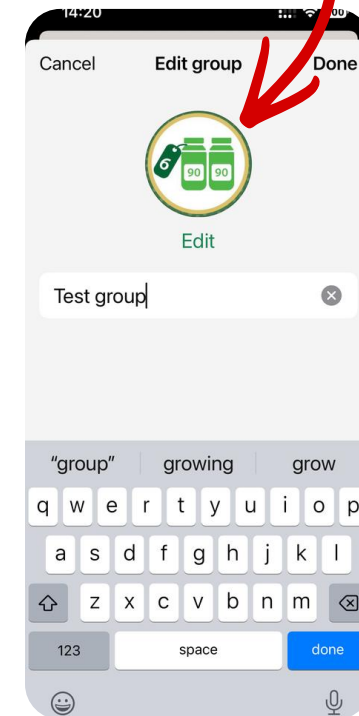
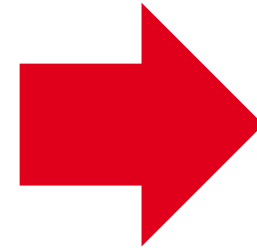
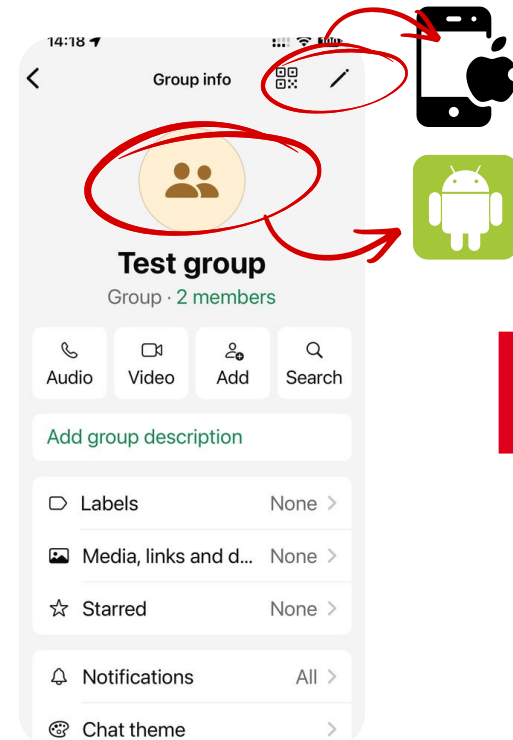
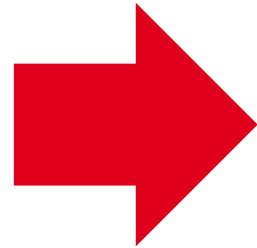
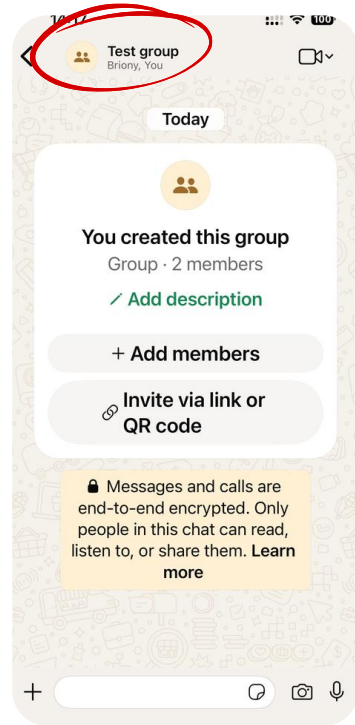
Send new messages: If left **on** (Image A), ALL group members can send messages at any time. We advise you to turn this **off** (Image B). This can be switched on temporarily after each session to allow questions and discussion.

Add other members: This can be left **on** (Image A) if you're happy to allow all members to add others; or **off** (Image B), if not.

Approve new members: If left on, this will allow members in only after admin approval. Only turn this on if you feel it's necessary for your group. We want to be **welcoming and make it easy for people to join.**



Step 3: Creating a group in WhatsApp Business



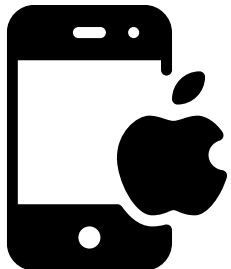
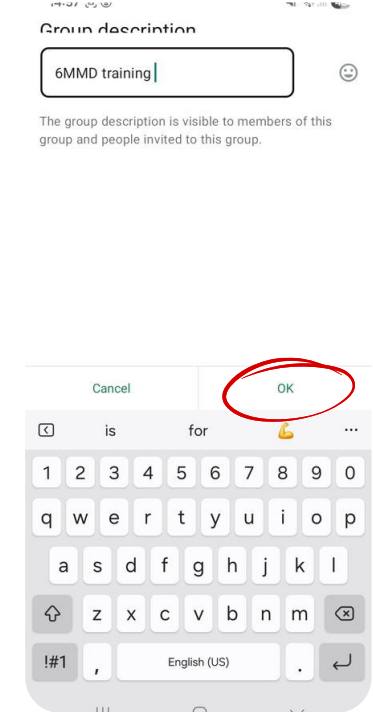
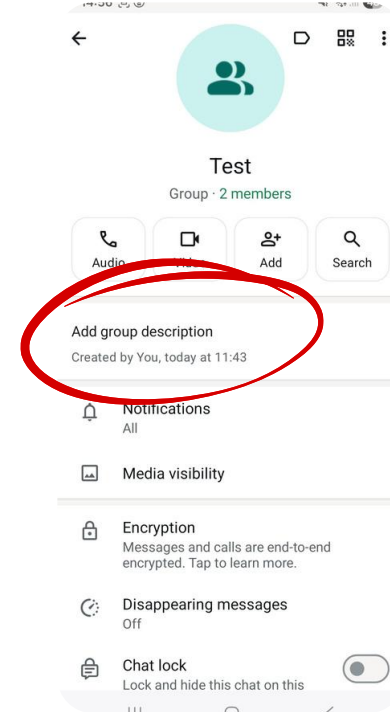
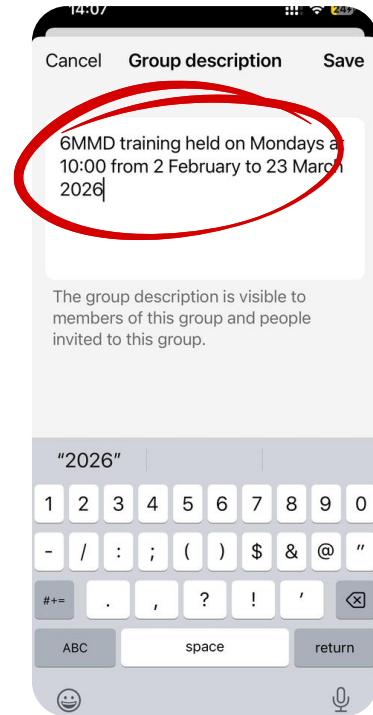
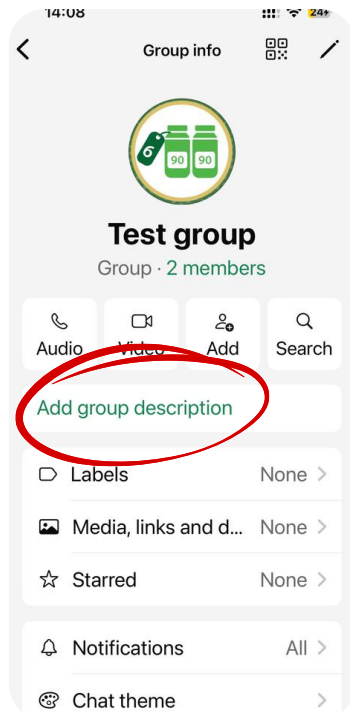
3.6 Add group settings

Click on the group name at the top.

3.7 Add a group image

Click on the pen (top right, iPhone) or on the image placer (Android). Choose an image that fits the group, e.g., the 6MMD logo from the SOPs.

Step 3: Creating a group in WhatsApp Business



3.8 Add group description (iPhone)

Click on "Add group description".
Write details of what the training is about and when it will happen. Click "Save".

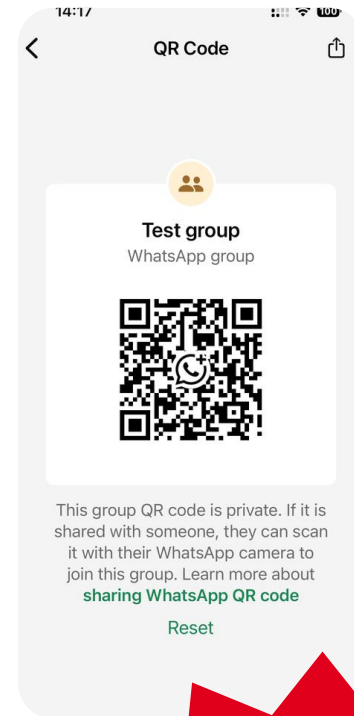
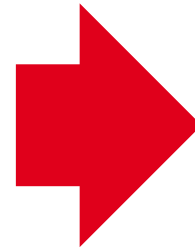
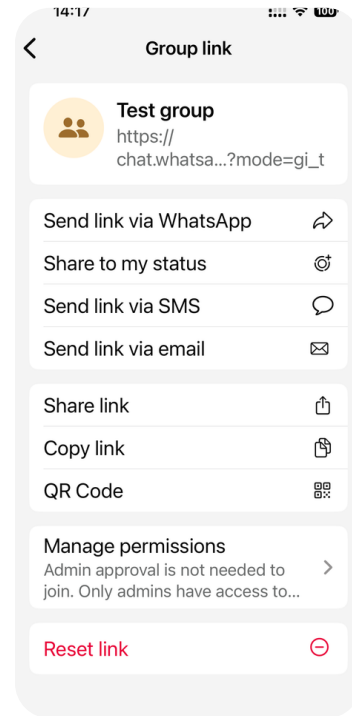
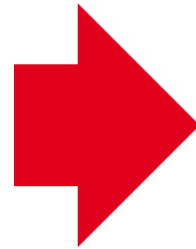
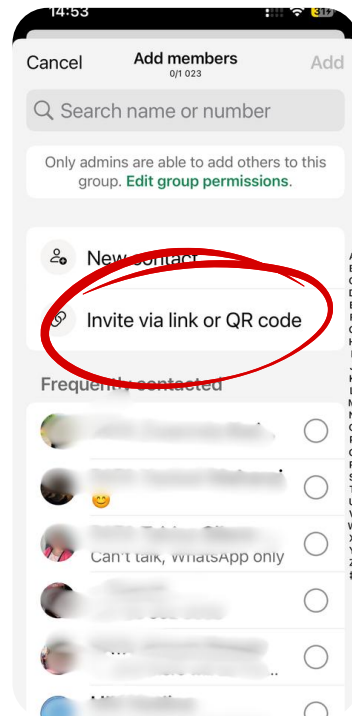
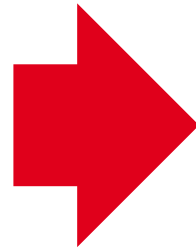
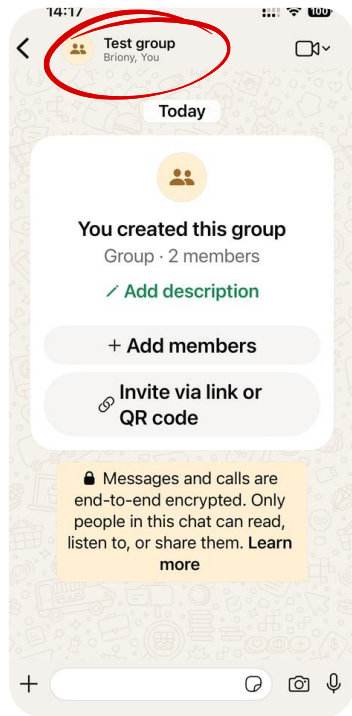


3.8 Add group description (Android)

Click on "Add group description".
Write details of what the training is about and when it will happen. Click "Save".

Step 4: Adding people to the group

4.1 Inviting people to "self-join" (preferred option)

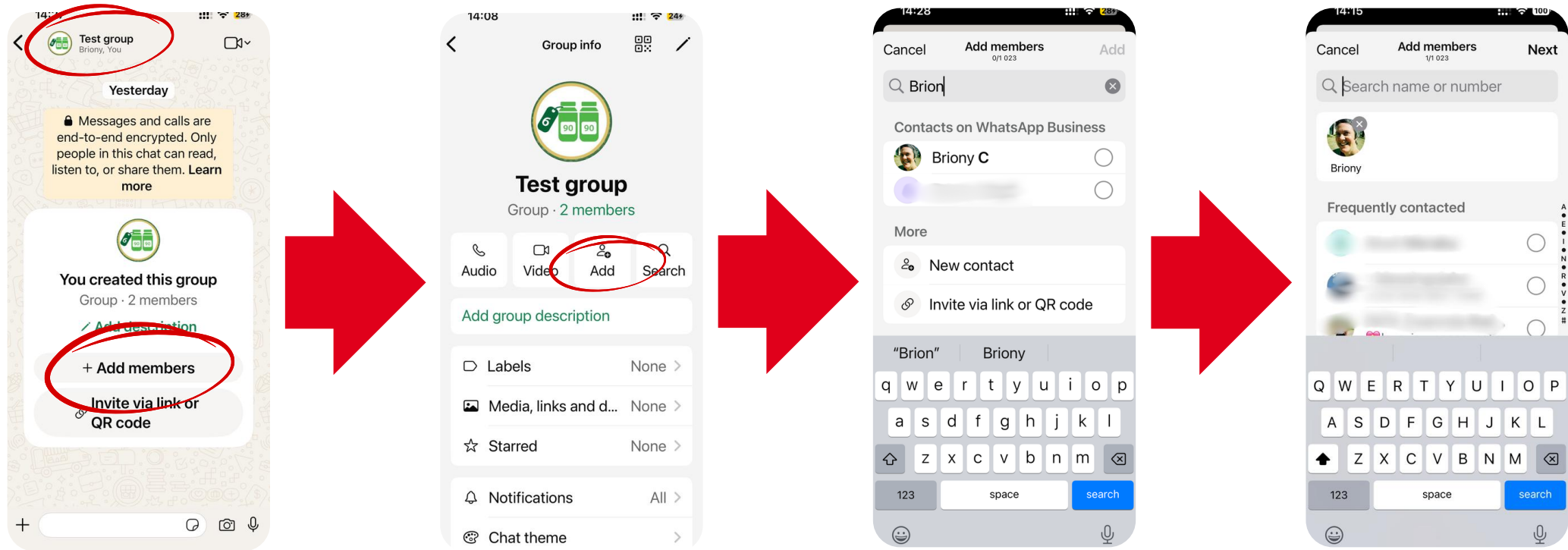


Send invite link and/or QR code
 Click on the group name at the top.
 Scroll down and click on "Invite via link or QR code".
 Share the link and/or QR code in whichever format is easiest.

We want to be welcoming and make it easy for people to join.

RIAS Step 4: Adding people to join the group

4.2 Adding people manually



Click on "Add members"

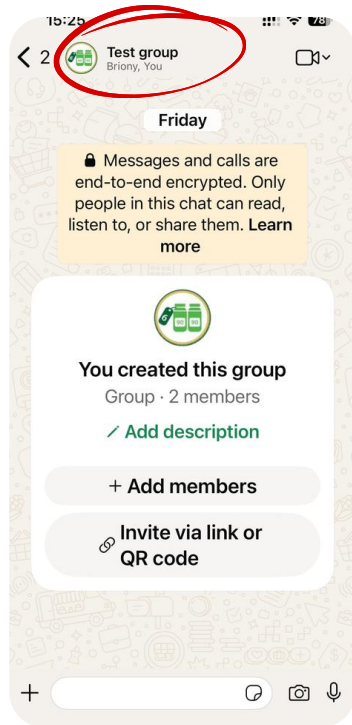
OR

Click on the group name at the top and then click "Add".

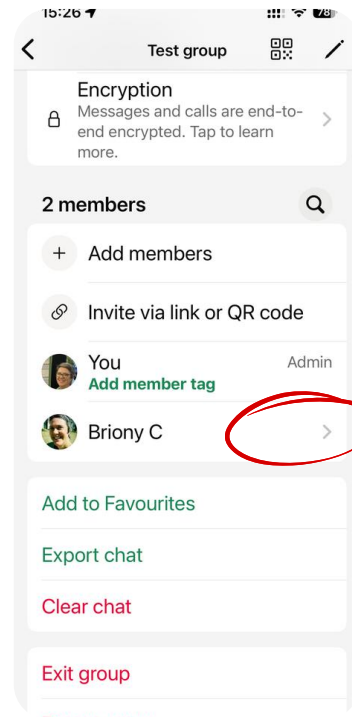
Add members from your contacts by typing their names in the search box, and then clicking on their names.

Step 5: Making admins

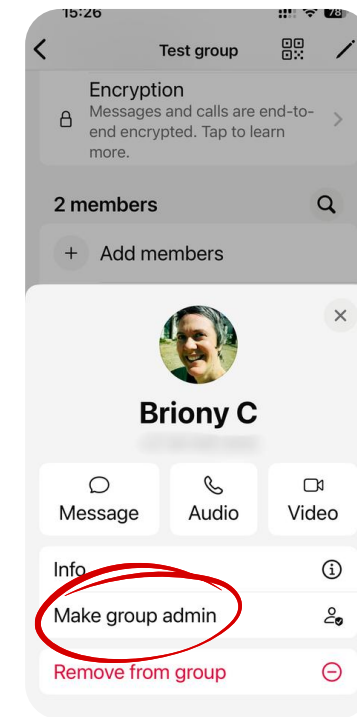
Always have a number of trusted admins in case of inadvertent bans.
These bans are usually temporary and can be appealed.



Click on group name.



**Scroll down to "members"
and choose the one you want
to be admin.**



**Click on "Make group
admin".**

IAS Tips and tricks when adding participants



WhatsApp is sensitive to any actions that could be considered spam (adding too many people, too quickly; sending the same message to too many people). Sticking to a few rules will minimize the risk of being banned (usually temporary):

- Only add people who have **consented** to be part of the group. Adding people who have not agreed to be part of the group may get you banned from WhatsApp.
- When adding participants – even those who have consented – do so **slowly**. Adding too many people at a time may get you banned from WhatsApp.
- Ideally, participants should **join the group themselves**, using the link or QR code. If you want to keep tight control of who is in groups, leave “Approve new members” on in the settings. This will mean that you/admin review new participants before they are allowed in the group.

Part 4

Marketing and admin

Recruitment and training group creation



In this section

- **Step 1:** Marketing the training Slides 61-65
- **Step 2:** Preparing a group management plan Slides 66-68

Step 1: Marketing the training



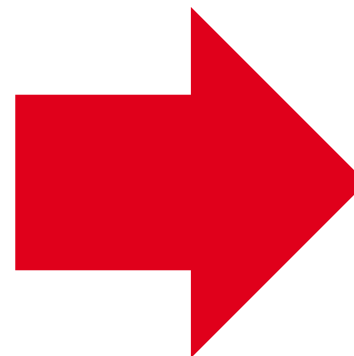
Remember from Part 2:

If you are running a training group, you ideally want everyone who will benefit from the training to join.

Cast the invitation net wide and make it easy to join.

In Part 2, these questions were answered:

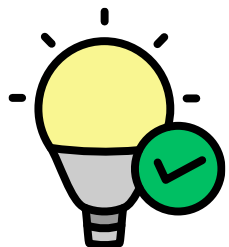
1. Who are the target participants?
2. How can you contact those people?
3. Do you need to create an invitation or message to send?



In this part, we will share tips on making sure you reach everyone who will benefit, and illustrate how to create a simple invitation.

Step 1: Marketing the training

Tips on reaching your audience



- Start recruitment early. The earlier, the better!
- Don't reinvent the wheel. Use recruitment channels that already exist, such as district and facility WhatsApp groups.
- Use all the options available to you: WhatsApp groups, email, local/district meetings, implementing partners.
- Advertise several times, to catch potential participants who missed first (or second...) notices.



Most importantly, make it easy for people to join the group.

Step 1: Marketing the training

Make it easy for participants to join

- If you don't need to have tight control over who joins the groups, then don't have it:

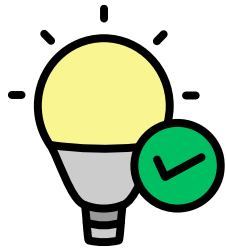


- If you don't need participant details, don't add a sign-up survey.
- If you do need participant details, use a sign-up survey but ask only what you absolutely need to know.
- Let people join groups themselves, using the WhatsApp group link or QR code (see Part 3).
- Encourage people to share the link or invitation with others who may be interested.

Step 1: Marketing the training

Creating an invitation (JPEG or text)

Important information to include in the invitation:



- What the training is about
- A short explanation of the WhatsApp-based training format
- When the training will happen
- How to sign up
- A contact person for questions on joining and signing up
- When registration closes, if applicable

Step 1: Marketing the training

Creating an invitation (JPEG or text)



Test Training
Mondays @ 13:00, 2 March - 20 April 2026

Training includes sessions on

What is WhatsApp-based microlearning?

One 15-minute session once a week for 8 weeks

- Held 'live' in WhatsApp group
- If you are registered and miss a live session, you can catch it up in your own time

Each session has 1-3 learning points

- Cases
- Couple of polls with answers
- Open session for questions
- Summary of learning points in jpeg image and voice note

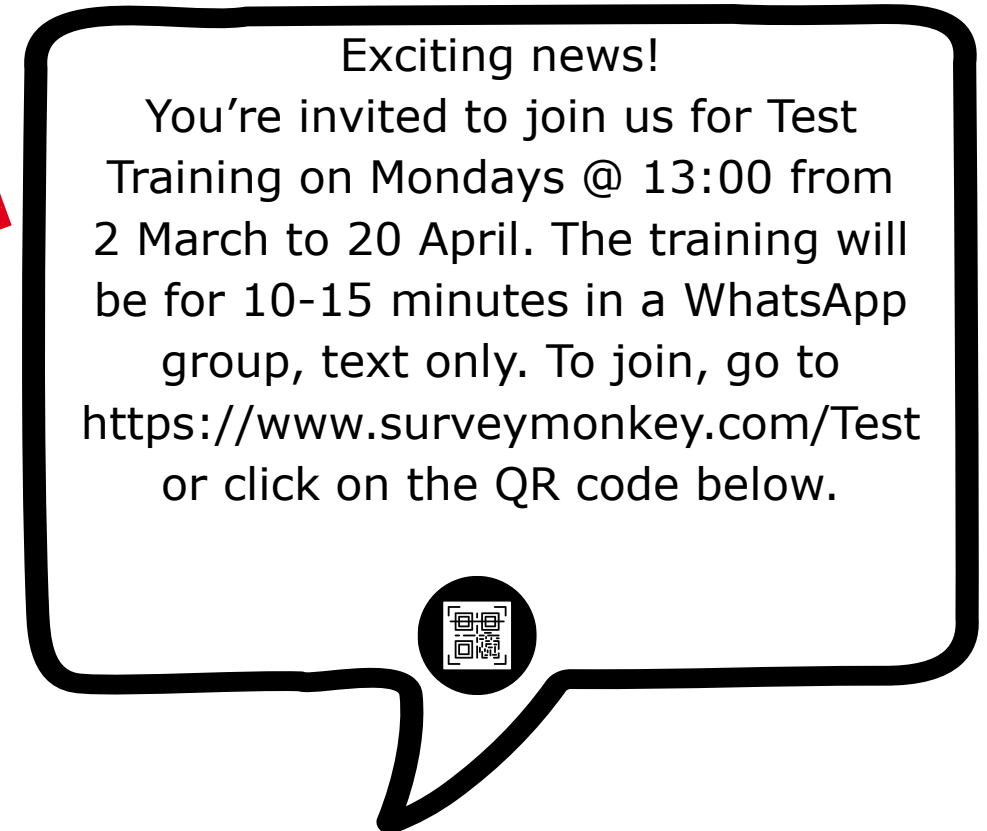
How to sign up for the Test Training?
Sign up at the link below, or scan the QR code to be taken to the registration link



<https://www.surveymonkey.com/Testtraining>

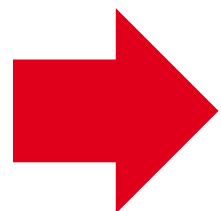

If you need help, call Trainer on 081 234 5678

Registrations close: 27 February Training starts: 2 March



Exciting news!

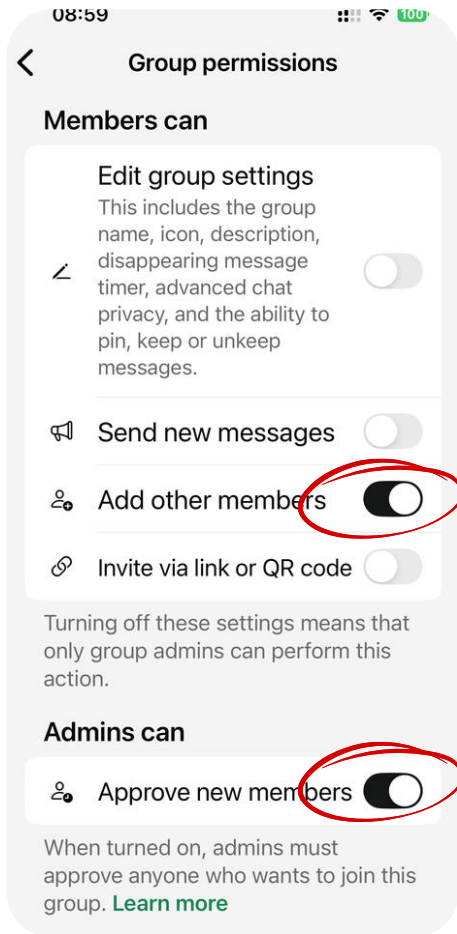
You're invited to join us for Test Training on Mondays @ 13:00 from 2 March to 20 April. The training will be for 10-15 minutes in a WhatsApp group, text only. To join, go to <https://www.surveymonkey.com/Test> or click on the QR code below.



The link and QR code used here will be either to the sign-up survey (if you have one) or to join the WhatsApp group directly (if you don't need people to sign up).

Step 2: Preparing a group management plan

Setting up secure WhatsApp groups: Set your settings



Edit group settings: If left **on**, ALL group members can alter settings. It is preferable to turn this **off**.

Send new messages: If left **on**, ALL group members can send messages at any time. We advise you to turn this **off**. This can be switched on after each session to allow questions and discussion for a short period.

Add other members: This can be left **on** if you are happy to allow all members to add others; or **off**, if not.

Approve new members: If left **on**, this will allow members in only after admin approval.

These two settings should be **left off**.

Turn on **necessary** controls only. We want to be welcoming and make it easy for people to join.

Step 2: Preparing a group management plan

Setting up secure WhatsApp groups: Housekeeping rules

Housekeeping

2026

- Sessions will mostly be case-based, with a couple of polls.
- Lessons are based on Test guidelines.
- We love to hear from you. Feel free to send emoji reactions on messages to interact during sessions and questions at the end.
- These sessions are a safe space for learning together. Please consider all discussions as confidential within the group.
- We welcome discussions on the lessons. If you wish to discuss the management of a specific patient because you feel it will benefit the group, please **do not share any identifying patient details** (e.g. name), to protect confidentiality.
- We will keep the sessions short (10-15 minutes). We know how busy you are!
- Please only share comments related to the learning – memes, images and/or comments that are not related will be removed.
- We do our best to avoid hackers/scammers. Please be vigilant and report any suspect messages.
- We all need downtime, so posting in the group will only be possible within the learning sessions.
- Please be kind. We are here to learn. There is no such thing as a stupid question.

Any concerns regarding these group rules should please be discussed with Trainer immediately. WhatsApp them on +27 (0)81 234 5678.



Housekeeping rules (either in JPEG or text) must be shared before **each** session. This is also a good way to remind people of the sessions – send the housekeeping rules 15 minutes before the training.

Important

WhatsApp Business must be used for the training as it allows admins to remove comments for everyone. This is vital in case confidential information is shared.

Step 2: Preparing a group management plan

Setting up secure WhatsApp groups: Moderating sessions

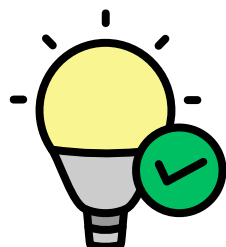
Commenting should be kept **off** during the session and opened at the end for a couple of minutes to allow for questions.

Depending on the size of the group, you may need a moderator or second facilitator in addition to the facilitator. This is especially recommended for groups with over 100 participants.



Answering questions after the session

- If the facilitator is a subject expert and knows the answers to questions, they can be answered “live”.
- If there is ANY doubt around how to answer a question, send a message to say questions will be answered later, discuss the correct answer with a subject expert, and answer later. Remember, you are giving information to a large group of people who may also forward the information to others.



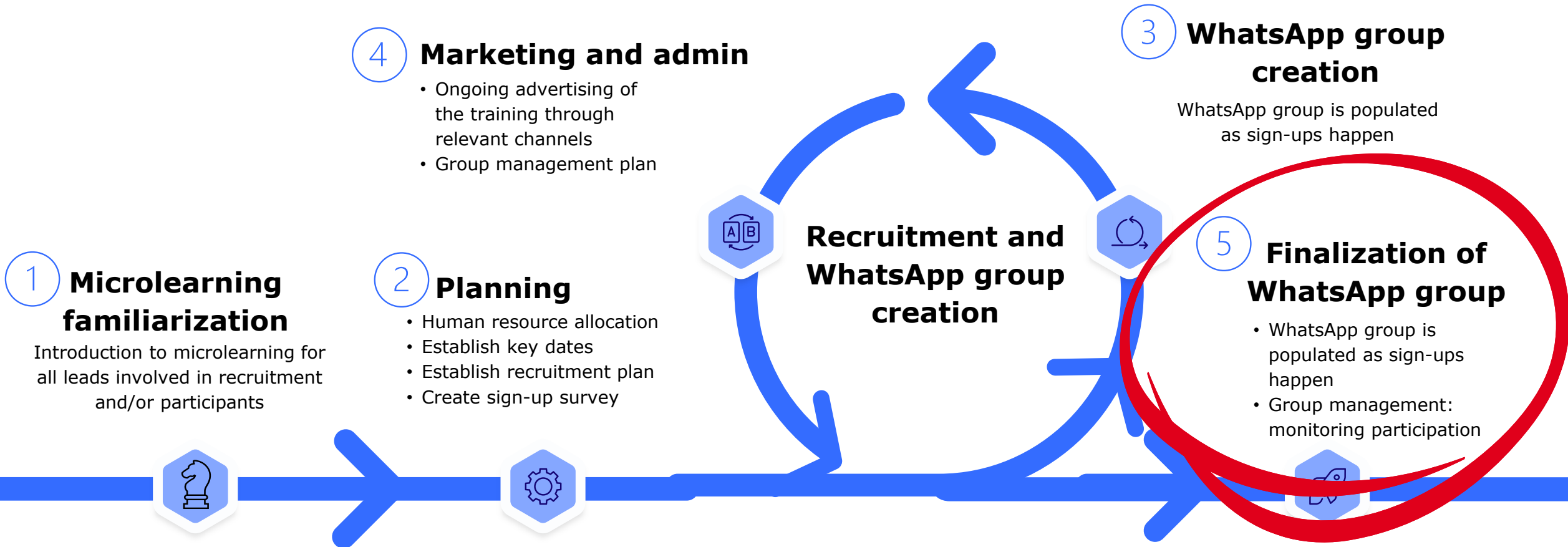
It is imperative that correct information is shared in groups.



Part 5

Finalizing groups and monitoring participation

Recruitment and training group creation



In this section

- **Step 1:** Finalizing groups Slides 72-73
- **Step 2:** Monitoring participation Slides 74-76

Step 1: Finalizing groups



- Participants should be added to groups as they sign up (Part 3).
- A “closing date” should be advertised to encourage early sign-up, but participants should be allowed to join until the sessions start.
- A few days before the sessions start, send a reminder.



Don't forget! Our Test Training sessions start on Monday at 13:00. We'll send another reminder on Monday morning. We're looking forward to learning with you!

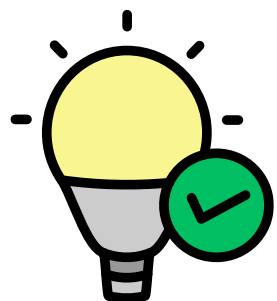
Step 1: Final checks

- **Group settings:** Are they set so that you have control in the group for the lesson (Part 3 and 4)?
- **A minimum of two people set as admins:** If anything happens to one admin's access, the other is still there and can take over delivery of session posts (Part 2).
- **Facilitators/moderators:** Does everyone know what they need to do and when to do it (Part 2)?



Reliable internet access: The facilitator needs to be in a place with reliable internet access to send messages.

Step 2: Monitoring participation



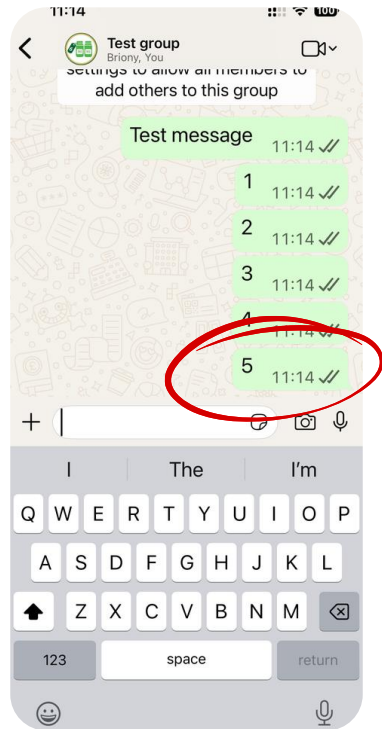
This can be done **only** on the phone from which the sessions are sent.

- WhatsApp's "read" function can be used to see who has opened each message.
- If you have the contact details of participants stored on the phone, this can be done one by one (extra admin).
- If you don't have contact details, you can measure proportions of participants who have read lessons at specified timepoints:



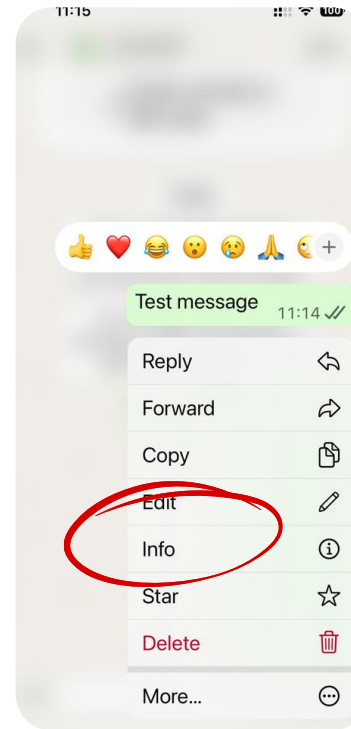
- In live session
- 24 hours after live session
- In a week (before next session delivered)

IAS Step 2: Monitoring participation (iPhone)

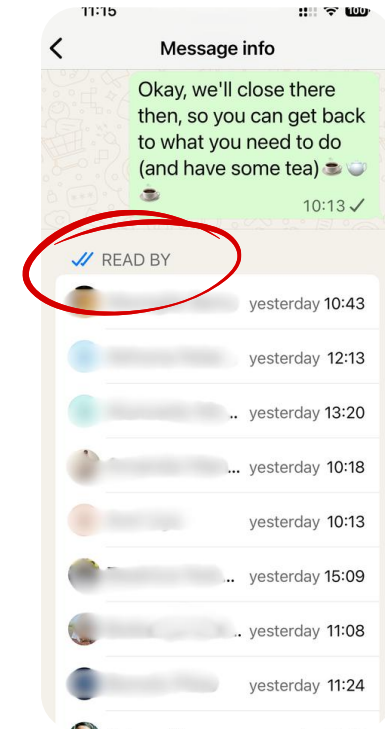


3.1 Hold your finger on the message you want to see.

This is generally the last message sent in a session.



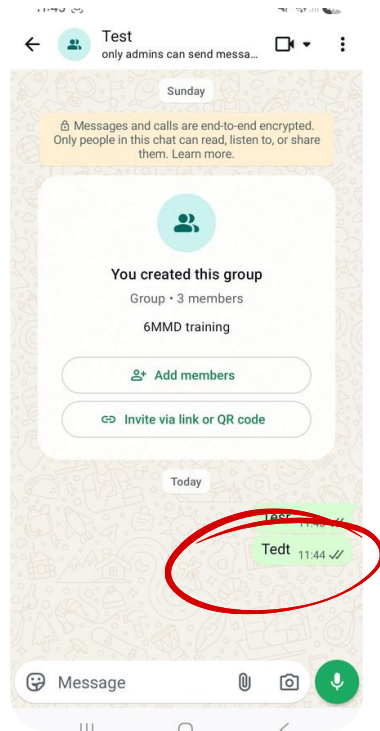
3.2 Click on "Info".



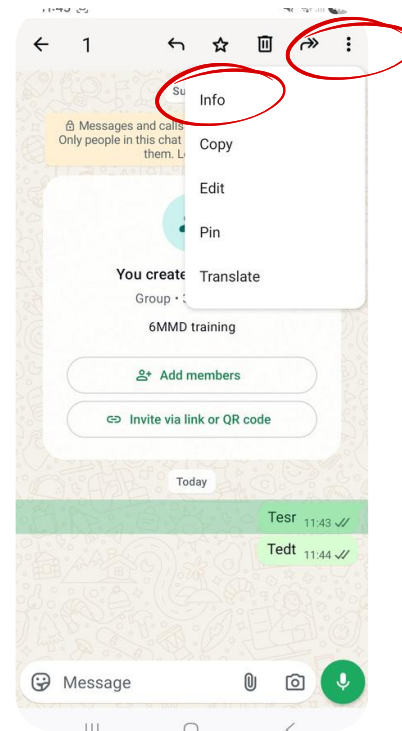
3.3 The list of participants who have read the messages, and when, will show.

Below this, there is a delivery report.

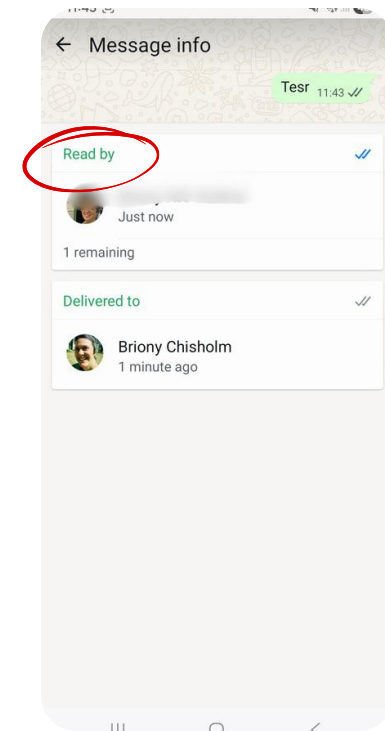
IAS Step 2: Monitoring participation (Android)



3.1 Hold your finger on the message you want to see.
This is generally the last message sent in a session.



3.2 Click on three dots (top right) and then "Info".



3.3 The list of participants who have read the messages, and when, will show.
Below this, there is a delivery report.

Part 6

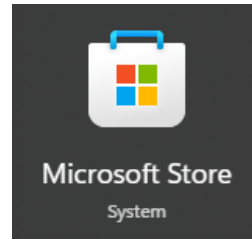
Running the training

In this section

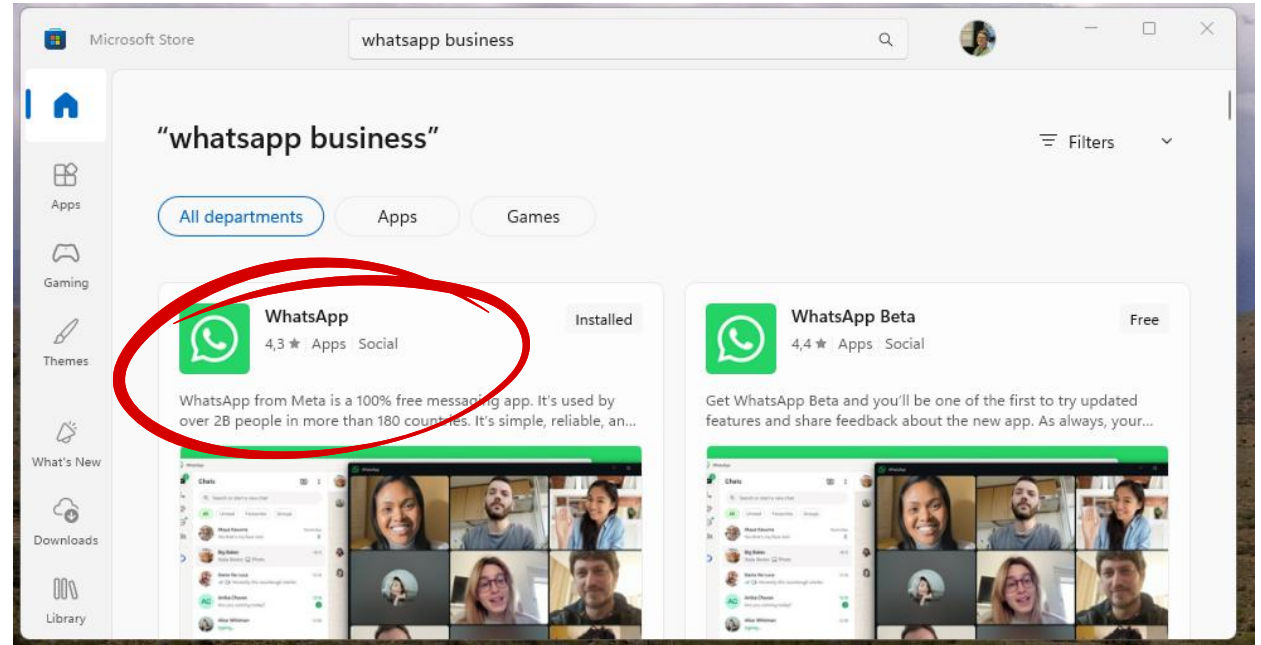
- **Step 1:** Setting up your desktop Slides 79-83
- **Step 2:** Before each session Slides 84-85
- **Step 3:** Delivering the sessions Slides 86-99
- Tips and tricks Slide 100

Step 1: Setting up your desktop

Downloading WhatsApp Desktop



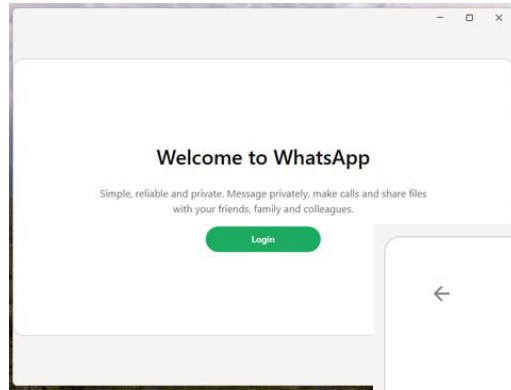
1.1 Click on the "Start" button on your computer and search for the "App store". Click on it to open.



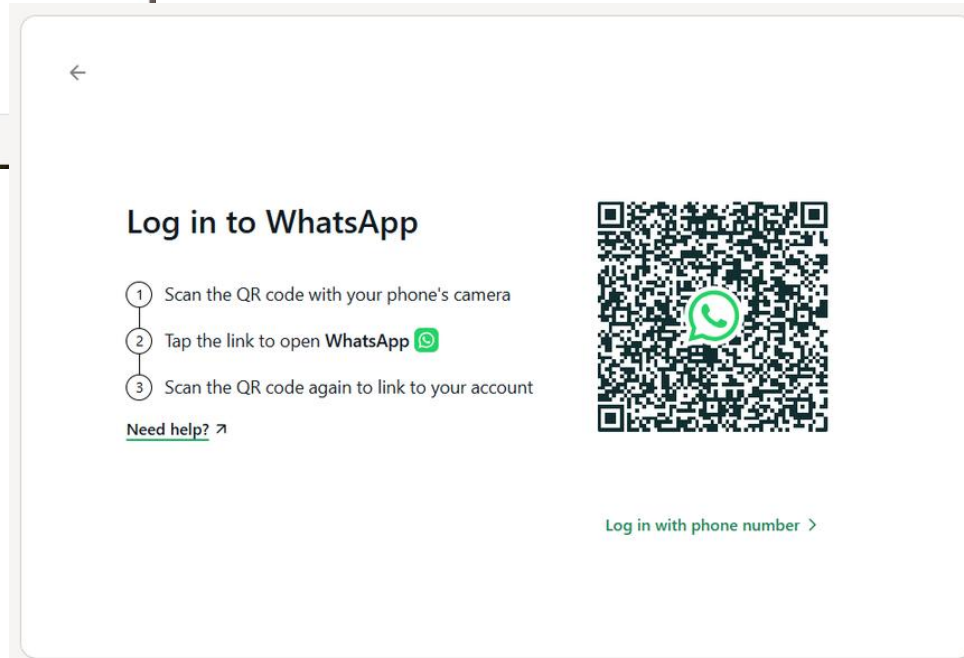
1.2 In the App store, search for "WhatsApp" and download it.

Step 1: Setting up your desktop

Downloading WhatsApp Desktop



1.3 Open WhatsApp and click on "Login"

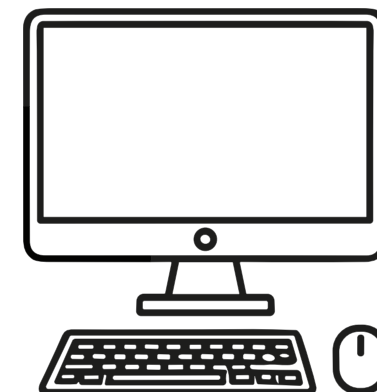
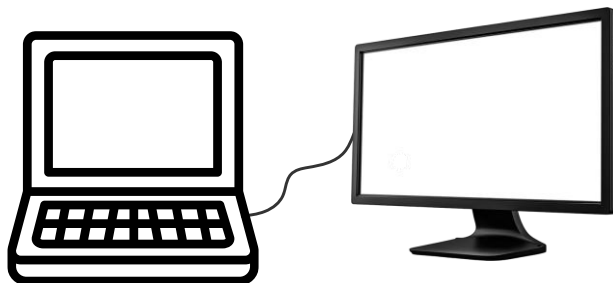
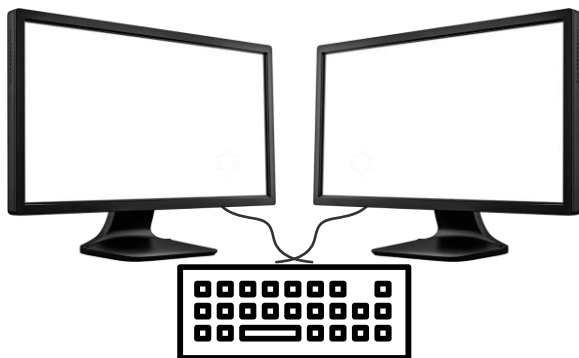


1.4 Log in in one of two ways:

- Open **WhatsApp Business** on your phone. Go to "Settings" (iPhone)/Three dots top right (Android), then "Linked devices", then "Link a device". Hold your phone camera up to read the QR code and say "OK". Keep WhatsApp Business open on your phone until Desktop is loaded.
- Click on "Log in with phone number" and follow the instructions.

Step 1: Setting up your desktop

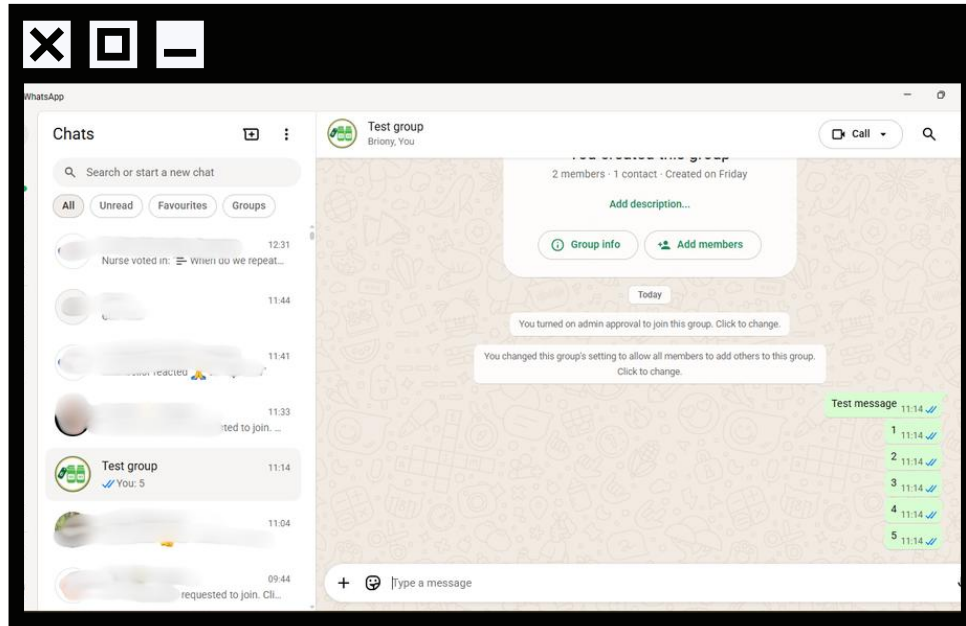
Facilitator set-up



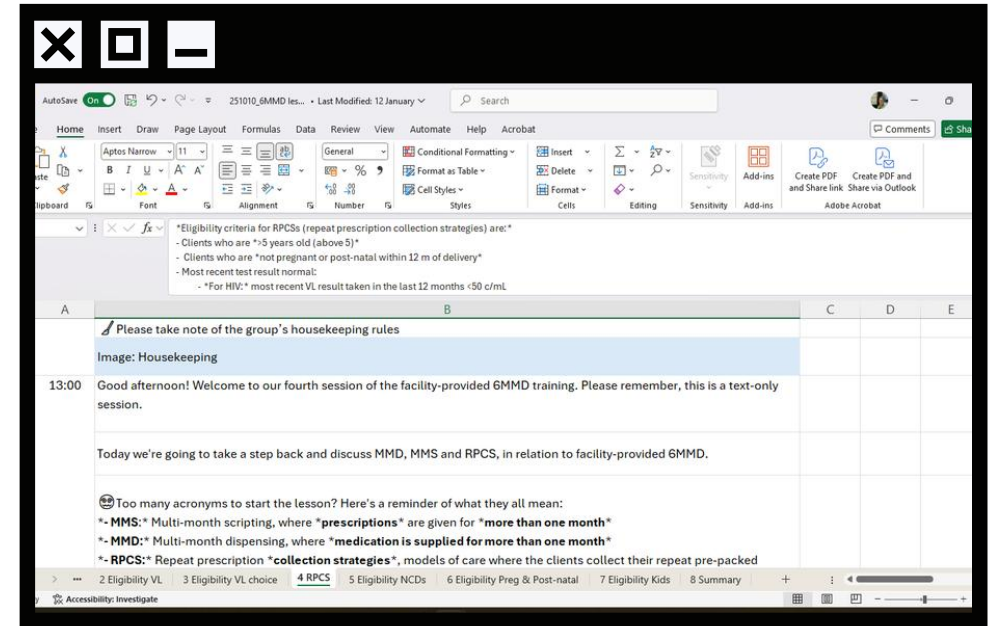
- The training will need to be facilitated from a desktop computer or laptop, ideally two screens, one for the training guide and one for WhatsApp.
- If two screens are not available, the two files can be minimized to show side by side (see next slides).

Step 1: Setting up your desktop

Facilitator set-up with two screens



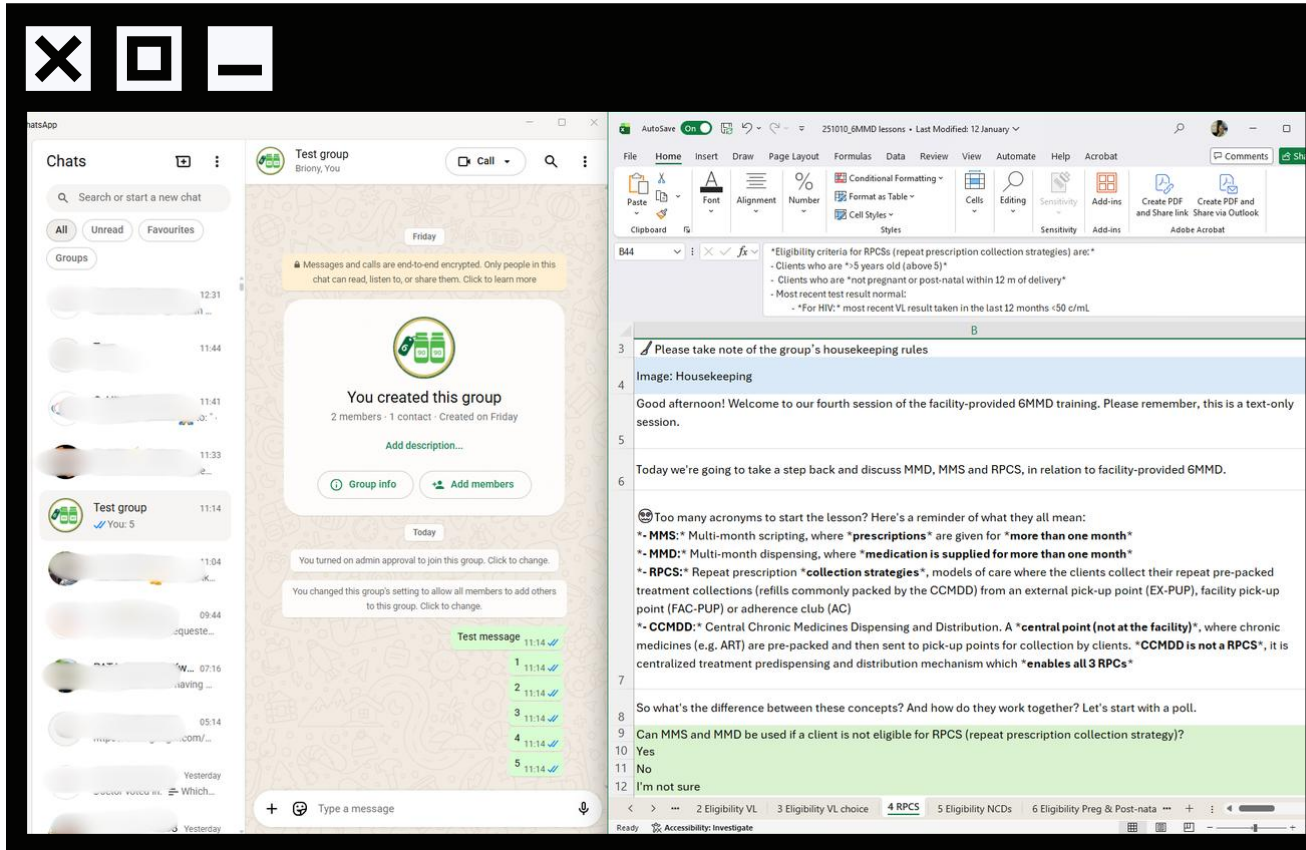
Screen 1: WhatsApp desktop opened to the training group



Screen 2: Open on the Excel spreadsheet with the day's lesson

Step 1: Setting up your desktop

Facilitator set-up with one screen



Minimise both pages and drag them to be split across one screen

Step 2: Before each session - Practice delivery



Facilitator/s should read through the text of the session, and know the order of the posts and when to get ready for polls, images and voice notes.

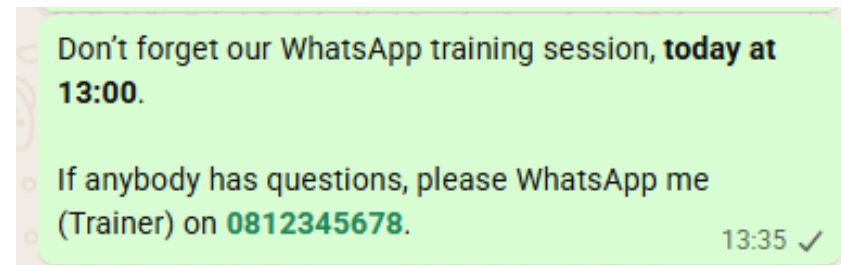
Practice delivery of the full session with co-facilitator/admin support in a separate WhatsApp group:

- Check timing. Ensure mastery of polls and inserting images and audio files.
- Practice the co-facilitator taking over if something goes wrong.

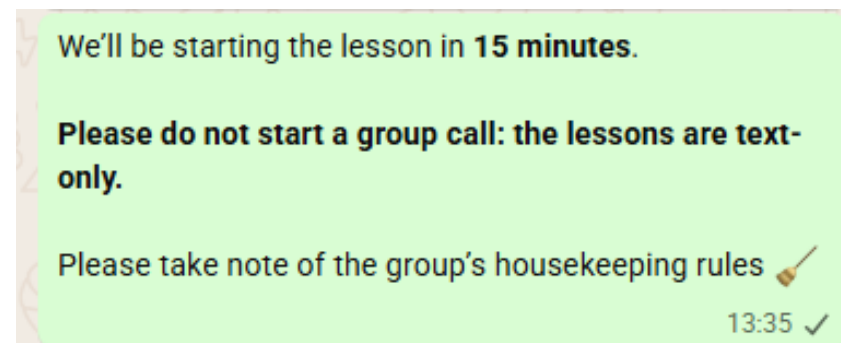
Step 2: Before each session



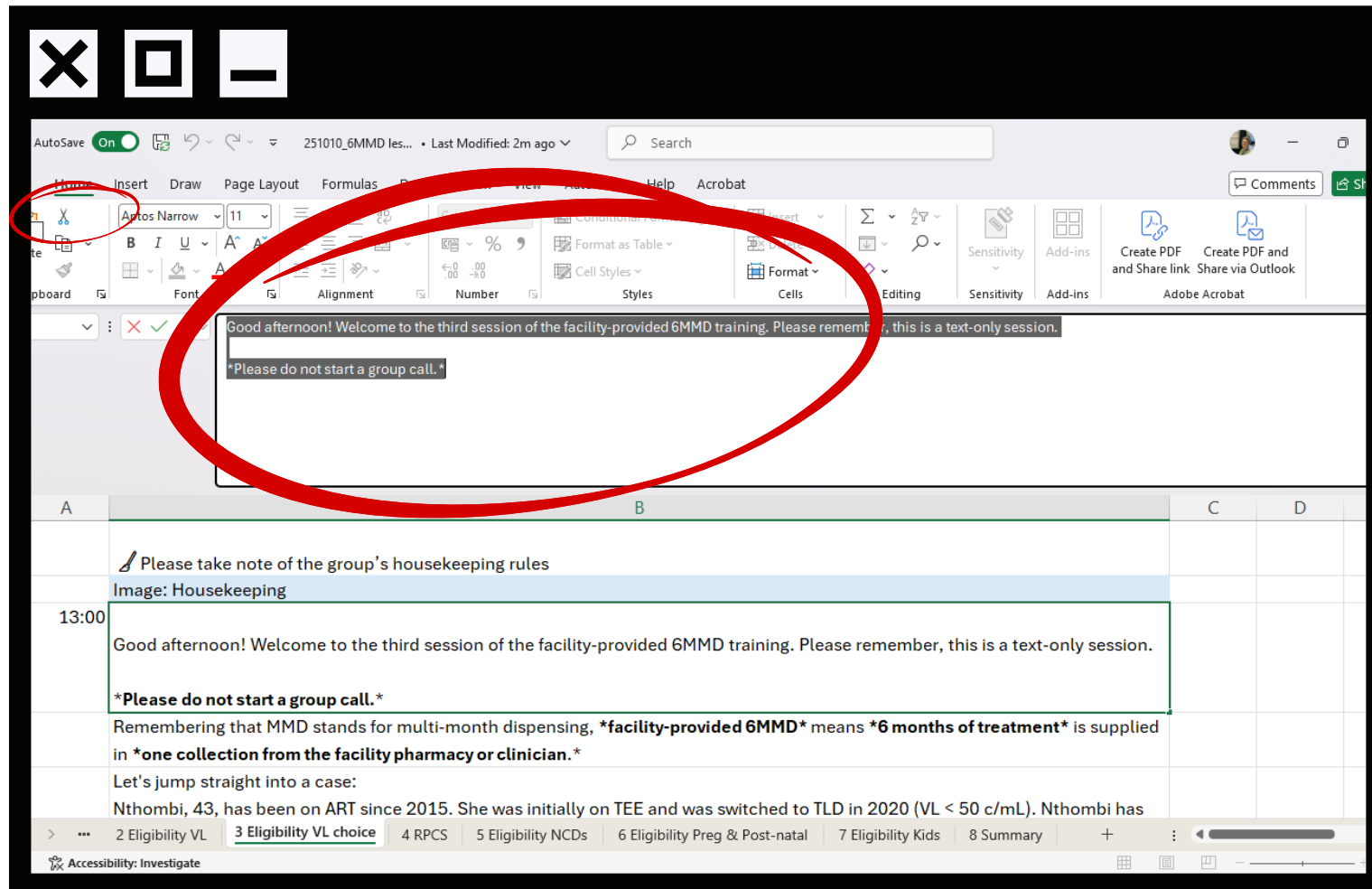
First thing on the morning of the sessions, send a reminder.



Fifteen minutes before the session, send a second reminder with the housekeeping rules attached (Part 4).

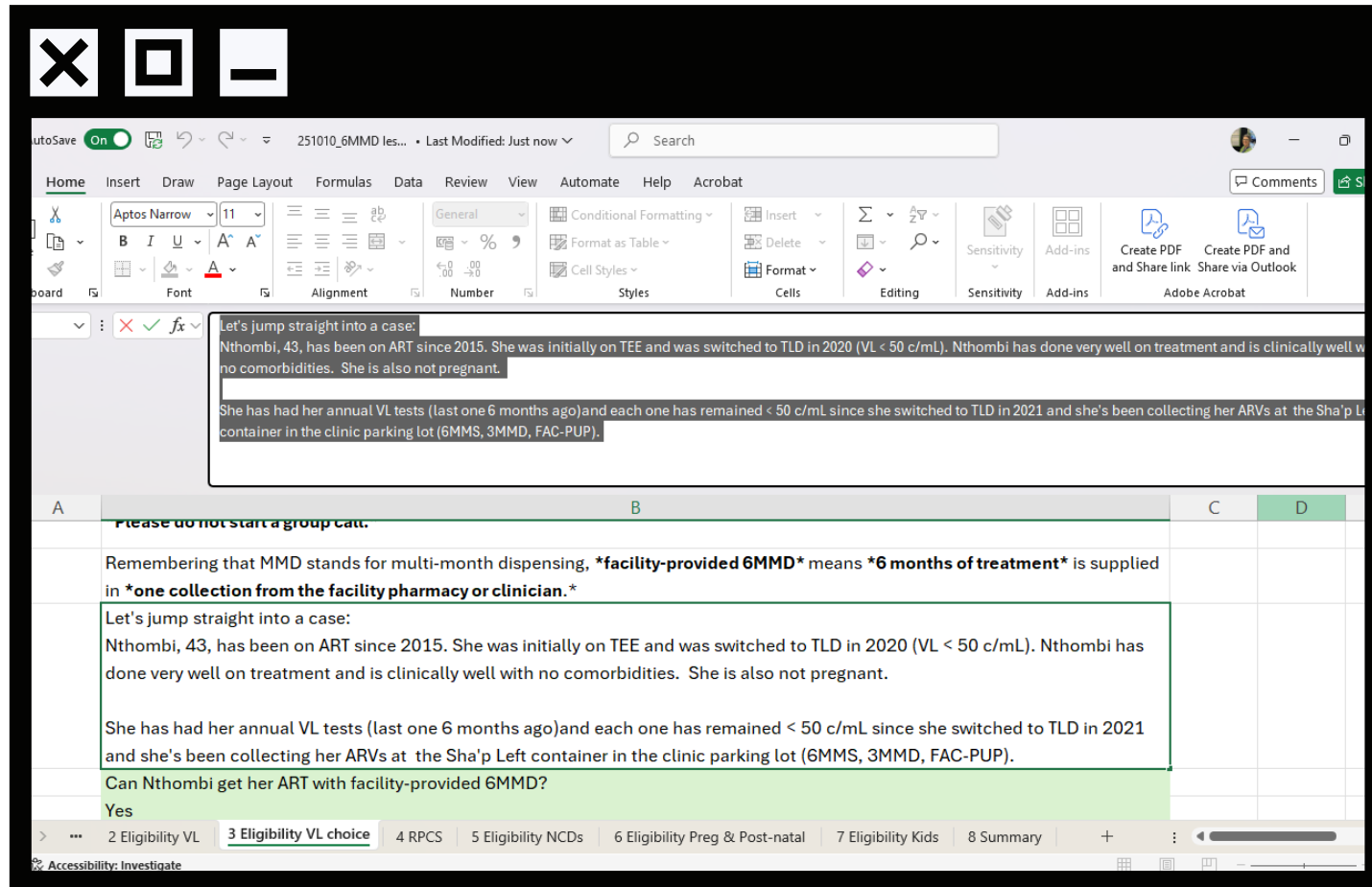


IAS Step 3: Delivering the sessions – Open



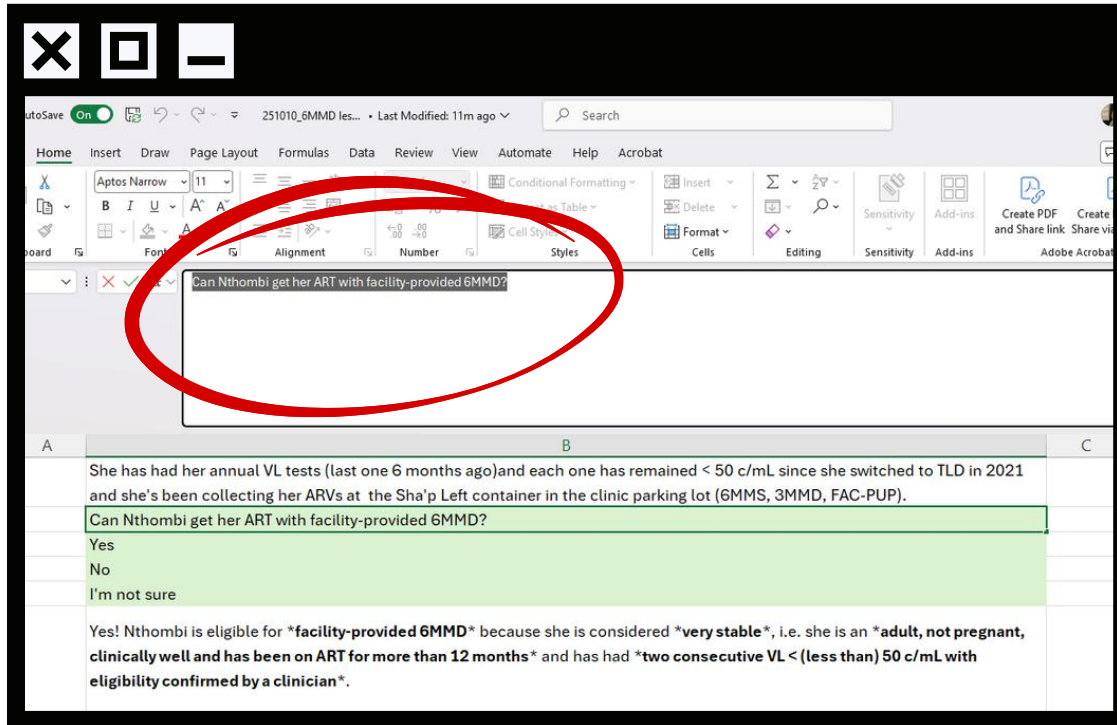
When the lesson starts: On the Excel spreadsheet, select the cell with the welcome note. Copy the text from the formula bar and paste it into the WhatsApp group. Then click "Enter".

Step 3: Delivering the sessions – Content

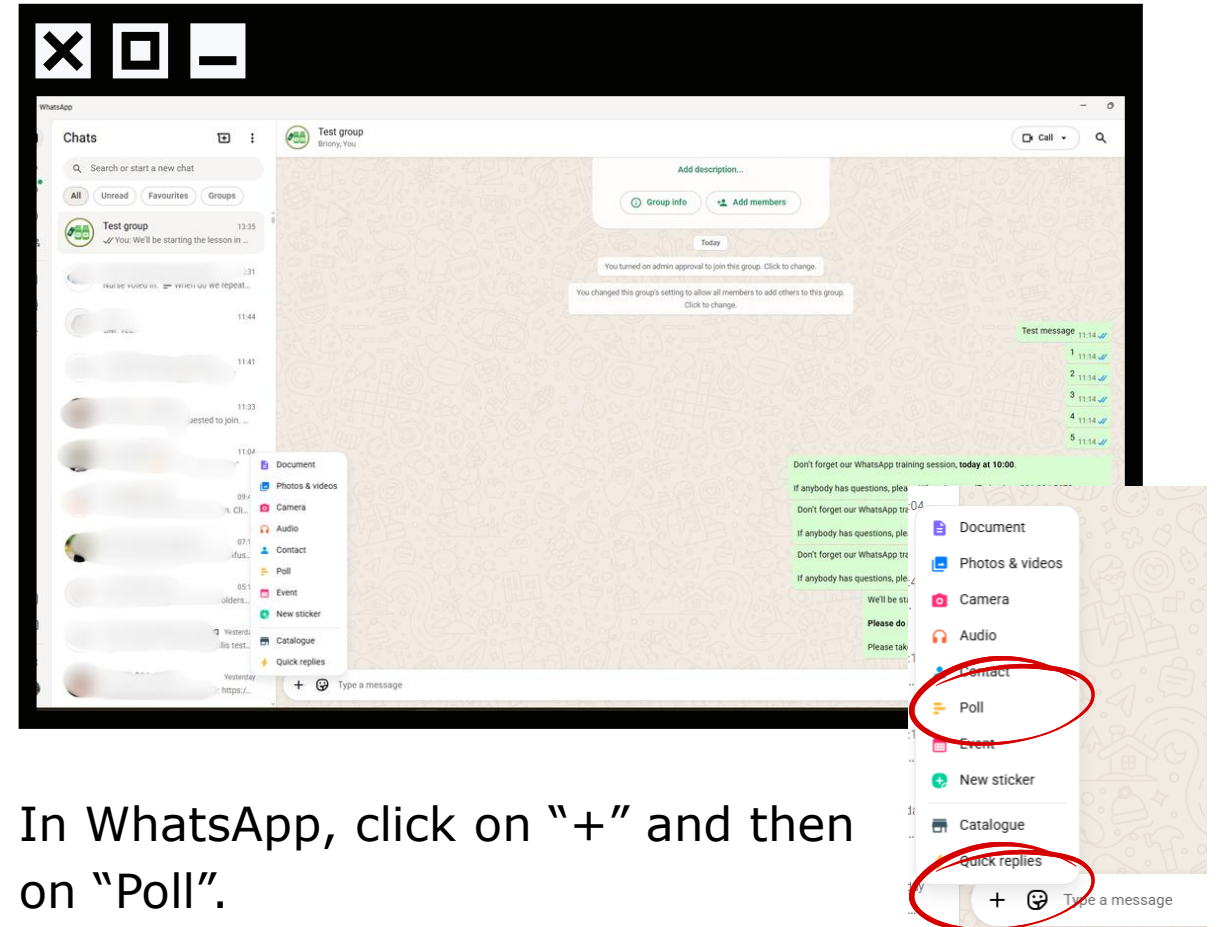


Each cell is a new message.
Work your way down – slowly.
Remember, participants are reading much more slowly than you can paste into WhatsApp.

RIAS Step 3: Delivering the sessions – Polls

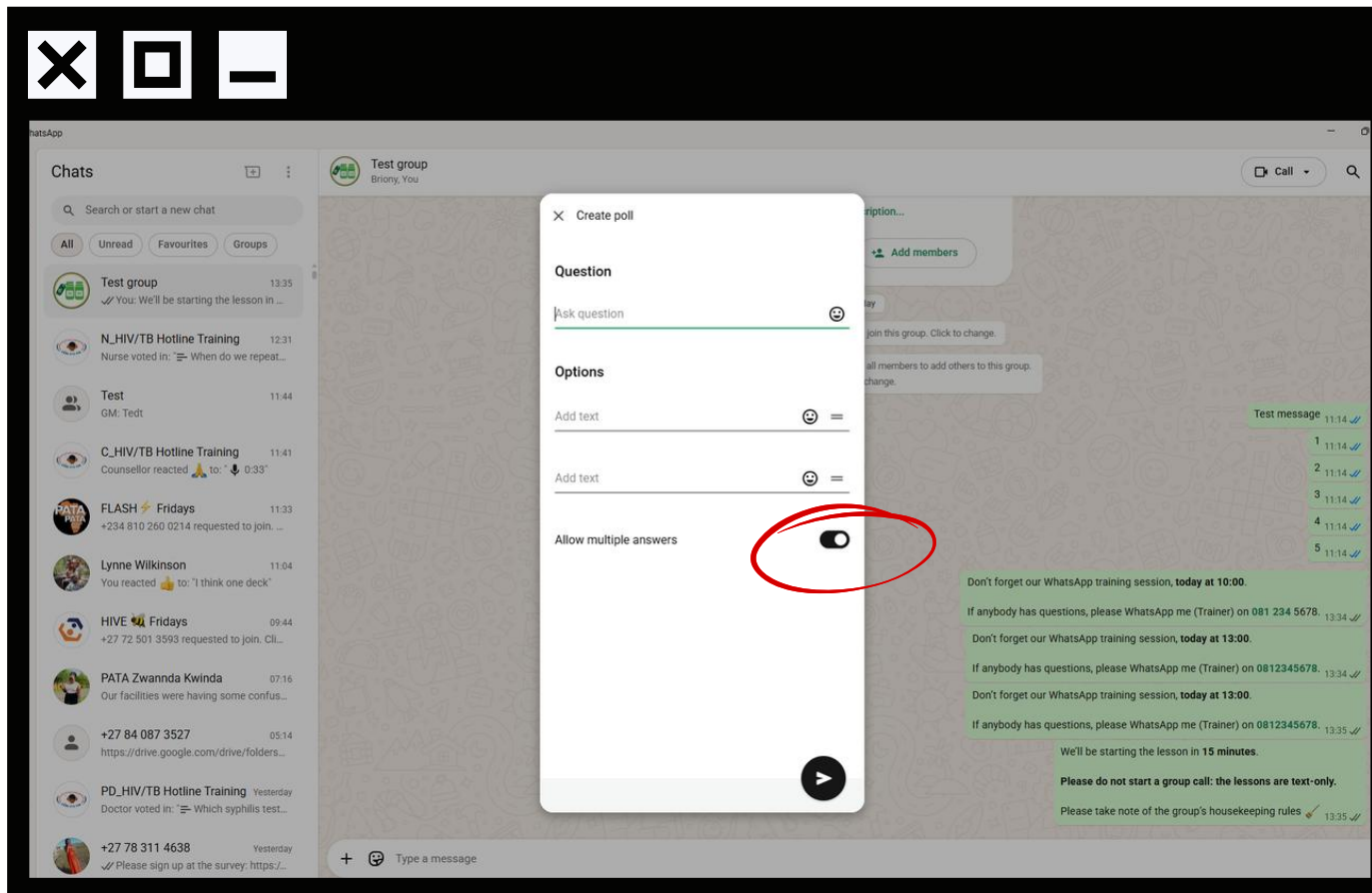


Green cells are polls. Again, copy from the formula box and paste.



In WhatsApp, click on “+” and then on “Poll”.

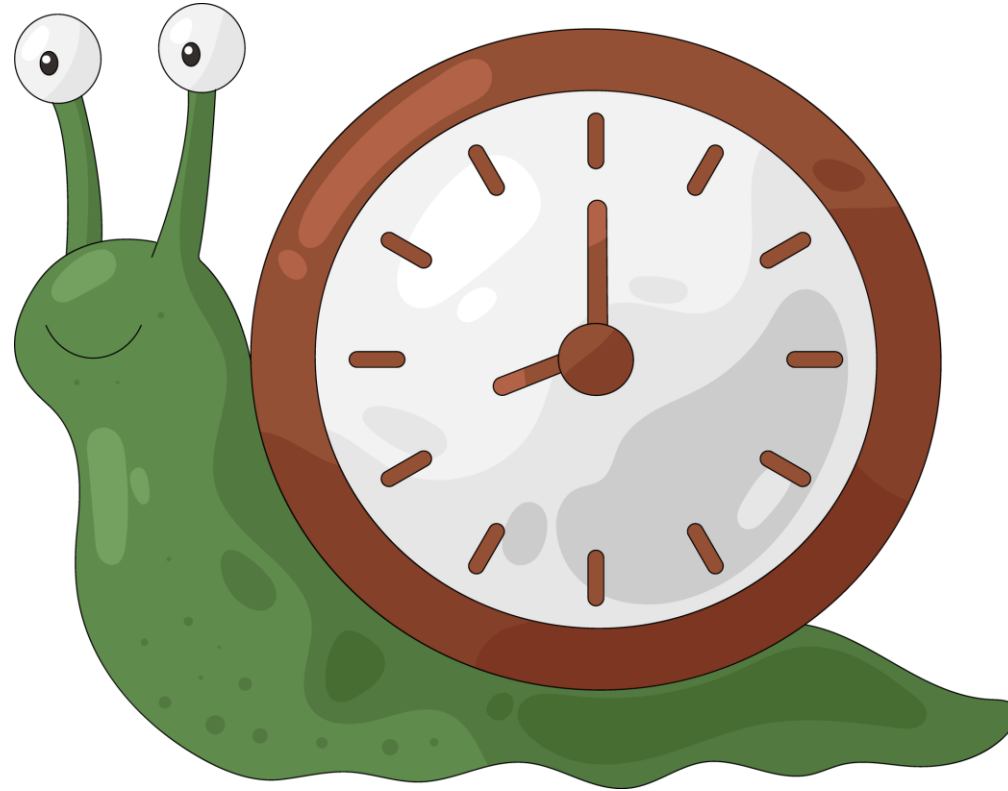
IAS Step 3: Delivering the sessions – Polls



Copy/paste the question and answers into the poll.

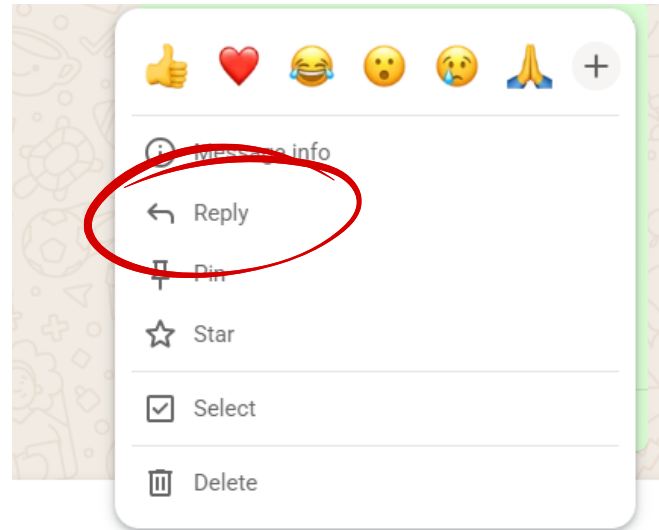
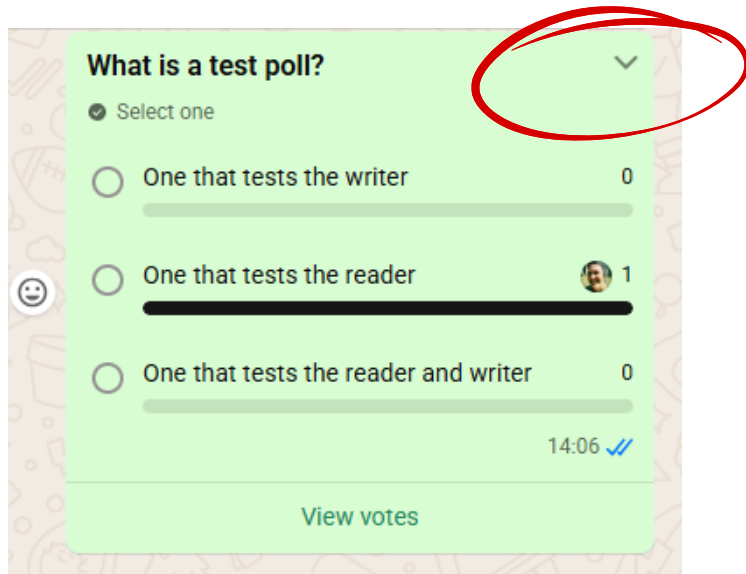
If the question includes “Pick all that apply”, leave “Allow multiple answers” on. If not, switch it off.

Step 3: Delivering the sessions



Just a reminder to slow down. If you can see people are still voting on polls, wait before sending the next message (answer).

RIAS Step 3: Delivering the sessions – Polls



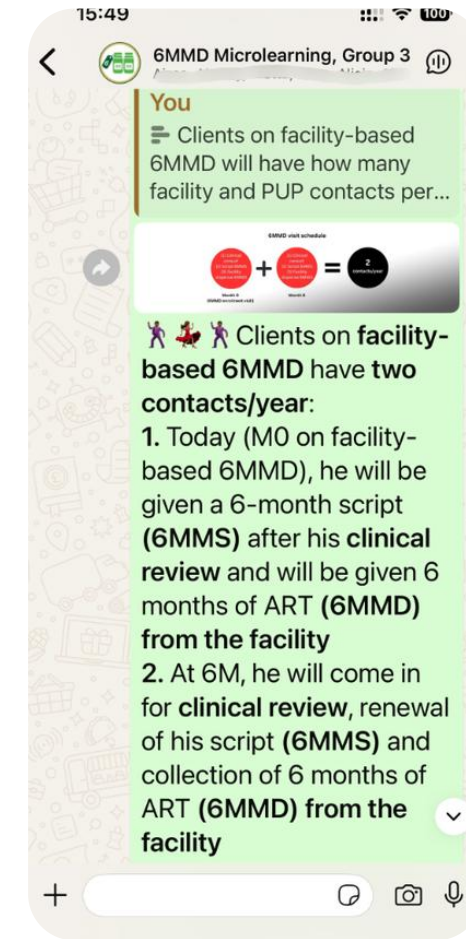
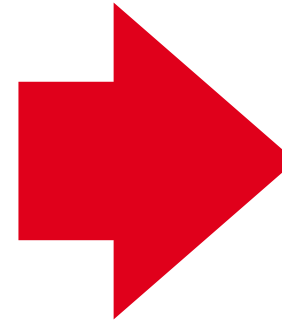
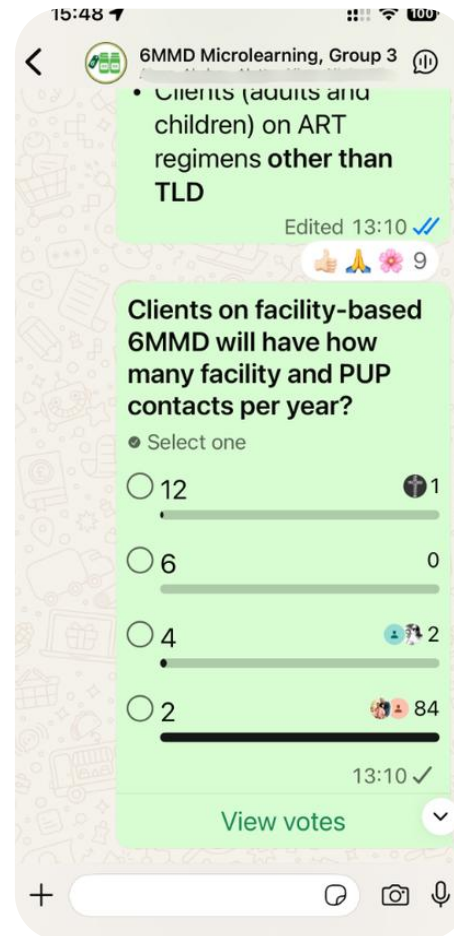
Once voting has slowed, click on the down arrow of the poll (top right), click on "Reply", and copy/paste the answer into the text box.



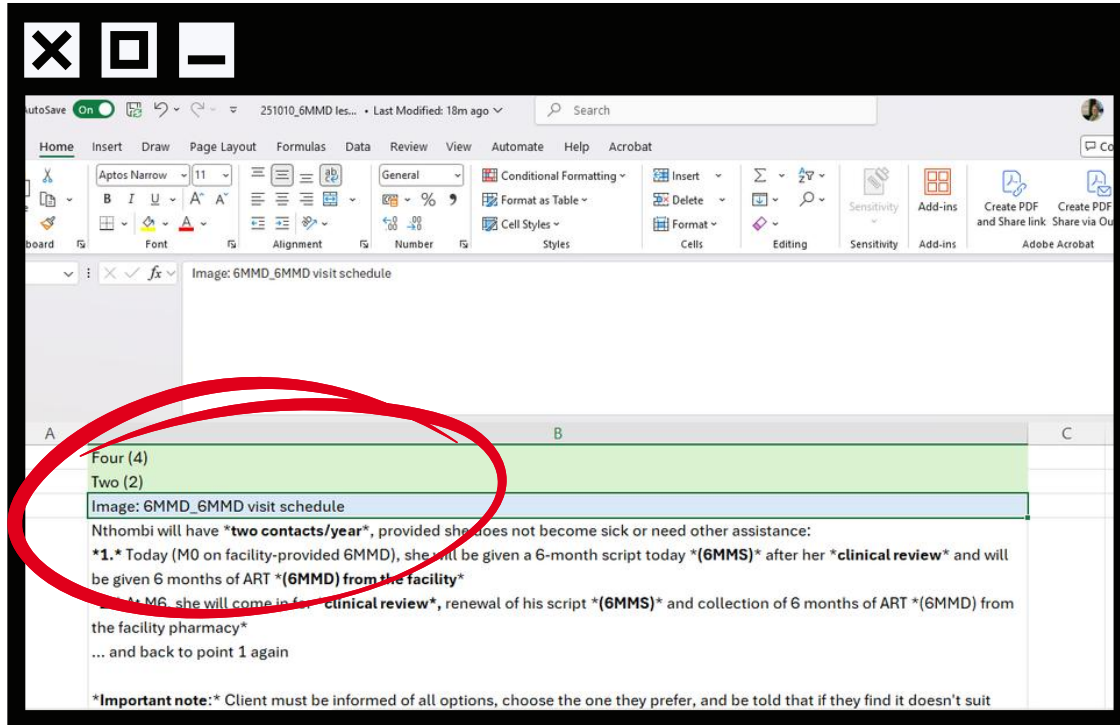
IAS Step 3: Delivering the sessions – Polls



Participants can vote at any time, even when settings are put on admin-only commenting.



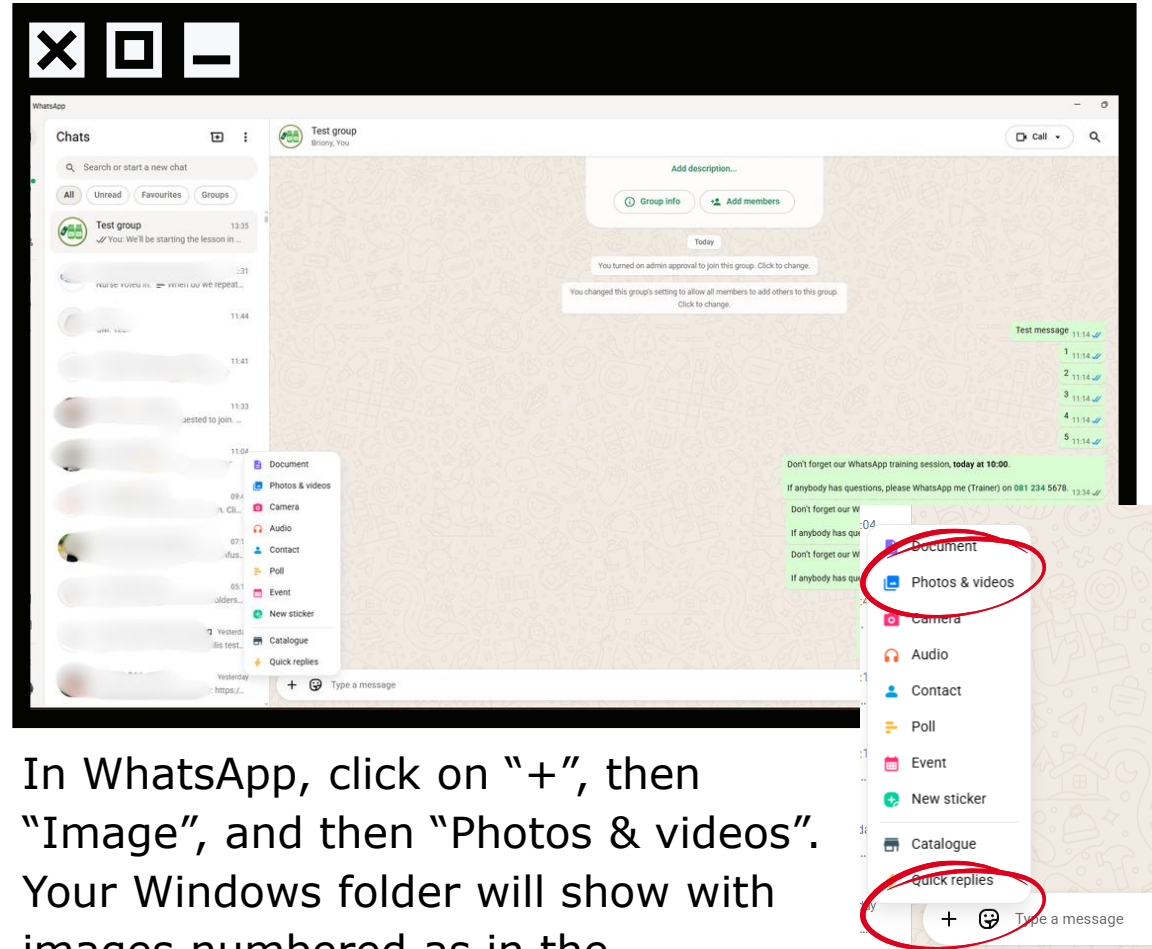
RIAS Step 3: Delivering the sessions – Images



Blue blocks are where images should be sent.

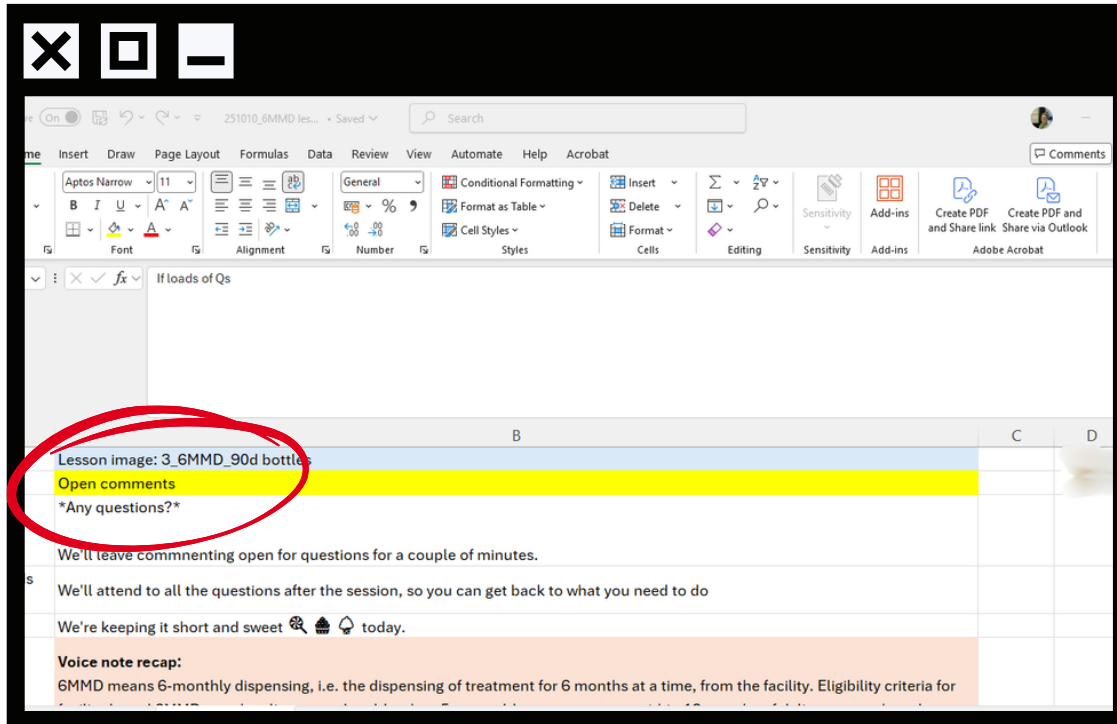


Make sure you know where the images are stored!

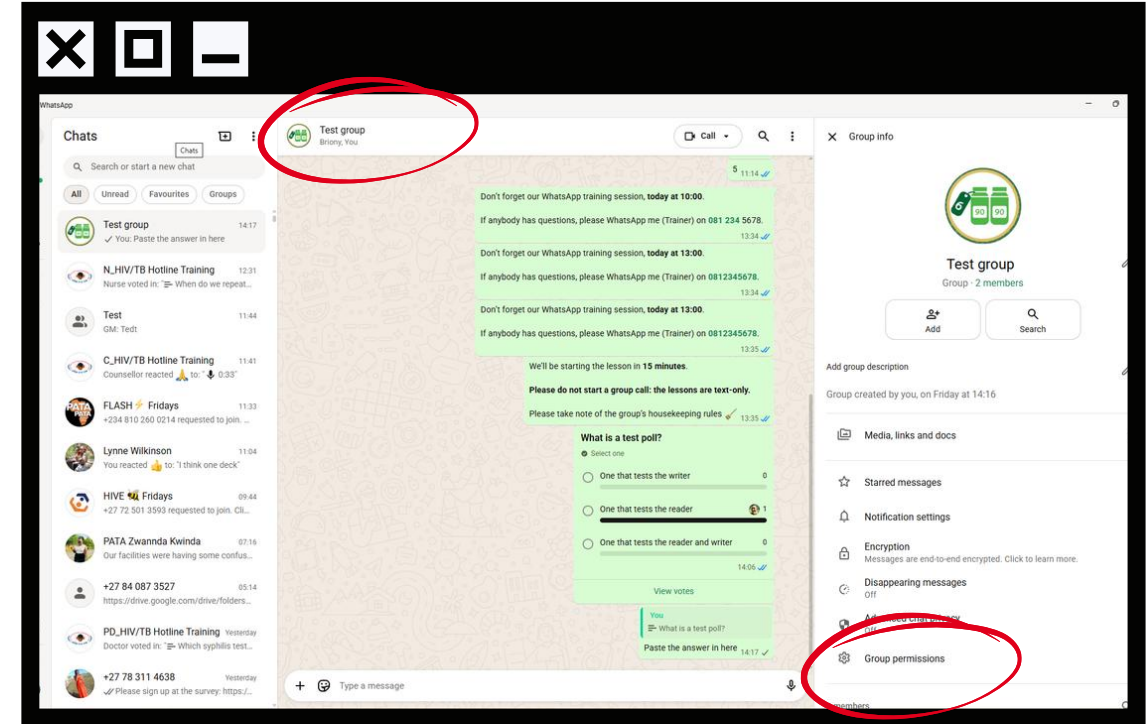


In WhatsApp, click on "+", then "Image", and then "Photos & videos". Your Windows folder will show with images numbered as in the spreadsheet. Add the image.

RIAS Step 3: Delivering the sessions – Q&A

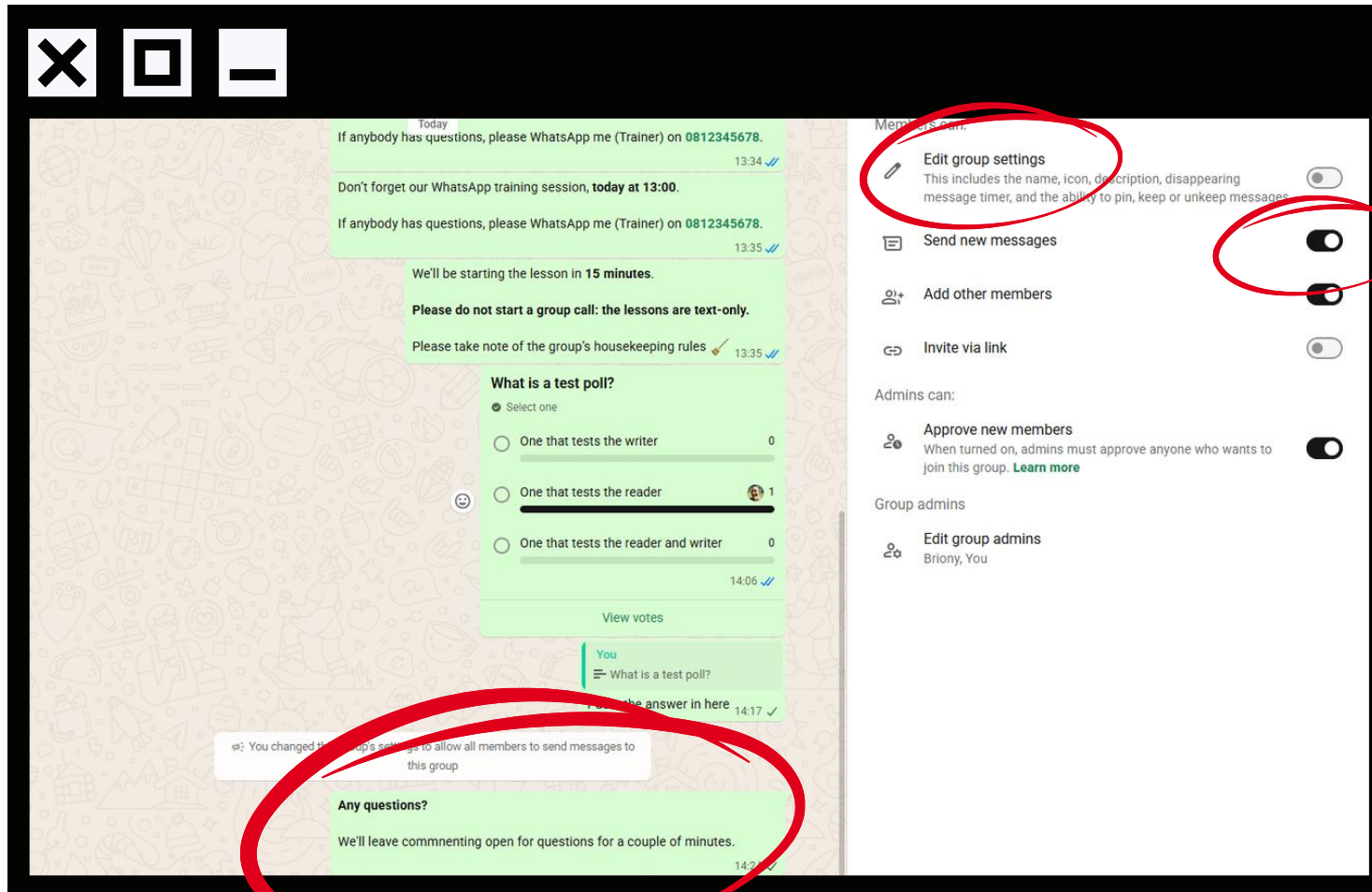


When you get toward the end of the session, a yellow cell will say "Open comments".



In WhatsApp, click on the group name at the top. Settings will open to the right. Click on "Group permissions".

Step 3: Delivering the sessions – Q&A



Turn "Send new messages" on. A notification will show in the group.

Send a message asking if there are any questions.

Allow time for people to respond (at least 2 minutes).

Turn off "Send new messages" and send a relevant message about answers.

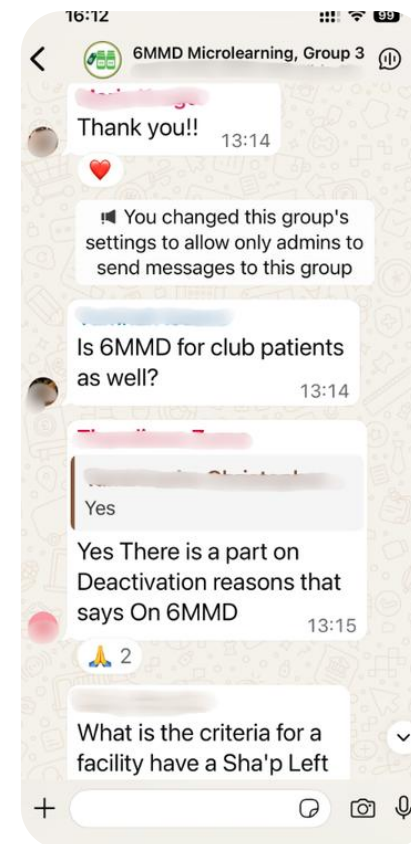
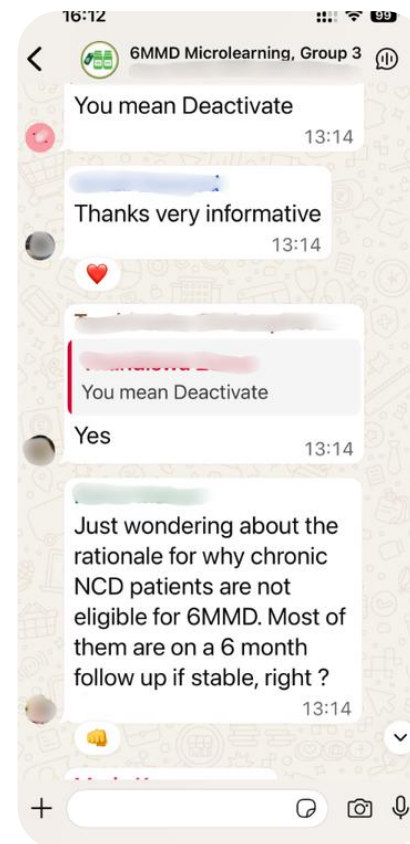
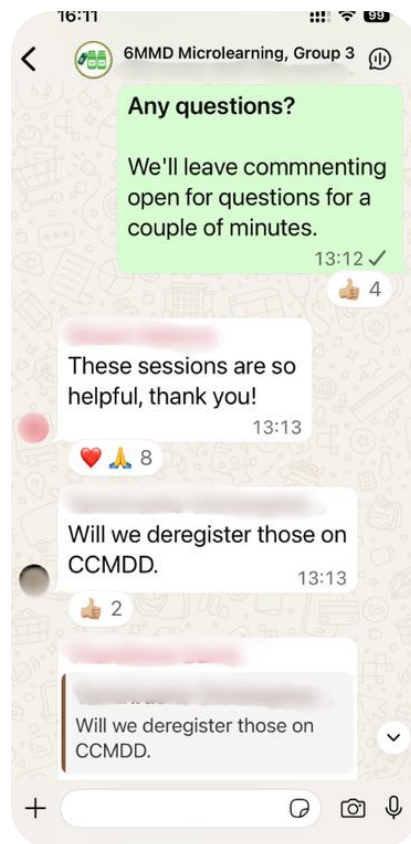
Both facilitators then send a relevant message about answers.

IAS Step 3: Delivering the sessions – Q&A



Remember:

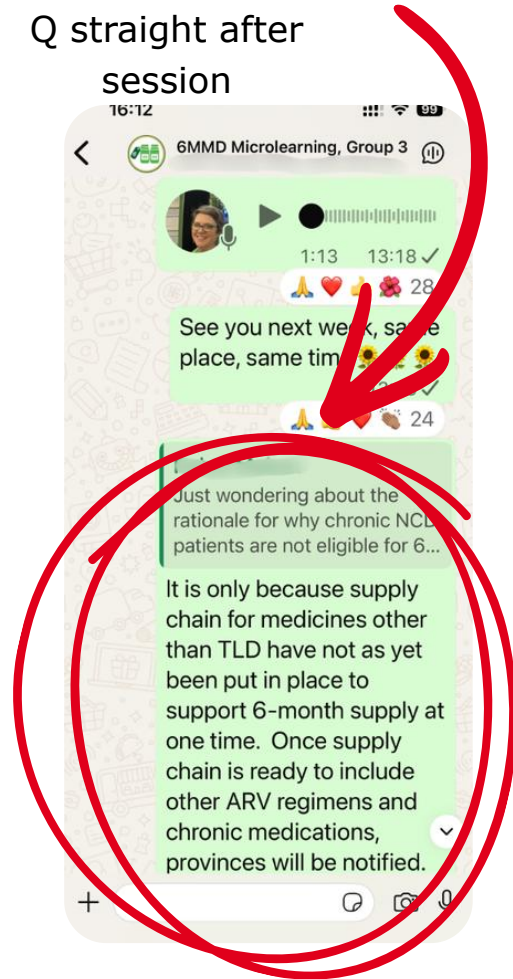
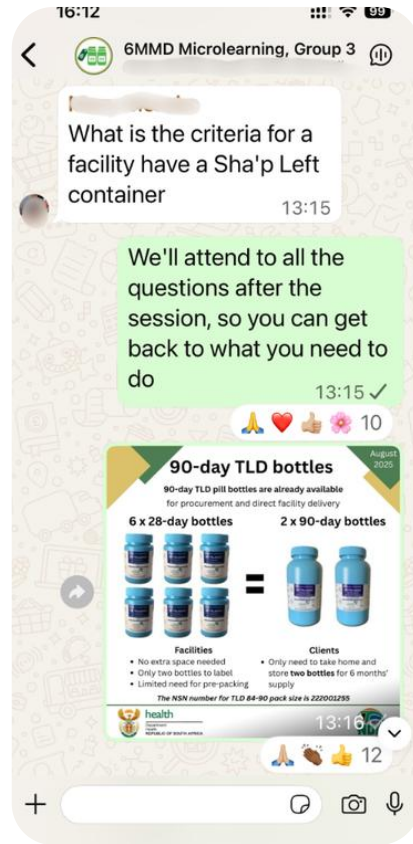
Questions do not need to be answered immediately.
If you are unsure, seek advice and answer later.



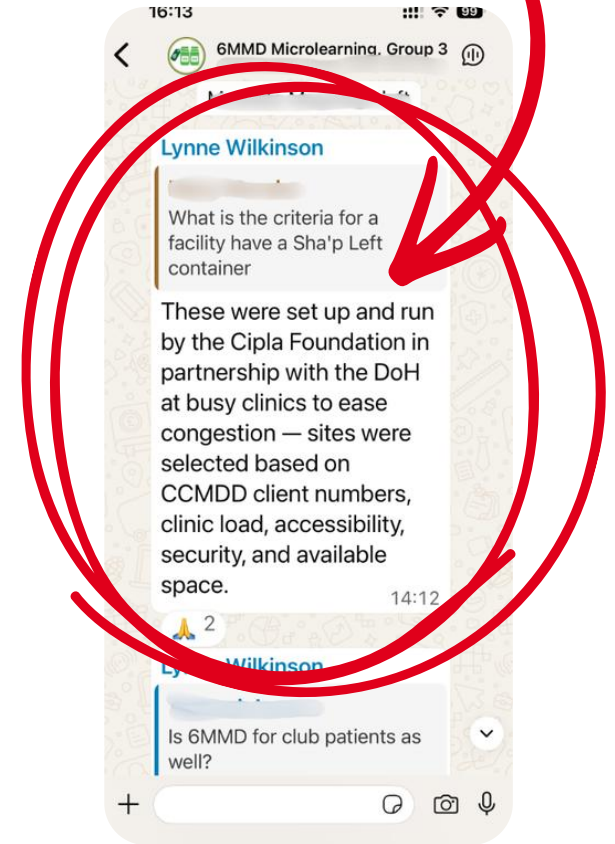
IAS Step 3: Delivering the sessions – Q&A



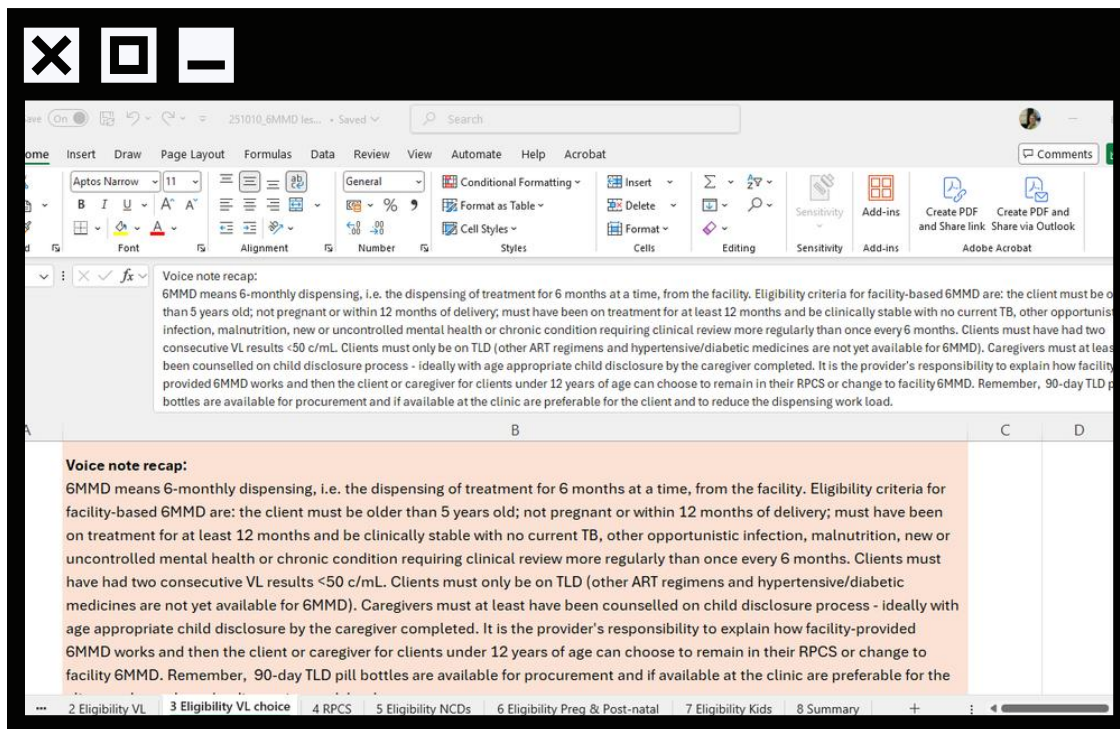
Facilitator 1 answering Q straight after session



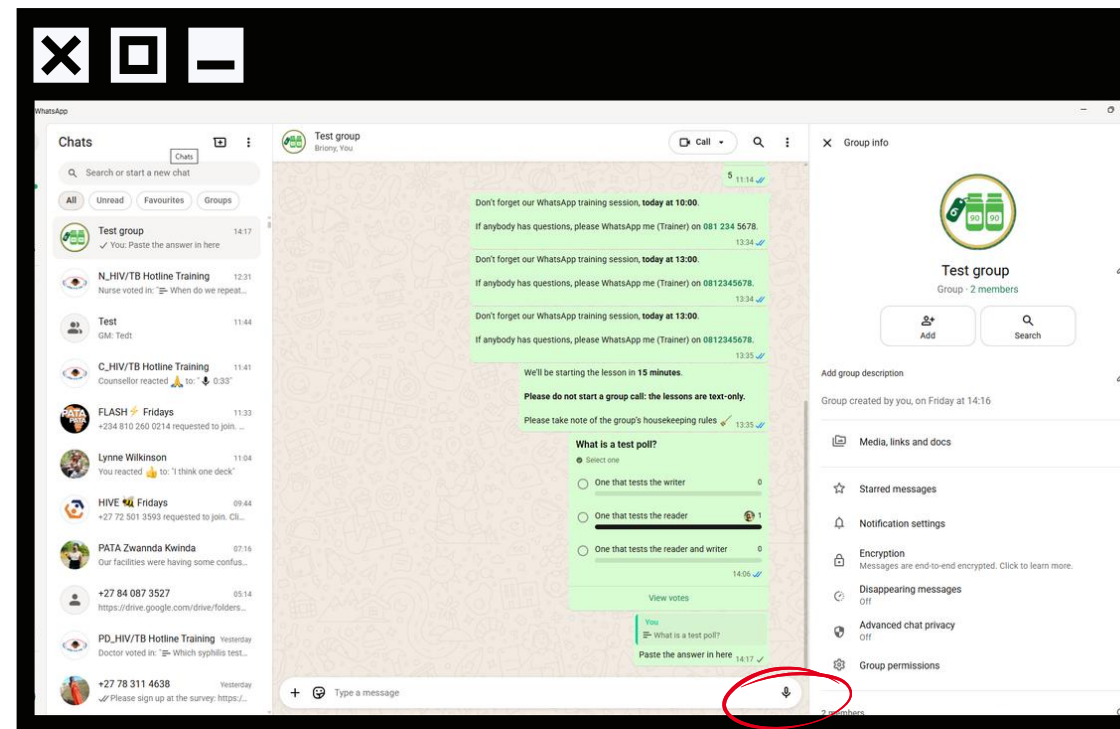
Facilitator 2 answering Q the next day, after discussion with experts



Step 3: Delivering the sessions – VNs



The pink cells are voice notes (VNs).

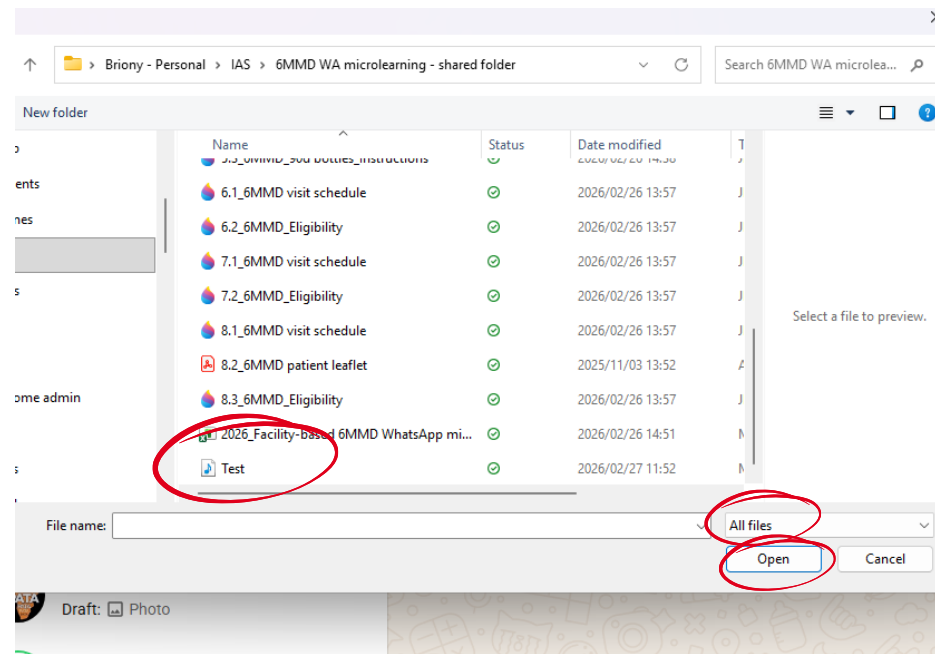
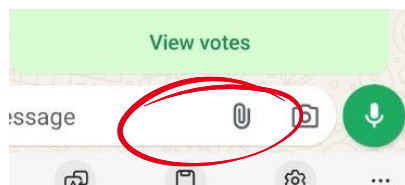
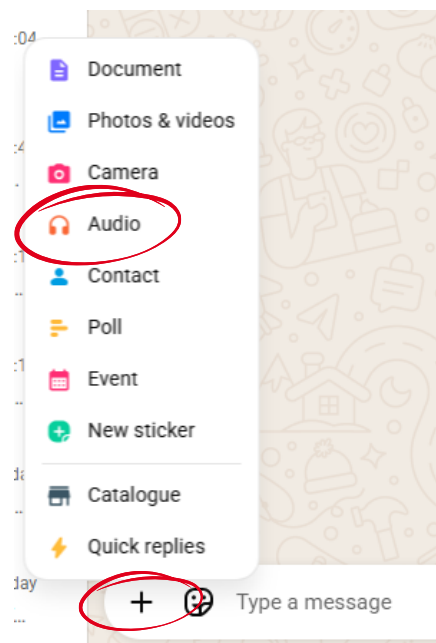


Click on the little microphone, record the message, and send. Remember to talk slowly and clearly. These can be pre-recorded and saved. If you wish to use the pre-recorded VN, see next slide.



Step 3: Delivering the sessions – VNs

If you prefer to use the pre-recorded voice notes



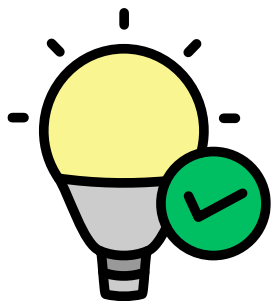
In WhatsApp, click on “+” (iPhone) or “Paperclip” (Android). Click on “Audio”.

Ensure that “All files” is chosen. Click on relevant voice note, e.g., “Session 1”. Click on “Open”.



Tips and tricks

- Set up your computer to make the process easy for you.
- Get used to copying/pasting across from Excel to WhatsApp before you start the training.
- Make sure you know what folder your images are in.
- Ask a colleague to practice with you so that you can work out timing, and make sure you don't go too fast.
- Use emojis! Encourage participants with clapping hands or party poppers when they get things right!



Practice before you start delivering sessions.

Contact details

If you have any questions or need support, please contact dsd@iasociety.org.