Scenarios and Solutions

The following are some real-life problems that clients had and how I was able to solve them. Most of the solutions highlight the creativity and the innovation I use in learning and development in general, and instructional design specifically.

Scenario #1: Meet Them Where They Are – In the Car!

Problem/Concern

Two companies were merging. As a result, they merged sales procedures and processes. Needless to say, this caused a lot of problems for the sales staff.

The sales teams were often on the road. Because they were not in the office, it would be challenging to reach them with traditional training. Job aids and other normally printed materials were also an issue.

Yet, the sales team needed both to know about the changes coming down the pipeline and how to put them into practice.

Solution

eLearnings were created in Rise 360. The benefit of Rise is that it works seamlessly with laptops and with phones. This way sales staff did not need to be in the office to complete their training. With Rise, there are a number of interactive features (tabs, flashcards, …) to keep them engaged and not just reading.

A Sales section of the website was also created where sales staff could download or print policy and procedures, as well as newly created forms. The sales section also contained job aids, quick reference guides and a frequently asked questions section. It also contained a forum where they can discuss the changes and ask questions.

A series of podcasts were created. Since sales staff spend a lot of time in their cars, they would be easy to listen to. Each podcast focused on a policy or procedure that had changed. Salespeople were also interviewed in each episode to talk about their experiences with the new processes and how they had successfully applied them.

Scenario #2: Information Security that Works

Problem/Concern

The current Information Security annual eLearning that all employees were required to take needed to be revamped. The company still had issues with tailgating and the clean desk policy not being observed. These were concepts that were addressed in the eLearning.

Solution

The existing eLearning was text-heavy and relied on employees reading long policy documents. Since I had relationships with several Subject Matter Experts for another project, I asked them quickly what they thought of the Info Security eLearning. They told me it was boring, and no one read it. The answers to the quiz questions were fairly easy so they could take it and pass without reading the lengthy, dry documents.

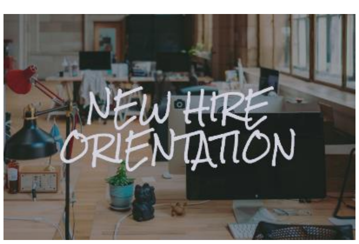
Taking this information to heart, I reviewed the original IS documents and pulled out what employees needed to know. Using images, flashcards, and word scrambles, I created a series of scenarios based on a day in the life where the employee would encounter typical informational security issues. For example, you are walking into your building and a delivery person wants to walk in right behind you, they do not have a badge. What do you do?

The scenarios are typical situations they encounter on a regular basis. The information is placed in a manner that adult learners will understand and appreciate. The same SMEs that complained to me about the original eLearning, came back to me complimenting the new eLearning. Specifically, they appreciated the scenarios and the interactivity.

I also suggested a monthly contest where people who complied with the clean desk policy would be entered into a contest to win gift cards they could use for lunch from local restaurants.

Scenario #3: Off to a Good Start

Problem/Concern



Each year there were several weeklong new hire training classes. These were not universally well-received. Many managers felt the orientation was too long. Several departments, HR, and IT specifically, were often bogged down and precious time was wasted during orientation while they completed their tasks. Because of downtimes and the often one-sided nature of training, many new hires were also critical of the process.

Solution

I met with the managers to review what was being covered in class. This way they knew what was going on throughout the week. While we had the CEO already giving a welcome message, I asked If the managers who usually had employees in the class if they wanted to give a message.

Next, I met with IT and HR. As a result of our meeting, I was able to develop a simple form for participants to complete for IT at the beginning of orientation. This form would give them the information they needed to complete their profiles. They still needed to meet with the group members one-on-one, but those meetings would be a lot shorter. I also gave HR a 90-minute session on the morning of the first day so that participants could complete all HR paperwork as a group.

On the morning of the second day, the managers would introduce themselves and their department. While this was going on IT would meet individually with each new hire, complete their IT paperwork and issue them their laptop. By the end of the morning, all IT work will have been completed.

Finally, I implemented more activities and games to keep interest high and to encourage more of a dialog between new employees and between new employees and the trainer.

Scenario #4: What is an eLearning Anyway?

Problem/Concern

When I started little eLearning had been done, although there was interested in doing more. The software used was a little-known application that only one person (who recently left) knew. The concept of an eLearning was new to management and recording a day of in-person learning and showing it to people was passed as an eLearning. No one on the training team was versed in eLearning either.

Solution

First, I championed and got eLearning software (at the time Captivate was the industry standard). I worked with our manager to see if any trainer was available and interested in being cross trained on instructional design and using Captivate.

Next, I gave the trainers a quick training on what makes a good eLearning, and equally important, what does not make a good eLearning.

Scenario #5: Friend NOT Foe

Problem/Concern

The training department had an adversarial relationship with several departments in the company who felt that training was not needed and was, frankly, a waste of time. SMEs were non-cooperative and were often backed by their managers.

Solution

We started with a lunch meeting where I started by playing some games that showed adult learning basics and why we (training department) were able to incorporate these principles into training. Then (with the help of several more receptive departments), we were able to show how training (job aids, quick reference guides as well as eLearnings) could reduce errors and the time it takes to complete more intricate tasks.

We asked for the help of a subject matter expert and promised not to monopolize their time.

I worked with the training staff to create targeted emails to send to SMEs and to make effective 30-minute meetings to get answers to questions and address specific concerns.

As a result, we were able to have a follow-up meeting several months later and show several job aids that we had created that were being used effectively by their staff. They were asked to bring metrics to the meeting that showed fewer errors and quicker turnaround times.

They were able to see that training was an ally and not an adversary.