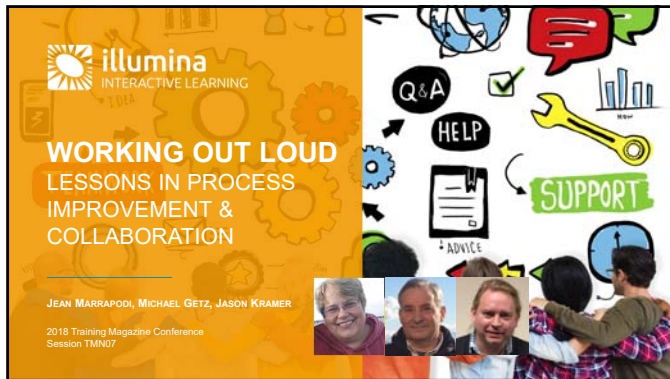


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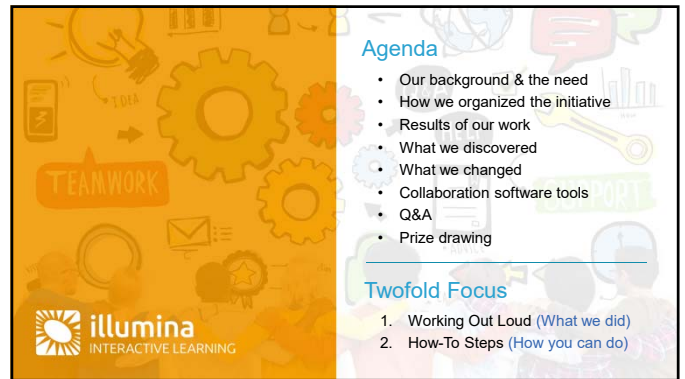
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INTERACTIVE LEARNING

WORKING OUT LOUD

LESSONS IN PROCESS IMPROVEMENT & COLLABORATION

JEAN MARRAPODI, MICHAEL GETZ, JASON KRAMER

2018 Training Magazine Conference
Session TMN07



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Agenda

- Our background & the need
- How we organized the initiative
- Results of our work
- What we discovered
- What we changed
- Collaboration software tools
- Q&A
- Prize drawing

Twofold Focus

1. Working Out Loud (What we did)
2. How-To Steps (How you can do)



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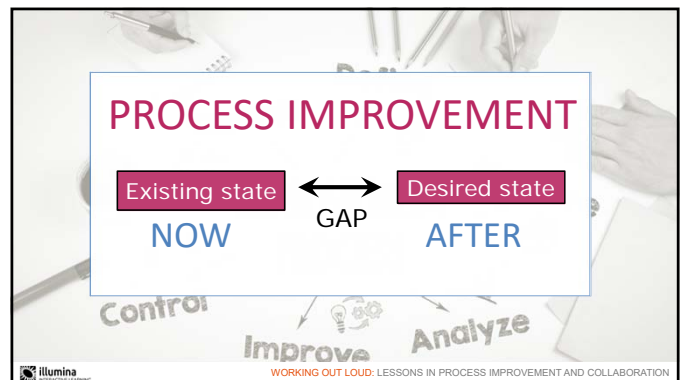
The Need

About illumina:

- Small custom e-learning development studio
- Clients in a wide range of industries
- Wide range of custom development services

Strengths and challenges:

- Team busy creating outstanding e-learning
- Flexible approach – adapt to client needs
- Processes not all well documented
- Desire for better insight into working more collaboratively and efficiently
- Living our mantra: *Good eLearning. Done Well.*

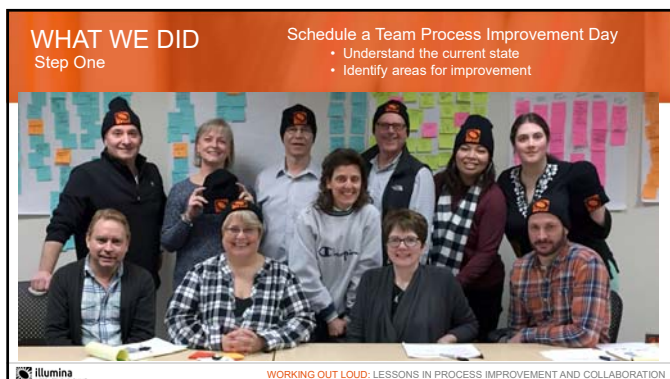


PROCESS IMPROVEMENT

Existing state **NOW** ↔ GAP ↔ Desired state **AFTER**

Control, Improve, Analyze

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WHAT WE DID
Step One

Schedule a Team Process Improvement Day

- Understand the current state
- Identify areas for improvement

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PROCESS IMPROVEMENT DAY

As a team, we:

- Completed a SWOT analysis to get the big picture
- Watched videos about process mapping
- Split into sub-teams to map our parts of the whole process
- Identified red flags
- Shared and discussed our process maps

Define, Control, Measure, Analyze, Improvement Process

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SWOT ANALYSIS

- Business tool
- Examines
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
- Looks at
 - Positive and Negative
 - Internal and External

INTERNAL
strengths weaknesses

EXTERNAL
opportunities threats

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HOW TO

1. Assign one color post-it to each item
2. As individuals, do a 5 minute brain dump for each area
3. Post individual post-its on the appropriate chart
4. Split into 4 groups & categorize post-its

Strengths **Weaknesses**

Opportunities **Threats**

Supplies:
Flip chart paper
Markers
5 colors of post-its (one must be red)

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WHAT I REALIZED

A full team SWOT analysis can be enlightening:

- Offers many diverse perspectives – many new ideas
- Recognition the team sees so many strengths
- Affirms what we already sense
- Reveals what we aren't aware of

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PROCESS MAPPING IS CHAOS DEFINED

Order processing

```
graph TD
    Start([Start]) --> CheckOrder[Check order]
    CheckOrder --> CancelOrder[Cancel order]
    CheckOrder --> CheckAvailability[Check availability]
    CheckAvailability --> NoInStock{No in stock}
    NoInStock --> CancelOrder
    NoInStock --> CheckCredit[Check credit card]
    CheckCredit --> NoGoodCredit{No good credit}
    NoGoodCredit --> CancelOrder
    NoGoodCredit --> ProcessOrder[Process order]
    ProcessOrder --> Deliver[Deliver]
    Deliver --> Finish([Finish])
```

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WHAT WE DID

LEARN PROCESS MAPPING

Learn from an expert
The Process Consultant, Ian James
theprocessconsultant.com/videos

- What is a business process?
- Process Improvement: People
- Pitfalls and How to Handle Them
- Cycle Time
- Process Improvement Handoffs
- Flexibility

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Video: "What is a Business Process"

View link posted to the chat area: <http://fast.wistia.net/embed/iframe/hlrix46z6t>

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HOW TO

Learn process mapping

- Watch videos
- Practice on a simple process: Making toast

Map the process


- Divide into workgroups
- Identify any red flags

Share with whole group

- Discuss, refine



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Sales

Instructional Design

Project Management

Production/QA

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EXAMINE AND DISCUSS

What we discovered

- Lots of complexity!
- Many steps we were unaware of
- Within a team, people often had different ideas of how things worked
- Overlaps in many steps - redundancy

- Similar red flags across groups
- We need more time to examine

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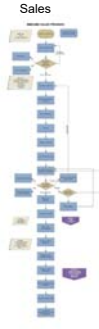



WHAT WE DID/ HOW TO

Use software to translate the post-it charts for each area

Possible tools

- SmartDraw
- Visio
- Lucid Charts


We discovered lots of overlap between roles

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HOW TO

Combine the role charts into a swimlane



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Our graphic designer finalized into PowerPoint for readability

We share this with customers during kickoff meetings

Process Improvement Swimlane

1 of 5

Sales	Customer	Project Management	Instructional Design	Graphic Design	Development	Quality Assurance
Project Review		Secure Resources				
Contract and SOW	Agree to SOW and Contract	Schedule Kickoff Meeting	Assignments Project	Assignments Project	Assignments Project	Assignments Project
		Internal Planning Meeting				
		Customer Kickoff				

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RECAP: WHAT WE DID PROCESS IMPROVEMENT DAY


- SWOT analysis of the big picture
- Watch videos about process mapping
- Teams mapped out each process
- Reviewed together
- Logged red flags



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WHAT WE LEARNED


- All-day retreat format was optimal
- One day was not enough time
- Reflecting as a group was very effective
- We could be doing many things better
- Needed to clarify our processes to our customers, partners and consultants



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WHAT WE DID AFTERWARDS

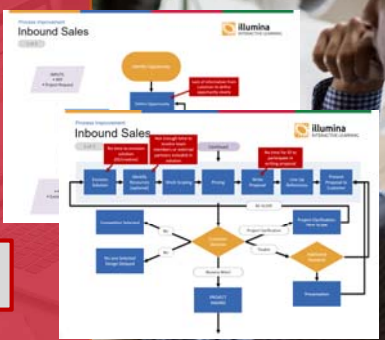
1. Transcribed info from SWOT analysis
2. Built out individual process diagrams
3. Aggregated red flags in each sub-process
4. Identified tools to help right away
5. Planned for Process Improvement Day 2



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REVIEWING OUR RED FLAGS

Inbound Sales Process




- Lack of information from customer to define opportunity clearly
- Not enough time to envision best solution (ID/creative)

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REVIEWING OUR RED FLAGS

Project Management

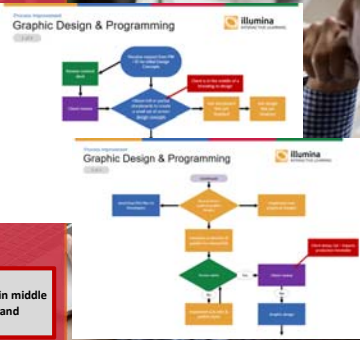


- Delays in client contracting; sometimes need to start project before contract
- Need to educate new clients/teams about process, expectations, etc. for their reviews
- Not enough time to prepare for kickoff meeting
- Details about publishing, platform, gating, etc. not defined
- Client source materials often not available before kickoff to help educate internal team
- Budgeting scope revisions can take time and can put a hold on development; often move through without pausing

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REVIEWING OUR RED FLAGS

Design & Programming



- Start production before final approved storyboard in order to stay on track with schedule
- Client delays QA – impacts production timetable
- Graphics issue: Client is in middle of a corporate rebrand

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REVIEWING OUR RED FLAGS

Instructional Design

- No time to do adequate needs analysis
- Client software system or data not available
- Client software system in flux throughout project life cycle
- Project manager review bottleneck
- Need to produce sample graphic designs in parallel with storyboards
- ID has to move onto another project after storyboards are complete

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CONSIDER: WHAT IMPACTS YOU?

Asked staff to weigh in on actionable topics to plan for Process Improvement Day 2

Project Management Demands	Managing Scope	Customer Delays	Decision Tracking	Specifications Tracking	Sign-Off	Technical Issues	Project Document
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓	✓	✓

We organized the red flags from each sub-process into topic areas to tackle as a group

- Establishing scope at the outset of projects
- Recognizing and dealing with scope changes
- Documenting key decisions on projects
- Handling significant customer delays
- Demands on project management

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TACKLE THE RED FLAGS ONE BY ONE

- Identify the problem
- Look for root causes
- Ask HMW questions (How Might We)
- Brainstorm multiple solutions

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THE FIXES

Managing Scope

- Improve ability to define project scope pre-sales and at kick-off
- Improve internal team's clarity on project scope (and boundaries)
- Educate client better on process, reviews and changes that can impact scope
- Recognize changes in scope earlier
- Improve ability to assess, track and communicate large and small scope changes to client and team

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THE FIXES

Decision & Specifications Tracking

- Immediate capturing & documenting important project decisions:
 - In document review (content outlines/copy decks, design docs, storyboards, etc.)
 - In status calls
 - From e-mails
 - From other sources (Teamwork, ReviewMyElearning, GoogleDocs, etc.)
- Easier access to specifications:
 - Details about publishing, platform and other technical specifics
 - Branding guidelines
 - Style guides, program glossaries and language guides

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THE FIXES

Handling Customer Delays

- Assess & deal with impacts of delays when they are inevitable:
 - Resource impacts
 - Schedule impacts
 - Financial impacts
- Help clients anticipate and prevent project delays

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LEVERAGE PROCESS IMPROVEMENT TOOLS

CORE TOOLS

- Teamwork
- Slack
- Proofme
- ReviewMyElearning
- Articulate 360 Review

ADDITIONAL TOOLS

- TechSmith Video Review
- Google Docs
- PipeDrive
- LinkedIn Learning/Lynda.com

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teamworkprojects

slack

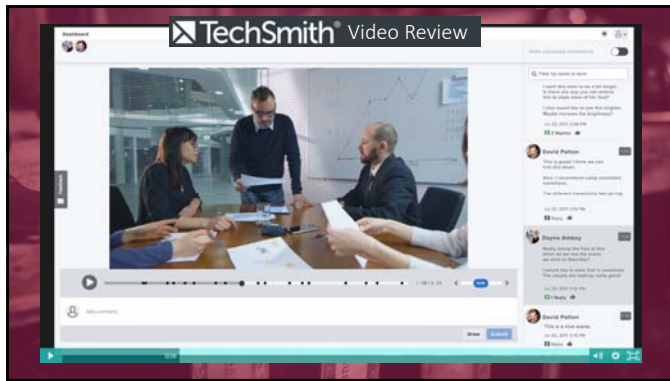
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Review My eLearning

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