

Best practice

Implementation guide

ClickLearn ApS
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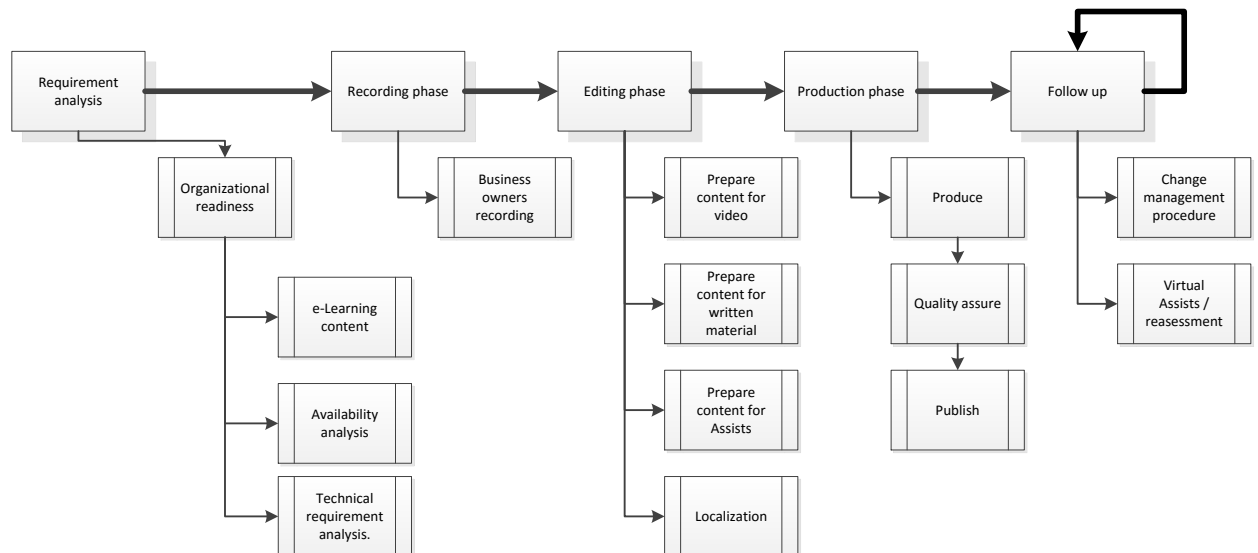
Implementing ClickLearn

This guide is intended for customers of ClickLearn, implementing ClickLearn for the first time within their organizations. We maintain this guide with each release of ClickLearn to ensure that it is optimized for the feature set of ClickLearn.

ClickLearn introduces an abundance of features for creating and maintaining training material, Electronic Performance Support (EPSS) and documentation for many business platforms. The best implementations of ClickLearn are characterized by:

- Organizational centralized author-competencies for the production and publishing of ClickLearn contents.
- Business Process Owners record and note the content.
- The organizational centralized users that truly know ClickLearn have a tight coupling with the Change Management function within the organization.

A documentation and learning project has little value if it is not maintained and resources should be put into change managing the ClickLearn documentation and EPSS.



Caption 1 The ClickLearn best practice implementation model.

Requirement analysis

The requirement analyzing shall efficiently cover:

- Who is responsible for ClickLearn?
- What is the content that we need within ClickLearn?
- What are the candidates for Electronic Performance Support?
- Where should our content be available?
- How do we communicate that the content is available?
- Are there any technical issues that need coverage?

Organizational readiness

We put great emphasis in preparing the organization for creating and maintaining the documentation. This is typically the distinction between a fantastic ClickLearn process and a mediocre implementation. Determining the stakeholders that handle the practical day-to-day-operation of ClickLearn, i.e. assisting and teaching users in recordings, performing post-recording editing operations, pick-up requests from the departments, is the single most important task in preparing for the ClickLearn implementation. Communicating the responsibilities to remainder of the organization (having an e-mail address on the content) is also essential.

ClickLearn or its partners can provide all the training necessary to take the day-to-day responsibilities of maintaining and supporting ClickLearn within your organization.

We normally recommend a 4 to 8 hour training session focusing exclusively on these day-to-day super users. This training is sufficient to accommodate a large number of recording users and sufficient for providing the right training to the recording users.

E-learning content

Preparing and structuring the content (typically headliners) and is a requirement analysis in its own right. We normally recommend that the organizational anchor-points for the ClickLearn product also collect the requirements for the content within the organization, efficiently asking each department, business process owner:

What are the key processes within the department?

Identifying the key processes within each department gives an outline of the recordings needed to be performed. For some companies with high volume replacements in staffing it is a very sound idea to keep in mind that we are not just training the existing employees. Typically asking the question: “What would a new employee require in terms of training?” is a great starting point.

What are the possible candidates for EPSS?

Everything recording is a possible candidate for the EPSS. However maintaining high-quality EPSS can be a time consuming task. There are number of factors that may influence on which processes, you choose for your EPSS repository.

High volume turn around in employees in a specific department or part of your organization may point to key-processes being part of the EPSS.

Infrequently performed operations (monthly, bi-weekly) are typically difficult to learn from a video, tutorial or simulation. These types of processes are always good candidates for the EPSS.

What are the roles within/across departments that we need to provide learning / teaching to?

Structuring content in roles makes a lot of sense. We normally perform tasks depending on our role within the organization. It is seldom a great idea to make available, to the call-center employee, an instruction on how to perform a monthly P & L-statement. However, that particular process will

probably make sense to the financial controller. Providing an equal amount of content for each department is seldom a good idea. Instead, it makes sense to spent time in the areas where employee-replacements are high.

How do we best structure the recording?

Bear in mind that some recordings may be more efficiently broken down in multiple recording (f.ex. an order process with large differences in steps between types of order). Dedicating content to a particular sub process gives the best possible result and experience for the end-user. ClickLearn has options to integrate and merge recordings together for a collective result.

What is best structure of the end training material?

Often departments have shared content. Structuring that content into a single book makes sense keeps the updating operations at a minimum. Structuring the end training material is really a question of how well we target the documentation to a particular role within the organization and how easily maintainable we keep the content.

Availability analysis

The availability analysis is a simple checklist where the organization answers a number of questions:

- Do we want to make content available on individual users (pads, iPhones, etc.)?
- Do we want a collective platform for all content or will we create subareas for each role or department within the organization?
- Should the content be made available on specific technical platforms (business systems, SharePoint, etc.)?

Scouting these issues and determining, if technical issues may arise with any of them is typically a great idea to do in the requirement analysis phase and secures a smooth process, where no resources are wasted.

Technical requirement analysis

The technical requirements analysis is traditionally a very short phase. It is primarily a readiness check with the IT-department and should provide solutions to:

- Are there any ClickLearn requirements for recording on the platform?
- Which media do we intend to distribute on? (i.e. DVD's for low-bandwidth sites or internet/intranet solutions).
- Is it possible to do secure logins for each user to make content available on the internet?
- Templates, learning portals, visual layout of Assists, etc. are typically structured and created in this phase using either ClickLearn resources or a partner for consultancy.

Recording phase

Business process owner recording

Prerequisites

The business owners recording is normally a very short and intense phase. The prerequisites for initiating the recording process are:

- Make sure that you have enough equipment (PC's) to accommodate the business owners. Also make sure that the equipment is working.
- Do short intense recording phases with each business process owner (typically no more than an hour to 1,5 hours).
- Have all business process owners arrive at the recording session well prepared (knowing exactly what they need to record and which additional information to explain).
- Schedule all recording sessions on a tight schedule ensuring no delays (most BPO's will be able to put in an hour or two, but not an entire day of waiting).
- Set-up metadata in ClickLearn with regards to Instruction-numbering to match existing quality assurance systems, authors, responsibilities, etc.

Recording

During the recording session, focus on:

- Make sure that trained staff are available on site during the recording sessions.
- As part of the recording session give the users a 15 minute collective instruction on recording and adding notes and chapters to the content. Make sure the user knows what to do when they make a mistake within the recording (post-record editing).
- Structure the navigation in a similar way for all users. The best results are achieved by using the mouse in the user interface, avoid tab-movement within the user interface and short cut key-access.
- Make sure that the users focus on getting their knowledge into the system, providing sufficient notes, and actively determine, if their selections within f.ex. Combo-boxes, Radio-buttons, checkboxes are targets of a specific business rule.
- If large amounts of existing material are to be included in the recording, have the business process owners provide the material to the expert ClickLearn users and let them incorporate the material as notes, pictures, hyperlinks. Let the user put a note where the content should be presented.

We have partaken in a process, where 150 instructions, distributed among 20 process owners were recorded using 7 PC's in ONE day with 1 hour of recording time per BPO.

Replaying instructions

Each process should be able to replay after the user has left the recording-system. This is essentially the process that ensures an efficient maintenance of the documentation. Find glitches in the replay process by doing a replay on the instructions. The business process owners need not participate in this process.

Editing phase

The best results are achieved, if the ClickLearn trained users perform the editing phase. Not by BPO's. The editing phase consists of aligning all materials to the media

Prepare content for written material

Preparing the content for the written material essentially gives the basic structure of the whole document. The phase consists of a quick run-through in the Writers role of ClickLearn. Typical tasks performed are:

- Adjusting language in notes to a uniform style (active / passive language, spelling errors).
- Adjusting chapters to a uniform style (number of levels, scenarios in chapters, etc.)
- Adding additional content provided by BPO's to the process: images, hyperlinks. Make sure that the content is available on all the platforms, you have chosen (intra, extra, ipads, etc.). Adapt content from a uniform source.
- Creating groupings in the steps where applicable.
- Adjusting note size and setting notes for written material only (larger text amounts not suitable for video).
- Role adjustments. On some business systems, your role dictates your menu-structure within business system. Make sure, that the menu structure is available on the desired role.
- Do a quick read-through of the documentation and see that everything is placed as desired.
- Check metadata of the ClickLearn recording to make sure that it is aligned with the desired content.

The second part of preparing content for the written material is the structuring of the material into collections suitable for Roles. You structure each recording in to one or more books of content, each book can belong to one or more shelves. This basic structure allows you to target audiences in roles, user groups, departmental units, etc. In ClickLearn production can be done on all three levels (i.e. recording, book and shelf):

- Using the roles defined in the requirement analysis phase add the recording to the correct books.
- Best results are achieved, if books representing specific roles are created.

Prepare content for video

The video editing in ClickLearn is a very simple process. ClickLearn makes available a high-quality video with correct mouse-tracking, fade-ins/outs. In a completely structured format. Use the video-role to best prepare for the content:

- Transforming note size from written material into video style notes.
- Disabling narration where notes are too long or undesired.
- Creating short notes where desired, replacing the disabled longer notes.
- When using digital natural sounding voices, correct any specific texts that are incorrectly pronounced.

Prepare content for Assists

In preparing the content for the Virtual Assists you should switch to the assist role within ClickLearn. This role will give you a hands-on experience on how your final assists will appear for the user. Focus only on the recordings that are Assist candidates based on your findings in the requirement analysis phase. The typical preparations are:

- Adjusting selections in combo-boxes, grids, etc. to correctly conform to the All rows., all cells., all columns- and any value-settings in the Assist.
- Hide any irrelevant notes within the Assist.

Localization

ClickLearn offers an automated localization of your documentation. There are three different scenarios in localizing documentation in ClickLearn:

- Run system in one localized version with supporting documentation in one other language (English system, German documentation).
- Run system in multiple localized versions with supporting documentation in multiple languages (many different localized version-systems, one language for each).
- Run system in many localized versions with supporting documentation in one language (many different localized version-systems, documentation in English).

Identifying which scenario best suits your needs is fundamental.

Replaying

When using multiple localized systems you will need to perform the replay for each instruction and each language. This process recollects the screenshots, video, material on the localized system and makes it available for editing.

Localizing

After the replay in each localized system you will normally do:

- Voice selection, when using natural sounding voices.
- Editing notes for each target language.
- Ensure that boiler template is available for all languages.
- Proofing by someone who speaks the language.

Production phase

Produce

You produce the material by hitting the produce button. However, there are number of prerequisites to producing the finished material:

- Make sure that all natural sounding voices are installed on the production PC.
- Adjust video and simulation sizes for the mobile and desktop based computing.
- Add the Assist repository to reachable web-site (both for updating and downloading).
- Make sure the templates for video, documents and assists are installed on the production PC.

Quality assure

It is easy to change and reproduce material. Do a thorough quality assurance the first time you produce to make sure that all content is available at your discretion.

Publish

When publishing make sure, that you have automated the process as much as possible. This makes it easier to maintain the documentation. ClickLearn will provide the publishing input in the technical issues-part of the requirement analysis phase. In this phase it is time to put everything to work.

Make sure that you have all the locations, usernames and passwords needed to access the destination-environment of the publish process.

Follow up

The follow up process is a repetitive task. It may occur at fixed intervals or be subject to a per case change management structure.

Change management procedure

Have a firm take on the change management procedure:

- How do we apply changes to the ClickLearn portals?
- Do we have version control on the recording level?
- Do we have versioning in meta tags of ClickLearn recordings?
- Do we keep a structured change repository for ClickLearn recording changes?
- What sort of testing level do we apply to different types of content? (i.e. Difference between Virtual Assists and Written documentation) ?
- What sort of replay procedure do we apply when Windows changes (which also changes the way forms are presented)?
- What kind of difference in degrees do we accept between our live-system and the ClickLearn documentation?
- Are we using ClickLearn for testing changes to the underlying business system?

Make sure your end-users can see the actual content. Inform your users and make a communication strategy for future updates to the content, including:

- Who is to be informed? (create mailbox groups that respond to the books or shelves being changed).
- How do we ensure that changes to the underlying business system are communicated to the people responsible for ClickLearn?
- Who is informing?
- What do we communicate?

The communication is not an integral part of ClickLearn and must be handled in a structured way outside ClickLearn.

Virtual Assists / reassessment

Virtual Assists assessments should be visited frequently in the beginning assessing, what needs to be changed, key instructions that should be converted to Assists. Some of these findings are relatively easily obtainable through interviews with the end-users. Having a periodical structured process ensures that the performance support system follows the changes in your underlying business.

Your business changes and your Performance Support should always change with it. Keeping your eyes open to the changes within the organization is integral to a successful EPSS. Make sure your departmental executives understand what ClickLearn can do. It will become another tool in their belt when it comes to minimizing the resource usage per task performed within their department.

Most truly efficient EPSS processes have stakeholders at the departmental executive level.