Training and Process Documentation

Strategies for Onboarding Success

Emily Back
Business Analyst
Jamie Humbarger, APS, CPP, CPA
Associate Bursar - Accounting

June 7, 2016
OBJECTIVES

What you’ll be able to do:

• Identify and apply strategies for Onboarding Success
  – Identify and apply best practices for creating or revising training programs
• Identify when process documentation is needed
• Identify how to approach writing process documentation
• Visually see some examples of various formats of documentation
WHY DO WE TRAIN?

Audience Response
Starting backwards...

• Start with the questions, and lead your learners into the answers.

  – Why should they learn it?
  – What will they learn?
  – How will they be evaluated?
  – How can they improve next time?
Best Practice: Providing Rationale

Explain why learners should learn the content, and how it applies to their work.

What’s in it for me?

(Stolovitch & Keeps, 2011; Prensky, 2010)
Best Practice: Make it Real

Makes the information more...

REAL

RELEVANT

(Stolovitch & Keeps, 2011; Prensky, 2010)
Inform learners of what they will be able to do after completing training.

(Stolovitch & Keeps, 2011; Prensky, 2010)
Best Practice: Measurable and Achievable

Performance Objectives = Performance Goals

Action Verbs

- Recall
- Create
- Answer
- Explain
- Write
- Identify

(Stolovitch & Keeps, 2011; Prensky, 2010)
Which is measurable?

Choice 1: Know the difference between the start button and the stop button 100% of the time.

Choice 2: Identify the stop and start buttons correctly 100% of the time.

(Stolovitch & Keeps, 2011; Prensky, 2010)
Best Practice: Design Activities to meet Objectives

• Give learners things to do that help them achieve the performance objectives.

• Engage them!

- Solve a realistic problem
- Answer a relevant question
- Perform a task

(Authentic Learning)

(Stolovitch & Keeps, 2011)
“Knowledge remains just knowledge until we put it into action. Practice is the best way of learning, and wisdom emerges from practice.”

Van Tiem, Moseley, & Dessinger (2012)
Best Practice: Evaluation & Feedback

Check to see if the learners have mastered the performance objectives.

Correct them when they are incorrect.

Confirm when they are correct.

(Stolovitch & Keeps, 2011)
What is the end result of using these best practices?

- REAL
- RELEVANT
- EFFECTIVE
- ENGAGING
- MEANINGFUL

(Stolovitch & Keeps, 2011)
What is a Process?

**process**

/ˈpræs, ˈprɪs/  
noun

1. a series of actions or steps taken in order to achieve a particular end.  
"military operations could jeopardize the peace process"

**synonyms**: procedure, operation, action, activity, exercise, affair, business, job, task, undertaking  
"investigation is a long process"
- Action oriented
- Outline steps to take
  - In the proper order they should be taken
- Solid
- Precise
- Factual
- Important
- Complex
- Steps are being missed/incorrectly completed
- Lengthy
- Routine (but essential)
- Consistency demanded
- Involves change
- Confusing
Considerations

- Readers NEED to know
- Assistance/Guidance
- Exceptions
- Technical Issues
Information Gathering

- Experts
  - Long time staff
  - Stakeholders
  - Technical staff
  - Users of the procedure
- Notes
- Surveys
- Flow Charts

Asking the right process discovery questions elicits the answers you need to be effective.
- Write actions in order they are to happen
- Avoid too many words
- Communicate clearly
- Active voice
- Lists and bullets when necessary
- Careful use of jargon and slang
Assess Design Elements

- Flowcharts
- Screenshots
- Checklist
- Highlighting
Putting Your Draft into Practice

- Users completing the task
- Review for accuracy/gaps
- Update with any changes
- Publish final document
- Review and update annually
Process Diagram Documentation

<table>
<thead>
<tr>
<th>Process Flow</th>
<th>Person Responsible</th>
<th>Person Involved</th>
<th>People to be Informed</th>
<th>Documents</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling thirsty</td>
<td>Myself</td>
<td>No-one</td>
<td>The Boss</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Cup</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Coffee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milk?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td>Add milk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Sugar?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td>Add Sugar</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>NO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stir your drink</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Process Documentation using Flowcharts

Example:
Basic flowchart symbols

Any problems with the following set of directions?

Shampoo directions
1. Lather
2. Rinse
3. Repeat

Begin or end
Information input
Operation
Information output
Question yes/no?

Begin shampoo → Wet hair with warm water → Select bottle

Information on bottle → Shampoo? No → Lather shampoo into hair

Hair clean? Yes → End shampoo

No → Rinse hair with warm water → Yes
Beverage Ordering

**Cashier**
- Says Hello and asks the customer what he would like
- Confirms drink, size, and specific ingredients
- Tells Barista drink size, and specific ingredients
- Tells the customer the amount owing
- Accepts payment, returns change to customer if appropriate

**Customer**
- Approaches the counter
- Requests specific drink
- Provides the cashier with payment
- Walks to barista counter for coffee
- Accepts/picks up coffee
- End

**Barista**
- Selects appropriate size, ingredients and creates coffee
- Completes coffee and brings to barista counter
- Announces drink specifics and if possible, hands to customer
- End