



THE GMarie GROUP
Performance Improvement Specialists

Technical Documentation

Developing State-of-the-Art Documentation and Help Systems

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Introduction

You have made a sizeable investment in your software system. The “Go Live” date nears. You feel anxious, wondering not only “Will it work?” but just as importantly, “Will our employees be ready to use it?”

Often, when faced with such a situation, organizations turn to training as a solution and, before you know it, they have created lengthy manuals and scheduled multiple classes to give their employees “everything you ever wanted to know” about the system. Unfortunately, these types of solutions often also include things people don't want to know and, more importantly, don't need to know.

This approach to training is sometimes called the “fire hose” technique, in that it is like drinking from a fire hose—filling people up too fast and with too much information. It usually doesn't work. While it may provide some valuable learning, it is usually too much, too fast and results in employee overload.

With system implementations, employees need to be able to “serve themselves” and get the information they need, when they need it. An Electronic Performance Support System (EPSS) approach helps provide on-the-job training by utilizing best documented practices, procedures and job aids to help users complete system tasks for particular job roles, rather than learning everything about a system at once.

Ironically, companies tend to expend considerable resources on the purchase of software, yet are reticent to invest the time and effort to properly document business processes and train their valuable employees in how to use those processes through the bright, shiny new system they have just purchased.

And, as we know, a software investment is only valuable if the organization's people know how to use it most effectively!

Wait, We Need Training?

One issue with the educational aspect of system implementations is that project managers tend to wait until too late in the project to start thinking about training and documentation and are often unaware of the typical challenges that need to be addressed:

1. **Time:** New system implementations can take an army of resources to properly create and deliver user support and training. When project managers wait until late in the project, they often cannot complete effective training in time for the rollout and/or do not have adequate internal resources to complete the task. This results in ill-prepared end-users, which leads not only to performance issues and costly errors, but employee dissatisfaction and turnover.
2. **Technical resources, while knowledgeable, are not curriculum developers:** Often, the task of developing training and documentation is assigned to technical subject matter experts and system programmers that are likely overloaded with last-minute testing to ensure optimal system performance. Equally important, technical resources are generally not professional communicators or learning experts (just ask anyone who has ever tried to read a VCR user manual!). As a result, systems training written by a technical expert is often NOT instructionally sound, which leads to the same issues mentioned above— performance issues, costly errors and overall dissatisfaction with the new system.
3. **Documentation is not training:** Documentation about how the system works fails to account for the way users will *actually use* the system in their daily jobs. Likewise, system reference materials do very little to prepare users for the task-based nature of their work. So, while technical documentation is great source material for developing effective, EPSS-based training, it is not—in and of itself—effective training. Using technical documentation as training creates inefficiencies and slows adoption of new system functionality.

To meet these challenges, consult a team of expert instructional designers. They conduct analysis to determine exact training and documentation needs, design performance-improving solutions, develop the materials in partnership with your subject matter experts, implement the training and evaluate its effectiveness in your organization. By following this process, you ensure your organization gets the most out of your new system: employees will use it correctly!

Ready, Set, Go!

You may have put together a plan to meet the needs of your system rollout, but, have you taken the time to plan for ongoing needs? Documentation and training materials soon become outdated after initial rollouts as the system changes and is updated and customized to meet the needs of the company. Since personnel changes are common throughout most organizations, the need for good training and documentation will continue throughout the life of the system. Meeting the implementation rollout demands is only part of the challenge.

Companies should use consistent tools and methods of deployment to make content easier to maintain:

1. Process documentation and training needs adequate time and resources to be properly created and deployed. This documentation and training should be considered part of the software implementation, rather than an afterthought.
2. Companies should agree on authoring and training delivery tools/platforms to cut costs and create consistent materials. Once these are determined, updates are easier to complete and maintenance can be simplified.
3. The right experts for the job must be used for the job at hand. For system training, a team that includes experts in instructional design, technical documentation, and the use of the tool are needed. Often, outside experts must be brought in for the development of documentation and training that can be updated and maintained internally.
4. Content must be easy to access. EPSS and/or custom online help systems make this easier by providing context sensitive materials right when the user needs it.
5. Solutions should include Communities of Practice to allow users to ask questions and share best practices. Custom and off-the-shelf collaboration tools, such as Outlook Express (a free Microsoft program that is included with a typical installation of Internet Explorer) can provide functionality to make this process easier to manage.
6. Training for geographically-dispersed audiences should be developed using flexible tools and templates that make conversion to other cultures and languages easier.

Finally, consider this: With a professionally-developed training and support system in place, the training challenge shifts from training employees on all aspects of the software implementation to training them how to find the answers they need when and where they need them.

Summary

Project managers face special challenges when developing training and documentation for new system implementations. With the speed of new product introductions and the ever-changing array of system products, it can be daunting to address all training and documentation needs effectively. Companies should clearly think through their documentation and training development strategies so they can properly identify all needed resources to accomplish their objectives.

The design and development considerations and advice offered here will help you create more dynamic, better accepted training and support systems for your employees.

The GMarie Group

For over 20 years, The GMarie Group has provided nationwide clients with custom learning and performance improvement solutions. To do so, we apply the ADDIE Model, a systematic process for:

Analyzing Performance and Training Needs

The GMarie Group recommends initiating a project through rigorous analysis, which is the key to obtaining valid results and ensuring that a significant cross-section of the organization has a stake in the process. We can conduct training needs and performance analysis to determine learning solutions to address identified performance gaps.

Designing and Developing Effective Solutions

We design and develop online (Web-based) training, virtual Webcasts, podcasts, instructor-led training, performance support tools, learning portals and much more! Our team can author your custom product using any industry-standard authoring tool (e.g. Flash, Lectora, Flypaper and Captivate).

Implementing Products and Programs

We provide training program planning and coordination, train-the-trainer, training delivery and facilitation for all types of subject matter. We can also help integrate Web-based solutions into your LMS or LCMS.

Evaluating Reactions, Learning, Skills Transfer and Returns

Using Kirkpatrick's "Four Levels of Evaluation," we develop tools and scoring mechanisms to measure participant reactions to learning, mastery of objectives, transfer of skills to the job and return-on-objectives.

How Can We Help YOU?

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