

Overview of the InfoPros Model for Training and Courseware Development

At InfoPros, we develop training solutions for our Clients' products, services, and software applications. This white paper provides an overview of the process associated with developing a training solution, with the process largely the same whether the challenge is to train a sales team on a new product, provide on-the-job training for employees working on a manufacturing line, or teach internal users how to use a new software application.

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Overview

At InfoPros, we develop training solutions for our Clients' products, services, and software applications. This white paper provides an overview of the process associated with developing a training solution, with the process largely the same whether the challenge is to train a sales team on a new product, provide on-the-job training for employees working on a manufacturing line, or teach internal users how to use a new software application. There are multiple approaches that can be used to meet a specific training goal, including:

- Instructor-led materials, participant manuals, and end-user guides
- Job task training and job aids
- Quick tours to introduce new concepts and products
- Train-the-trainer classes
- Proficiency tests or simulations

The most effective approach will be the one that balances the business requirements with the needs of the intended audience and delivery of the requisite concepts and information.

Throughout this paper the term "course" is used as a generic term to describe the various training solutions available, such as a complete course or set of training materials.

The InfoPros Approach

The initial focus in developing a training solution is to ensure that we thoroughly understand our Client's goals, challenges, and requirements to assure that the training or courseware being developed aligns with the business needs and objectives. This means understanding not only the information to be conveyed but also the intended audience, their work environment, and the budget and time that can be allocated to training.

InfoPros follows a structured approach to training and courseware development projects by first identifying all learning objectives and capturing relevant source material and content. We then gain a thorough understanding as to the needs, characteristics, and workplace environment of the audience. Only after this initial analysis has been performed can specific recommendations be made as to the approach and types of training materials that would be effective in meeting the defined goals and objectives.

Our responsibility is to create a dynamic learning experience for each participant that maximizes their opportunity to comprehend and retain the key learning objectives. In order to obtain the required information, we follow a comprehensive three-step process:

- **Step 1: Needs Analysis**

During this step, InfoPros will analyze the Client's goals, requirements, and objectives and gain an understanding of the target audience and their work environment. We also will start the process of defining course objectives, topics, and lesson strategies.

- **Step 2: Design**

Step two builds upon the needs analysis by further identifying specific details relating to the course. During this phase our team may meet with your subject matter experts (SMEs) to learn the fundamentals of your product, service, or application. This step provides us with the information needed to design a comprehensive course blueprint.

- **Step 3: Development & Evaluation**

The last step of the process encompasses the content development of the course material, review cycles, and preparation for a course evaluation that can be conducted to provide further input once the course is delivered.

The InfoPros Team

Depending on the size and scope of a training project, the InfoPros project team will include professionals with a variety of skills and areas of expertise:

- **Project Manager:** Keeps the project on schedule, acts as the liaison between InfoPros and the Client, ensures that all questions are answered and all issues are resolved; all projects have an InfoPros Project Manager.
- **Instructional Designer:** Focuses on the blueprint and outline of the course, plans lessons and hands-on activities, employs methods and media to keep participants engaged; the Instructional Designer architects the curriculum such that material is retained by participants after the class.
- **Training Developer:** Involved in blueprinting and mapping the course, the Training Developer conducts interviews with subject matter experts to gather material to incorporate as course content, then develops the course content.
- **Editor/Reviewer:** Performs copyedits and reviews of Client deliverables and content as they are developed; the Client always is included in our review process.
- **Desktop Publisher:** Designs templates for course curriculum, such as PowerPoint slides, Instructor and Participant Guides; the desktop publishing need will depend upon the nature of the project.
- **Illustrator:** Creates and provides graphics and illustrations as required; our Illustrators create and manipulate graphics more efficiently than any other team members.

Step One: Needs Analysis

During the analysis phase, we will have one or more detailed discussions with the appropriate Client personnel to gather specific information about the project. We will discuss the impetus for the project along with specific needs, requirements, and challenges to be addressed by the course as well as gain an in-depth understanding of the target audience and the work environment. We also need to understand the expectations for delivering the training, including budget and timeframe. Throughout the process, we gather the relevant source material and content that will be needed to develop the training materials in the following ways:

Project Analysis

During project analysis, we gather the “basics” of the training project. These basics include defining the overall course objectives, establishing preliminary learning objectives, and understanding the product, software application, or service participants will be required to learn. The following are sample questions critical to establishing the foundation of the training course or program:

1. What are the problems or key issues that need to be addressed through the training course or program?
2. What is the background and experience of the target audience? What is the work environment?
3. What training material is currently available?
4. Have the course topics and/or objectives been defined?
5. How much is documented and how much will need to come via interviews with subject matter or content experts?
6. Will trainees have access to the product or application during the training?
7. How many people need to be trained? Is the need likely to grow or change in the future?
8. Will the course or training materials require updating? If so, how frequently?

Audience Analysis

Audience analysis is the second component of our needs analysis, where we further our understanding of the audience, what participants need to take away from the training, and the background they will bring to the course. The following offers a sample of the questions used in this type of assessment:

1. Who are the target course participants?
2. What knowledge will a participant possess coming into the training?
3. Will participants have the same or different levels of background knowledge?
4. What are participants expected to know after completing the course?
5. What types of learning constraints exist? Are there any limitations to work around when developing or delivering the training?

Timeline and Delivery Expectations

The final component of our needs analysis relates to the timeline and delivery of the course or training materials. These questions address the timeframe constraints, the type of evaluation needed, and the format required for delivery. The following offers a sample of questions used for this assessment:

1. What is the timeline for project completion?

2. Are there any relevant dates that should be considered, such as: when does the course need to be implemented? Are there any sales or product release considerations?
3. What post-training follow-up is required?
4. Should course and/or training materials be available online, in softcopy, in hardcopy, or a combination of the formats?

Step Two: Design

The data collected during the analysis phase identifies and defines the specific approach for structuring and delivering the concepts and materials to be conveyed to the target audience. The design phase is focused on identifying the key concepts and the specific details about the relevant product, application, or service, for which we will conduct interviews with subject matter experts. It also is during this phase that we will gather and identify much of the source materials and content including design documents, prototypes, applications, and reference material that will be used to develop the training content. Depending on the type of training required, the course design phase may involve the following steps:

1. Develop a course blueprint that will provide the overall course strategy: learning objectives, instructional approach, course activities, and time estimates.
2. Design the user interface and user experience by storyboarding the course to ensure that each section or module has the appropriate level of content.
3. Create the design elements of the training materials: instructor and participant guide template design, slide templates, web-based modules, etc.
4. Provide recommendations for course reference materials and supplemental documentation.
5. Deliver drafts of the course blueprint and training material design.

Step Three: Development & Evaluation

The final step is the development of the course content, training materials, and participant evaluations. During this process, the blueprint and/or outline serves as the guide to complete all lessons or modules, finalize course activities, and write the content for the training materials: course presentation, instructor and participant guides, and/or web-based modules.

An important element of course development that can be overlooked involves the evaluation of the training course or program. This is a joint process for the Client and the course participants. Obtaining feedback from the participants can help determine whether or not learning objectives were met. The following are sample questions that can be used during the course evaluation:

1. How clear were the primary learning objectives and expectations of the course?
2. Was the course presented in a cohesive and logical format?

3. What did you learn that you did not know prior to coming to this course?
4. What will you do differently moving forward as a result of this course?
5. Did the course fulfill your expectations? Do you have a better understanding of the product, service, or application you are required to use?

Conclusion

If you are considering training for your product, service, and/or software application it is important to understand the following:

1. A prerequisite to developing any type of training materials is the ability to clearly and specifically define the objectives. InfoPros can assist in clearly identifying the project requirements as part of our upfront needs analysis.
2. The entire project – from concept to implementation – should follow a systematic, structured process. InfoPros employs a structured process to ensure that we capture key objectives for the training or courseware and that the delivered training material will achieve these objectives.
3. Developing any type of training material is a collaborative effort. InfoPros provides the expertise in developing effective training solutions with the Client providing the requisite expertise on its specific product, service, or application.
4. Training material should be developed with a goal of easily reusing or repurposing some or all of the content in multiple ways. InfoPros creates and designs training materials that seamlessly can be repurposed into content for the web, selling aids, or reference material.

At InfoPros, we understand the value that training materials can offer to a company's product, service, or software application. We successfully support the diverse training needs of companies such as Hill-Rom, Waukesha Electric, Wells Fargo, and Maxwell Technologies. When you partner with InfoPros you can be assured your project will be completed on schedule and on budget, meeting or exceeding your expectations.

About InfoPros

Since 1994, InfoPros has proven its documentation and training expertise with a commitment to best-in-class services and Client-centric solutions. We specialize in delivering a blend of services for documenting products and processes, training development, and translation and localization.

Whether you need a complete training program to augment a new product or service, or you require job aids for internal learning, InfoPros has the experience and skills to deliver the results you are looking for. By combining our Client focus with our structured three-step approach, we are able to design a customized solution that will fit your business needs.

To learn more about how InfoPros can customize a solution for you, contact us at:

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