ATD Dallas Chapter
October Meeting Pre-Read

Case Study Introduction: Engage, Equip and Empower
To provide a more engaging learning session, we want to give you the opportunity to step into our shoes and design a solution for a project request designed to support current company initiatives. By the end of the working session, your randomly assigned team will collaboratively build an action plan/solution that would address the major milestones of the project, and share our best practices on how to utilize and manage multiple teams at each stage of the process.

The Training Request: Transition from our current new coworker orientation training, which is a self-guided 6-day workbook blended approach (called DRIVE 1st Gear) to an electronic, interactive eBook that integrates with our LMS.

The Timeline: Fully deliver the eBook version of our current DRIVE 1st Gear training books within three months.

Training Audience: All new field-based coworkers from all lines of business complete DRIVE 1st Gear within their first 6 days with the company. Coworkers read and complete activities in their 1st Gear workbook and also complete a series of eLearning modules and quizzes over the duration of the program in our LMS. Their final certification is a "checkpoint" completed by the Store Manager to validate that the coworker has demonstrated an understanding of the new skills needed to complete assigned tasks.

The Process: To successfully manage this project from a Training perspective, you will need to partner with the following teams located at our Field Support Center in Plano to gather information, ask the right questions and identify possible obstacles to help you devise the most efficient plan of action. Each of these teams will host a station that you will rotate through.
- LMS Team
- Operations Support
- Studio
- Corporate Communication
- Instructional Designers

Assumptions:
- We have already chosen a vendor partner who will provide the application needed to support the eBook and will also partner with us to transfer our current content into eBook format
- IT has validated that the eBook system will function in our stores so that coworkers can complete the current paper-based activities by accessing materials through a cloud-based platform

- We will not be making substantial changes to the content of DRIVE 1st Gear. However, the delivery method for current modules can be shifted to accommodate project requirements as needed.

Rotating Station Information: As you visit each of the stations, use the information below to better understand how each team will partner with you and identify what additional information you need to complete an analysis and recommend a solution. Ask discovery questions to identify what resources each team can provide and identify how best to partner with them to design, develop and launch the project. You will also walk away with tips and techniques on how to build and sustain partnerships across departments and teams to accomplish strategic operational goals.

LMS Team
This team supports the learning management system, including building programs, testing courses, assignments, and reporting recommendations. For this team, discovery questions should focus on:
- Timeline to upload materials and test in the system
- Testing procedures and required resources
- Any potential blockers that might impact the project

Operations Support
This team provides and validates operational processes and workflows. They are the lifeline to our coworkers in the field. These are our operational Subject Matter Experts. For this team, discovery questions should focus on:
- Onboarding processes in the stores
- Change management recommendations
- Potential blockers such as technology limitations
- Requirements that must be met to successfully onboard new coworkers in the stores

Studio
This team develops audio, video and stillshot options as part of a blended learning approach. For this team, discovery questions should focus on:
- Availability and/or any competing projects that might impact our timeline to deliver
- Identifying any existing resources that can be re-purposed for this project
- Timeline and processes to complete a video or still shoot

Corporate Communication

This team provides change management for new initiatives and change in processes. They also are key in creating communication plans to ensure all coworkers are prepared and supported. For this team, discovery questions should focus on:

- Recommendations for how best to message this change and when to communicate
- Overview of the communication process to coworkers and available channels
- Required materials that you must provide for the Communications team to complete their project deliverables

Instructional Designers

This team provides sound, instructional design strategies and educational interventions on operational processes to support the knowledge, skills and behavior changes to our coworkers in the field. For this team, discovery questions should focus on:

- Availability of resources and any competing projects that might impact the timeline
- Options for technology
- Existing content that can be repurposed for this project
- Best practices and/or existing requirements/processes that can be utilized to successfully develop content

Your Mission: Rotate through all stations, gather pertinent information, ask great questions and formulate a plan. After the last station, your group will gather together and determine the best plan of action to implement this request. Jot down what the timeline looks like, current obstacles to take into consideration and overall training and delivery strategy as you work with all of these departments towards the goal!