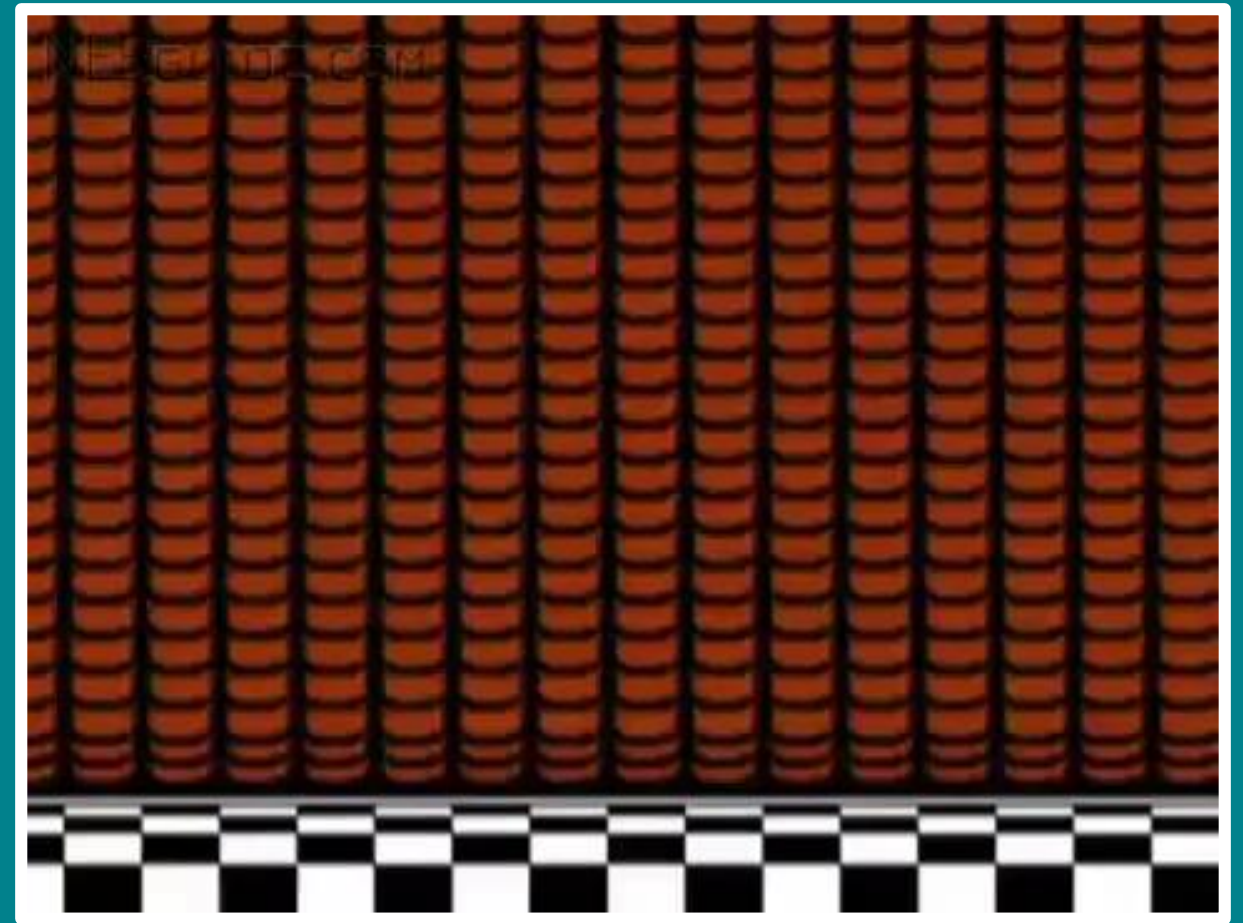


CATCH MORE SMES WITH HONEY

Tools, Tips & Tricks to Sweeten the Deal





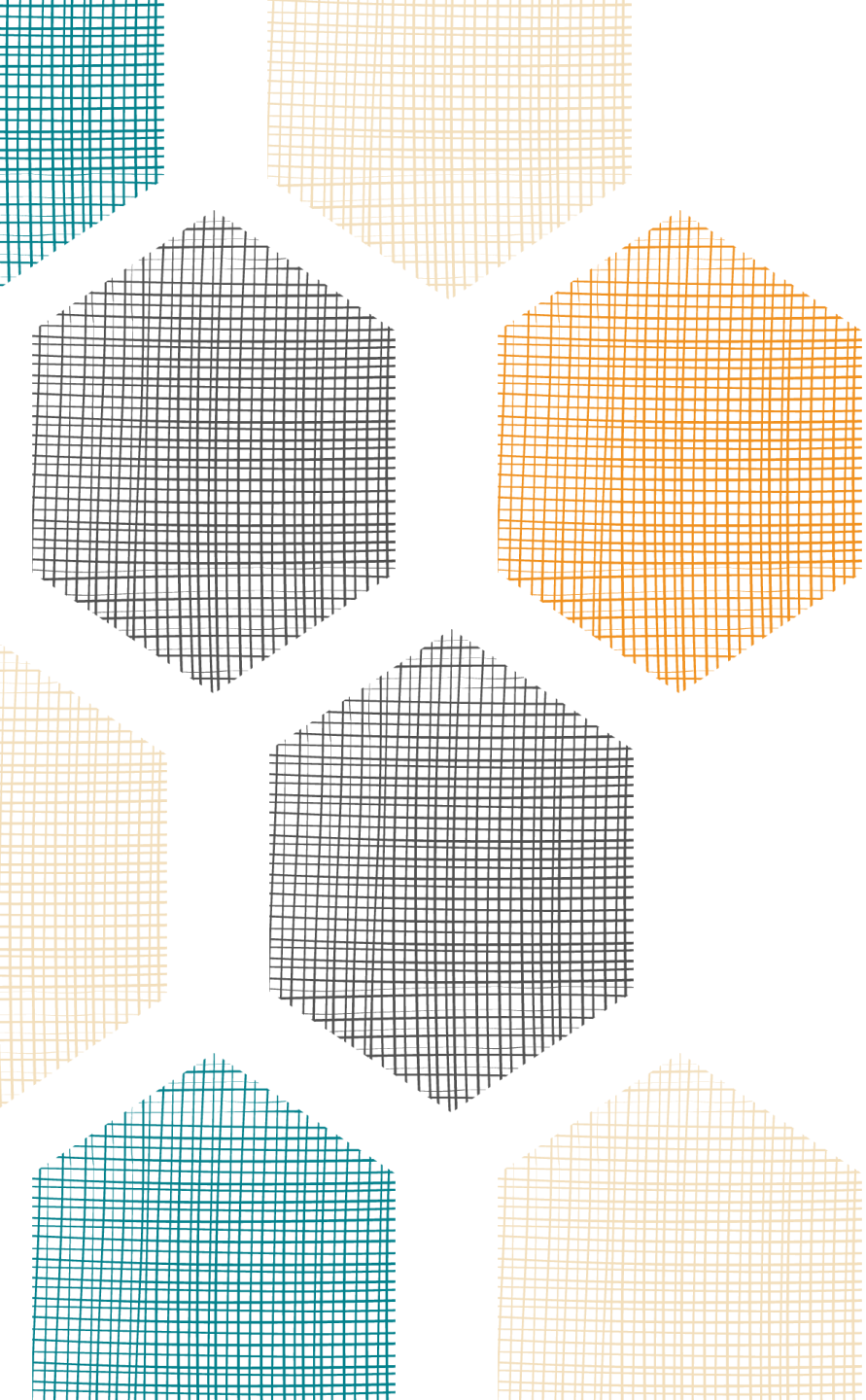


MY GRANDMA ALWAYS SAID,
"YOU CAN CATCH MORE
FLIES WITH HONEY THAN
WITH VINEGAR."

A decorative graphic on the left side of the slide consists of several overlapping hexagons. Some hexagons are solid colors (teal, orange, grey) and others are filled with a fine grid pattern of the same colors. They are arranged in a cluster on the left side of the slide.

THE CHALLENGE

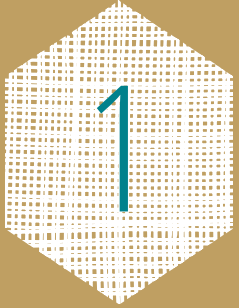
We all want to make an impact, but we have different approaches.



THE SOLUTION

Make it easier for the SME to
partner with you.

SWEETEN THE DEAL



Process



Tools



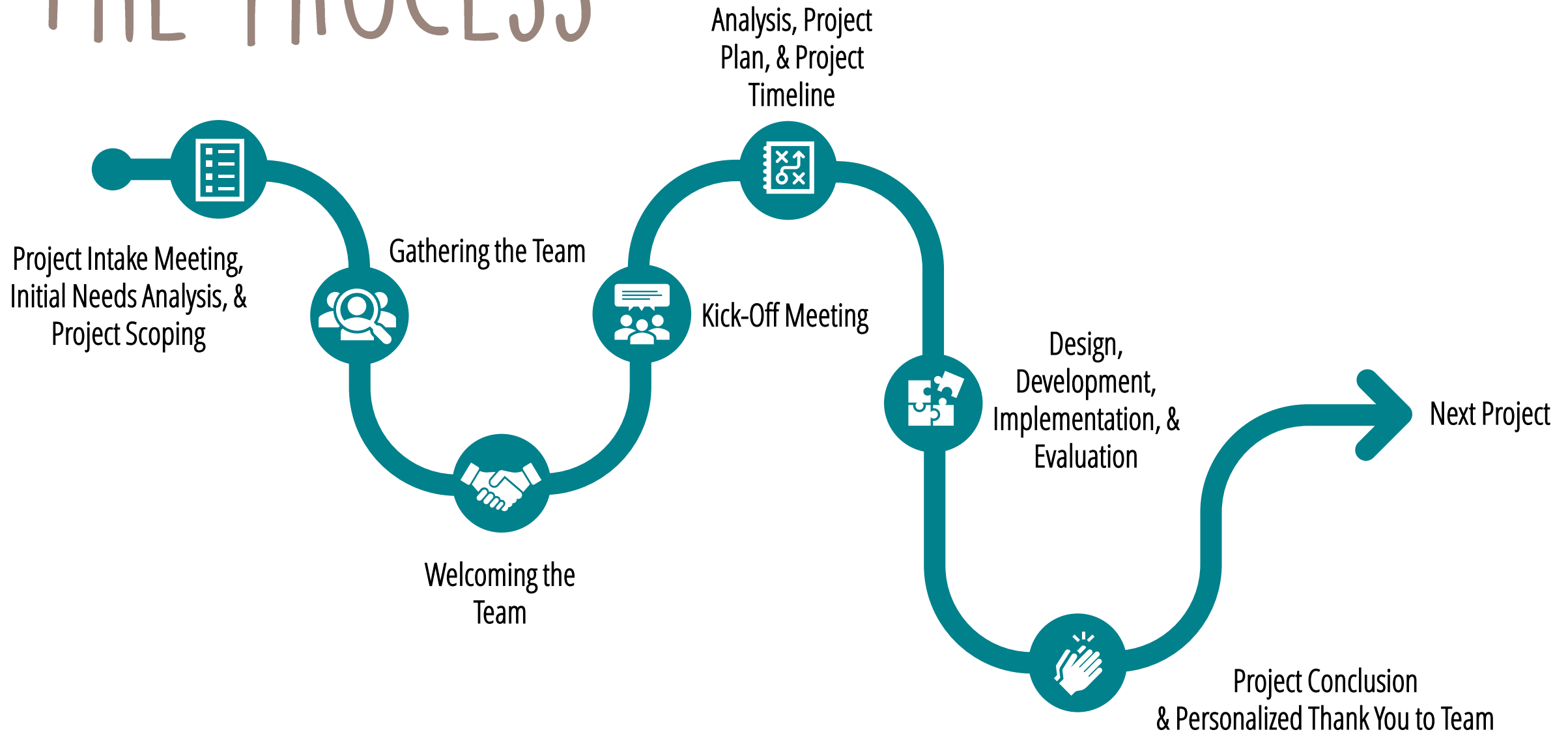
Approach



THE PROCESS

16/10/2019

THE PROCESS



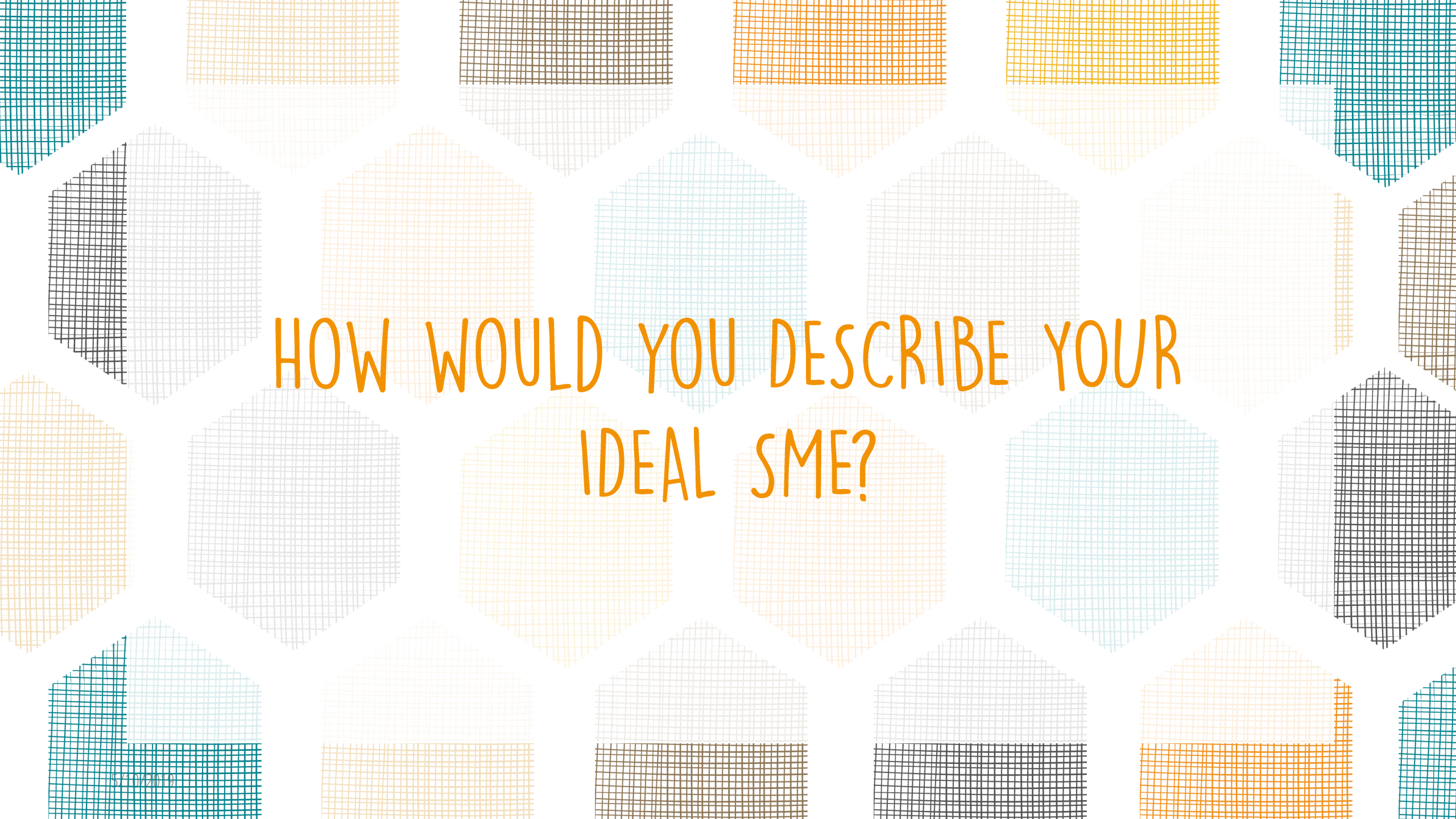
THE PROCESS



THE PROCESS — GATHERING THE TEAM

- Identify SMEs as early as possible.





HOW WOULD YOU DESCRIBE YOUR
IDEAL SME?

FOUR TYPES OF SMES

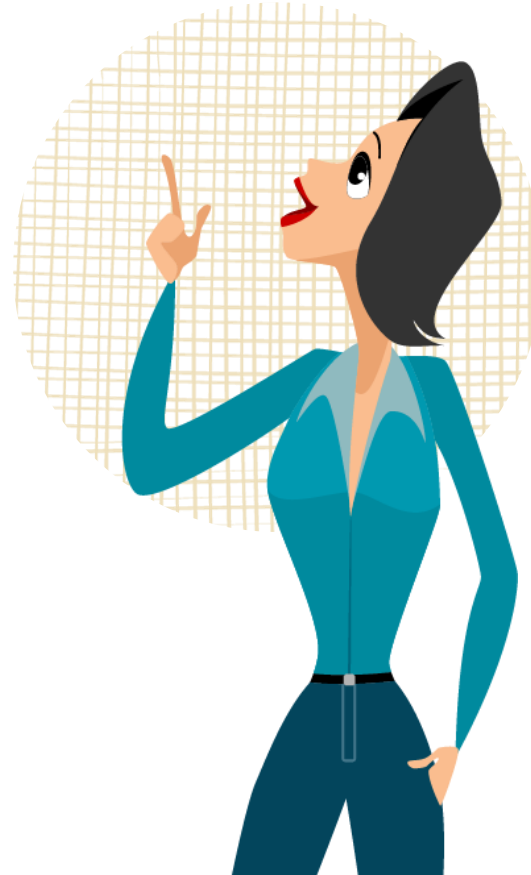
Believer



Voluntold



Know it All



Cynic



FOUR TYPES OF SMES — THE BELIEVER

“I understand how important training is. I will provide you with whatever information I have and will respond to your emails as quickly as I can.”



FOUR TYPES OF SMES — THE VOLUNTOLD

“I’m not sure why I’m even a part of this project or this team. I have way too much work already. What am I doing here?”



FOUR TYPES OF SMES — KNOW IT ALL

“I don’t know why they didn’t just put me in charge of this project. I could do this in my sleep! By the way, EVERYTHING must be included from this 2,000-page manual.”



FOUR TYPES OF SMES — CYNIC

“Training is never the solution; I don’t know why we are wasting our time on this. I’ve already built a PowerPoint on this topic and no changes are needed. You can email me, but I can’t promise I’ll be able to get back to you.”



MY IDEAL SME

EXPERTISE

Best practice of knowledge, facts, and processes

EXPERIENCE

Job-task knowledge gained through hands-on experience

INFLUENCE

Ability to make content-related decisions that stick

INTEREST

Have a desire for the project to be successful



THE PROCESS — GATHERING THE TEAM

- Identify SMEs as early as possible.
- Help your stakeholder to identify the best type of SME using the four characteristics needed: Expertise, Experience, Influence & Interest.
- Don't only identify your SMEs, identify EVERYONE who will need to review your project.



THE PROCESS — WELCOME THEM TO THE TEAM

To: SMEs

From: Awesome ID or Project Manager Who Cares

Subject: Welcome to the [Insert Project Name] Team!

Hello Everyone,

If you are receiving this email, you have been identified as a key subject matter expert for the [insert project name here] project. This means that your input about this this topic, the audience, and our company is critical to the success of this project.

Soon you will receive a meeting invite from [insert name] for our project kick-off meeting where we will discuss project goals, expectations, and timeframe.

We know that you are all very busy with your daily responsibilities, and we are grateful for your partnership and valuable input.

If you have any questions or concerns before the kick-off meeting, please let us know.

Welcome to the team! We look forward to working with you.





HOW MANY OF YOU HAVE KICK-OFF
MEETINGS?

KICK-OFF MEETING

THE AGENDA

Introductions	Where are we now?	Where do we want to go?	How are we getting there?	Wrap-up
---------------	-------------------	-------------------------	---------------------------	---------



KICK-OFF MEETING

- Leader does introduction to project, business need, and your role.
- If the team has not worked together before, round robin.
 - *Name, Role*
 - *Their experience with this topic*
 - *Fun fact or icebreaker of some sort*

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up



KICK-OFF MEETING

- Review the current status.
 - *The current business problem*
 - *The audience*
 - *What resources / training materials are currently being used (if any) for this issue*

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up



KICK-OFF MEETING

- Provide an overview of the project and get their buy-in and support.
 - *Success criteria for the project*
 - *Current design assumptions* (modalities, length of time, ideas on learning objectives, etc.)
 - *Technology considerations* (hosting, how training will be accessed, if training will be tracked, should audio be included, etc.)

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up



KICK-OFF MEETING

- Overview of the project process
- Project team roles and responsibilities

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up



KICK-OFF MEETING

Overview of the project process

	Analyze <i>Defining what is to be learned</i>	Design <i>Specifying how it is to be learned</i>	Develop <i>Authoring and Producing training materials</i>	Implement <i>Launching the training</i>	Evaluate <i>Measuring the effectiveness of the training</i>
Instructional Designer	<ul style="list-style-type: none">Identifies scopeNeeds AssessmentAudience AnalysisSets learning objectivesAssesses existing documentation and materialsIdentifies training conceptProject plan	<ul style="list-style-type: none">Maps existing content to knowledge and skill gapsCreates design document	<ul style="list-style-type: none">Creates storyboards, script, and draft courseware (Alpha and Beta)Based on feedback, revise and finalize all deliverables	<ul style="list-style-type: none">Updates deliverables with final project team and pilot team feedbackProvides final Gold deliverables	<ul style="list-style-type: none">Provides analysis and recommendations based on evaluation and usage data collected
Project Team	<p>Provides:</p> <ul style="list-style-type: none">Information about current state and future goalsSupplies existing content – PPTs, Policies, Subject Matter ExpertiseReviews and provides feedback on training conceptReviews and approves project plan	<p>Reviews, provides feedback and approves:</p> <ul style="list-style-type: none">Training topic outlineStoryboardScript <ul style="list-style-type: none">Attends team project meetings	<ul style="list-style-type: none">Reviews and provides feedback for Alpha (60 – 70% complete)Loads Beta (90-95% complete) to LMSTests Beta with key team members (pilot group) for access and understandingProvides feedback to IDAttends team project meetings	<ul style="list-style-type: none">Develops internal roll-out planLoads Gold (100% finished)	<ul style="list-style-type: none">Provides input into revision recommendations

KICK-OFF MEETING

Project team roles & responsibilities

Project Role	Responsibilities
Subject Matter Expert	<ul style="list-style-type: none">• Attends regular meetings• Partners with ID to incorporate critical knowledge expertise into course• Reviews deliverables and provides feedback
Project Advisor	<ul style="list-style-type: none">• Attends regular meetings• Reviews deliverables and provides feedback• Coordinates with LMS admins for loading of training
High-Level Key Stakeholders	<ul style="list-style-type: none">• Part of final review team for deliverables• Provides support on as-needed basis
Testers	<ul style="list-style-type: none">• Reviews and provides feedback on Beta version of the training
Project Manager & Lead Instructional Designer	<ul style="list-style-type: none">• Manages project and deliverable deadlines• Facilitates project team meetings• Designer and developer

Are there any other key stakeholders, SMEs, or individuals who will be impacted by this training that should be involved in the project?

KICK-OFF MEETING

- How we will work together:
 - *Status Update Meetings* (frequency, who should attend, & best days/times)
 - *How we will be sharing files*
 - *Preferred methods of communication* (phone, email, skype, meeting, etc.)
 - *Dates to avoid*

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up



KICK-OFF MEETING

- Wrap-up
 - *Recap what next steps will be*
 - *Remind them of next meeting date or to keep an eye out for invite*
 - *Thank them!*
- Follow-up:
 - *Send the project timeline and get feedback*
 - *Schedule all your upcoming meetings.* (30 mins for status update & 90 minutes for review meetings.)

Introductions

Where are we now?

Where do we
want to go?

How are we getting there?

Wrap-up





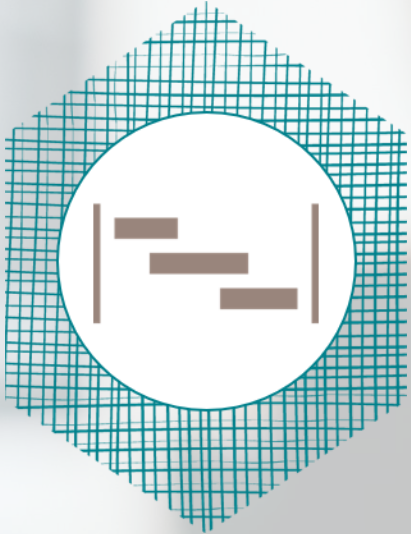
QUESTIONS?



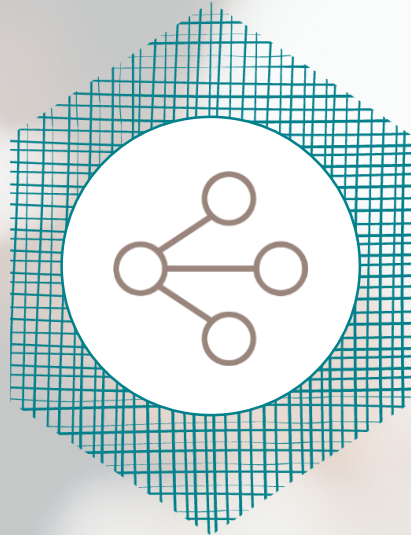
THE TOOLS

THE TOOLS

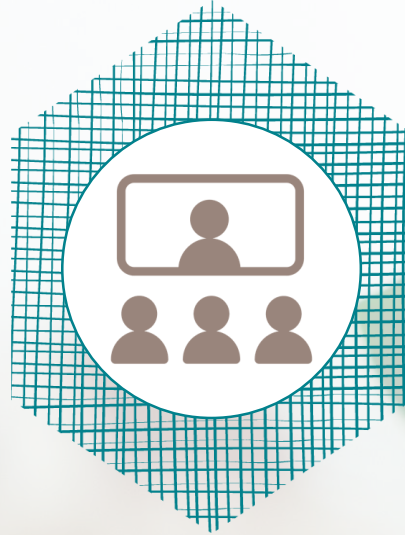
Project
Plan, Timelines,
and Task Tracking



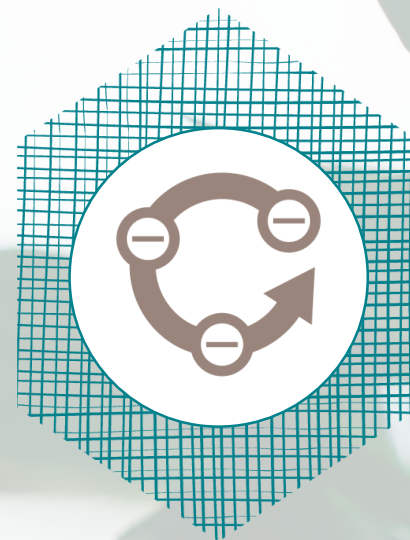
Sharing
Files



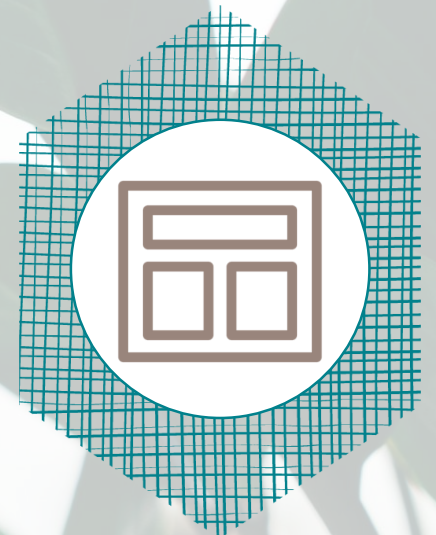
Virtual Meetings



Sharing
Feedback



Templates



WHAT TOOLS DO YOU USE? LET'S DISCUSS.

PROJECT PLANS, TIMELINES, AND TASK TRACKING

Project Plans (What are we doing):

- eLearning Project Plan – [Tim Slade](#)
- eLearning Heroes for Project Plans and more

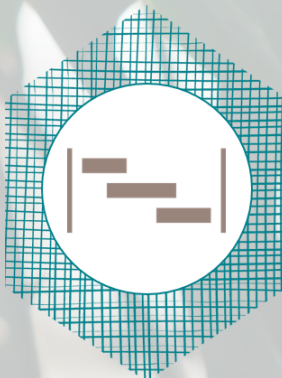
Timelines (How are we doing it, Who, When):

- eLearning Project Timeline (Schedule) – [Tim Slade](#)
- Microsoft Office Timeline

Task Tracking (Manage Your Tasks):

- Trello
- Freedcamp

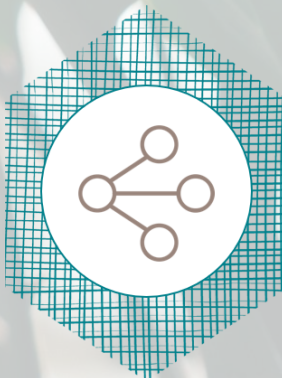
[More software for free project management](#)



SHARING FILES

Name	Features
Dropbox	<ul style="list-style-type: none">• Can be used for sharing or storage• Free account storage space: 2GB• No file expiration• Works across most computers, phones, tablets.• File recovery and version history• Easy to share folders or individual files
Hightail	<ul style="list-style-type: none">• Free account storage space: 100MB• File expiration 7 days• File size limit 2GB
WeTransfer	<ul style="list-style-type: none">• No registration• Send up to 2GB, no strings attached

TIP: Have a set naming convention in place for version control. Ex: Title of Training_V1_05.09.19



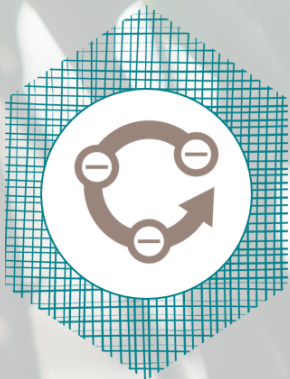
VIRTUAL MEETINGS

Name	Features
Uberconference	<ul style="list-style-type: none">• Up to 10 participants per call• Call recording• International conference #s• Will notify you when someone has joined before you are dialed in• Screen sharing on both sides• Unlimited # of conference calls per month• Does not play well with Safari
Zoom	<ul style="list-style-type: none">• Hosts up to 100 participants per call• Call recording• Unlimited 1:1 meetings• 40 mins limit on group meetings• Screen sharing on both sides• Great outlook plugin• Plays well with Mac, Windows, Linux, iOS, and Android

TIP: If meeting virtually, have video meetings wherever possible.

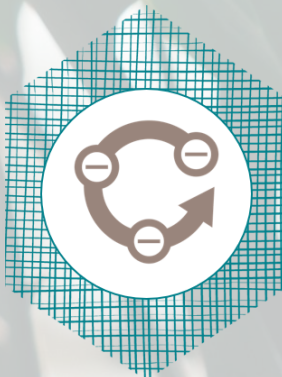
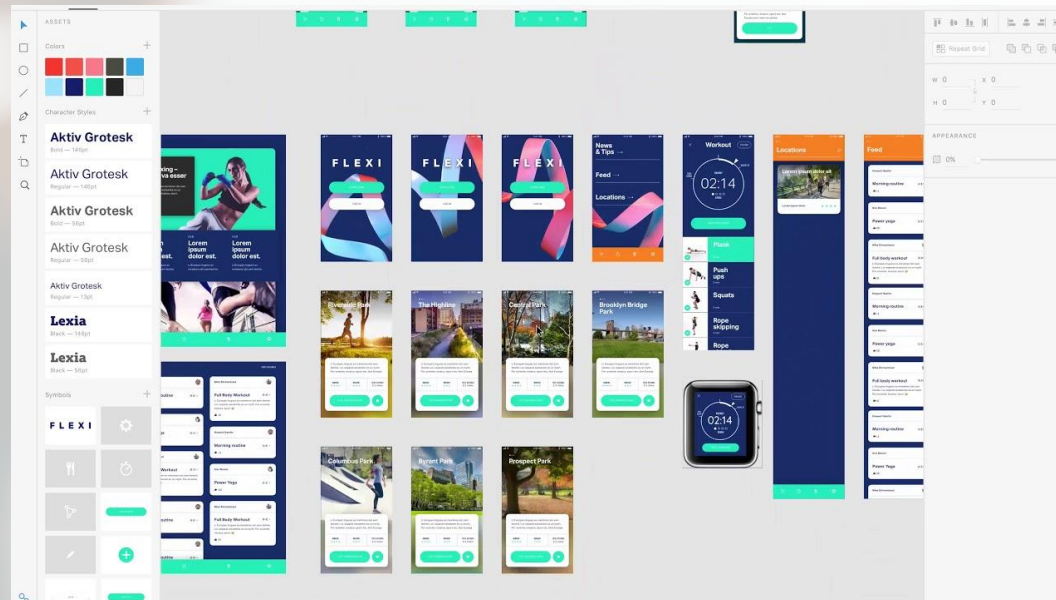


REVIEWS AND SHARING FEEDBACK



REVIEWS AND SHARING FEEDBACK — STORYBOARDS

- MS Word / PPT – User comments and tracking
- Dropbox comments
- Adobe XD

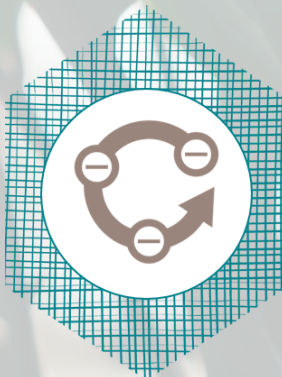


REVIEWS AND SHARING FEEDBACK — ELEARNING

- Articulate Review
- Adobe Captivate Reviewer
- Review my eLearning
- ScormCloud
- Send an email with a word template they can use to gather their feedback

[Check out more here](#)

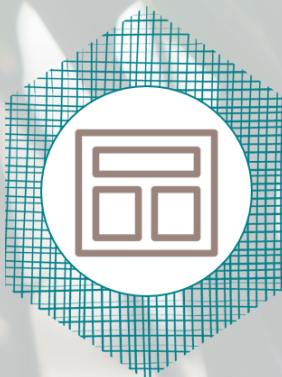
TIP: However you collect your feedback, remember version control and set expectations!



TEMPLATES

- Power Point templates for meetings
 - Kick-off
 - Status updates (ID Update/Questions, Task for this meeting, Next Steps)
 - Project Conclusion (Start, Stop, Continue)
- Communication Templates & Templates for Reviews
 - Template for introduction email
 - Template for each review email (Storyboard, Alpha, Beta, Gold)
 - Templates for gathering feedback

TIP: Make sure your messaging and expectations are clear and consistent across team members.





QUESTIONS?



THE APPROACH

THE APPROACH— HELP THEM ALONG THE JOURNEY

Make it
Easy

Be Kind



THE APPROACH— MAKE IT EASY DURING MEETINGS

- Record the meeting
- Include an agenda/goals for each meeting
- Capture takeaway items for each team member and review them at the end of the meeting
- Remind the team what is coming up next
- Send a follow-up email

THE APPROACH— MAKE IT EASY DURING REVIEWS

- Provide clear instructions and a critique sheet for reviews
- Give them an estimate of how long it may take
- Remind them of due dates
- Request things as soon as possible and be realistic about turnaround time
- Check in on the due date and ask if they need more time
- Let them know the impact if feedback or items are delayed

THE APPROACH— BE KIND

- Be genuinely interested in who they are and what they do
- Start meetings with non-work-related discussions
- Actively listen
- Give them credit and thank them often



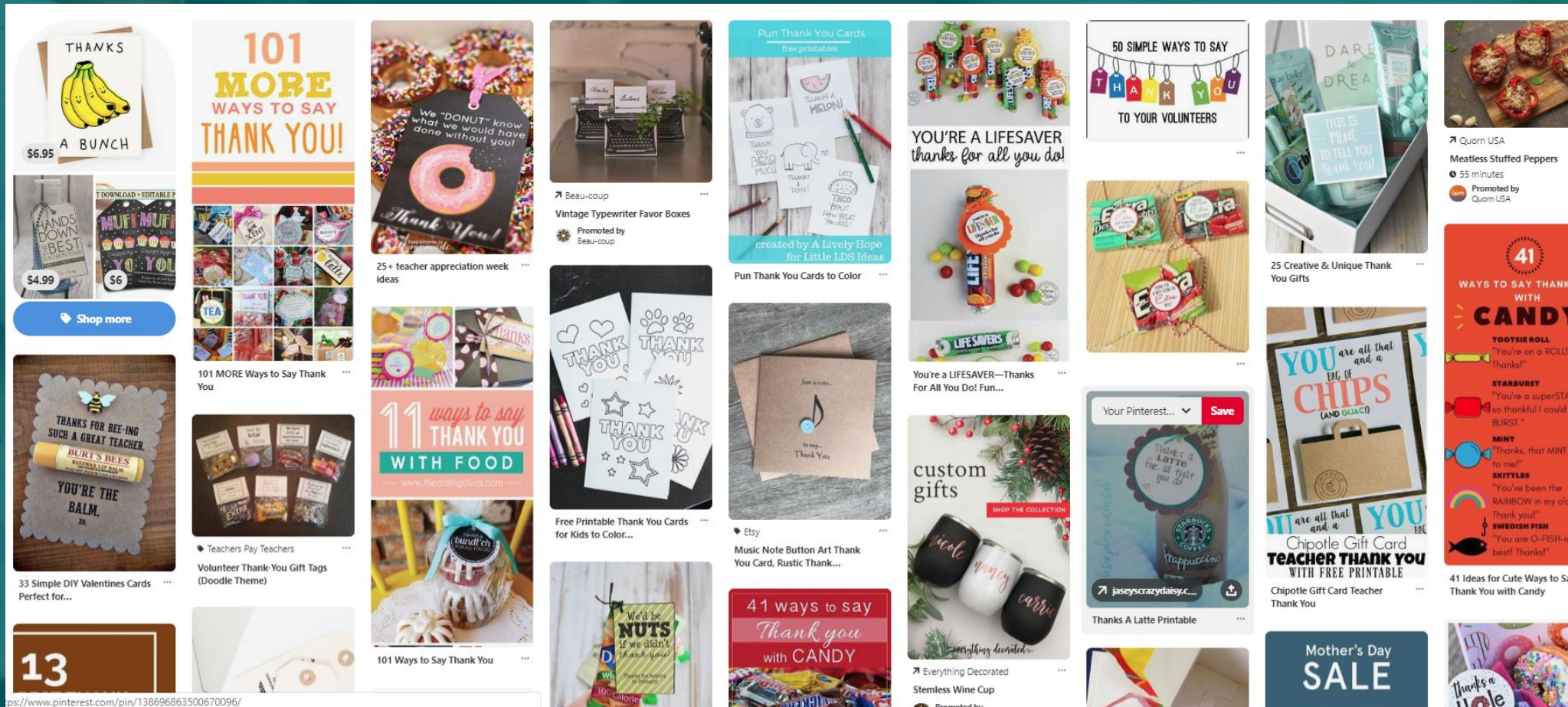
THE APPROACH— BE KIND

Thank You Ideas

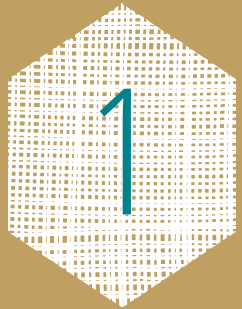
- Handwritten thank you note
- Recognition
 - Praise in meetings and over emails
 - Send an email to their boss praising them and cc them
 - Use employee recognition programs
 - Write a recommendation on LinkedIn
- A thoughtful Gift:
 - Coffee, book, sweets, flowers, gift card (for a favorite item), bonus, etc.

THE APPROACH— BE KIND

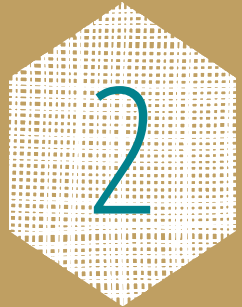
Need additional thank you ideas?



SWEETEN THE DEAL



Process



Tools



Approach





QUESTIONS?



THANK YOU

Questions? Email me!
Deanna.fischer@fischermicrotech.com

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