

October 23 – 25, 2019 • Las Vegas, NV

# DEVLEARN<sup>SM</sup>

15<sup>th</sup> Anniversary



**704**

**Catch More SMEs With Honey:  
Sweet Ideas & Tools for Project Success**

**Deanna Fischer, Fischer Microtech, Inc.**

# CATCH MORE SMES WITH HONEY

Sweet Ideas and Tools for Project Success



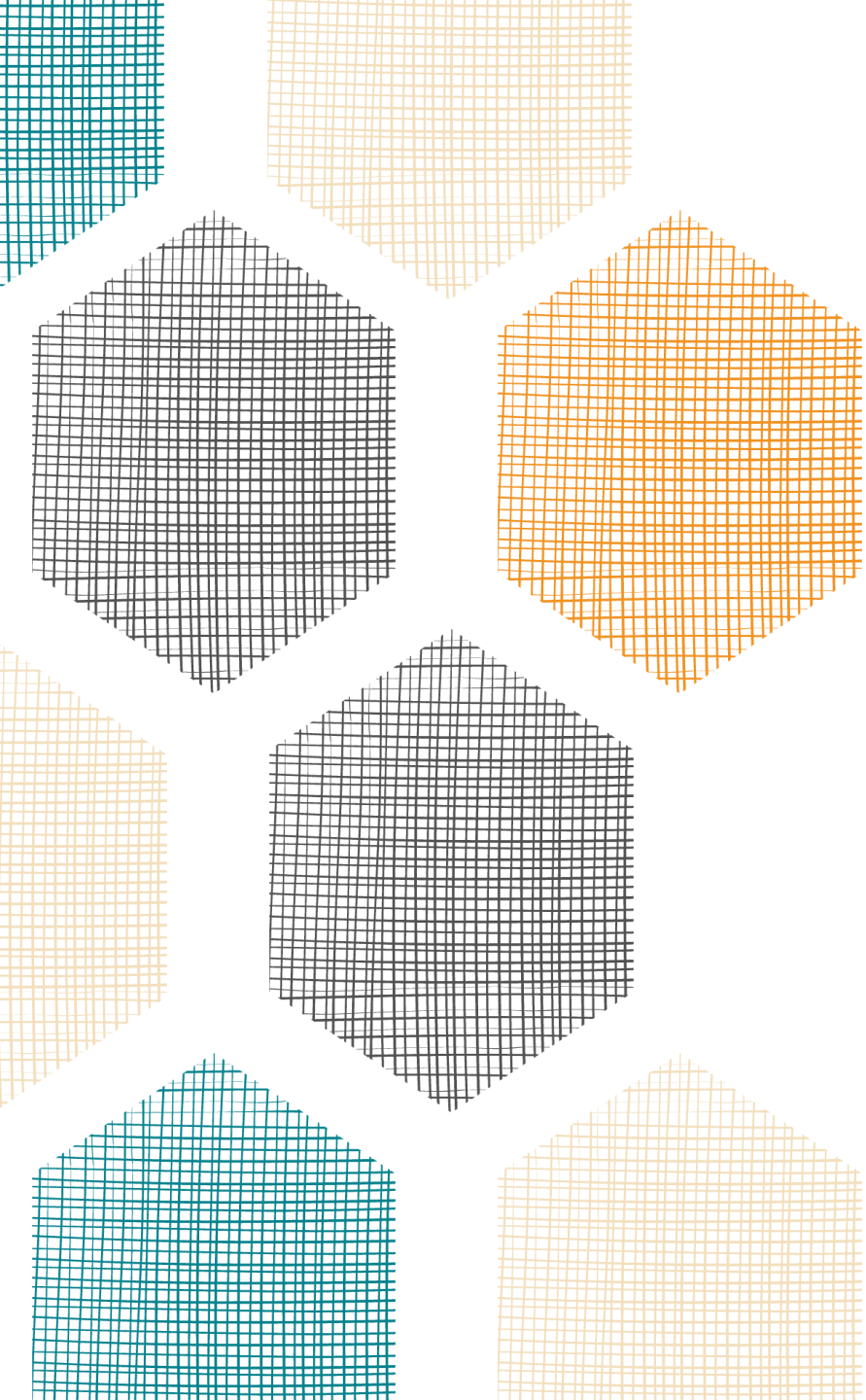


MY GRANDMA ALWAYS SAID,  
"YOU CAN CATCH MORE  
FLIES WITH HONEY THAN  
WITH VINEGAR."



# THE CHALLENGE

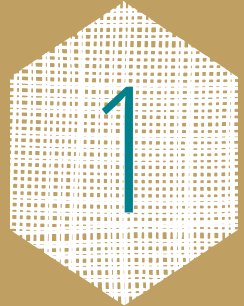
We all want to make an impact, but we have different approaches.



# THE SOLUTION

Make it easier for the SME to partner with you.

# SWEETEN THE DEAL



Process

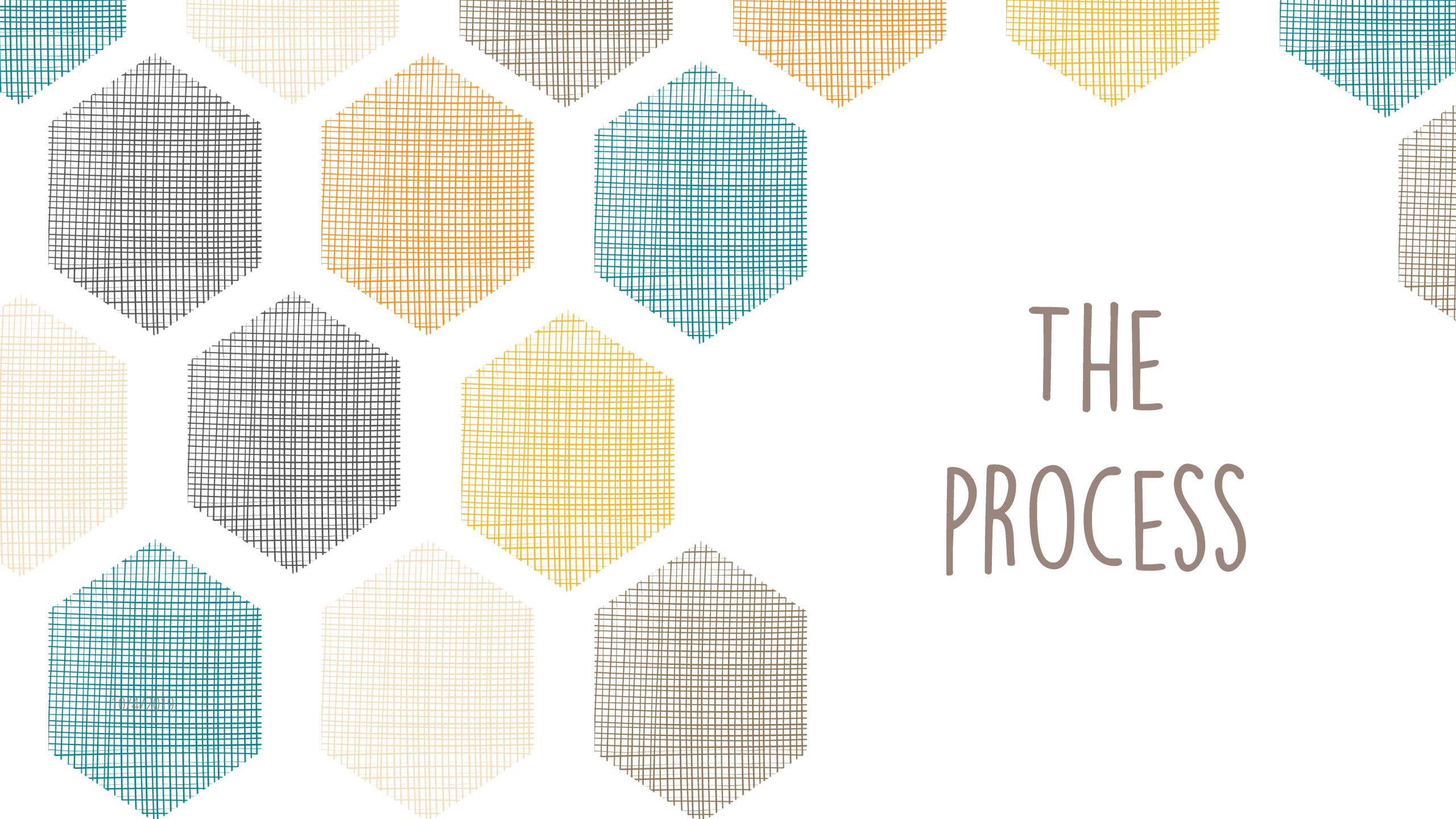


Tools



Approach

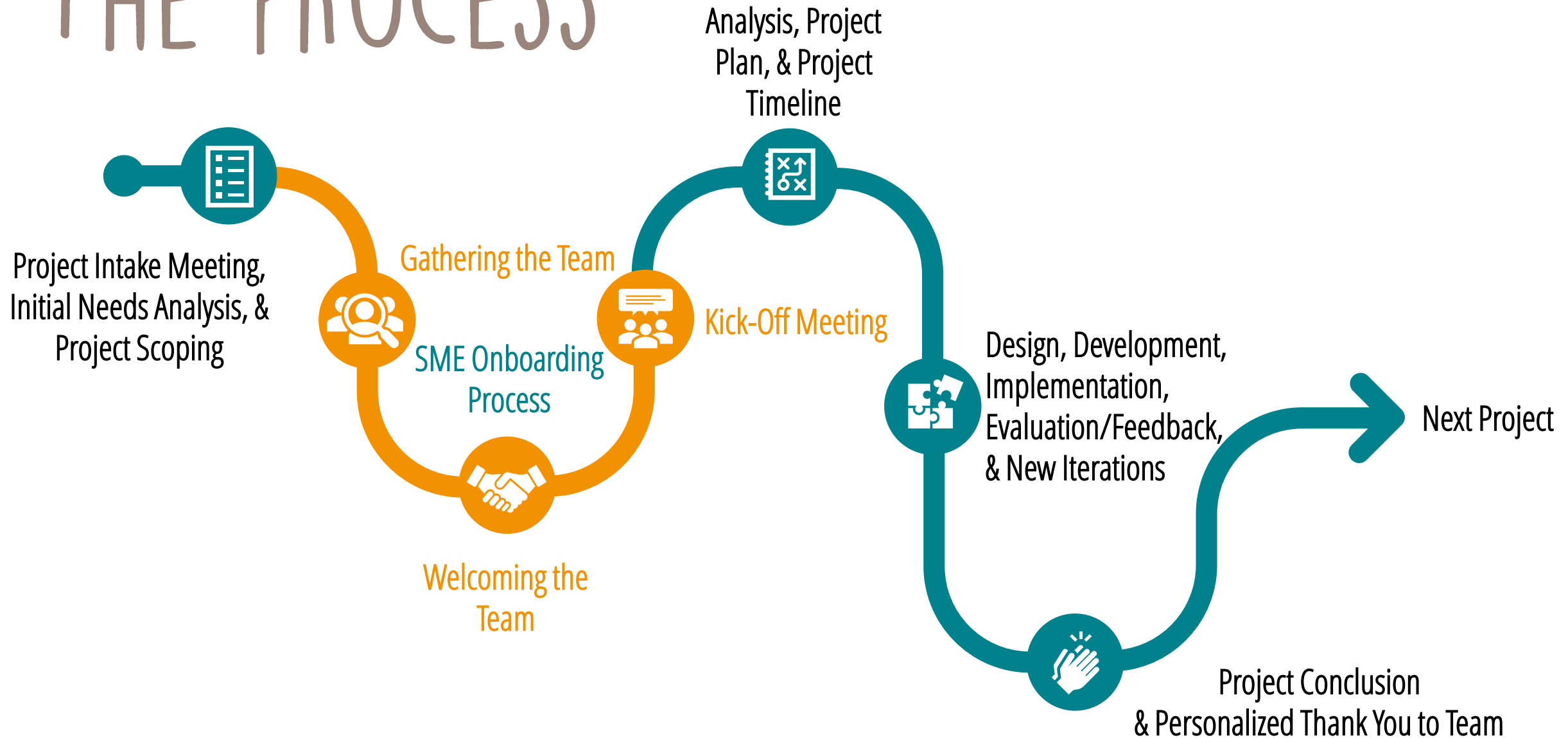




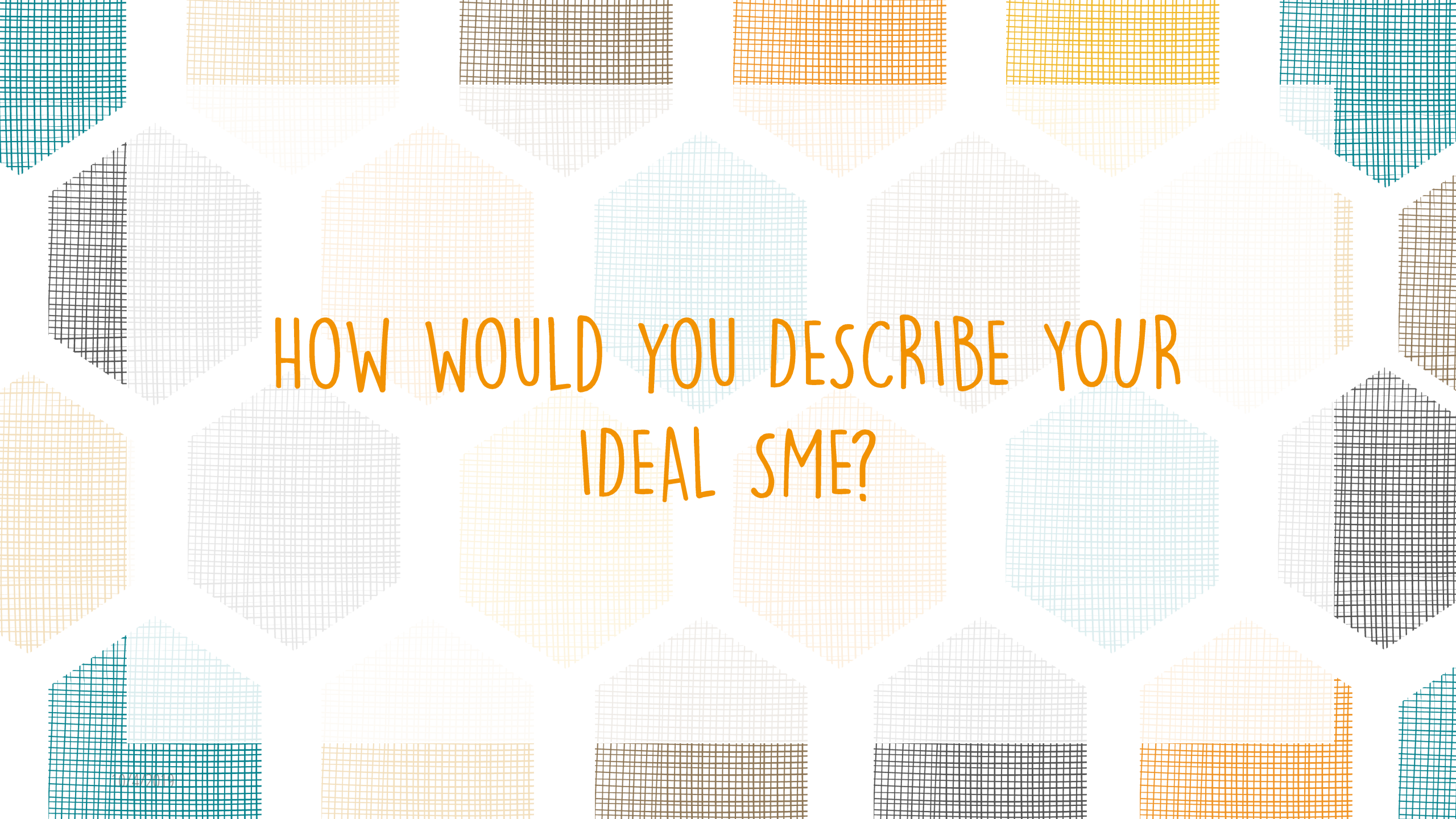
# THE PROCESS

10/31/2019

# THE PROCESS







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





HOW MANY OF YOU WELCOME YOUR  
TEAM BEFORE MEETING?

# 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.



# THE PROCESS

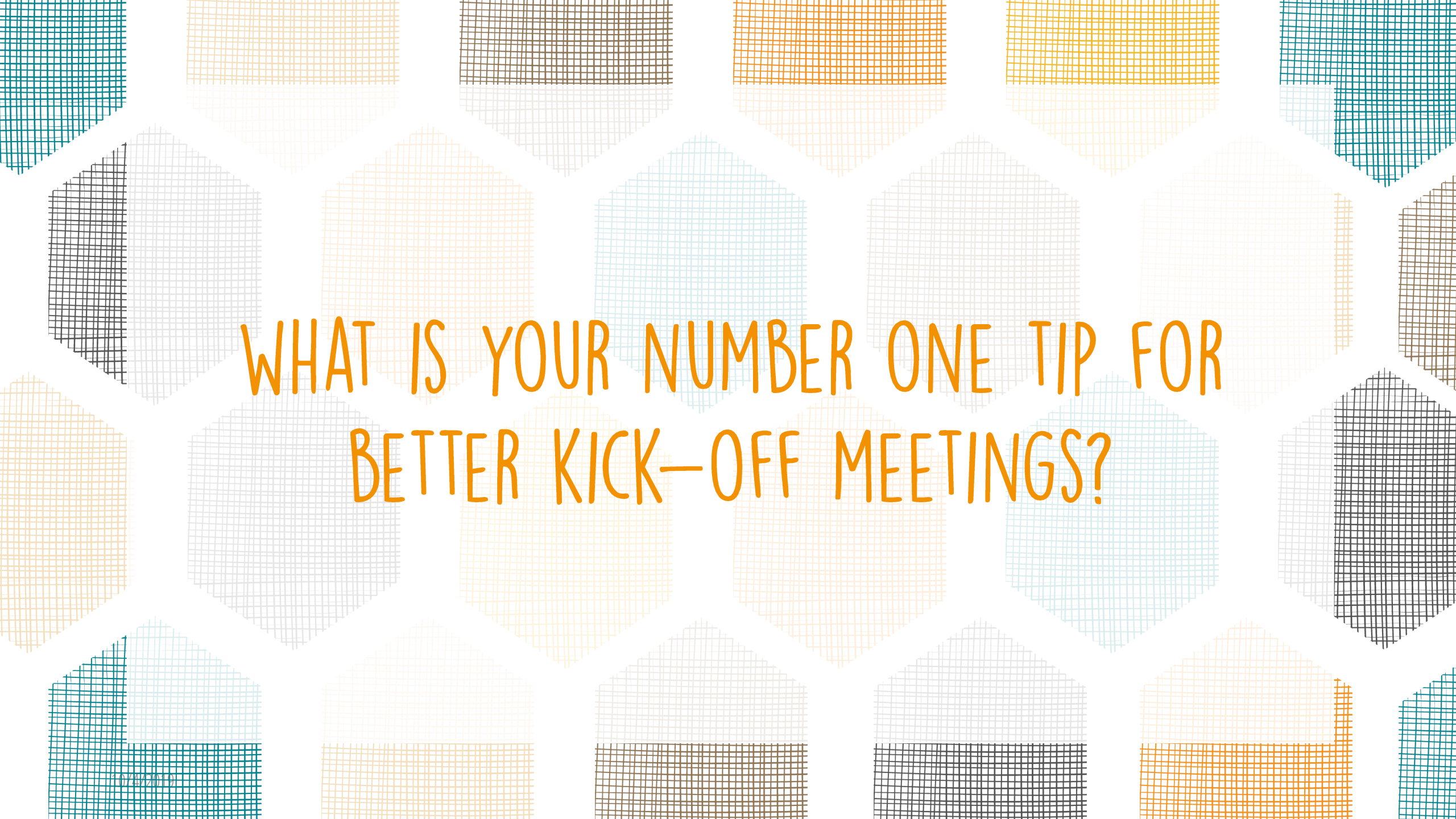




HOW MANY OF YOU HAVE KICK-OFF  
MEETINGS?

HOW MANY OF YOU  
FEEL LIKE THIS AFTER  
YOUR KICK-OFF  
MEETINGS?





WHAT IS YOUR NUMBER ONE TIP FOR  
BETTER 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





# THE PROCESS — THE KICK-OFF AGENDA

A group of five diverse business professionals are seated around a white conference table in a meeting room. They are focused on a laptop screen in the center of the table. The room has a whiteboard in the background and a warm, professional atmosphere. The image is overlaid with a semi-transparent brown filter.

## Introductions

- Leader introduces the project and you
- Individual introductions

# THE PROCESS — THE KICK-OFF AGENDA

Introductions	<b>Where are we now?</b>
<ul style="list-style-type: none"><li>- Leader introduces the project and you</li><li>- Individual introductions</li></ul>	<ul style="list-style-type: none"><li>- Discuss the business problem</li><li>- Discuss the target audience</li><li>- What resources currently exist</li></ul>



# THE PROCESS — THE KICK-OFF AGENDA

Introductions	Where are we now?	Where do we want to go?
<ul style="list-style-type: none"><li>- Leader introduces the project and you</li><li>- Individual introductions</li></ul>	<ul style="list-style-type: none"><li>- Discuss the business problem</li><li>- Discuss the target audience</li><li>- What resources currently exist</li></ul>	<ul style="list-style-type: none"><li>- Key success measures for the project</li><li>- Assumptions about the deliverables requested</li><li>- Ask their thoughts and get their buy-in</li></ul>

# THE PROCESS — THE KICK-OFF AGENDA

Introductions	Where are we now?	Where do we want to go?	How are we getting there?
<ul style="list-style-type: none"><li>- Leader introduces the project and you</li><li>- Individual introductions</li></ul>	<ul style="list-style-type: none"><li>- Discuss the business problem</li><li>- Discuss the target audience</li><li>- What resources currently exist</li></ul>	<ul style="list-style-type: none"><li>- Key success measures for the project</li><li>- Assumptions about the deliverables requested</li><li>- Ask their thoughts and get their buy-in</li></ul>	<ul style="list-style-type: none"><li>- Overview of the project process (The model you are going to use – SAM, ADDIE, ASSURE, etc.)</li><li>- Review project team roles and responsibilities</li></ul>

# KICK-OFF MEETING

## Project team roles & responsibilities

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

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

# THE PROCESS — THE KICK-OFF AGENDA

Introductions	Where are we now?	Where do we want to go?	How are we getting there?
<ul style="list-style-type: none"><li>- Leader introduces the project and you</li><li>- Individual introductions</li></ul>	<ul style="list-style-type: none"><li>- Discuss the business problem</li><li>- Discuss the target audience</li><li>- What resources currently exist</li></ul>	<ul style="list-style-type: none"><li>- Key success measures for the project</li><li>- Assumptions about the deliverables requested</li><li>- Ask their thoughts and get their buy-in</li></ul>	<ul style="list-style-type: none"><li>- Overview of the project process (The model you are going to use – SAM, ADDIE, ASSURE, etc.)</li><li>- Review project team roles and responsibilities</li><li>- Discuss how you will work together</li></ul>

Preferred  
Communication  
Methods

Best  
Days/Times to  
Meet

How to Share  
Feedback and  
Files



# THE PROCESS — THE KICK-OFF AGENDA

Introductions	Where are we now?	Where do we want to go?	How are we getting there?	Wrap-up
<ul style="list-style-type: none"><li>- Leader introduces the project and you</li><li>- Individual introductions</li></ul>	<ul style="list-style-type: none"><li>- Discuss the business problem</li><li>- Discuss the target audience</li><li>- What resources currently exist</li></ul>	<ul style="list-style-type: none"><li>- Key success measures for the project</li><li>- Assumptions about the deliverables requested</li><li>- Ask their thoughts and get their buy-in</li></ul>	<ul style="list-style-type: none"><li>- Overview of the project process (The model you are going to use – SAM, ADDIE, ASSURE, etc.)</li><li>- Review project team roles and responsibilities</li><li>- Discuss how you will work together</li></ul>	<ul style="list-style-type: none"><li>- Request black out dates via email</li><li>- Recap what next steps will be</li></ul>

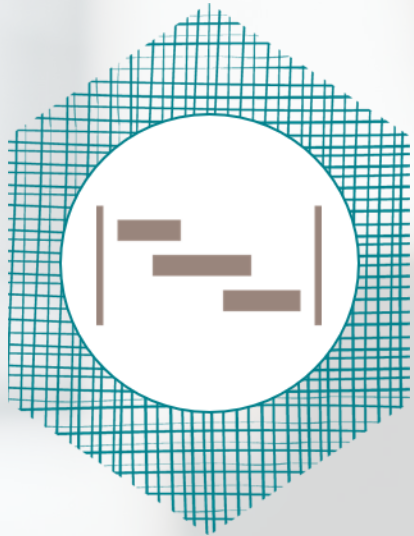




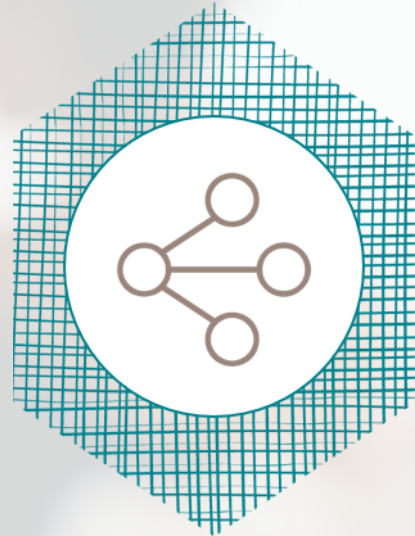
# THE TOOLS

# THE TOOLS

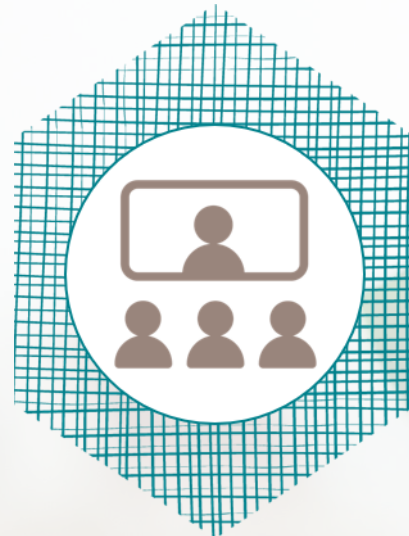
Project Plan,  
Timelines, and  
Task Tracking



Sharing  
Files



Virtual Meetings



Sharing  
Feedback



Templates

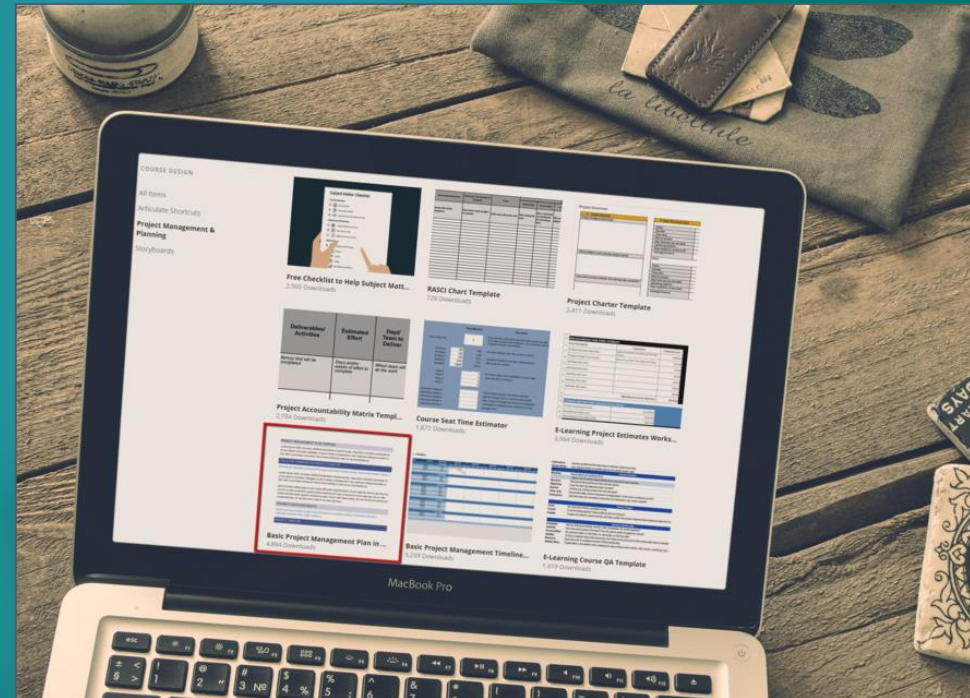


# PROJECT PLANS, TIMELINES, AND TASK TRACKING

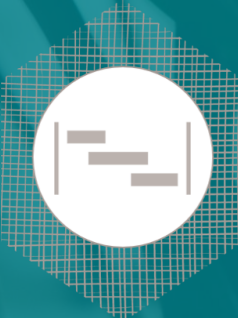
Project Plans (What are we doing):



eLearning Project Plan – [Tim Slade](#)

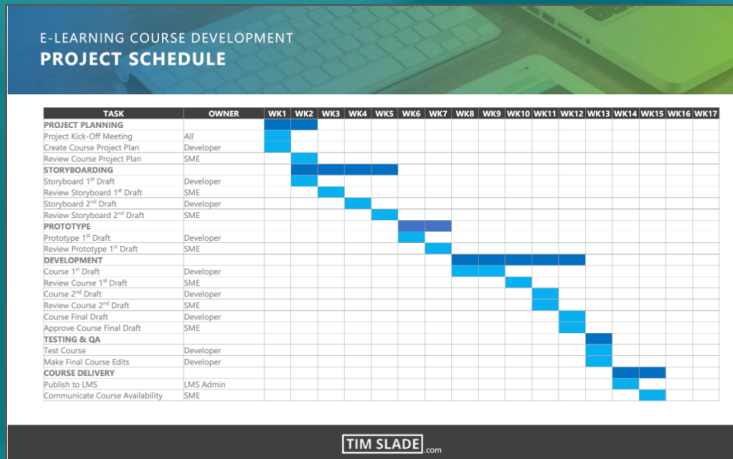


[eLearning Heroes Downloads](#) for Project Plans and more

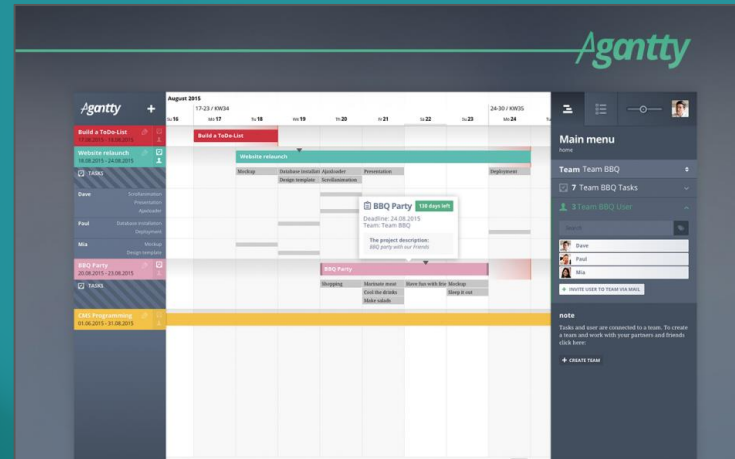


# PROJECT PLANS, TIMELINES, AND TASK TRACKING

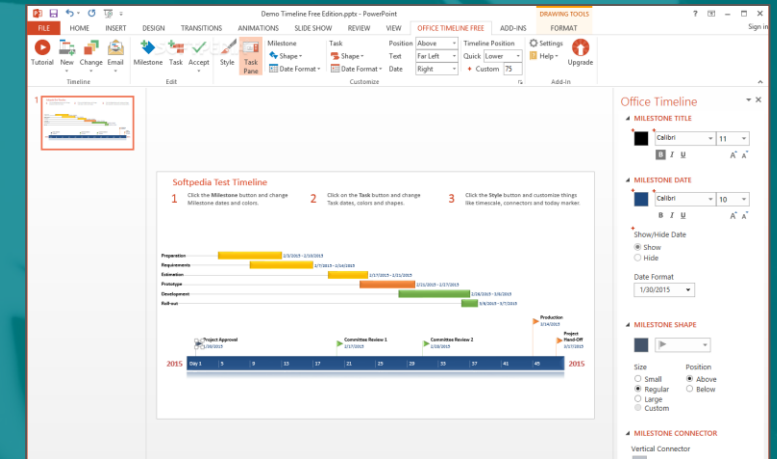
Timelines (How are we doing it, who, when):



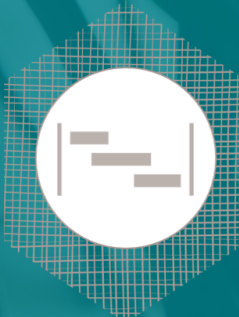
eLearning Project Timeline (Schedule) – [Tim Slade](#)



Agantty

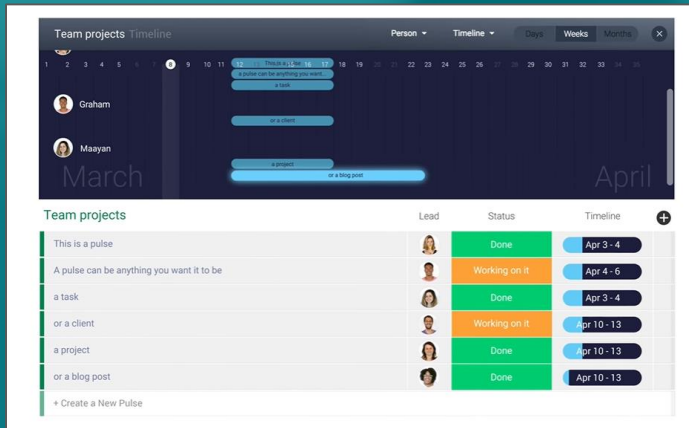


Microsoft Office Timeline

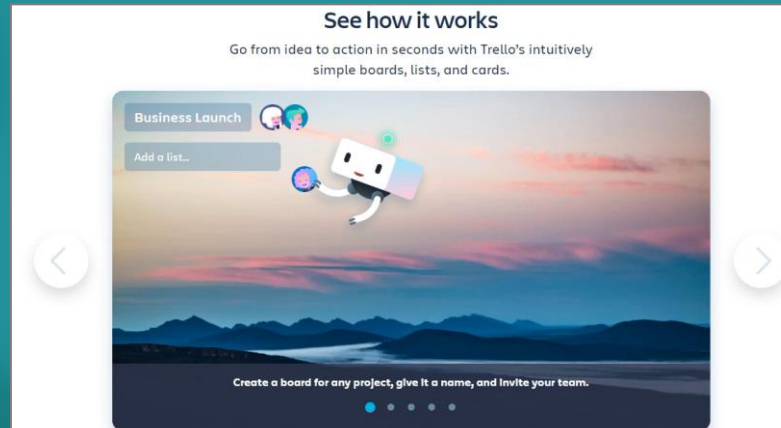


# PROJECT PLANS, TIMELINES, AND TASK TRACKING

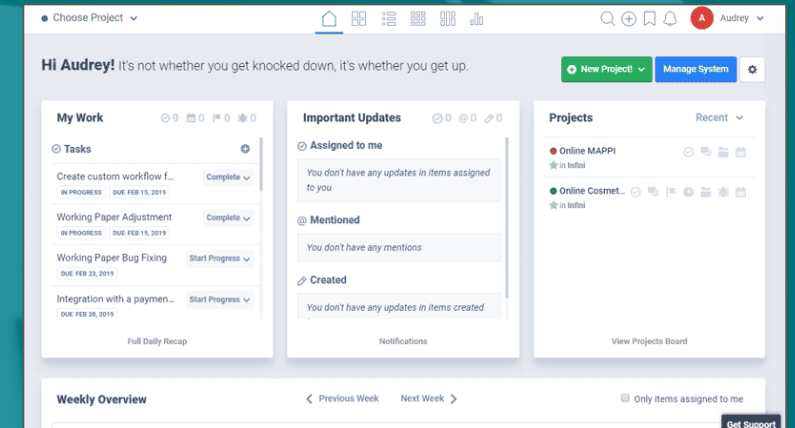
Task Tracking (Manage your tasks):



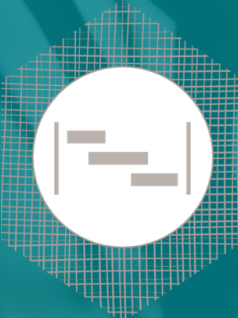
Monday.com



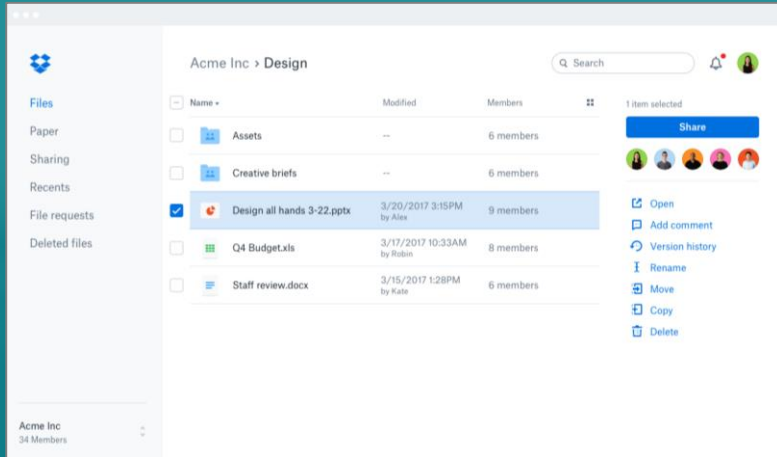
Trello



Freedcamp

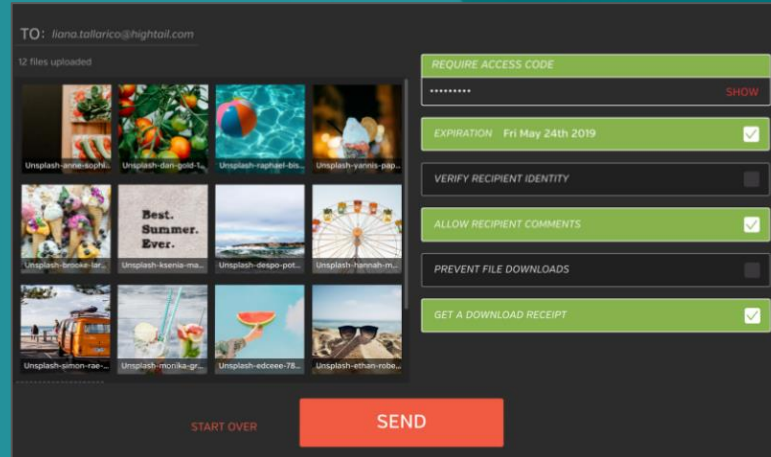


# SHARING FILES



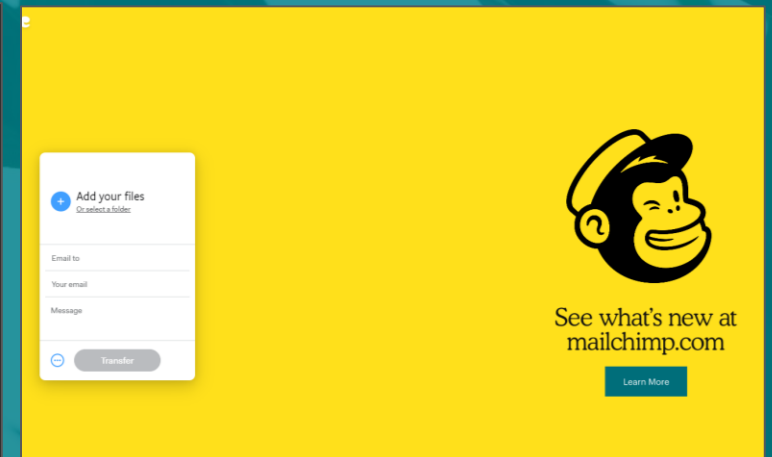
## Dropbox

- Free account storage space: 2GB
- Easy to share folders or files
- File recovery and version history
- New comments feature on files



## Hightail

- Free account storage space: 100MB
- File expiration 7 days
- File size limit 2GB
- Pro version available with additional features



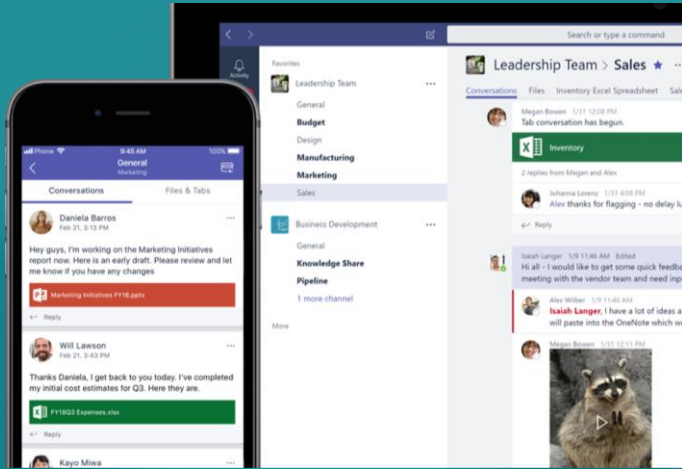
## WeTransfer

- No registration
- Send up to 2GB, no strings attached
- Pro version with custom branding also available

**TIP:** Have a set naming convention in place for version control. Ex: Title of Training\_V1\_05.09.19

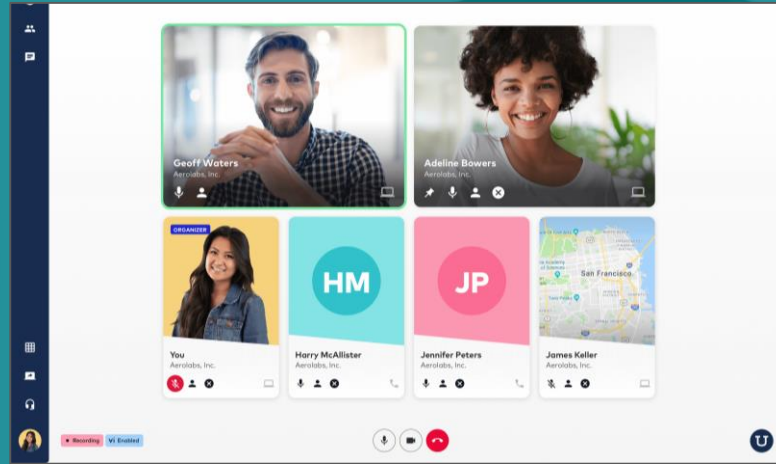


# VIRTUAL MEETINGS



## Microsoft Teams or Skype for Business

- Part of many enterprise systems



## Uberconference – Free Version

- Up to 10 participants per call & unlimited # of calls per month
- Call recording, screen sharing, and video sharing
- Will notify you when someone has joined before you are dialed in



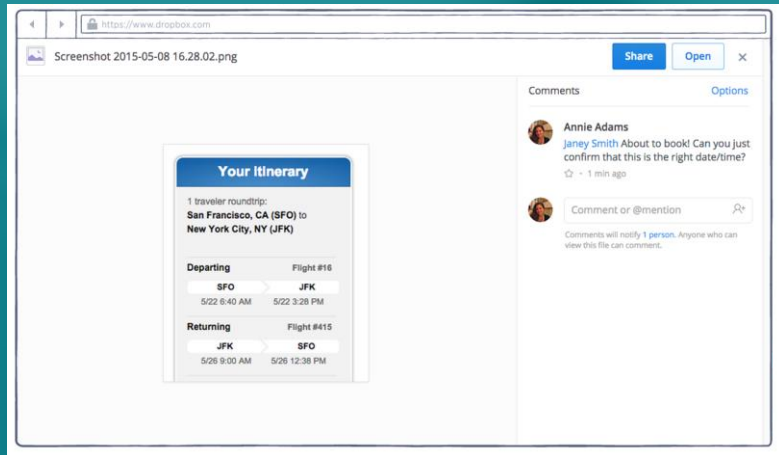
## Zoom – Free Version

- Hosts up to 100 participants per call but limits free calls to 40 mins for groups
- Call recording
- Unlimited 1:1 meetings with no time limit
- Screen sharing and video
- Great outlook plugin

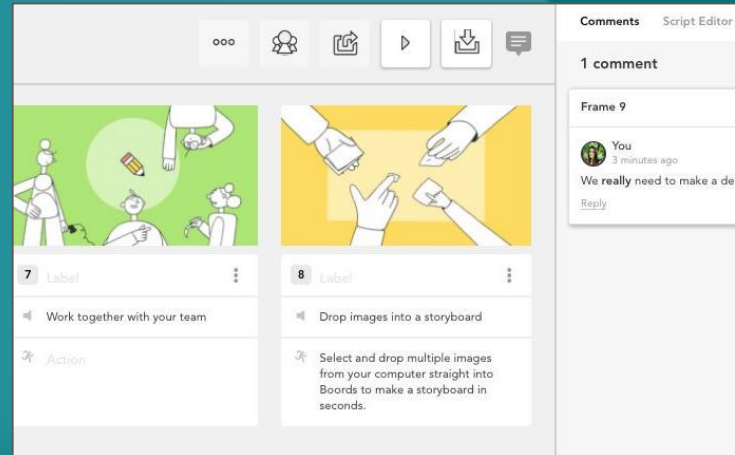
TIP: If meeting virtually, have video meetings whenever possible.



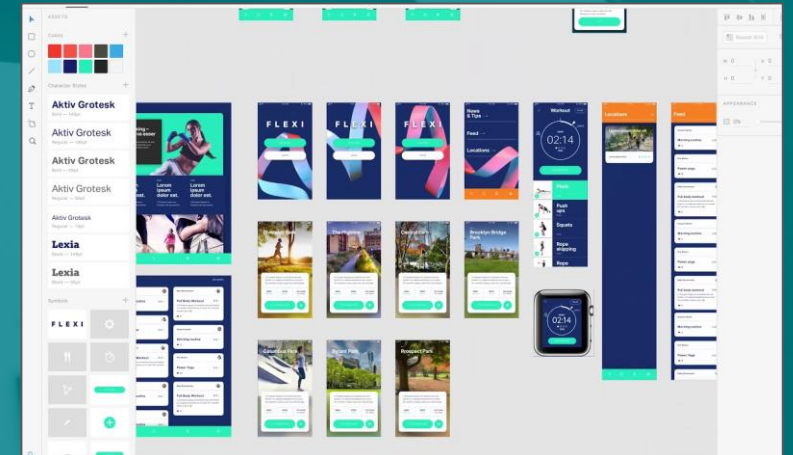
# REVIEWS AND SHARING FEEDBACK — STORYBOARDS



Dropbox Comments



Boords for Videos



Adobe XD





# REVIEWS AND SHARING FEEDBACK — ELEARNING

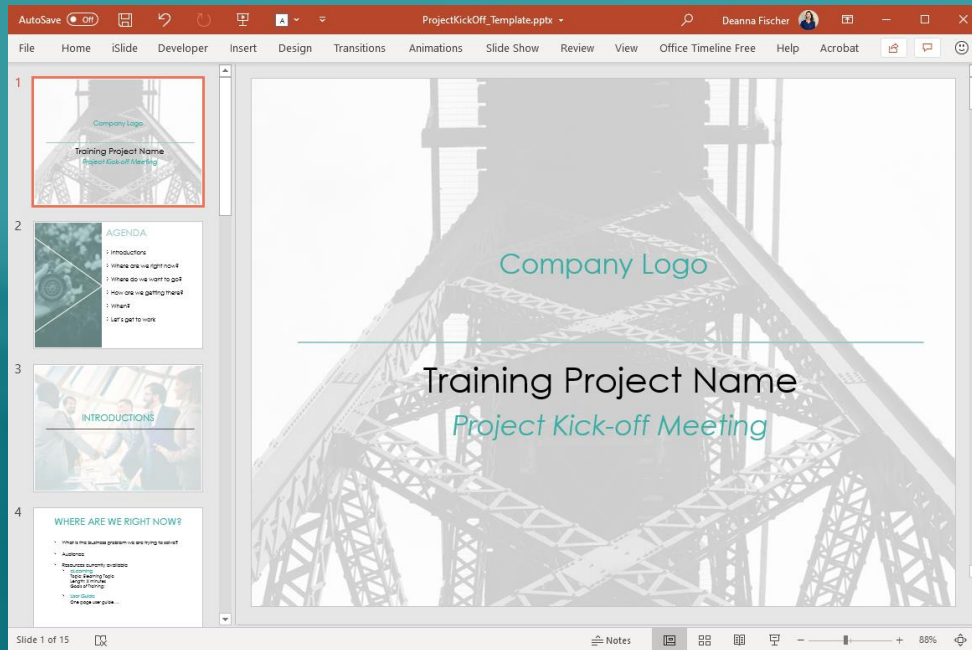
- Articulate Review
- Adobe Captivate Reviewer
- Review my eLearning
- Host on ScormCloud and send an email with a template for capturing feedback

[Check out more here](#)

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



# TEMPLATES



## PowerPoint Templates

- Kick-off meeting
- Status update meetings
- Project conclusion meeting (start, stop, continue feedback)
- Template set up for notes

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

**Name of Training – Alpha Review**  
eLearning Testing Script

**Date:** \_\_\_\_\_  
**Reviewer Name:** \_\_\_\_\_  
**Course Name:** \_\_\_\_\_  
**Estimated Length:** \_\_\_\_\_

**Purpose:** Thank you for participating in this review! The purpose of this eLearning review is to verify that content is accurate, technical functionality is working properly, and graphics are representative of the content and your audience. To assist you in identifying what you should be looking for and organizing your feedback, please see the checklist and issue tracker below.

**Testing - If any issues/errors are found please list them on page 2.**

1. Course run time for you:  
Total Time: \_\_\_\_\_

2. Is the content easy to understand and accurate?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
3. Check spelling and punctuation.	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
4. Check that all navigation functions properly (forward, back, play button, resources, menu, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
5. Do all hyperlinks work on slides and in resources?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
6. On quizzing slides, could you submit and receive feedback for each question?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
7. Do the graphics compliment the content and represent your audience?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
8. Does audio match screen content/text?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2
9. Additional problems?	<input type="checkbox"/> Yes	<input type="checkbox"/> Errors listed on p.2

**SME eLearning Review Email**

Hi **Insert Name**,

The **Insert Name of eLearning** training is now ready for **alpha** review. You can review and leave your feedback via **Articulate Review** at this link: [Link here](#)

For the review this time around, we want to focus on content, navigational/technical usability, graphics and audio. If you are new to eLearning reviews, or if you know of someone who may be doing this for the first time, I've created a helpful list below identifying specific items we should be verifying.

**Content:**

- Is the content flowing as expected?
- Is the content easy to understand?
- Is the content accurate?

**Navigational or Technical Issues:**

- Ease of use, Back/Forward buttons, clickable items, breaks in links, etc.
- On quizzing slides, could you submit your answer? Did you receive feedback?

**Graphics and Sound:**

- Do the graphics compliment the content and represent your audience?
- Are there issues with graphics such as graphics on top of each other, running off the side of the page or over text, etc.
- Grammar issues or typos
- Can you hear the narration and sound effects throughout?

If you have any questions or issues, please let me know.  
I'm looking forward to reviewing your feedback on \_\_\_\_.

Thank you for your help!

## Email Templates & Feedback Templates

- Welcome to the team email
- Review/Feedback request email for each phase
- Feedback capturing template if using a word doc





QUESTIONS?



# THE APPROACH

# THE APPROACH— HELP THEM ALONG THE JOURNEY

Make it  
Easy

Be Kind





WHAT DO YOU DO TO MAKE  
MEETINGS AND REVIEWS EASIER FOR  
YOUR SMES?

# THE APPROACH— MAKE IT EASY DURING MEETINGS

- Be prepared and share your screen
- Record the meeting
- Include an agenda/goals for each meeting
- Capture meeting notes and takeaway items for each team member
- 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
- Be realistic about turnaround time
- Check-in & offer more time
- Let them know the impact of delays – not over email



# 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



WHAT WAS THE NICEST "THANK YOU"  
YOU EVER RECEIVED?

# THE APPROACH— BE KIND

## Thank You Ideas

- Handwritten thank you note
- Recognition
  - Add a thank you note on your learning materials or in an announcement email



Thank  
You

# THE APPROACH— BE KIND



Scrolling Credits in eLearning

## ENSURING WORKPLACE SAFETY

**WORKPLACE VIOLENCE**  
Any act of threat of physical violence, harassment, intimidation, or other threatening disruptive behavior that occurs at any work related location

**2 MILLION WORKERS** Report having been victims of workplace violence each year in the U.S. US BUREAU OF LABOR

### WHAT CAN YOU DO TO HELP?

**FOLLOW THE POLICY**

- × Everyone is required to wear an ID badge
- × Visitors must be escorted
- × Do not possess weapons of any kind
- × Do not engage in behavior that contributes to an offensive work environment

**BE AWARE OF WARNING SIGNS**

- × Changes in behavior or appearance
- × Alcohol/Drug Use
- × Anger/Rage/Poor Impulse Control
- × Abusive Stalking Behavior
- × Threats
- × Violence towards person or property

**If you hear or see something, say something**

SECURITY CONCERN LEVEL	WHO TO CONTACT
Security Emergency	Call 911
Non-Emergency Security Concern	Security Center
Concern about Self or Co-Worker	Supervisor, HR Rep, or Security Rep.

**Security Center #**  
(101) 123.456

Special thank you to George Smith and the Security Team

DEANNA FISCHER  
Learning Design

Give credit at the bottom of your resources

# THE APPROACH— BE KIND

## Thank You Ideas

- Handwritten thank you note
- Recognition
  - Add a thank you note on your learning materials or in an announcement email
  - 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? Pinterest

The image displays a grid of various thank-you ideas from Pinterest. The ideas include:

- THANKS A BUNCH**: A card featuring three bananas, priced at \$6.95.
- 101 MORE WAYS TO SAY THANK YOU!**: A collection of colorful cards and gift tags.
- 25+ teacher appreciation week ideas**: A card with a donut and the text "We 'DONUT' know what we would have done without you!".
- Vintage Typewriter Favor Boxes**: Small boxes designed to look like typewriter keys.
- Pun Thank You Cards**: Cards with puns like "THANK YOU FOR BEING A MELLOW!" and "LET'S TALK ABOUT HOW GREAT YOU ARE!".
- YOU'RE A LIFESAVER—Thanks for all you do!**: A card featuring a Lifesaver candy.
- 50 SIMPLE WAYS TO SAY THANK YOU TO YOUR VOLUNTEERS**: A string of colorful tags.
- 25 Creative & Unique Thank You Gifts**: A box containing various gift items.
- 41 WAYS TO SAY THANK WITH CANDY**: A red card listing various candy-based thank-you ideas.
- 33 Simple DIY Valentines Cards**: A card with a bee and the text "THANKS FOR BEE-ING SUCH A GREAT TEACHER."
- 101 MORE Ways to Say Thank You**: A collection of gift tags.
- 11 ways to say THANK YOU WITH FOOD**: A card with a donut and the text "We'd be NUTS if we didn't thank you!".
- Free Printable Thank You Cards for Kids to Color...**: Cards with simple designs for coloring.
- Music Note Button Art Thank You Card, Rustic Thank...**: A card with a music note and the text "Just a note... thank you".
- 41 ways to say Thank you with CANDY**: A red card with various candy-themed thank-you messages.
- custom gifts**: A card featuring Starbucks coffee cups with the text "I love you money".
- Thanks A Latte Printable**: A Starbucks coffee cup with a thank-you message.
- Chipotle Gift Card TEACHER THANK YOU WITH FREE PRINTABLE**: A card for a Chipotle gift card.
- Chipotle Gift Card Teacher Thank You**: A card for a Chipotle gift card.
- 101 Ways to Say Thank You**: A card with a donut and the text "We'd be NUTS if we didn't thank you!".
- 13**: A card with the number 13.
- Mother's Day SALE**: A card with the text "Mother's Day SALE".

# SWEETEN THE DEAL



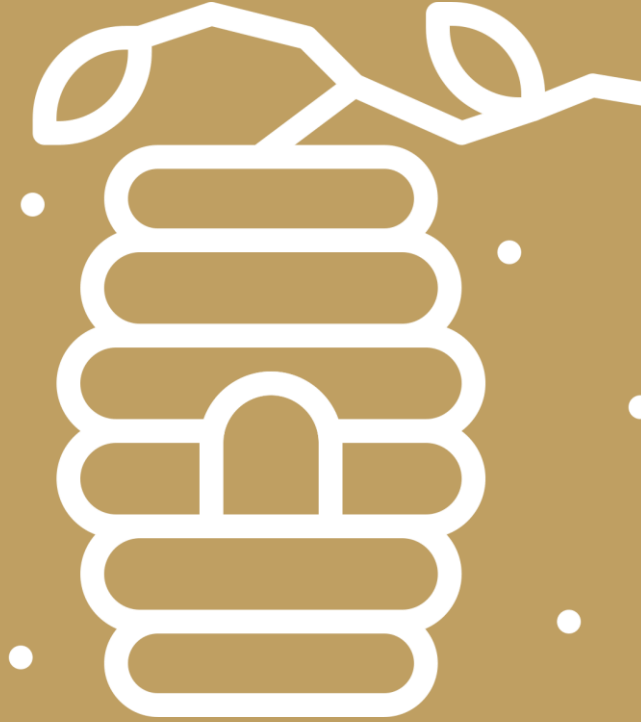
Process



Tools



Approach





# THANK YOU

Deanna Fischer

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[www.DeannaFischer.com](http://www.DeannaFischer.com)

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