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PRH Consulting Inc.

New Products

Greetings!

I have always liked Peter Drucker's quote, something to the effect that "the only business whose purpose is to make money is a mint." Sure, businesses need to make a profit but they must ultimately provide products or services that customers need. If you do that, the profits will follow.

Though economic growth is largely driven by population (more people means we need more cars), technology in the broadest sense is another critical driver (the internet means we all need computers now too). Some technology adds exponential value because it can be used to generate related products and services. The digitization of information is like that—it has enabled the development of computers and cell phones but also enabled companies in general to do more business because of the connectivity and information-processing capabilities these devices offer.

Currently, PRH Consulting is working with clients to identify and build the capabilities needed to support several new products and services. Looking back over the years, we found that we have accumulated quite a bit of experience with new products and, while I must say it can be challenging, it is also very rewarding. In this issue, we will highlight some of what we feel are the key issues and opportunities.

On another note, this will be the last issue of "Building Capability." We have decided (maybe five years later than the early adopters) to join the movement towards "tiny chunks and transactions." Instead of buying albums, now we buy individual songs. Instead of a newsletter, we are going to shift our communications to email blasts, blog posts, and even downloadable videos addressing smaller topics. Hopefully, this will streamline our process and enable us to communicate more frequently.

We are doing this because we've heard feedback from a number of clients that they find discrete and digestible chunks of information to better fit they way they operate day to day. And, since those types of communications can be easily saved or forwarded but are really not meant to printed...maybe we will even save a few branches.

So, if your company is in the process of developing or introducing a new product and are interested in ways to improve it's adoption, we would be happy to help out. If you like the newsletter as is, please give the new approach a try. Please call if you would like to talk over some ideas.

Pete

Peter R. Hybert, CPT
Principal Consultant

New Product Training and Performance Support

Significant changes in the business require training and performance support (e.g., process changes, reference documentation, information tools, etc.) in order to be successful. And, new product offerings, a category in which we include new services and tools, are often significant changes.

Minor changes or variations on existing offerings may require only minimal support whereas more innovative offerings often require a broader look at their impact on a number of audiences and domains of know-how. New manufacturing processes and equipment. New test procedures. New installation techniques. New service and troubleshooting tasks. New support policies. New ordering requirements. Etc.

We believe that taking a systematic approach upfront, while the product is being developed, can identify the vast majority of these changes and allow them to be addressed before they become risks to the timeline. In fact, if they are addressed early enough, it may be possible to modify the

Inside this issue:

New Product Training and Performance Support, continued

product or supporting process in a way that significantly reduces the amount of work or learning needed.

For example, for difficult tasks (i.e., those with a large number of steps, those that require large amounts of skill or knowledge) you may be able to design tools, job aids, or reference information to make them easier to perform. Or, maybe you could even modify the work process to make the task simpler and reduce the amount of training needed. This makes a significant difference across the entire life cycle of the product.

Design for Share-ability

For example, imagine your company provides a service to which customers subscribe (e.g., telephone, internet, cable). A new feature or package may require the salespeople to know key product information, such as features, function, costs, what it can/can't do, how to order, etc. But other roles will need this same content, for example, service technicians.

"...make the task simpler and reduce the amount of training needed. This makes a significant difference across the entire life cycle of the product. "

In the same way, manufactured products also impact sales people, manufacturing operators, installers and service technicians, and others who work directly with the product as well as managers, marketing people and engineers. If you modularize the content during the design process, you can build it to be shared, which reduces the development cycle time and also improves consistency of message.

The diagram at right shows how individuals may work inside of a process or support it from outside. Underneath, there are a series of deliverables that support the process, including references, tools, training...many of which contain the same or similar content. Understanding the requirements of roles and tasks helps you design solutions that fit multiple needs and find ways of sharing content, outputs, and insights.

The Process

Our process is fairly straightforward—we identify the work processes required to support the new product, along with the affected audiences. Then we define the specific tasks, performance situations, and supporting capabilities. This is the same process we use with *any* performance analysis for *any* project! (Because we need the same type of information.)

Sometimes we have a starter list from similar projects or work processes and sometimes not. Sometimes we focus on only what has changed and other times we define it all. It depends…

The Team

With a new product, the performance is rarely known. Instead the team must decide or even create the performance, rather than simply describe it. Since nobody knows from experience, you use either "intended performance" or our "best informed judgment" about the performance. You have to sort of triangulate on the performance by engaging a cross-functional group of team members.

For example, you will probably need an engineer or two from the product development team. They are often busy and their focus is usually on the *product* functionality more than the tasks performed by people using it. So, the engineers should not be your ONLY content resource. But they do control the product functionality and requirements so you definitely need them onboard.

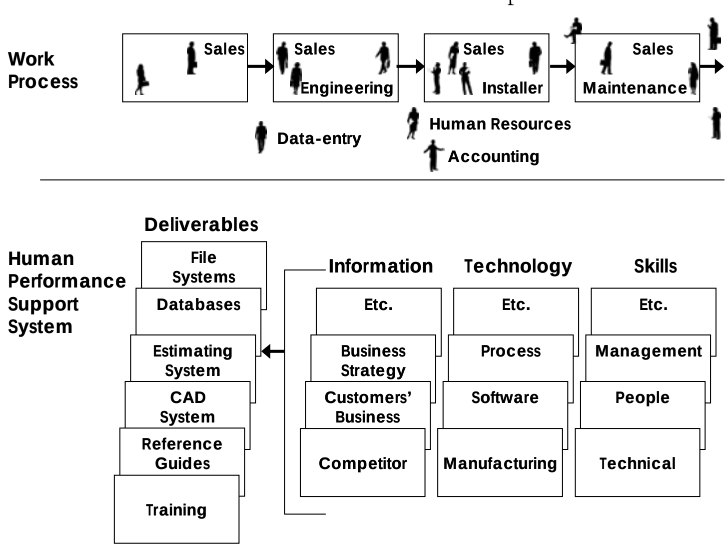
We also recommend incorporating representative members of the target audience. That is, people who currently perform the role/tasks that will be affected by the new product. They can help you gauge how significant the changes really are and where your audience will have the most questions. The dialog they have with the engineers is frequently beneficial to both parties.

We were recently hired late in the process with the development of a tool for one of our clients. We joined the project during a series of beta tests. These tests provided the first opportunity for field people to provide input on the tool. The intent was for us to identify potential training needs but instead the field people ended up identifying a number of brand new requirements and issues. To their credit, the engineering team delayed the release and addressed the functionality...but not without some internal angst.

And, why not have your training and technical writing resources work together so you can coordinate deliverables and minimize the use of subject expert time?

Variation—Rapid Prototyping Approach

We have also used simulation and rapid prototyping to accelerate the development process. You use scenarios and specific examples to discuss process, tasks, etc. Always keep a log of unanswered questions and open issues. This log, if managed, might really be the biggest benefit of this approach—it flushes out problems early on rather than allowing them to be swept under the rug in the early stages of the project by more immediate concerns.



Top 5 aka "The List"—Five Product Support Development Mistakes

There is plenty to worry about with a new product development initiative and mistakes can be made in training, documentation, reference, and support.

Focus on the product instead of the work. It is convenient to organize documentation and training according to how the product is organized. By components, by feature. But performers doing their job don't think in a product orientation. They think about the tasks they need to do. The training and tools need to be organized to fit the work requirements.

Emphasis on details instead of the bigger picture—Haven't we all been in the situation of trying to figure out how to install or start-up something...a swingset, a computer, etc.? Insert Tab A into Slot B. It would often help more to have the big blocks first so you could see where it is all going...and maybe even figure out some of the small steps yourself!

All "how's" and no "why's"—With technical products, there is often voluminous documentation explaining how to perform specific tasks...but often very little on why or what happens if you don't. The why's and watch-for's often help you understand a little more about how the product works, which can help you generally when you are using the product.

Assuming it is just a "delta". It is easy to marginalize issues that make a new product more than just a variation of today's product. Management often wants to downplay the change to speed up implementation. But it is easy to underestimate the difficulty of learning something new. Some early adaptors may survive without training. But the rest of the audience may need more help.

"Wait till it's ready"—It might seem like a good idea to wait until the product and documentation is ready before starting on the training...but it is not. The key is knowing what to start on early. Start early on defining work processes and capabilities. Then, application exercises. You will certainly discover issues nobody has considered and maybe early enough to change something that would be a potential problem later.

Project Profile: **New Facility Communication System**

Situation

We just completed development of a series of training programs supporting the introduction of a new product line in an existing business. The product line was actually developed by an outside company and brought in to our client's organization in an OEM arrangement.

While our client was a large, engineering-driven company, the product developers were a small, entrepreneurial organization. Though the system included hardware, the product was really the software—and the developers liked making changes on the fly. The product was really more a result of evolution than design.

Our role evolved to defining the work processes and then building them into training. There were no master performers. And, the company was in a hurry to get to market so they decided to accelerate the product roll-out. There was not even time to learn from beta-site installations. (Not recommended, by the way.)

Lessons Learned

Below are some of the key success factors from the project.

<u>Start With the Work</u>

Even though a new product may introduce a number of new domains of know-how (in this case, computer networking and programming), we started with an analysis of the work outputs, tasks, and requirements for the core audiences. We used an existing work process model and identified what would change. We kept supporting capabilities related to tasks—this kept the training aligned with what people need to *do*. This enabled us to minimize the volume of content and emphasize job aids and exercises.

<u>Communication is Key</u>

Change can happen quickly and the co-located product team often communicated these changes in the hall or via email. Unfortunately, at first weren't in those loops. It took some time for us to get included.

<u>Figure Out the Resources Needed</u>

Our client just didn't have enough people on the team. As a result, our SMEs were constantly trying to do double-duty with our needs for input and their day jobs. At one point, we were asked to observe an expert setting up the classroom lab equipment and use that as our performance analysis! We made a valiant attempt, but for technical reasons, they couldn't finish the set-up...and we had to go into recovery mode.

<u>Don't (Completely) Avoid Becoming a Pseudo-SME</u>

See the previous paragraph. Many training practitioners want to avoid learning the technical stuff. Ultimately, it is the SMEs responsibility. But, if you know you will have limited opportunities for input and review, it is only common sense that the smarter you get upfront, the better you can use those opportunities.

In fact, there were a few times we actually generated field engineering documents because they didn't exist and we needed them for the training.

> **"We used our capabilities and objects tools to track development status and the location of content."**

<u>Have a Way to Manage Change</u>

We used our capabilities and objects tools to track development status and the location of content. That way, we could have multiple developers working on the project without duplication or gaps. And, if something changed, we knew where to find it.

Conclusion

New products can be very frustrating. The technical and business members of the team want to talk about what is new, hip, and even unknown or undecided. You want some of that. But you also want the basics—like terms and definitions, tasks, outputs.

You want to get firm information but often you will only get the best current view...and warnings about where to expect changes. But, new products and services offer an opportunity to influence work processes as well as individual skills/knowledge. If your focus is performance, new products are high leverage.

News and Events...

Chcago e-learning and website

Over the years, PRH Consulting has been wasting a lot of time (aka researching) various ways of collaborating over the web using low cost, high functionality solutions. Our project meetings are usually "working meetings" (not webinars) and clients are increasingly hesitant about the cost and time needed for travel. For the type of work we do (analyzing performance, and designing and developing training and other solutions) we need active participation and collaboration. And we need it during and outside of the meeting.

One big technical challenge has been working from within and outside of very secure corporate firewalls.

Pete and frequent colleague Dottie Soelke have created a decision matrix and presentation about this very problem. The intent was to help people pick the tool that will do what they need done. So far, we have presented it at ISPI, at the CISPI (Chicago ISPI chapter) conference preview session, and the Chicago eLearning and Technology show case. It is scheduled for a 2010 ISPI skillcast. If you are interested, you can get the information in the "Library."

Visit "the library" on our website for past presentation hand-outs and related articles!

Technology

"Cloud Computing"

Recently the buzz in the IT world has been about "cloud computing." This is basically using software and servers that are located "elsewhere" and accessed through the internet instead of buying and maintaining your own. It is called "cloud computing" because, on network diagrams, the internet is usually shown as a cloud.

Apparently we are much more leading edge than we thought. We have been using "cloud computing" for a number of our business functions for another reason—cost and time savings. We've leveraged on-line services for email, website hosting, file storage and back-up, web conferencing, calendar and task management, and project management and communication.

It makes a lot of sense for small businesses—you can lease vs. buy expensive hardware (and expertise). Now it seems that larger companies are starting to go this route too.

Of course, you need to be careful to select reliable suppliers. And we suggest that you be very cautious about free services — they have to survive somehow so they are probably going to mine your data for advertising or market research purposes.

Still, outsourcing non-core processes is often a smart move and it helps you focus on your primary areas of expertise.

Are your resources bogged down in ongoing content changes and unable to get in front of key business needs?

Give us a call...we have some ideas.

PRH Consulting Inc.

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Rant: Twitter by Pete

I have two twitter accounts….one for me and one for the company. So, I'm hip...aren't I? (Well, if you have to ask…)

Twitter is one of the easiest things on the web to learn and use. That is, "how to use" Twitter is the easiest thing to learn. "***Why*** use Twitter?" is still a question I can't answer. Here are some hypotheses.

1. People who out doing stuff all the time want their friends to maybe join them but don't actually want to make plans in advance.
2. People who are very mobile want their family and friends to know what they are up to.
3. It's just fun to see something you said end up on the internet.

I'm not sure that any of those make sense...to me, Twitter still seems like the equivalent of opening your back door and yelling to the neighborhood that you are doing the dishes. A non sequitur.

Honestly, I can't come up with functionality that isn't already present (and actually done better) in email, threaded discussion, or a blog. Except that you can twitter on a cell phone using a (cheaper) texting package instead of a data plan...

Or is it really just the level of effort, because it is pretty easy to just send a tweet and go on to something else?

Recently there was an article in the Chicago Tribune about people who were nominated for having the funniest tweets. OK...I get that. Entertainment.

But in the March Issue of T&D Journal there was an article about using Twitter for training. The premise was that people in your meeting or training class are multi-tasking anyway (i.e., not paying attention but, instead, playing with their mobile devices) so why not accept and leverage that?

Let learners ask each other questions! *(Why? Why not just ask the instructor who actually knows the answer?)* Let learners provide "real-time reviews" of the class. *(Why? Have they even learned enough to know what they are talking about yet? Are people supposed to leave or stop and turn around at the door when they read the tweets?)* Have master performers post regularly for learners to follow and learn what they are doing. (*What!? Can useful performance information be described 140 characters at a time? "I just identified an implied need!" Um...OK.)*

One suggestion is to use it to build a professional network. This one seems sort of feasible. People do use it to stay connected and get quick answers to simple questions from a known, reliable group. It is a smaller investment of time than say calling individuals (and it is more interactive than sending out a, um, well newsletter).

Hey, Twitter me *@prhconsulting* !