Creating Effective Job Aids for eLearning and Performance Support

ATD-NYC eLearning/Performance Support SIGs
Meeting 1/20/2016

Prepared by Hal Christensen, Andrew Sellon, and Mark Cassetta
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What is a Job Aid?

A job aid is a repository for information, processes, or perspectives that is external to the individual and that supports work and activity by directing, guiding and enlightening performance.

Allison Rossett
A Handbook of Job Aids
What are the Benefits of Job Aids?

As part of a training solution, Job Aids can:

- Reduce the length of instructional time (25-50% reduction is common)
- Reduce the cost of instruction
- Reduce the effects of the Forgetting Curve and the amount of Scrap Learning (ROI Institute estimate: 60-90% of course content is forgotten/not used)
- Significantly reduce errors
- Significantly increase confidence in ability to perform the given task
What Functions do Job Aid Serve?

• **Informational** – Provide Basic Details of Topic
• **Procedural** – Support Completion of Task Steps
• **Heuristic** – Coach Decisions (Rules of Thumb, Best Practices)
What are Common Job Aid Formats?

- Checklists (most common)
- Decision Trees/Tables
- Step-by-Step/How-To directions
- Maps
- How-To Videos
- Worksheets
- Tables
- Flowcharts
- Infographics
- *Post-It* notes
What Makes a Job Aid Effective?

Good Job Aids are:

- Clear
- Concise
- Readily accessible
- Firmly in the context of the work to be done
- Designed to
  - Provide *actionable* knowledge
  - Minimize the amount of prior knowledge needed
When Are Job Aids Needed?

- **Before Work** – To plan for doing a task or set of tasks
- **During Work** – To assist while doing the task
- **After Work** – To review and evaluate what was done
How Can Job Aids Enhance eLearning?

- Downloadable performance support takeaway “bonus” tool for your key learning points
- PDF format: can be read on virtually any device, including tablets and smart phones
- Video: Mp4 format plays on almost anything
- Audio (Podcast): Mp3 format plays everywhere
- Two approaches within your eLearning:
  - PDF (but course must be updated if PDF changes)
  - Document linked via URL (but course must be updated if URL changes)
And now…

SAMPLES FROM MEMBERS
Samples…

FROM ANDREW SELLON
Are any of these symptoms present?

Trauma  
Break  
Hyperflexia

NO

Treat per Symptoms:

YES

Refer to Specialist

No Improvement after below treatment(s)?

Symptom 1 standard treatment(s)

Symptom 2 standard treatment(s)

Symptom 3 standard treatments(s)
Are any of these symptoms present?

Symptom Set A
Symptom Set B
Symptom Set C

YES

Symptom Set A: Specialist A

YES

Symptom Set B: Specialist B

YES

Symptom Set C: Specialist C

NO

Treat per Symptoms:

Standard Treatment(s)

Consider adding other testing as needed
SuperCo Job Aid

Manager Guide for LMS: How Do I…?

<table>
<thead>
<tr>
<th>View a List of My Team Members</th>
<th>Enroll Associate(s) in a Course</th>
<th>Add a Course to Associate’s Learning Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve or Decline Learning Request</td>
<td>View Associate’s Learning Plan</td>
<td>Remove a Course from Associate’s Learning Plan</td>
</tr>
<tr>
<td>View Team’s Courses and Status</td>
<td>Create a Learning Plan for Associate(s)</td>
<td></td>
</tr>
</tbody>
</table>

To perform any of the tasks below, start by accessing the SuperCo LMS:
1. Open your browser to SuperCo Home Page
2. Click the My Workplace tab
3. Log in using your single sign-on ID and password
4. Click the link on the left for LMS

Task 1: View a List of My Team Members
1. From the Manager Self-Service menu, click Team Members
2. Click any column header to sort by that column
3. Use the View Team Members Reporting To box to select another manager, then click the Go for your results
4. Choose any Action from the drop-down box provided to view another part of an associate’s record

Task 2: Approve or Decline Learning Request
1. From the Manager Self-Service menu, click Team Members
2. In the Pending Approvals section at the top of the page, click to Approve or Decline the learning event for the specified learner

Back to Top
Samples…

VIA MARK CASSETTA

THE EVOLUTION OF THE “GETTING THINGS DONE” JOB AID
Mastering Workflow | PROCESSING & ORGANIZING

Stuff

"IN"

What is It?

Is it actionable?

NO

Eliminate

Trash

Possible later actions

Incubate

Sometime Maybe
lists/folders

YES

Projects

If multi-step, what’s the successful outcome?

Planning

Project plans

Review for Actions

What’s the Next Action?

Do it

If less than 2 minutes

Delegate it

Defer it

in communication system, and track it on...

Waiting For

For me to do, specific to a day or time

Calendar

Waiting For

For me to do, as soon as I can

Lists/folders

Next Action

Action reminder lists/folders/trays

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2004
GTD® Workflow Processing and Organizing

LIFE'S RANDOM INPUTS

```
<table>
<thead>
<tr>
<th>Purpose</th>
<th>Vision</th>
<th>Goals</th>
<th>Areas of Responsibility</th>
</tr>
</thead>
</table>

WHAT IS IT?

WHAT'S THE DESIRED OUTCOME? (If multi-step)

IS IT ACTIONABLE?

YES

NO

PROJECT

DEFER IT

DELEGATE

DO IT

PRE-DEFINED WORK

TRASH

INCUBATE

REFERENCE

Possible later action

data-specific triggers

Someday Maybe lists/folders

paper/digital lists/folders

```

2008
“stuff”

- In-basket
  - What is it?
  - Is it actionable? → no
  - Trash

- Someday/maybe (tickler file; hold for review)

- Reference (retrievable when required)

→ yes

- Projects (planning)

- Multistep projects

- Project plans (review for actions)

- What's the next action?

- Will it take less than 2 minutes?

→ yes

- Do it

- Waiting (for someone else to do)

→ no

- Delegate it (to do at a specific time)

- Next actions (to do as soon as I can)

- Defer it
Full Poster Version of the Workflow

(includes “big picture” concepts of GTD)
Recommended Reading

- Atul Guwande, *The Checklist Manifesto*
- Allison Rossett and Lisa Schafer, *Job Aids and Performance Support*
- Richard Saul Wurman, *Information Anxiety*
- Mimi Goss, *What Is Your One Sentence?*
- You can also find a variety of job aids on instructional design on Articulate’s eLearning Heroes [Community Forum](#).