LEARNING CUT EPISODE 12:
AGILE LEARNING SOLUTION DEVELOPMENT - JUSTINE JARDINE

Michelle Ockers: Welcome to another episode of Learning Uncut. I'm Michelle Ockers.

Karen Moloney: And I'm Karen Moloney.

Michelle Ockers: And today we're talking to Justine Jardine, who's a learning experience designer. We're going to be talking with her about working in an Agile project environment to develop a learning solution for rollout of new software. So we'll focus on how she worked and the solution she developed on a rollout of a new transportation management system at Coca-Cola Amatil. Welcome, Justine.

Justine Jardine: Thanks, Michelle. Thanks, Karen.

Karen Moloney: Welcome.

Michelle Ockers: Can you tell us a little bit about the purpose and scope of the project you were working on, Justine, to get our heads around the context?

Justine Jardine: Yes. So I was working at Coca-Cola Amatil, and as you mentioned, they were looking at implementing a new SAP transportation management module. Coca-Cola Amatil has implemented quite big SAP modules in the past. But there have been a few years since then. And so the purpose of this module was really to look at moving logistics into the future, was really this module was going to set the groundwork for future phases of logistics and really looking at the propelling it into the future. So it was seen as strategically quite an important project within the supply chain team.

Michelle Ockers: Okay. And it was a fairly large-scale project in terms of the length of time and the amount of resource that was allocated to it.

Justine Jardine: So initially it was going to be a six-month project, and it wasn't seen as being particularly large; it was sort of a medium-size project. But as the project went on, it was realized that the complexity of the business requirements and the system build was a lot larger than what was originally planned. So it turned from a sixth-month project into a year's project. And this was just phase one. There are plans for up to four or five phases for the project. So we needed to keep that in mind as well with the whole design of the implementation.

Michelle Ockers: It sounds like a lot of projects many people would have worked on before that start a certain scope, and as awareness grows, the scope starts to increase, which presents some challenges in itself for us as learning designers. I think this was the first time you'd worked on a project using Agile methodology, although you have worked on many software rollouts over the years. In your experience, what was different to how the team worked compared to software projects that

you've worked on in the past? And what sort of challenges and opportunities did this present to you as a learning designer?

Justine Jardine: Traditionally SAP implementations and other software system implementations have followed the waterfall model, which is very much sort of a linear sequential implementation where each phase has to be completed before the next phase begins. So we'd start with requirements gathering. They would then look at designing the system. They'd then look at implementing the system of which change in training was one of the parts of that.

But with this project, and as you said, this was my first Agile project, and it was actually the team's first Agile project as well. So it was very new to the functional team, to the IT team. So we were all sort of learning as we're going along. But with the Agile project, it's more of an iterative approach. So the idea is for the design and the build of the system to be agile, to be open to change, to be presenting back to the business, getting feedback from the business. And so the big challenge was that the final outcome, what this final system will look like is not known.

So you kind of had to come to anticipate that in the same way the IT team and the Functional team were needing to be agile, so were the Change and the Training team. So it was a very different way of ... very different approach. But it definitely had its advantages. So it had pros and cons to it. And I just looked to see how I could maximize the advantages of the system build and the design and development of the training content in this sort of environment as well.

Michelle Ockers: So what were some of those advantages? Where was the opportunity in that? And how did you shift the way you worked and your mindset to take advantage of those opportunities?

Justine Jardine: Well, so when I started on the project, I was the only training resource. And one of the things that identifies I guess an Agile project is they do sprints, so different companies may do it in slightly different ways. But the Agile approach looks at every two weeks presenting back to the business what the system build is looking like, what the design is looking like, and getting feedback on that.

So as one of the only training resources on the project, I really saw the value in those sprint showcases, as they call them. And so I saw it as being a way of being able to start capturing what the final outcome would be, but bearing in mind that things might change every two weeks. But there had to be something that would sort of stay the same as we went along, or at least I would track along with the sprint showcases, and with the build, and build up my own knowledge and my own understanding of the system and therefore design a training approach or a capability development approach that would be the most appropriate for that build.

So I would attend the sprint showcases, and what I also realized was the value of those showcases for future development, training, content development as well as for the end user. So I would record the showcases, and then I did a transcript of the showcase as well and published that, made it available to the broader team. And so that was something that was quite wonderful to me as an instructional designer on a SAP project because I was made privy, I guess, to those sort of initial design and build presentations, which often we weren't given.

So in a typical sort of waterfall environment, your training team would come in at the user acceptance stage. They would, if there were test scripts that have been developed, you would grab those. Some may not have been developed. You would get business requirements documents. But you wouldn't really have an understanding of why the system was being built in this way and the changes along the way or the decisions that were being made along the way resulting in this outcome. So-

Michelle Ockers: It strikes me that one of the things we're always talking about on new projects as learning developers is the challenge of not being brought in early enough. And whilst you're saying the final system wasn't known when you started being involved, that ability to develop a deep understanding of why decisions are being taken in a certain way in the system functionality and what that meant for the end user, how it catered to their needs, that would surely make for a better quality learning solution in my mind.

Justine Jardine: Definitely. I do really think that one of the reasons for the success of this project was that I was on it early, and like you say, sort of tracking along with the build. And so if anybody is sort of thinking about whether this sort of approach is something that can be repeated, the other advantage was that it was just me for a long time on the project. So it wasn't like there was a big team that we're tracking the project along for what was going to be a six-month project but became a year project.

It was just myself. So I would just suggest that you would just need one training resources to keep track along the project, to also keep training, change and training front of mind within the project team because often with these projects this only comes to implementation stage, and then people are like, "Oh, I guess now we've got this marvellous system, now we've got to actually train people." Whereas I was attending the daily stand-up meetings, which is part of the agile approach as well, and the whole time just making people conscious that, yes, having a good system is important, but having capable people that can use the system and understand the system is just as important for project success.

Karen Moloney: Yes. That's a story that kind of really resonates with me around ... I mean, I've worked on some of those SAP projects, but other systems implementations and even just bigger, wider learning and development projects where people kind of just sort of, they've done all their content, and they've gotten everything that

they need to. And then they pull at it at the last minute, and I'm sure there's many people out there that can relate to that.

So I really was interested in this the BAYG approach, the build-as-you-go approach to creating learning that you took. So could you just talk us through a bit about how you did that and what that looked like?

Justine Jardine: Yeah, sure. So because we were having these fortnightly sprint showcases. I sort of felt like I needed some way to actually start capturing this content or these resources so it's available to everybody. So one of the first things that I looked at doing with my colleague was to design and build a portal on SharePoint. So this became like the hub for the project.

The project team were also using a collaboration tool called Confluence, which is by Atlassian, which is a really great tool. But it was just only available to people with a login within the project team. So the learning portal was a public SharePoint site. And we called it the SAP TM Learning Portal, and it was where all the learning resources and content would be stored.

So I started with the sprint showcases. Then what I did as well was I put on notifications on the collaboration tool so that whenever things were published up into the collaboration tool, like business requirements, documents, et cetera, I would get pinged on that, and I could start building up my own knowledge of the system.

I then started to almost curate the content because at one point there was just so much information floating everywhere, and I realized that I actually needed to start the process of sort of chunking the content. So I curated it for myself by topic. I then started to look at the course outlines, so looking at who were the major stakeholders, what did they need to know, and started to building out course outlines quite conscious that at some point development would need to start. But the clearer the course outlines I had, the more well-developed they were, the quicker that would ... It would speed up the course development when we got to that point.

Karen Moloney: Okay, so that's something really interesting. Thinking about that idea of the portal, that you had limited budget, you had key audiences, and then you also had secondary audiences as well for those different resources. So the resources that you created needed to be scalable and sustainable. So can you tell us how you addressed that?

Justine Jardine: Yeah, sure. I guess from previous implementations, and, Karen, you may have experienced this as well, is that the training team sometimes developed sort of big work constructions, and that were many pages, and lots of screenshots, and big training courses, and things like that.

Karen Moloney: Mm-hmm (affirmative).

Justine Jardine:	And I knew that I didn't have the capacity myself to do that, and even if I got one or two resources, I just wouldn't be able to produce the same amount of content that a six-to-eight person team would be able to create. So one of the things that I did right up front on the project was, as I mentioned before, Coca-Cola Amatil had implemented SAP modules in the past, so I was quite keen to get people's experience on basically what had worked well in the past, what hadn't worked well, and what would they like to see in the future for an SAP-type implementation.
	So from that I gathered, the two main things that came out of those sessions was that people love job aids and relied very heavily on job aids or performance support resources in whatever format they may be, and secondly people wanted a training system, a play system, which not all projects allow for because budgets. To have another SAP training system can be quite expensive.
Karen Moloney:	Yeah, it could take a lot of time to set up all of that data and resetting it.
Justine Jardine:	Exactly.
Karen Moloney:	Done that once or twice.
Justine Jardine:	Yeah. It can be pretty painful, yes. So I guess I, in terms of the work instructions versus job aids, I sort of jumped over the whole work instruction idea, and I went straight to creating job aids. And these job aids really it's I developed them in PowerPoints. They primarily had one main screenshot on it with callouts as to the main fields on the screen. Because the same screens were often being used by different audiences, I created the job aids to be able to be used across the different audiences but just highlighted where parts of the job aid were only applicable to certain audiences.
	And I found that just the time to create something like that was a lot quicker. The usability of it across the audiences, it also made people, our end users be able to see all the different ways the screen can be used, and even though they may not perform that particular function, they could pick up general information about the screen, like filtering or other columns, et cetera.
	I went in and I asked if I could have a training system, got pushed back because of budgets, managed to negotiate that we would be able to use the testing system. So the system they were using for UAT, we'd be able to use that for training as well.
	So we've got training logins set up, et cetera. And it just felt really good to be able to answer to what people had asked for, the two major things that would make a big difference to them in terms of their learning the system and getting comfortable with the new system.

Karen Moloney: Yeah, and what sort of feedback did you get from learners about those resources that you created?

Justine Jardine: Most have very good feedback. So a couple of weeks ago I sent out sort of a post training evaluation survey just to get feedback on their learning experience, the learning resources, as well as their feeling of readiness for go live. I asked how useful they found the job aids, the training courses. We did log books as well for some of the warehouse staff, the videos we recorded, et cetera. And everybody marked that they found the training or the learning resources developed as either very useful or useful. So I was very pleased with that feedback.

Karen Moloney: That's awesome. Yes, you should be. Sometimes we have a lot of self-confessed perfectionists in our industry. I'm a recovering one. But you mentioned a phrase when we were preparing for this about the project that made my ears prick out, which perfect, perfect ... Oh my gosh, I can't even say it, perfection versus usability. And I think that that's actually quite important. I mean, but it's a big mindset shift, isn't it, for us learning designers who are used to controlling everything and producing perfect work to kind of go, "What's the minimum viable product? What do I absolutely need to create to make an impact?" So how did you kind of deal with that mindset shift for yourself and change what you were doing for this project?

Justine Jardine: You know, it's a mindset shift for us within a training team, and it's also a mindset shift for our end users. So I think I'd probably focus more on expectation setting with the key and the super users and the end users. And maybe in doing so I sort of convince myself that this was a good way of going. I was making the most of the time and the resources that we had available.

                    What I did do, I did well. So it may not have been a 10-page document, it may have just been a one-page document, but I tried to make sure that that was the best one-page document that I could create, that it was ... But I focused more on is it accurate, is it within context, is it going to be useful, rather than are they nice diagrams and colours and that sort of thing.

                    But yes, I spent quite a bit of time speaking with key users, super users, end users to say to them, "I've got a video here. I think that if you watch this video in conjunction with referring to the training course, I think this will be really helpful and will get you going in the system. Please understand that this is not a perfect video, this is actually a video I took from a meeting that I held with our business lead, but it covers the key things that you would need to know in order to do this transaction within the system. So that's just an example.

                    And I think if you set the right expectation and people are looking for something that can just help them do their job, if they're not necessarily looking for the bells and the whistles, there's place for that in different ... There's a need for that in different places, and we weren't marketing the training program, we were just trying to get people comfortable to do their job.

Karen Moloney: And I think that that's really quite important, isn't it? And I think that one of the phrases that you'd used previously was around doing the best you can with what you've got.

Justine Jardine: Yes.

Karen Moloney: And sometimes you don't ... Sometimes, let's not make it too complex, I think we have a tendency to overthink things. And like you said, I think asking lots of questions up front of the people who are actually going to be using the materials and getting all of that input really does inform the choices that you make as a learning designer.

Justine Jardine: Yes. Absolutely. One of the things I always had to be conscious of was to make sure that everything I did was scalable. So, as I mentioned, this was just the first phase of the project. So the time that I spent on the design and working with my colleague on creating the learning portal, I knew would be beneficial not just for this project but also for future projects, and it was just provided somewhere which gave some ... Like, it created the hub, so there was kind of a glue that glued together all the job aids, the learning, the training courses, the videos, the sprint showcases. It glued it all together.

Michelle Ockers: So apart from the scalability, sustainability is obviously an important issue as well because things don't stand still. There could be changes made subsequently to functionality, to the way different screens are used. And one of the interesting things that I know you did was you published the job aids as more PowerPoint, not as PDFs. So often we tend to publish things in formats that can't readily be edited. But part of your strategy was to equip certain people to be able to go in and directly edit the job aids and future without that necessarily all needing to be controlled by people in a learning and development team.

Do you want to talk to us a little bit about your thinking there and how you actually set that up, and the challenge of making sure things stayed accurate and how what sort of quality control and strategy you had around that?

Justine Jardine: Yeah, sure, Michelle. Up front, because I realised, well, there could just be me doing, unless I've got budget to find another resource, and initially I wasn't sure of that. So up front I realized there was no point in me developing content in things that were requiring a license or requiring specific skills. So therefore I ruled out using Captivate in this instance, and I chose to use PowerPoint for the courses.

For the job aids, again, I decided to use PowerPoint or Word. And so the reason for that was two-fold, that if I needed help with the development of content, that people wouldn't need licenses or would need the skills. And second-fold if I'm going forward in terms of the maintenance of the content, it meant that anybody with basic Microsoft skills would be able to maintain the content from the learning portal.

So the learning portal was basically structured, broken up by stakeholder groups. So if you were in the warehouse, you clicked on the warehouse image on the carousel, and you went through to the warehouse page. And that listed all the job aids and the training courses, et cetera, relevant to you in the warehouse.

If you clicked on one of those links, as you said, it would open up in PowerPoint. And if you had been given read or write access to that folder, it meant that you could go in and edit that content. So now that I've rolled off the project, that's exactly what the team is going to be doing going forward. So the training content that I developed under a project environment is going to be moved into being maintained from an operational point of view. And they will have full read and write access in order to do that.

In terms of sort of control, we just did control from a point of view of everybody could view the content, but only certain people would be able to edit the content. But in terms of reviewing edits that everybody made, after the go-live it's not sort of a formal review process that it went through. It was up to ... Because a lot of those are the key end super users who have been involved in UAT or are very knowledgeable about the system. So there's a level of trust that they will go in, make edits, and that they can check each other's work in a sense as well, and update, and continuously improve the content going forward.

Michelle Ockers: Yeah. Fantastic. And that would have been very tricky to do if everything had been stuck away in a learning management system rather than on a portal that people could access readily whilst doing their job, right?

Justine Jardine: Yes. Absolutely. And we do have portals at our learning management systems, sorry, at Coca-Cola Amatil, and the plan is in time that all that content will be moved into the learning management system once it sort of becomes part of operational training. But I purposely chose to have it all housed in a learning portal that was as easy as possible for people to be able to access rather than locked in an LMS. I also with the benefit of putting it on SharePoint was that there was mobile access. So it may not have been like a slick app or anything like that. Unfortunately, we didn't have budget to develop apps.

But I was really looking at what can I ... How can I leverage to the best what we have available to us within the company? And a good creator, a website-type experience that people are used to outside of work, I could create that within work on SharePoint. And it's also accessible to people on their mobile while they're in the warehouse. Wherever they are they're able to access the content.

Michelle Ockers: Yeah, so really making the most of what you had available to you to work with, right?

Justine Jardine: Yes.

Michelle Ockers: And the other thing that strikes me is that the key users and super users who in effect are your subject matter experts in this instance, or you want them to become your subject matter experts, they're a slightly different group or audience than your end users. And getting them involved and skilled up to a deeper level early and then having this approach, almost a shared responsibility for maintaining the materials on an ongoing basis potentially for developing some of those was really important. And most of us had the experience of working with subject matter experts--it's critical in the development of all kinds of learning solutions. They're often really busy people who've got lots of other tasks to do, especially on projects.

So it's kind of a key risk. Their availability is a key risk on development of learning solutions. What approach did you take to set expectations with these subject matter experts, your key users and super users, and to maintain the involvement you needed from them?

Justine Jardine: At Coca-Cola Amatil they follow a implementation approach, where you don't have training consultants train your end users because the risk is that the knowledge may walk out the door with the training consultants. They have an approach where key or super users are heavily involved in the project as you say, involved in all aspects of the project, involved in user acceptance testing, and then involved in the training of the end users.

So that was how the whole capability strategy was developed around that key user, super user training the end user approach. Now, these key and super users have been chosen by the business. We weren't involved in the selection of them. So one of the things we needed to make sure that they understood what was expected of them and also for us to get to know them a little bit better and to find out in what areas they may need more support, depending on who they were in their previous experience.

So right up front I put together a survey that we sent out to the key end super users as a way of communicating the expectations, sort of listing out, "Have you been involved in an implementation project before? Have you been involved in training end users before? If yes, please tell us your previous experience," that sort of thing, and also to get their commitment. So there was a question that was saying, "If you attend the sprint showcases, you are, say, involved in the meetings, and in the build, you're given the training content, do you think you'll feel comfortable to be able to on-train end users?"

So it was both sort of setting expectations, communicating expectations, as well as getting feedback from the key end super users. And I really found that of value because it was kind of laying it all out.

We then had fortnightly meetings with the key and super users to keep them engaged, to continue getting their input. And I just really felt that the whole success of a project like this is dependent on those key and super users being knowledgeable enough and comfortable and confident enough to be able to on-

train the end users. So definitely we shouldn't underestimate the importance of engaging them and keeping them engaged throughout the project.

Karen Moloney: Absolutely. I'm thinking, I mean, that the Agile/build as you go approach, that you've taken to learning on this project, has been really awesome. I love the idea of it, and just wondering what tips, what would be your key takeaways for anybody listening who would be looking to adopt this style of approach to their projects?

Justine Jardine: Start building content or capturing content where you can, whatever it may be, however small it may be. So basically start with your micro content, whether that's just a paragraph in your own little document where you sort of starting to curate all the content. So don't think big, like, "Oh, how am I going to create this whole course?" Just think about, "Well, what can I capture?" whether it's a process flow, whether it's just a description of a key term, that sort of thing.

And I guess also keep a mindset where you expect change, because that's the whole benefit of an agile-type implementation. And the idea is to have a better outcome. I've found that when I change my mindset and I didn't sort of fear change, I saw it more as a challenge as well as a way of testing how flexible the solution that I put together was. And if I could see that my solution was a bit too rigid because of this change, I knew that it'll probably change another 10 times down the line. So I knew that I needed to therefore change that bit of the solution to be more flexible and more agile.

Michelle Ockers: Fantastic. And so, Justine, could you share with us the biggest thing you do for your own professional development?

Justine Jardine: I think I'm pretty much a point of need person. If there's something that I need to know, I'm a lot more curious and probably more willing to sort of spend the hours doing a course or reading a whitepaper or something when I really need to know something or to improve the way I'm doing something. For example, during this project I don't have a lot of project management experience, and I just realized that I needed to develop my skills in that area. So there were two things I did: I sought out a mentor within the business, experienced training manager who guided me and helped me with templates and somebody that I could say this is a situation I'm in, and we could talk about next steps and plans. So I found that so valuable.

I also did a project management course through the AITD with yourself, Michelle, which I also found extremely valuable. I also did the change management course all through the project. And I did a human-centred design course as well, which maybe helped me be even more empathetic and thinking about the end user and what would work for the end user rather than what would work best from a training implementation point of view.

So, yeah, I just really enjoy doing courses or studying while I'm actually in the moment in the need. And then just generally I think I just, I try and ready really widely. I will pick up anything and I will read it. Whether it's a marketing magazine or whether it's a gardening magazine, I will watch anything. And I look to see what I can draw from whatever it is. So I often look at colours, or I look at design, or I look at fonts, font sizes. I look at content. And I just think about, "Oh, well, that's there, using that in that industry. I wonder how I can apply that to my industry or what I do." So I guess I just look for inspiration and learning from everything around me.

Michelle Ockers: Sounds like a sense of constant curiosity at play. I love it. So if anyone would like to get in touch with you, Justine, we're going to include a link to your LinkedIn profile with the show notes for the episode.

Justine Jardine: Well, if anybody'd like to get in contact with me to discuss any aspects in more detail, I'm more than happy to respond via LinkedIn, or give me a call.

Michelle Ockers: Thank you, Justine, and thank you so much for sharing your experience and insights today into working in an Agile project environment and the build-as-you-go approach.

Justine Jardine: It's a pleasure, Michelle. And, Karen, thank you very much for your time.

Karen Moloney: Thank you. That was great.