

DISCOVERY & SOLUTIONING WORKSHOP FOR USER-CENTRIC TRAINING DOCUMENTATION

An eGuide

OVERVIEW

In product development, ignoring the digital customer onboarding process can become one of the biggest reasons that drives your customers away. After all, no matter how great your product is, if your customers don't know how to use it — or find it difficult to — they'll quickly move on to the next best option.

Despite that, while most companies will claim they spend time to create training documentation and support for the digital customer onboarding process, they often go at it with a waterfall approach that can have significant costs involved, including time lost due to delays that can otherwise be avoided.

So, as a digital onboarding solution, we realized that an agile approach is necessary to create user-centric training documentation that is accessible, easy to understand, and best serves the customers' needs.





WHAT'S IN THIS EGUIDE

In this eGuide, we've revealed a way to kickstart the process of creating user-centric training documentation alongside product development rather than after it.

You'll learn a 10-step process of how to approach the initial stages of discovery and solutioning in a more structured manner and in a way that aligns all stakeholders on how the training documentation should be created.

HOW TO USE THIS TRAINING DOCUMENTATION GUIDE

This eGuide can be used to organize a three to three-and-a-half hour workshop for the initial stages of Discovery and Solutioning to create Training Documentation. The workshop can be conducted in person or remotely on Miro.

To synthesize insights from the workshop, we have also provided a template for an Output Report that you can use to present as a summary report to the audience after the workshop. The template for this report as well as other resources are provided at the end of this eGuide.



FROM PLANNING TO EXECUTION IN 10 STEPS



Step 1: Finding the Right Team



Step 2: Preparing for the Workshop



Step 3: Orientation and Introductions



Step 4: Familiarizing with Miro



Step 5: Workshop Questions and Goals



Step 6: Identifying Stakeholders and Steps in Training Journey



Step 7: Mapping Stakeholder Needs in Training Journey



Step 8: Lightning Demos, Presentation and Voting



Step 9: Overview, Suggestions and Voting for Documentation Formats



Step 10: Conclusion and Discussion

STEP 1

FINDING THE RIGHT TEAM

Identify key participants for your workshop. You should include people from the Product, Marketing, Support & Success, Operations, and Learning & Development teams (if available).



STEP 2

PREPARING FOR THE WORKSHOP



Learn about the product/application for which you have been tasked to create training documentation.

Do a quick industry research and competitor analysis to understand other perspectives. Then, shortlist some training documentation formats that can be used for the product.

Schedule the workshop for 3 and a half hours (breaks included) and send invites upfront.

STEP 3

ORIENTATION AND INTRODUCTIONS

Initiate the workshop with a quick intro of the hosts and what the workshop is meant for. Lay down the goal of the workshop and align participants on why everyone is there.

Support & Training Documentation Workshop

Date: July 25, 2022

Your hosts today



Sami Rehman
Product Manager

You can come to me for:

- ☑ Scope & Deliverables
- ☑ Timelines



May May
Designer

You can come to me for:

- ☑ Formatting our documentation work
- ☑ Design strategy moving forward
- ☑ Competitor analysis

Agenda for workshop (~1.5-2 hrs)

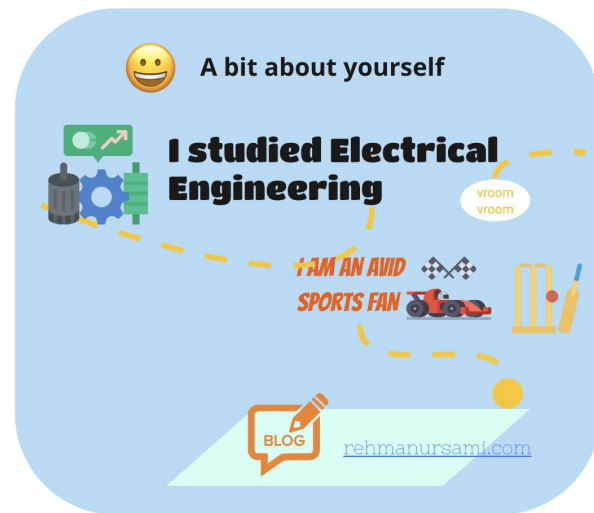
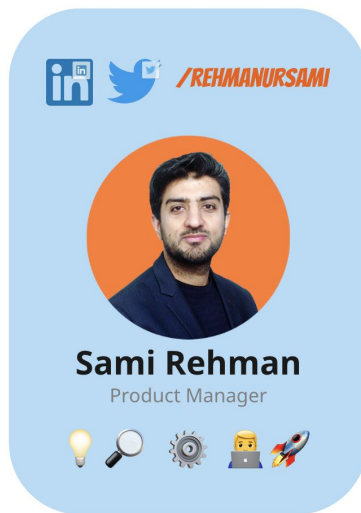
1. [10 mins] Intro
2. [5 mins] Miro basics and Introductions
3. [15 mins] Goals & Workshop Questions
4. [20 mins] Identifying Training Stakeholders and Steps
5. [10 mins] Break
6. [30 mins] User Training Journey map
7. [30 mins] Lightning Demos + Presentation + Voting
8. [10 mins] Break
9. [35 mins] Documentation Formats overview + Other Suggestions + Voting
10. [10 mins] Conclusion & Discussion

Ask a representative from the Product team to quickly describe the vision and strategy of the product to refresh everyone's memory. This will serve as the North Star throughout this exercise.

STEP 4

FAMILIARIZING WITH MIRO

Let everyone add some details about themselves on the Miro board, so that they can not only introduce themselves but also get acquainted with Miro in the process.



STEP 5

WORKSHOP QUESTIONS AND GOALS

In this section, we try to understand the vision of this exercise and identify the risks in achieving that goal.

What are the biggest pain points of your user currently?

Time management

Learning about complex flows in the system



What challenges and risks do you foresee in onboarding users to your product?

Adopting change - moving from the previous system to the new system

Learning about the new system along with handling daily users



What does success look like for this project?

Smooth launch

Self sufficient - Less support tickets

User efficiency improved (# of workflows processed in a day)

End user satisfaction

STEP 6

IDENTIFYING STAKEHOLDERS AND STEPS IN THE USER JOURNEY

Ask the team to list down all the stakeholders (both internal and external) who will be consuming the training documentation.

Get the team to map down all the steps in the training user journey, like:

- Before launch,
- At the time of launch,
- Post launch,
- Pre-purchase, etc.

Who are all the stakeholders who will be consuming the training documentation?

Grocery
Stores
Admin

Cashier

Support
team

Sales
team

What are all the steps in the training user journey?

Pre
Launch

At
launch

Post
launch

By this point, your team could probably use a breather, so this is the perfect time for a 10-minute break.

You can use this time to map the information (Stakeholders, Training Stages) from the previous section on to the board.

STEP 7

MAPPING STAKEHOLDER NEEDS IN TRAINING JOURNEY

Ask the team to identify and list down the training needs of all stakeholders at each stage of the training journey.

Stakeholders Key:



Grocery Stores Admin



Cashier



Support Team



Sales Team

Pre Launch

At Launch

Post Launch



Grocery Stores
Admin

As a store owner, I want to know what info I can share with the team before the launch to support a seamless transition to the new app

As a store owner, I want to track the training progress of my team to make sure that only the fully trained users are allowed to use the system to avoid too many mistakes in production.

As a store owner, I need to know what additional functionalities I have access to beyond a regular user to support my team

As a store owner, I need clear directions on training objectives and dates

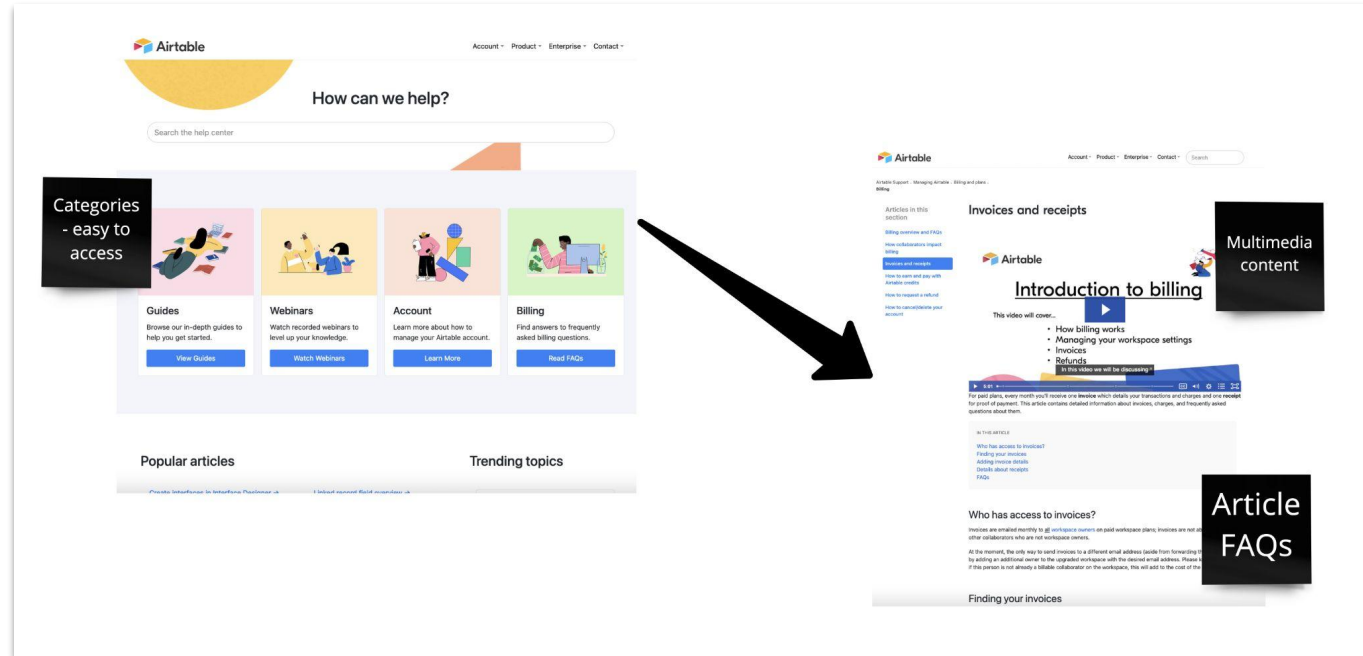
STEP 8

LIGHTING DEMOS, PRESENTATION AND VOTING

At this stage, ask everyone to browse the Internet and research to find other examples and ideas (at least 3 per person) of Training Documentation. Encourage them to go beyond their immediate industry.

Identify "BIG IDEAS" that can inspire. Put a sticky note beside it to sum up the idea.

At the end, ask everyone to present their ideas and conduct a voting exercise to shortlist ideas (in the next step).



STEP 9

OVERVIEW, SUGGESTIONS AND VOTING FOR DOCUMENTATION FORMATS

Present some popular and relevant training documentation formats to the team based on your research before the workshop. Present pros and cons for each format.

Ask the team for any additional ideas not covered previously and add them to the list.

Lastly, vote on the formats.



Chatbots

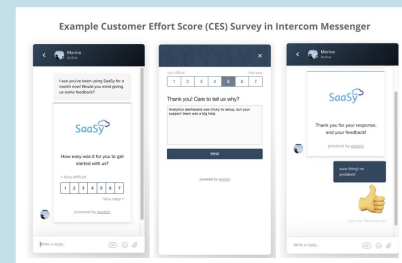
Can serve as in-app help centre for users to self-help to articles

Pros

- 24/7 support
- To the point solution

Cons

- Dependency on 3rd party tools



STEP 10

CONCLUSION AND DISCUSSION

Review the content covered in the workshop and give everyone some time to share anything they would like to add that was not already covered.

Thank everyone for their time and conclude the workshop.

We should be able to track learning of each user

One of our team currently uses a KB software that you might want to check out

HELPFUL LINKS

This eGuide covers only the Discovery and Solutioning stages of the entire process of creating Training Documentation.

Here's the link to the Miro template you can use when you conduct the workshop:

<https://miro.com/miroverse/training-documentation/>

Discovery and Solutioning are only the initial two steps of our 5-step Process of Creating User-Centric Training Documentation for Effective Digital Onboarding.

To learn more on our 5-step process to create user-centric training documentation, please refer to this article:

<https://www.mobilelive.ca/blog/create-user-centric-training-documentation-for-effective-digital-onboarding>



ABOUT MOBILELIVE

We're your full-service digital team obsessed with helping you make smart investments and reduce time-to-launch.

Our team of experts specializes in designing experiences, building products, and scaling technology with flexible engagement models, outside-in views, bespoke solutions, and a succession of early wins while never losing sight of the big picture.

100% client retention since day one
40+ iconic & Fortune 500 clients
20+ industry awards & distinctions

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