**IDD - Design Path Workshop**

*Day One*



Facilitator Guide

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**IDD Design Path**

*Analysis Module*

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**Privacy Disclaimer**

This training program may use real or live customer data to demonstrate the necessary procedures required to successfully complete job tasks. The purpose is to provide employees with the knowledge, tools, and experience to excel in their assigned position. It is important that employees understand this information is sensitive. **We, as Aetna Employees, are all responsible for ensuring that we use the information only as permitted under company policy**.

During this training period, employees will have access to sensitive information in multiple formats including customer names, addresses, identification numbers, group numbers, provider numbers, and health information. Employees may access or use this sensitive information for **training purposes only**.

Employees cannot use this sensitive information outside of training for any other purpose and should **not disclose** this sensitive information to anyone outside of training, unless it is used during the “soft landing” training period to serve the customers’ direct need.

***Important Note: No PHI will be included in the course, this includes:***

* All member IDs: SSNs, CMS IDs, HMO IDs, Medicare IDs, etc.
* Member, spouses and dependent names
* Member address and phone numbers
* Any other member specific information that could potentially identify the member
* Provider information, such as TIN, SSN, PIN, NPI, and name, unless it is needed to teach a specific provider topic like some type of provider inquiry, SCM or EPDB

***This means the trainers/facilitators are responsible for gathering all member and provider information required for any live demonstrations for class exercises and/or activities (not applicable for this module).***

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# About this Guide

This guide provides strategies for conducting this Analysis training module and is intended to be used in conjunction with various instructional materials such as classroom exercises, individual activities, reference/ review documents, and assessments.

Facilitator links to online activities and materials are found only in this facilitator guide. These links are to be shared with the participants as the agenda or the facilitator begins to present in class. Instructions on how to access the links and participate in the activities are explained throughout this guide.

# Facilitation and Activities

This guide will outline the talking points along with the face-to-face or virtual classroom activities for a successful training module delivery. It is recommended that facilitators follow the outlined talking points, questions and activities for this module. If a projector is not available, share the accompanying PowerPoint presentation using the features of the virtual classroom platform.

# Module Timing

The IDD Design Path Day One training module is expected to be approximately four hours (4hrs) and can be adjusted at the facilitator’s discretion.

# Suggested Method of Delivery

* A virtual learning (VLT) approach will be used with this guide and interactive exercises.
* The use of a projector when giving instructions for completing practical application exercises is recommended for face-to-face training.
* If a projector is not available, use the application feature of the virtual classroom platform (e.g. WebEx Training Center).

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# Class Preparation

* Review the details of this facilitator guide to ensure comfort with all instructions, exercises and activities
* Prepare your classroom and facilitation tools:
	+ Set up the classroom (if face-to-face) or virtual classroom platform (if distance learning)
	+ Prepare display of the accompanying PowerPoint presentation
* Review and print the following, if necessary:
	+ Facilitator guide
	+ Presentation
* Prepare small workgroup listings, for conducting group activities/break-out sessions
* Ensure participants have access to the IDD SharePoint site and have access to all materials
	+ If access is unavailable, use all available simulations and/or allow participants to navigate live/active member IDs from the trainer’s desk.
	+ If conducting a virtual classroom, ask participants to verbally provide navigation instructions during the application/desktop share feature
* Review any attachments or embedded documents provided within this facilitator guide
* Update activities/exercises with the required information necessary for this module
* Print, email, or distribute links to participant activities when appropriate

# Online Resources and Materials

* Access the virtual classroom platform, if/when necessary
* Access the [**IDD – Design Path SharePoint site**](https://aetnao365.sharepoint.com/sites/ipsidddesign/SitePages/Home.aspx)
* Open the ***Facilitator Guide, Agenda, and Presentation*** from the [facilitator portal](https://aetnao365.sharepoint.com/sites/instructional-design-development-facilitator-portal/SitePages/Home.aspx)

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# Day One Agenda

|  |  |  |
| --- | --- | --- |
| ***TIME*** | **TOPIC** | **FACILITATOR NOTES** |
| ***60 Minutes*** | ***Workshop Opening*** |  |
|  | * WebEx Entrance Greeting Chats
* Welcome and Introductions
* Conduct and Housekeeping
* WebEx Features Walkthrough
* Pre-survey results overview
* YOUR Workshop Objective
* Workshop Objectives and Daily Schedule
* Tutorial Structure, Navigation and Debriefs
* Online Resources – no need to take notes
 | * Review the pre-survey results, complete participant analysis and prepare a summary prior to class.
 |
| ***20 Minutes*** | ***Tutorial Time*** |  |
|  | * The ADDIE Model Defined Tutorial
 |  |
| ***20 Minutes*** | ***Workshop Opening Group Discussion*** |  |
|  | * Tutorial Debrief (What did you learn?)
* Potential Risks for NOT completing ADDIE phases
 |  |
| ***10 Minutes*** | ***Break*** |  |
|  | * Break
 | * Set up breakout groups during break!
 |
| ***20 Minutes*** | ***Case Study Introduction*** |  |
|  | * Welcome Back
* Case Study Review (Overall Problem Statement
 |  |
| ***10 Minutes*** | ***Analysis Introduction*** |  |
|  | * Analysis Objectives
 |  |
| ***20 Minutes*** | ***Analysis Tutorial*** |  |
|  | * Analysis Tutorial
 |  |
| ***30 Minutes*** | ***Analysis Tutorial Debrief and Toolkit Review*** |  |
|  | * Tutorial Debrief: What did you learn?
* Analysis Toolkit Discussion
 |  |
| ***30 Minutes*** | ***Brainstorming Activity and Debrief*** |  |
|  | * Individual Brainstorming
* Group Debrief/Sharing
 |  |
| ***10 Minutes*** | ***Session One Summary*** |  |
|  | * WebEx Breakout Room practice activity
* Broadcast messages (to avoid group interruption)
 |  |

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| --- | --- | --- |
|  | * Saving & sharing breakout room content
* Day 2 agenda
 |  |
| ***4 Hours Total Training Time*** |

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**Workshop Opening [60 Minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 60 minutes | Workshop Introduction | ***PRESENTATION:*** Slides 1-7 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Note:** *Maintain the WebEx sharing feature through the presentation unless otherwise instructed.***Welcome (Slide 1)*****ACTION:*** *Display Slide 1****ACTION:*** Create a greeting in the WebEx chat (e.g., “hello everyone from rainy New Albany!”).***ACTION:*** Using the WebEx share desktop feature, have slide #1 visible as attendees join the session.***SAY:*** Periodically advise of the time and say something like… “Good morning everyone. We are still waiting for others to join and we will get started at the top of the hour.”Provide a general greeting with something like… “It’s the top of the hour and time to get started. Hello everyone and thank you for attending the Design Path Workshop. We are going to jump right in and start with Introductions.”**Participant Introductions (Slide 2)*****ACTION:*** Display Slide 2***EXPLAIN:*** Using the WebEx attendee list, tell the participants to take a moment to review how we will introduce ourselves. Advise them we, the facilitators, will introduce ourselves first. Then, we will start down the attendee list in alpha order.***ACTION:*** Call on the next person in line until you have all completed introductions. Each participant should provide the following:* Participant name, team/department and location
* Share a recent success (professional or personal)
* Share a recent training-related challenge
* Share something interesting or unique about yourself or on your “life list”

**Conduct and Housekeeping (Slide 3)*****ACTION:*** Display Slide 3***SAY:*** “In all we do, we have to be professional and mindful of others at all times. Let’s take a moment to set the stage for our workshop. In the spirit of the “Aetna Way”, we will conduct ourselves as follows:1. To reduce background noises, we will be on mute until we are ready to speak to the group.
2. We will get a 15 minute break between session topics. So to avoid the temptation of “multi-tasking”…
	1. We will close our email with an out of office reply
	2. We will put our IM on DND with a message
	3. We will put our cell phones on silent or vibrate
3. We will dedicate our workshop time for our career development. We want you to get the most out of this training and think about how you can apply the principles you learn here to your everyday job. Remember, you bring a great deal of experience and insight to the table. We hope that you will actively participate in the discussions and activities and share your knowledge. This will increase your breadth of learning for everyone, including your facilitators.”

**WebEx Features Walkthrough (Slide 4)*****ACTION:*** Display Slide 4 |

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***SAY:*** “Before we get started, let’s take a few minutes to review the interactive features of the WebEx training environment.”

***ACTION:*** *Review the following features:*

* **Chat** - point out that this will be defaulted so that the participants can only talk to the instructor-they will need to change it using the dropdown feature if they want their message to be seen by the entire class. Have the participants practice by sending a greeting to the class.
* **Mute** - point out the microphone feature showing the participants how to put themselves on mute. Also mention that you may put the entire class on mute if there is excessive background noise
* **Raise Hand, Checkmark, Red X, emoji** – have participants practice using these features
* **Annotate**-open a whiteboard. Change the settings so that the class is able to annotate (you will have to grant permission to test this feature). On the WebEx Training center menu, click on “Participant”, and then select “Assign Privileges”. Check off the “Annotate” box. Press the OK button. Allow the students to write a greeting to practice.

### Pre-survey Results (Slide 5)

***ACTION:*** Display Slide 5.

**Note:** *Review the pre-survey results, complete participant analysis, identify trends and summarize main points to discuss prior to class.*

***EXPLAIN:*** How the pre-survey results can be used to provide a tailor-made learning experience for your user. How we, the facilitators, will use this information to tailor the learning experience. Point out any specific trends you noticed when you reviewed the results.

### YOUR Workshop Objective (Slide 6)

***ACTION:*** Display slide 6.

***SAY:*** “Not only is it important to participate in your training but it’s more important to know what/why you were assigned or elected to attend any training (or meeting). Why are you here? What do you want? Take a moment to read these statements and write down your responses.”

***ACTION:*** Give them about 1-3 minutes then ask 1-2 participants if they would like to share their responses**.**

**Learner Objective:** My personal expectation of this program is . I want to learn and be able to apply to my current projects.

***SAY: “***Periodically we, the facilitators, will ask you to review your objectives to ensure your needs are being met.”

### Workshop Objective (Slide 7)

***ACTION:*** Display slide 7.

***SAY: “***Here is the objective defined for the workshop week that is in addition to YOUR objective. Does anyone have any questions or see a conflict with this objective compared to yours?”

**Workshop Objective:** By the end of this program, Learning and Performance Professionals will be able to apply the principles of the ADDIE methodology to design and develop sound training curriculums and modules within the Aetna learning environment.

***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great let’s keep moving.”

### Workshop Overview (Slide 8)

***ACTION:*** Display slide 8.

***SAY: “***Now we are going to take a few minutes to review the structure of the workshop.

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### Workshop Breakdown:

1. Each session will start as a large group
2. You will complete a topic tutorial (or a group of tutorials)
3. We will regroup after everyone has finished the tutorial to participate in a group activity/discussion and review online resources
4. We will review WebEx breakout room instructions, team role and case study group assignments
5. You will go into your group’s breakout room to complete your Case Study assignments
6. We will regroup for Case Study presentations and a lesson summary
7. At the end of each session, we will ask you to complete a short survey to gauge your learning experience

### Tutorial Structure, Navigation and Debriefs:

1. Tutorials are the “lecture material” that outlines, defines and provides the background of each topic.
2. Each tutorial has audio. Make sure your volume is up and your headsets are plugged in (if necessary). All tutorials are available in your online participant materials. But when needed, the facilitator can send a link via chat.
3. The maximum time allotted to complete each tutorial (or group of tutorials) is 20 minutes. If/when you finish early, please use the “Raise Hand” tool in the classroom to indicate completion.
4. At the end of each tutorial (or group of tutorials), we will take some time to debrief and address any questions or comments.

### Online Resources:

We cover a lot of information in the tutorials, but don’t worry! We don’t expect you to take notes or remember every detail. All the information we cover will be available on our IDD Design Path SharePoint site.

***ACTION:*** provide the IDD SharePoint link in the WebEx Chat.

***SAY:*** I have provided the IDD SharePoint website link in the WebEx Chat. Take a moment now to save this link as a favorite.

***ACTION:*** Pause for a moment to allow them to save the link. Then, share the website via WebEx app share feature, pointing out the different areas of the SharePoint as you discuss them.

#### SAY:

After we discuss each tutorial, you will receive an online toolkit chocked full of great information, tools and samples. Use the toolkit to help you through the class activities and case studies.

We plan to add new materials to the toolkits as we become aware of them, ensuring that you have the most up-to-date information available at your fingertips.

All of the tutorial links and case study documents we use in this course are also available here for your reference. We will keep office hours so you can ask us questions directly if you need help with a project.

We hope the IDD SharePoint site will become an invaluable resource for your future IDD projects.

***ACTION:*** Return to the presentation, display slide 7.

***SAY:*** Let’s continue discussing our workshop layout.

### Case Study Structure:

A case study has been created to mimic a “semi-realistic” project development experience. Each group will act as a workgroup

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from team assignments to review through sign-off.

There will be **three (3) workgroups with 4-5 people** per group. Each group will be working through the case study problem.

Sometimes, all the groups will answer the exact same questions. The interesting discovery will be how each group resolves the issue. There will be similarities, differences and challenges for how to get “out of the box” and still satisfy your customer.

When there is a lot of content in a section, each group may instead be assigned a section of the overall case study, and report out on just that section to the rest of the workshop participants. During these times, we hope you will have a vibrant and active discussion by providing your thoughts and ideas in addition to what the smaller group has discovered.

While doing this case study with your workgroup, revisit YOUR objective statements. Start listening for and writing down information that may help you with your current work assignments.

### Team Roles:

Once you are in your break-out group, each person will be assigned a team role. We will rotate the responsibilities throughout the week.

**Team Leader (TL):** Act as a point person for group questions or issues that need to be directed to the facilitator. Performs “round table” to ensure everyone has provided valuable input. Facilitator may contact you periodically to make sure the group is on track.

**Time keeper (TK):** Keep the group moving forward and ensure the case study is completed within 30 minutes.

**Note taker (NT):** Share your screen in WebEx for the rest of the group to see the notes taken and email the final copy (with notes) to all participants & facilitators.

**Presenter: (P)** Share your group’s case study document with the main group at the end of the session and present the answers your group came up with.

**Active Participant:** Actively contribute and participate in the group discussion (all remaining group members).

***SAY/ASK: “***This workshop will utilize an industry method known as a “flipped classroom. Is anyone familiar with the definition and/or method?”

***ACTION:*** Allow someone, who states they are familiar, to explain to the group their knowledge and experience with the flipped classroom approach.

***Flipped Classroom Definition:*** The flipped classroom means that the participants are in charge of their own learning. The facilitator will not be “lecturing” in the traditional sense. The participants will be given information to explore on their own, then provided with questions to provoke thoughtful and meaningful answers. Participants share their newly acquired knowledge and think about how they can apply new concepts in a realistic context. The facilitator acts as a leader to guide discussions, but does not “teach”. The participants “teach” themselves and other participants.

**Workshop Opening Tutorial [20 Minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 20 minutes | Workshop Opening Tutorial | ***PRESENTATION:*** Slide 8 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Tutorial (Slide 9)*****ACTION:*** Display Slide 9. Send the link to the IDD Design Path Workshop Content via chat. Advise them to click on the link for the Workshop Opening > Workshop Opening Tutorial. Confirm that everyone can launch it. |

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***SAY:*** “Everyone will be put on mute while taking the tutorial. However, If a technical issue occurs, such as Aetna Stream taking too long to load, frozen screen or no audio, please unmute or enter it in chat to let us know so we can attempt to help you fix it.”

***ACTION:*** Click the “time to LEARN” image to launch a timer. Turn the timer to 20 minutes and press Start. Keep an eye on the time and the number of “Raised Hands” to determine the amount of time remaining for the tutorial. Check that either all hands are raised (indicating they have all completed the tutorial) or time has expired.

***SAY: “***It appears everyone has completed the tutorial. Let’s take a brief moment to review what you’ve learned and allow for some questions.”

**Workshop Opening Discussion/Wrap-Up [20 Minutes]**

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| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 20 minutes | Workshop Opening Discussion/Wrap-Up | ***PRESENTATION:*** Slide 9-13 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Tutorial Debrief (Slide 10) *ACTION:*** Display Slide 10. ***ASK:**** “Who can tell me the 5 phases of the ADDIE Model?” **Answer:** Analysis, Development, Design, Implementation, Evaluation
* “In what phase would you deal with piloting instructional materials?” **Answer:** Implementation
* “In what phase would you determine if training is the best solution?” **Answer:** Analysis Allow approximately 1-3 minutes for responses.

**Potential Risk Discussion (Slide 11)*****ACTION:*** Display Slide 11.***SAY:*** “Each has phase has a lot of components that can be time consuming. And in our learning environment, we are often tasked with assignments that require **rapid development** that does not support you giving each of these phases the time it truly deserves. However, we have to be mindful of the potential risks associated with skipping a phase or not completing at least one key component of each phase. If we don’t give this process its full attention, our training efforts will produce failed results.”***ASK:*** *“*Before I outline them, what have you experienced or what do you think would be some potential risks?” Allow approximately 1-3 minutes for responses.***EXPLAIN:*****Analysis:**•Spending valuable time and resources creating training that may NOT be needed•Not accurately identifying the true gap in audience knowledge•The instructional goal not being clearly defined and not achieving the customer needs•Missing critical job tasks needed (or not) to actually improve the job performance**Design:**•Without proper learning objectives, the designer will not be able to demonstrate that the learning event was actually successful.•Without proper assessments, the designer will not be able to prove if the learning improved the participant’s knowledge and skills. |

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•Without preparing the Nine Events of Instruction, the designer will not be able to inspire participants to actively engage and take ownership of their learning experience.

•Without properly defining the training sequence and delivery methods, the designer will not be able to ensure all the required content has been accurately presented and demonstrated to meet the learning objectives.

Development:

•Without creating an agenda, training outline and/or storyboard, will cause communication gaps between designer and workgroup members.

•Without reviews, open communication and a validation process, content accuracy is in jeopardy and causes rework.

•Without a deployment strategy, training roll out can be confusing, negatively impact the business continuity and result in low attendance.

### Implementation:

•Facilitators will not be properly prepared to train the material.

•The proper audiences may not receive the required training for improving the expected job performance.

### Evaluation:

•Unable to determine if training is the actual solution to the performance problem.

•Unable to verify if the learner had a positive learning experience.

•Unable to validate if the training had a favorable impact on the learner’s knowledge and skill level.

•Unable to quantify if the training had a beneficial impact to sustain the improved job performance.

•Unable to provide solid evidence that the training met the business requested requirements and expectations.

•Unable to prove the monetary value of the expense of training resources and event on the business’ bottom line.

After reviewing all the potential risks, if a discussion doesn’t automatically begin, ask about key concepts or definitions. Allow 3-5 minutes for open discussion and questions, then move on.

### Workshop Opening Wrap-Up (Slide 12)

***ACTION:*** Display Slide 12.

***ASK:*** “What questions do you have about anything that was presented or in the tutorial?” How are you feeling so far about you’ll be tasked to do in this workshop?”

Allow approximately 1-3 minutes for responses.

### Break (Slide 13)

***ACTION:*** Display Slide 13.

***SAY: “***In a moment, we will be taking a 10 minute break. While you are away on break, please remain in the virtual classroom and stay connected via phone. This will allow me to set up our breakout groups for a later activity. If you leave the virtual classroom or disconnect from your phone, I will not be able to add you to your group. However, please feel free to leave your desk and/or mute your phone during break. Use this time to check your email or complete other work tasks so you won’t be tempted to multi-task during the workshop. Please return from break at (fill in the exact time). Raise your virtual hand when you are back. See you soon!”

***ACTION:*** Create a note in the WebEx chat that states “Please return from break at (fill in the exact time). Raise your virtual hand when you are back. See you soon!”

***ACTION:*** Set up the breakout groups while participants are on break. **IMPORTANT!** Participants must be connected within the training center and on the phone in order for you to set up the breakout sessions.

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### How to set up breakout groups: [WebEx Breakout Group Instructions](https://help.webex.com/docs/DOC-1038)

***ACTION:*** On the WebEx Training center menu, click on “Breakout”, and then select “Breakout Session Assignment”.

Press the “Add Session” button to create a group. You may need to repeat this a few times to get the number of groups you want. Then simply click and drag the names from the Attendees list on the left to the appropriate group. When complete, click the OK button.

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**Case Study Introduction [20 Minutes]**

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| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 20 minutes | Case Study Introduction | ***PRESENTATION:*** Slide 14 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Case Study Introduction (Slide 14)*****ACTION:*** Display Slide 14. In presentation mode, only the top pictures will display. Until the class gets a chance to review the case study, you do **not** want to display the bullet points.***SAY:*** “Welcome back from break! In the next section, you will be introduced to the case study. You will work on the same case study throughout the rest of the course.Today, you will only be getting a high-level overview of the problem, as if someone has just requested a training program.As we move throughout different sections of the case study activities, you may periodically receive more background information.Try not to overthink it too much. The point is to apply new skills and knowledge in a realistic context. You won’t have all the data and information needed to realistically solve the problem from start to finish.***ASK:*** Are there any questions before we review the case study?***ACTION:*** Allow for silence or responses for about 30s. Spend***SAY:*** If no objections or comments, “Great let’s keep moving.”***ACTION:*** Put the link to a copy of the case study from the IDD SharePoint site.***SAY:*** Please access a copy of the case study from the IDD SharePoint site. The link is available in the WebEx chat. Take some time right now to review the problem. Raise your virtual hand when you have completed this activity.***ACTION:*** Allow approximately 10 minutes for the class to review the case study document from the IDD SharePoint site.***SAY:*** “Everyone will be put on mute while reviewing the case study. However, If a technical issue occurs, please unmute or enter it in chat to let us know so we can attempt to help you fix it.”***ACTION:*** Keep an eye on the time and the number of “Raised Hands” to determine the amount of time remaining for the case study review. Check that either all hands are raised (indicating they have all completed the case study review) or time has expired.***SAY: “***It appears everyone has completed reviewing the case study. Let’s take a brief moment to highlight the main points and allow for some questions.”***ACTION:*** Click the title “Case Study Introduction” on slide 18. The bullet points will now display. Review the bullet points with the participants.***ASK:*** Are there any questions before we move on?***ACTION:*** Allow for silence or responses for about 30s.***SAY:*** If no objections or comments, “Great let’s keep moving.” |

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**Analysis Introduction [10 Minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 10 minutes | Analysis Introduction | ***PRESENTATION:*** Slide 15-16 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Analysis Opening (Slide 15)*****ACTION:*** Display Slide 15.***SAY:*** We are now going to begin reviewing the first stage of the ADDIE process; Analysis.**Analysis Objectives (Slide 16)*****ACTION:*** Display Slide 16.***ASK:*** “Would someone like to read this slide?”***ACTION:*** Have someone read the slide.***ASK:*** Are there are any questions?***ACTION:*** Allow for silence or responses for about 30s.***SAY:*** If no objections or comments, “Great let’s keep moving.” |

**Analysis Tutorial [20 Minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 20 minutes | Analysis Tutorial | ***PRESENTATION:*** Slide 17 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Tutorial (Slide 17)*****ACTION:*** Display Slide 17.***ACTION:*** Provide the tutorial link in the WebEx chat: Advise them to click on the link. Confirm that everyone can launch it.***SAY:*** “In a few minutes we will be taking the Analysis Tutorial. The link to the tutorial is available in Aetna Connect or in the chat window, but is also always available to you on the IDD SharePoint site we talked about earlier today.You are not required to take notes during the tutorial because all the information is available on the SharePoint, but if it makes you feel more comfortable, feel free to do so.The time for completion is 20 minutes. There is audio in the tutorial, so have your headset ready.Please do not feel rushed. If you find that any part of the tutorial is moving too quickly for you or that you missed something, use the pause and/or rewind features on the video. The tutorial itself is only 8 minutes long. You have plenty of time to review.If you have any technical issues while taking the tutorial, please reach out to one of your facilitators. Please raise your electronic hand when you have completed the tutorial.”***ASK: “***Are there any questions or concerns about the instructions I just provided?” |

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***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great let’s keep moving.”

***SAY:*** “Everyone will be put on mute while taking the tutorial. However, If a technical issue occurs, such as Aetna Stream taking too long to load, frozen screen or no audio, please unmute or enter it in chat to let us know so we can attempt to help you fix it.”

***ACTION:*** Click the “time to LEARN” image to launch a timer. Turn the timer to 20 minutes and press Start. Keep an eye on the time and the number of “Raised Hands” to determine the amount of time remaining for the tutorial. Check that either all hands are raised (indicating they have all completed the tutorial) or time has expired.

***SAY: “***It appears everyone has completed the tutorial. Let’s take a brief moment to review what you’ve learned and allow for some questions.”

# Analysis Tutorial Debrief and Toolkit Discussion [30 Minutes]

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 30 minutes | Analysis Tutorial Debrief and Toolkit Discussion | ***PRESENTATION:*** Slide 18-19 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Tutorial Debrief (Slide 18)*****ACTION:*** Display Slide 18.***ASK:**** “What are the three major types of analysis you should do in the Analysis Phase and how would you define each type?” **Answer:** Needs Analysis, Task Analysis, Learner Analysis

**Needs Analysis:** Identifying the performance gaps between current and desired job performance and determining if there is a true training need.**Task Analysis:** Examining the context of the specific job, which includes defining the skills and knowledge required to perform that specific job at the desired performance level.**Learner Analysis:** Examining your training audience and taking into consideration their work experience, attitudes and education in order to develop the most appropriate training methods that will meet their learning needs.* “Who can define the term Performance Gap?” **Answer:** The difference between Expected and Actual Performance
* “What are some tools you can use to gather data in this phase?” **Answer:** Surveys, Interviews, Quality Metrics, Job Descriptions, Job Shadowing.

Allow approximately 5-10 minutes for responses/discussion.***ASK: “***Are there any questions or concerns about what you just learned?”**Analysis Toolkit Introduction (Slide 19)*****ACTION:*** Display Slide 19.***SAY:*** “As we mentioned before, a toolkit for each phase of the ADDIE model has been prepared to help you with the case study and with your future projects.The Analysis toolkit is available on the IDD SharePoint site, which I will share in the WebEx chat shortly. I’ll be sharing the toolkit on my screen, or you can open the document from the link and follow along. Let’s take a look at the Analysis Toolkit together.Keep in mind that not all of the information will pertain to the workflows set up by your department. These toolkits are based on Instructional Design theories and best practice.Keep in mind, too, that Aetna has separate entities working to uncover root cause issues and find best solutions (Continuous |

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Quality Improvement, for example), then has IDD professionals develop training based on their findings.

***ACTION:*** Use the appshare feature of WebEx to display the Analysis Toolkit and put link to it in the WebEx chat. Display each page of the toolkit as you explain what is on each page. Also, be sure to scroll to each page within each titled document. Allow for questions as you move through the documents.

#### EXPLAIN:

* **000\_Analysis Toolkit**: This is the toolkit title page and table of contents. This page can help you locate documents within the toolkit.
* **001\_Analysis Objectives and Overview:** This page will provide you with definitions and a high level overview of the Analysis phase.
* **002\_Types of Human Resource Development (HRD) Needs Analysis:** We didn’t really get into this in the tutorial, but there are actually different types of Needs Analysis that can be used depending on what your client is looking to accomplish. This page provides you with some high-level definitions of these different Needs Analysis types. This document may be helpful for future projects. Here at Aetna, we generally focus on Training Needs Analysis.
* **003\_Training Needs Formula:** This document provides you with a breakdown of the Training Needs Formula and some of the data sources you can use to help you determine Actual Performance and Expected Performance.
* **004\_Needs Analysis Chart:** This document goes hand-in-hand with the Training Needs Formula page. It shows you the steps to take after gathering data on Actual and Expected Performance.
* **005\_What Does a Training Needs Analyst Do**: This document outlines the specific tasks involved with performing a training analysis.
* **006\_Training Requisition Form:** This is a sample training requisition form that can be used to propose training solutions. You probably won’t need this form as an Aetna employee, but these are great questions to ask as part of your scoping. You could provide it to a client to get a better idea of why they feel they need training.
* **007\_ Expected Performance Tools:** Outlines the different tools you can use to calculate expected performance.
* **008\_Actual Performance Tools:** Outlines the different tools you can use to calculate actual performance.
* **009 and 010 Performance Analysis Overview and Checklist:** Provides you with the steps to take and a checklist when completing a performance analysis.
* **011\_Performance Records:** A list of resources you can use to gather information about output, costs, quality and time.
* **012\_Performance Factors:** A pie chart graphic outlining all the categories that have an impact on employee performance.
* **013\_Problem Opportunity Definition Summary:** a list of questions you can use to determine root cause.
* **014\_Confirm the Cause:** techniques to confirm the cause with the client.
* **015\_Propose Solutions:** Sample of listing root causes of a problem and possible solutions.
* **016-018 Task Analysis Documents:** samples of how to organize and conduct Task Analysis.
* **019\_Learner Analysis Worksheet:** great resource for gathering data on your learners.
* **020-022 Analysis Tools:** Samples and tips for gathering data using surveys, interviews, and observations.

***ASK:*** Are there any questions before we move on?

***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great let’s keep moving.”

**Brainstorming Activity and Debrief [30 Minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 30 minutes | Analysis Brainstorming Activity and Debrief | ***PRESENTATION:*** Slide 20-21 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **Brainstorming Activity (Slide 20)** |

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***ACTION:*** Display Slide 20.

***SAY:*** Now that you know a little bit more about the Analysis phase and have some tools at your fingertips, we are now going to start thinking about how we can analyze the problem presented in our case study. You will receive additional details related to the analysis of the case study. In a moment, you will get about 15 minutes to read through the new information and complete a short brainstorming activity. Evaluate the overall problem in the case study and review the new information along with some of the materials in the Analysis Toolkit to help you with this activity. This activity is meant to get your “creative juices” flowing and think about how you might start looking into the problem. There are no right or wrong answers-just let your thoughts flow.

***ASK:*** Are there any questions before we begin?

***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great let’s keep moving.”

***ACTION:*** Put the link in the WebEx chat to the brainstorming activity from the IDD SharePoint site.

***SAY:*** Please access a copy of the brainstorming activity from the IDD SharePoint site. The link is available in the WebEx chat. You can save a copy of the activity to your computer by clicking on “File, Save As” on the document. Once you have completed the questions, raise your virtual hand.

***SAY:*** “Everyone will be put on mute while we complete this activity. However, If a technical issue occurs, please unmute or enter it in chat to let us know so we can attempt to help you fix it.”

***ACTION:*** Allow approximately 15 minutes for the class to complete the brainstorming activity from the IDD SharePoint site. <http://timerrr.com/>

***ACTION:*** Keep an eye on the time and the number of “Raised Hands” to determine the amount of time remaining for the brainstorming activity. Check that either all hands are raised (indicating they have all completed the case study review) or time has expired.

***SAY: “***It appears everyone has completed the activity. Let’s take a brief moment to highlight the main points and allow for some questions.”

**Brainstorming Debrief (Slide 21)**

***ASK: “***Is there anyone who would like to share what they wrote?”

***ACTION:*** Initiate 10 to 15 minutes of discussion around the questions listed below.

### Brainstorming Questions:

* What other information/data do you think you may need from your stakeholders to perform valid analysis?
* What questions do you need to ask?
* What tools would you use to gather information?
* How would you go about analyzing this problem?

***SAY:*** So far, the information you have been provided with surrounding the case study problem is very general. Don’t worry! Tomorrow, you’ll be given a little more information, as if you had a “scoping call” and did some research on the problem before you jump into your break-out groups.

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**Summary [10 minutes]**

|  |  |  |
| --- | --- | --- |
| **TIMING** | **SECTION TOPIC(S)** | **MATERIAL/RESOURCES** |
| 10 minutes | Session One Summary | ***Presentation:*** Slide 22-24 |
| **TRAINING CONTENT/ACTIONS/TALKING POINTS** |
| **WebEx Breakout Room Practice (Slide 22)*****ACTION:*** Display Slide 22.***SAY:*** “Before we wrap-up for today, let’s talk a little about how the break-out session will work and practice getting into our Web- Ex breakout groups .* Prior to going into the small group sessions, we will review any new information about the case study as a larger group.
* We, the facilitators, will remind you were to locate materials and provide links in the WebEx chat**.**
* You will be provided with a list of your group and team role assignment before we break out into the small group in the format you see here. The group assignments will remain the same throughout the workshop; but we will rotate the team roles throughout the week. You can take note of your group number and team role now-this is what we will start with for our first breakout session. We will display this table again tomorrow before we get into our groups in case you forget.
* We, the facilitators, will be available for questions or technical difficulties throughout the breakout group sessions. If you need help, IM (instant message) one of the facilitators.
* We will be using the Broadcast Message feature while you are in your breakout groups to provide you with a 5 and 1 minute warning so you can wrap up your work. The system will provide you with a “breakout session ending” message when we are “pulling” you back to the main session. We will practice this shortly so you can get a feel for how it works.
* You can save and share your breakout group work directly in WebEx, which will make it easy for the group to work. We will practice using these features as well.

Are there any questions before we start practicing?***ACTION:*** Allow for silence or responses for about 30s.***SAY:*** If no objections or comments, “Great. Let’s get started. First, let’s go over how you share and save a document. Let’s use the brainstorming document we were just working with for this practice session.”***ACTION:*** Pull up a copy of the brainstorming activity document from the WebEx chat (the link you just used for the previous activity/slide). Use the WebEx AppShare feature to share your screen. Demonstrate how the groups should share and save documents.**Verify that all participants have been granted sharing and saving privileges*****ACTION:*** On the WebEx Training center menu, click on “Participant”, and then select “Assign Privileges”. Check off the “All Attendees Privileges” box. Press the OK button. |

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***SAY:*** “We are now going to put you into your breakout groups. You may experience a slight pause while this is happening followed by a beep. Once you are in your groups, and using the brainstorming document we were just working from, practice sharing and saving a document in WebEx. You can use the brainstorming document for your sample. Keep a lookout for a broadcast message that will warn you when we’ll be bringing you back to the main session. Once we have everyone back, I will show you how I can share the document you were working on in the session.”

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***ACTION:*** On the WebEx Training center menu, click on “Breakout”, and then select “Start Breakout Sessions”. **Note:** Break-out sessions should have been set up in advance! (refer to [**WebEx Breakout Group Instructions**](https://help.webex.com/docs/DOC-1038)as needed)

***ACTION:*** While the class is in the break-out groups, create a broadcast message and send a 1 minute warning message.

### How to Create a Broadcast Message:

On the WebEx Training center menu, click on “Breakout”, then click on “Broadcast Message…”

### How to Share Breakout Session Content:

On the WebEx Training center menu, click on “Breakout”, then click on “Share Breakout Session Content”. Select a name from the list, then press the OK button. The last document that the person shared will display.

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**Day Two Agenda (Slide 23)**

***ACTION:*** Display Slide 22 and review the information on the slide.

***ASK:*** “Are there any questions about the general layout for tomorrow’s workshop session?

***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great.”

**Session One Closing (Slide 24)**

***ACTION:*** Display Slide 24. Provide the links to the Day One Workshop evaluations in the WebEx chat.

***SAY:*** “We did it! We made it to the end of the first session. Today, we reviewed the overall ADDIE model-Analysis, Design, Development, Implementation, and Evaluation. You started to take a look at the parts of Analysis and brainstormed some ideas about a hypothetical problem.”

***ASK:*** “Do you have any general questions or comments about what we learned today or how the workshop will be going forward?”

***ACTION:*** Allow for silence or responses for about 30s.

***SAY:*** If no objections or comments, “Great!

***SAY: “***Throughout this course, we will be asking for your feedback. This helps us to understand what’s working and what needs improvement. Please take a few moments to complete the surveys-the links are available in the WebEx chat.

***SAY:*** “Once you have completed the surveys, you are done for the day! Thanks for joining us. We look forward to seeing you in tomorrow’s session. Have a great afternoon!”