

Rapid Analysis? Get the ANSWER!

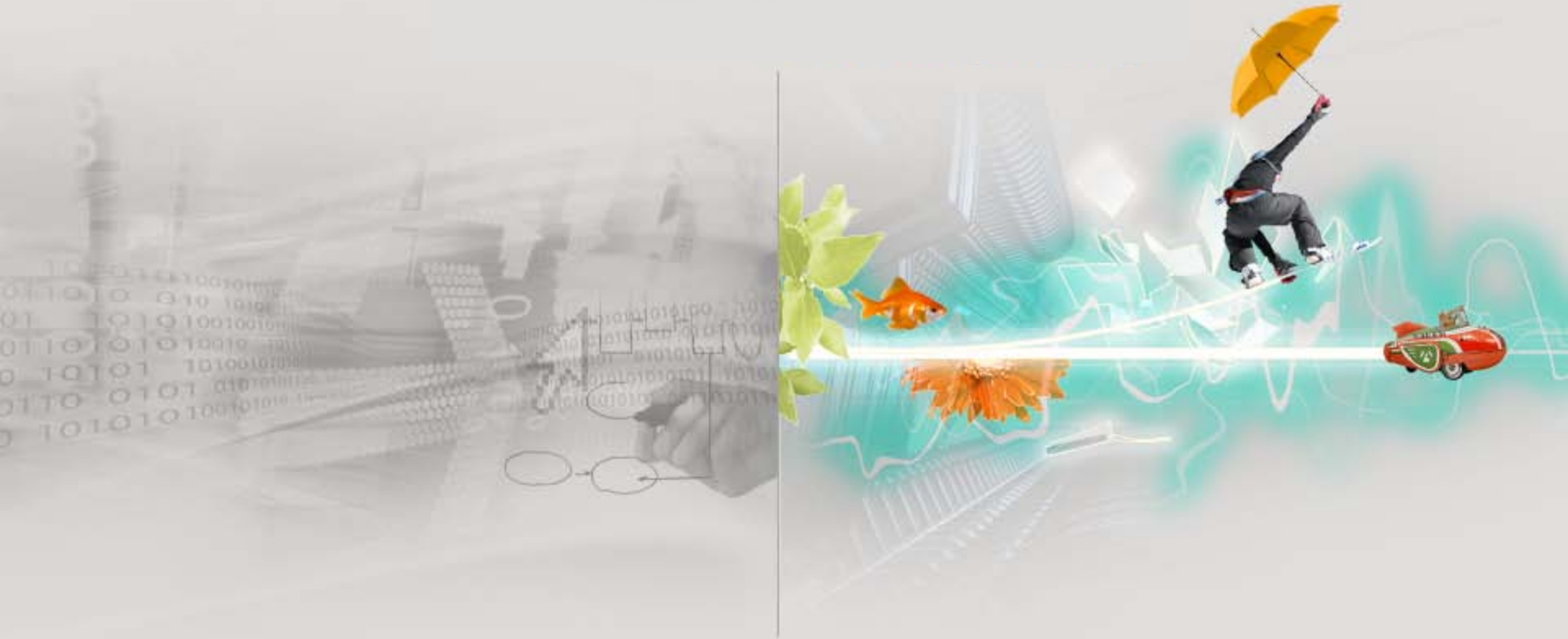
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Rapid Analysis?

Get the ANSWER!



Agenda

- Getting Started
- Audience
- Needs
- Successes
- Weaknesses
- Expertise
- Results
- Wrap-up
- Q&A





Getting Started

Why analyze?

- Study improves the quality of what we do
- Avoid waste

Why rapid?

- Pragmatic SWOT
- Urgency addiction

What do you need?

- Target seven people
- Variety of voices
- 2-3 hours minimum
- Discovery process

Audience

what makes your learners unique?

Needs

what needs will be met by this initiative?

business

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-
-
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-
-

learner

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-
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-
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Successes

what has worked well for your organization in the past?

Weaknesses

what has gone wrong in the past?

Expertise

what existing know-how and source material is available?

people

-
-
-
-
-

materials

-
-
-
-
-

Results

how will you measure the success of this initiative?

1. Learner Response:

2. Learning Retention:

3. Learner Performance:

4. Organizational Change:

5. Organizational Value:

What Makes Your Audience Unique?

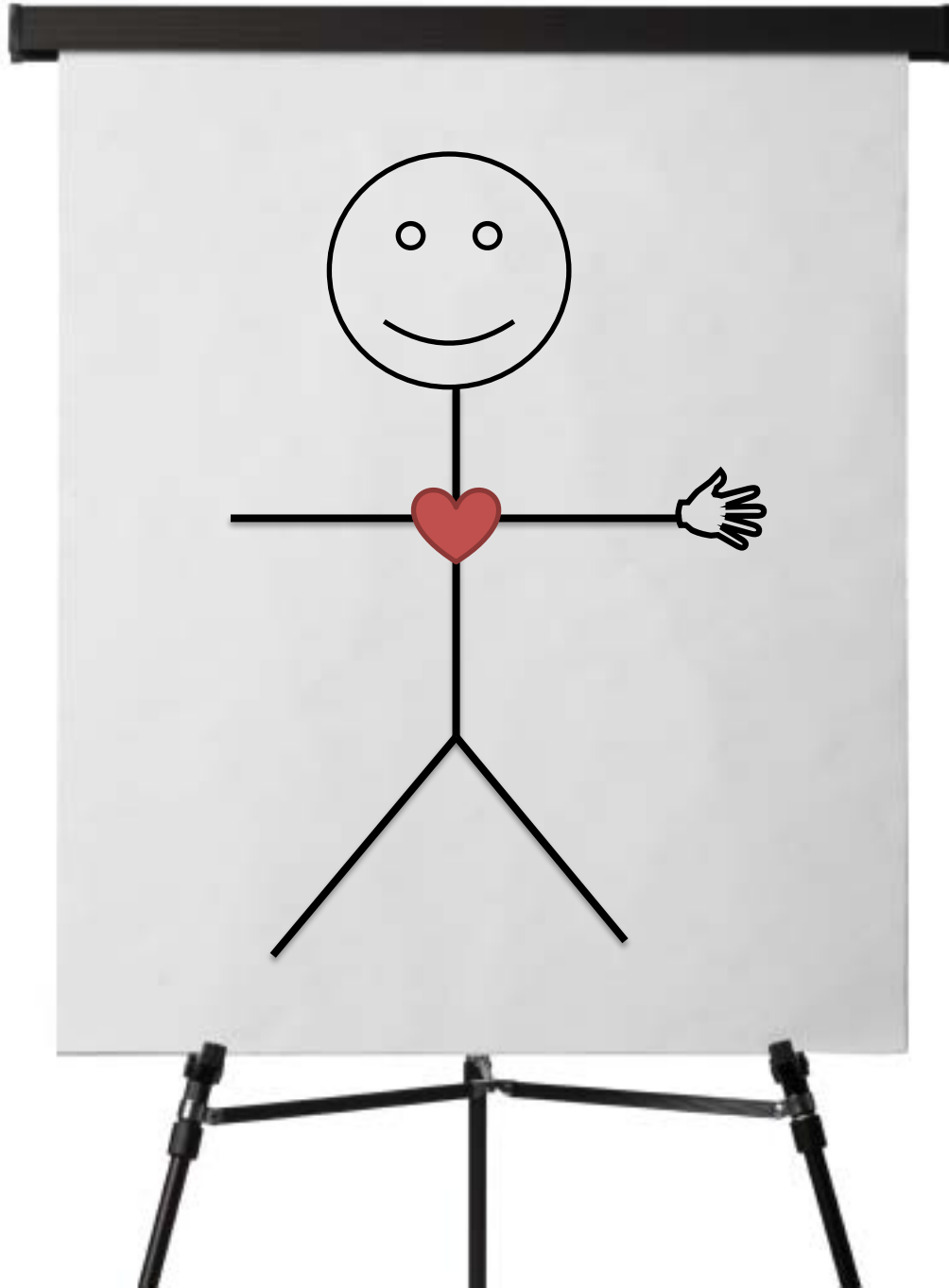


Why?

- Determine whose performance we're talking about
- Assess the scale of the analysis needed

How?

- Use a flipchart to anatomize hands, head, heart, face, quirks
- Keep results at hand for next steps (as there is significant overlap)





Audience

what makes your learners unique?

Hands: Uncover needs, recommend products, research clients, discovery

Head: PON info, peer network, working knowledge of product features

Heart: Not enthusiastic, busy, commission-based, competitive, confident, analytical

Face: 3 tiers of audience, business/finance pros, 25% female plus

Quirks: MacGyver & Martha Stewart

Successes

what has worked well for your organization in the past?

What Needs

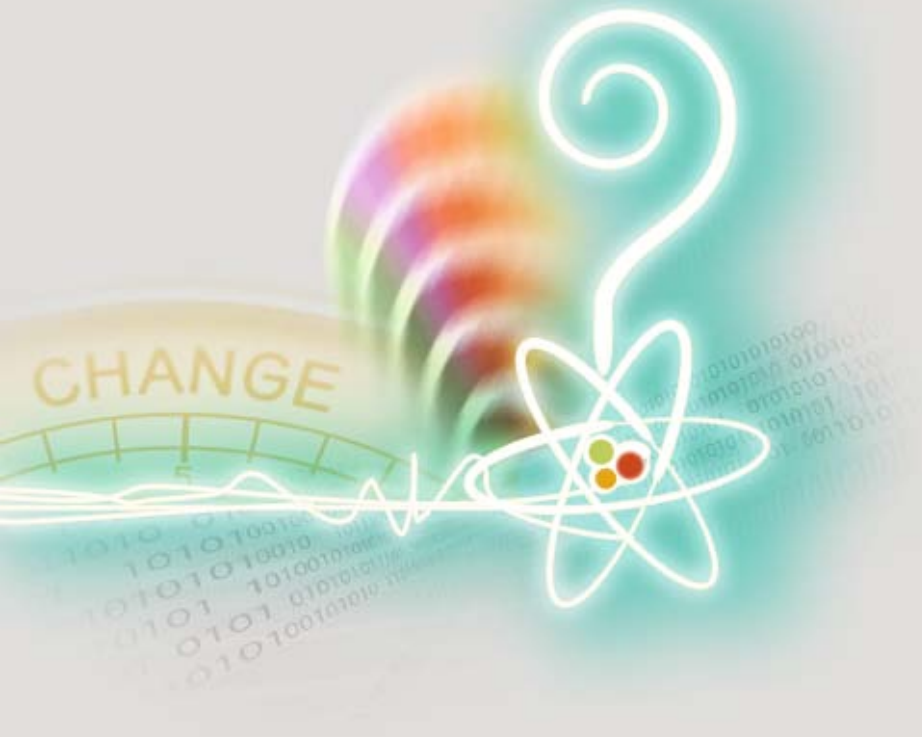
Will Be Met?

Why?

- Leverage existing, *found* data
- Work from business need to performance need to solution

How?

- Perspective shifts
- Chain of stakeholders
- T-chart categorization





G	G	G	G



project

Product Acumen

Needs

what needs will be met by this initiative?

business

- Sell full range of products
- Increase revenue potential
- Increase market share to 30%
-
-

learner

- Uncover client needs
- Product knowledge
- Match products to needs
- Recommend
- Answer questions & resolve concerns
-

Weaknesses

what has gone wrong in the past?

What Has Worked Well?

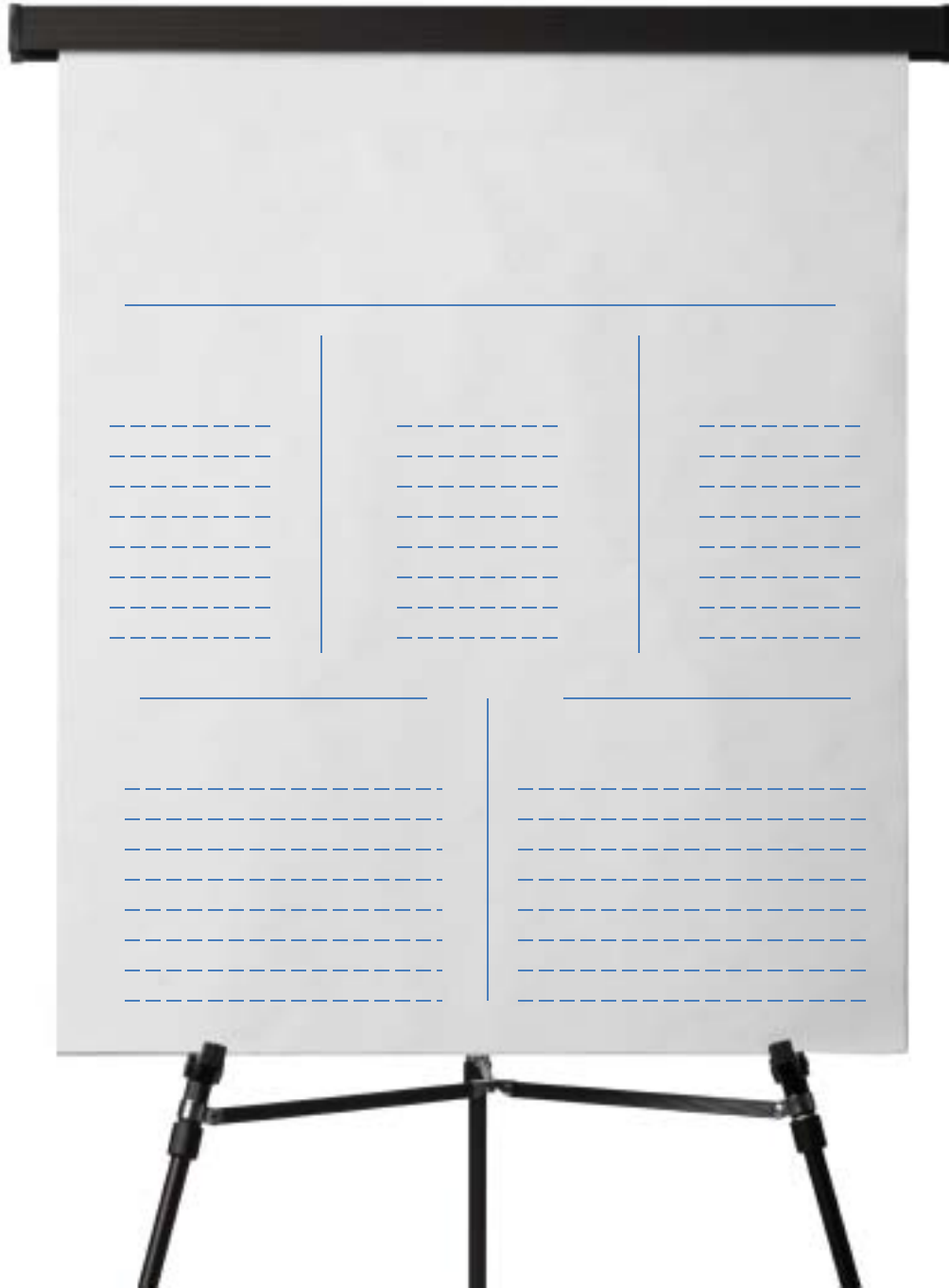
Why?

- Capture and channel energy from past training
- Build on the value of what's already been done
- Evaluate new initiatives against past success

How?

- Success newspaper





Successes

what has worked well for your organization in the past?

WBT allowed just-in-time training

Got to managers where they work

Focused on real work situations

Very flexible and that's what the managers liked

Expertise

what existing know-how and source material is available?

people

-
-
-

materials

-
-
-

What Has Gone Wrong?

Why?

- Identify things to be avoided in the training
- Get some distance

How?

- Weighted weaknesses



*What
happened?*

*Underlying
causes?*

Risk %

Weaknesses

what has gone wrong in the past?

ILT didn't work—managers away from work too long 25%

Focus on information and concepts, no “what's in it for me” 75%

Results

how will you measure the success of this initiative?

1. Learner Response:

2. Learning Retention:

What

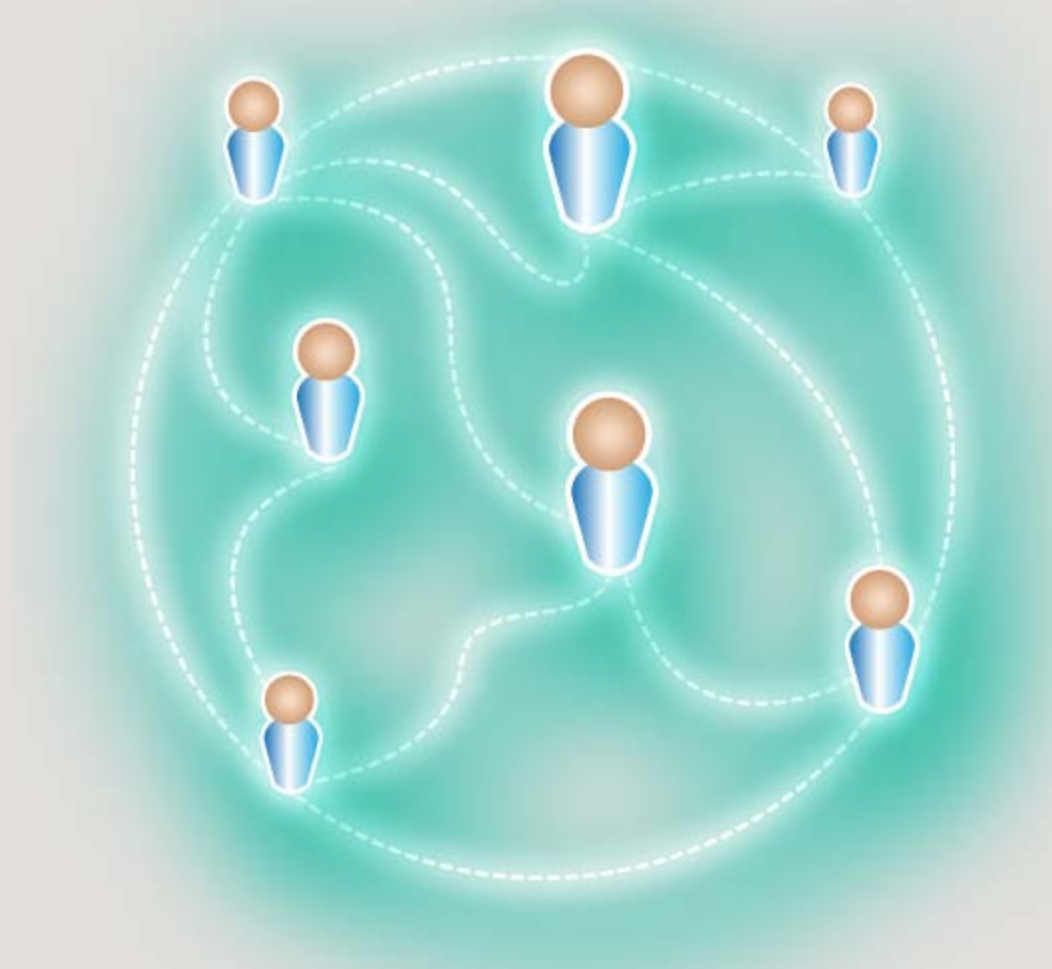
Already Exists?

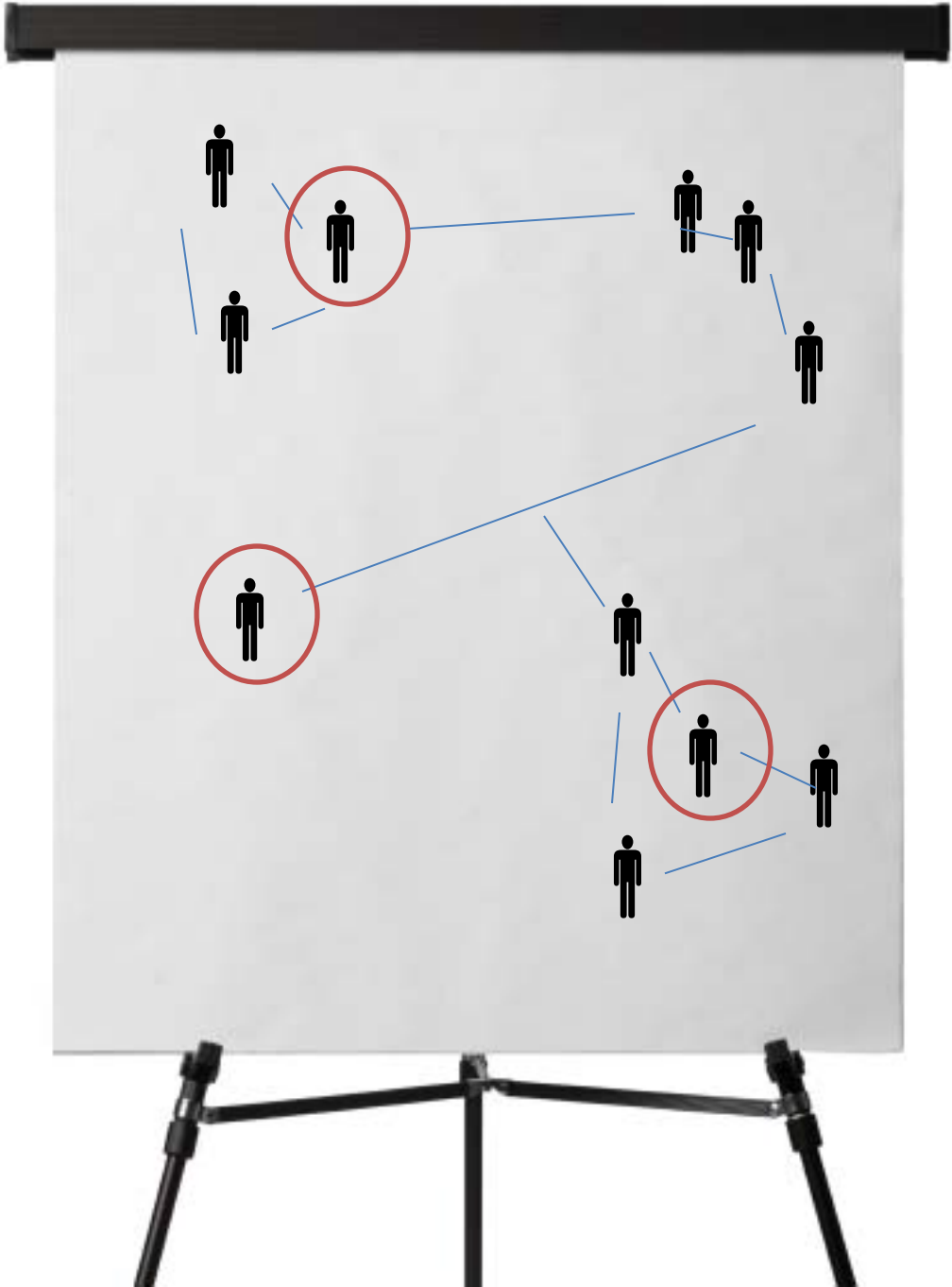
Why?

- Repurposing *critical* to success of quick-and-dirty
- Looks at extant data & begins subject-matter analysis

How?

- People network
- Overlay of resource network with sticky notes
- Summarize as knowledge network





Expertise what existing know-how and source material is available?

people

- Hilary Mantel (VP)
- Mike Chabon (Dir)
- Antonia Byatt (SME)
- Tom Hardy (Trainer)
- ???

materials

- Fact sheets
- 1st Research reports
- Marketing website
- Presentation graveyard
- Industry toolkits



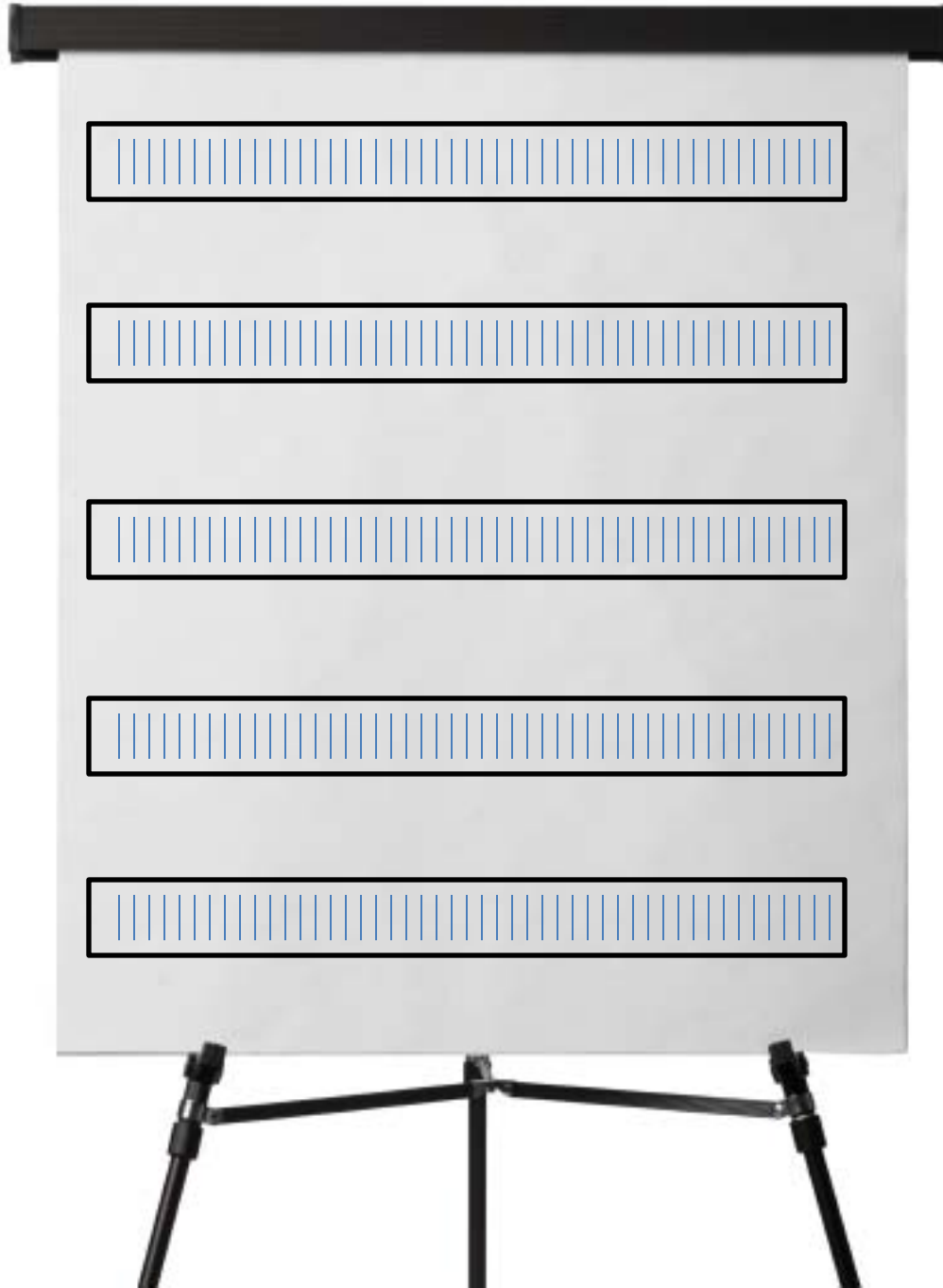
How Will You Measure Success?

Why?

- Establish expectations
- Connect training project to the business
- Create criteria for determining training content and design
- Provide measurable demonstration of value

How?

- Envision success
- Success rulers
- Performance mapping



Results

how will you measure the success of this initiative?

1. Learner Response: *85+% very satisfied*
2. Learning Retention: *70% pass 12-month follow-up*
3. Learner Performance: *75% complete client cases*
4. Organizational Change: *2013—move from 3 to 6 products*
5. Organizational Value: *2013—Market share moves to 30%*



Wrapping Up

- Summarize & report
- Recognize limitations
- Use as a starting point
- Take it viral
- Make it recursive

Thank You!



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Literature

Review

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