EDU500925-rt

How to Train Your Drafter: Develop your User Engagement Plan

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Hord Coplan Macht

Learning Objectives

- Brainstorm training topics your users need.
- Learn how to identify the best way to test progress at your company.
- Learn about developing your user engagement plan.
- Learn about existing training sources that can benefit your company.

Description

Training a diverse group of users requires more than a little bit of strategizing. From new users to seasoned veterans, everyone has something they can discover about the software they use. But how do you engage them all and keep them all growing? Explore various engagement methods and find the best approach for you and your trainees. Join our discussion of learning styles, presentation styles, training tools, on-demand content development, and ways of testing progress and identifying topics relevant to your users.

Speaker

Beth Evanoo is an Autodesk Revit Certified Professional and the BIM Technology Specialist for Hord Coplan Macht. She is a registered architect, with a bachelor's and master's degree from The Ohio State University. With Revit experience starting in 2010, and a particular interest in standards and organization, she has taken on the roles of BIM manager and Revit trainer at three firms, in addition to being a project manager. Her architectural experience includes retail, restaurants, and multi-family mixed-use developments. When not taming Revit, she spends her time creating masterpieces in yarn.

Roundtable Expectations and Format

This is an interactive session. Bring your writing implement and your thinking cap! I will facilitate the conversation, leading the group through developing their custom engagement plan. I will share my experience training users at three firms to spur discussion. To keep us on track, we will work through six steps, defining the **Why**, **Who**, **What**, **How**, **Where**, and **When** to train your drafter.

*"I keep six honest serving-men
They taught me all I knew;
Their names are What and Why and When
And How and Where and Who."*

- Rudyard Kipling

BUT FIRST! "Begin with the end in mind."

*"To **begin with the end in mind** means to start with a clear understanding of your destination. It means to know where you're going so that you better understand where you are now and so that the steps you take are always in the right direction."*
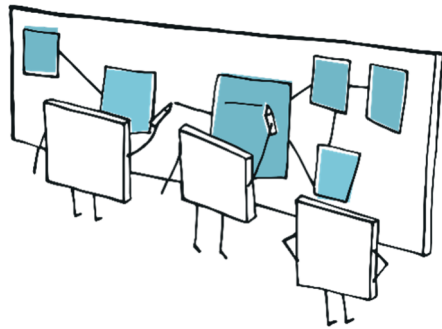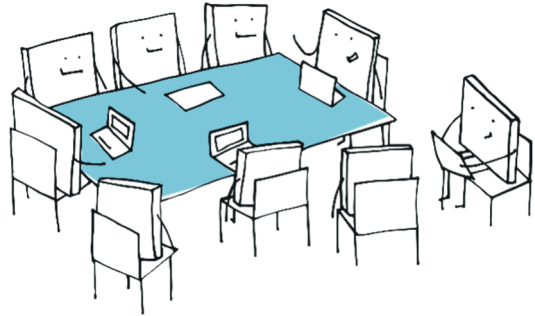
-Stephen Covey

The first step in solving the problem is to understand the problem. Don't just train to train. Train with a purpose! To *begin with the end in mind* means positioning **Why** as our foundation.
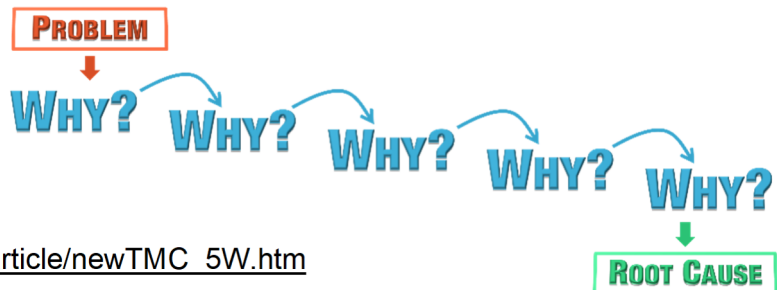
WHY?

What's My [Company's] Motivation?

The 5 Whys

Sakichi Toyoda, the founder of Toyota Industries, developed the practice of the Five Whys in the 1930s. It is still used today at Toyota to find the root cause of a problem.

PROBLEM

WHY? WHY? WHY? WHY? WHY?

ROOT CAUSE

https://www.mindtools.com/pages/article/newTMC_5W.htm

Self-Reflection

Reflect on why training matters for you.
Is there a commitment to training at your organization?
Why is training important?
Sharpen the axe!

"What if we train them and they leave? What if we don't and they stay?"

- Unknown

"Train people well enough so they can leave. Treat them well enough so they don't want to."

- Richard Branson

"If I only had five minutes to chop down a tree, I would spend the first two and a half minutes sharpening my axe."

- Not Abraham Lincoln according to
https://quoteinvestigator.com/2014/03/29/sharp-axe/
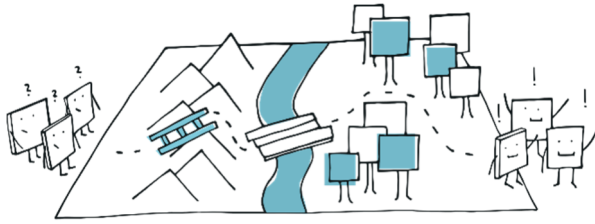
Where are we? Where do we want to be?
What **outcome** are you hoping for?
What does a **perfect** outcome look like?
What process, software or technical knowledge
are you trying to **share** with your trainees?
What will increase **efficiency** for your team?
What **pitfalls** are your users falling into?
Is there a **metric** you're trying to achieve?
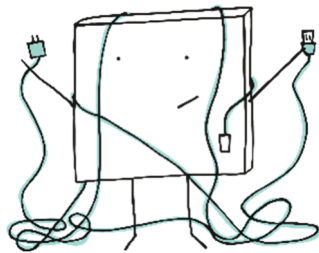Be as **specific** as you can!

WHO?

Get to Know Your Users
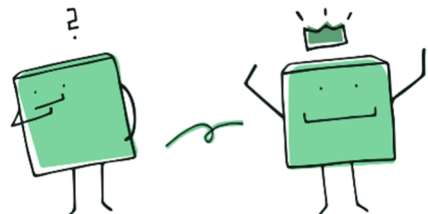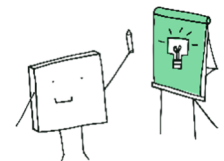
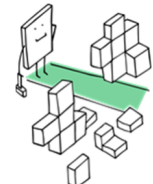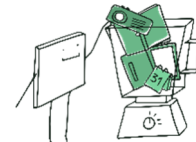Every firm is different. Every employee is different.
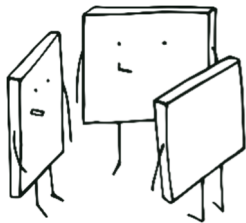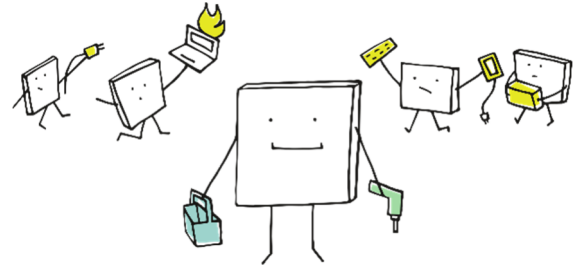
Observe
- Observe behavior, questions, and interest level
- Find their motivation!
- People learn when they are motivated
- Tap into their passions

Where to Start
- Bootcamp style (blender)
- Basic to Expert (building blocks)
- Specific workflows (jigsaw)
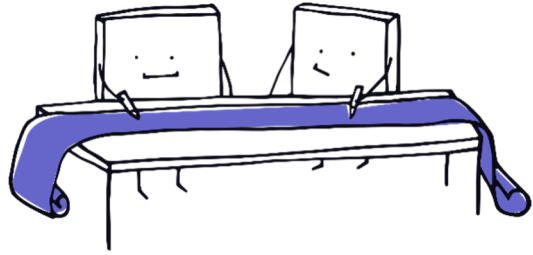- As needed (just-in-time)

Spectrum of User Levels
- Beginners to Experts
- You may have some newbies and hopefully some power-users
- What is the spectrum you are dealing with?
- How can you tell? (More on that later.)

WHAT?

Brainstorm Training Topics Your Users Need

Start broad and focus on specifics as you explore ideas.

Repeated Questions

What comes up all the time?
Are there common questions among users?
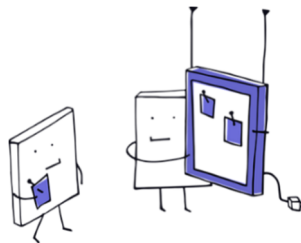Are there gaps in knowledge that can be filled?

Relevant Topics

What will make us more efficient?
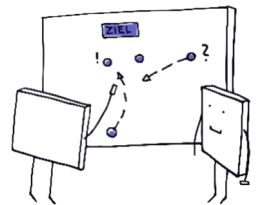What will lower user frustration?
What will get users excited?

Keep a [digital] list!

New ideas.
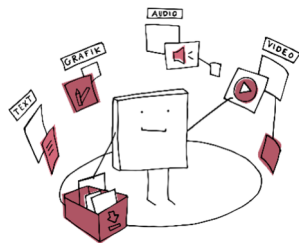New features.
Common errors.
Common questions.
Tips & Tricks

Topic Progression

Come back to this when you have a comprehensive list.
What comes first?
What comes next?
Can some people "skip the line"?

How?

Develop Your User Engagement Plan
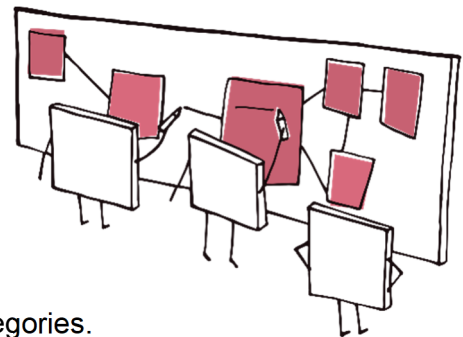
Learning Styles

Audio! Visual! Experiential!
There are many learning styles.
Some people fall within multiple categories.
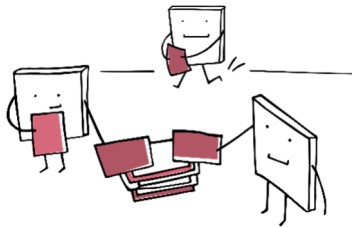The trick is to check as many boxes as you can.
Develop content that can be watched, read, and practiced. Provide practical examples and practice files if possible.

Presentation Styles

Live classroom training
Live virtual training
One-on-one training
Short, prerecorded videos

On-Demand Content Development

Illustrated instructions and short video tutorials are usually very helpful for users. They can follow the instructions at their own pace and refer to them at any time. PowerPoint (or an equivalent) is available in most offices, and can easily be leveraged to make instruction sheets, like below.
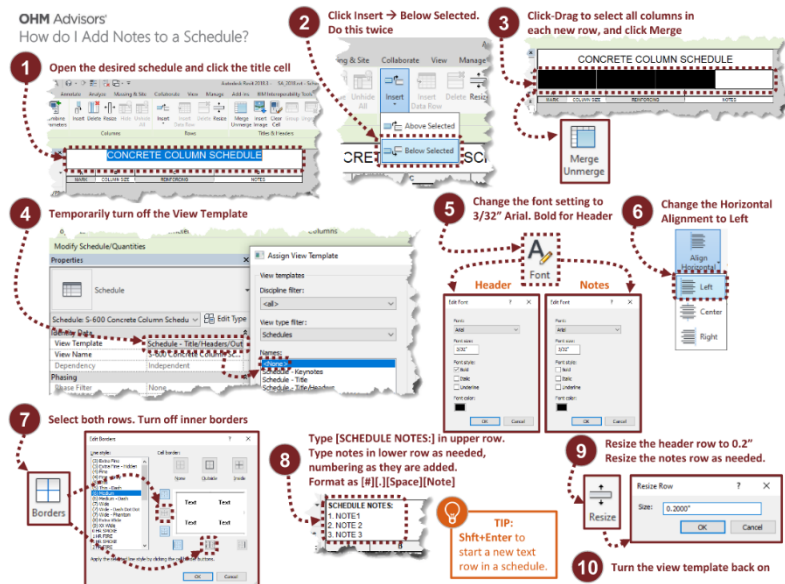

Figure 1 Example Instruction Sheet

Bribery (I Mean Motivation)

If you are hosting live training, a little bribery goes a long way. Even webinars
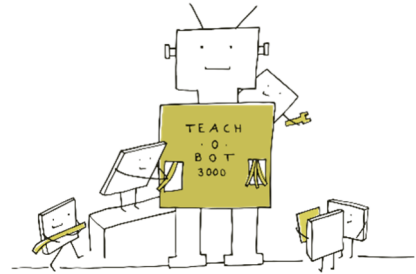Gift cards *(coffee, Amazon)*
Food *(morning pastries, fresh fruit, cookies, pizza, etc.)*
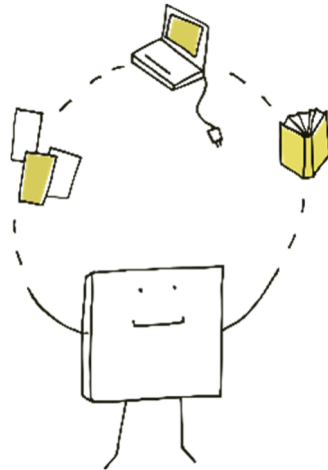Recognition (
Trophies (Cleanest Model,

WHERE?

Existing Training Resources

Internal Training Tools
What exists at your organization already? Build upon that or scrap it?

Video Conferencing

Instant Messaging

Work Planning

Screen Capture/Sharing

Knowledge Repository

Organize Information

Basecamp

Confluence

slack

Microsoft Teams

Snagit TechSmith

Microsoft Teams is one example of a repository of information you can build to give users a single source of truth. Channels can be used to direct user discussions and questions. Tabs can hold references like company standards *(PDF or website tab)*, graphic-based training content *(SharePoint tab)*, training videos *(Stream tab)*, and to-do lists *(Planner tab)*.
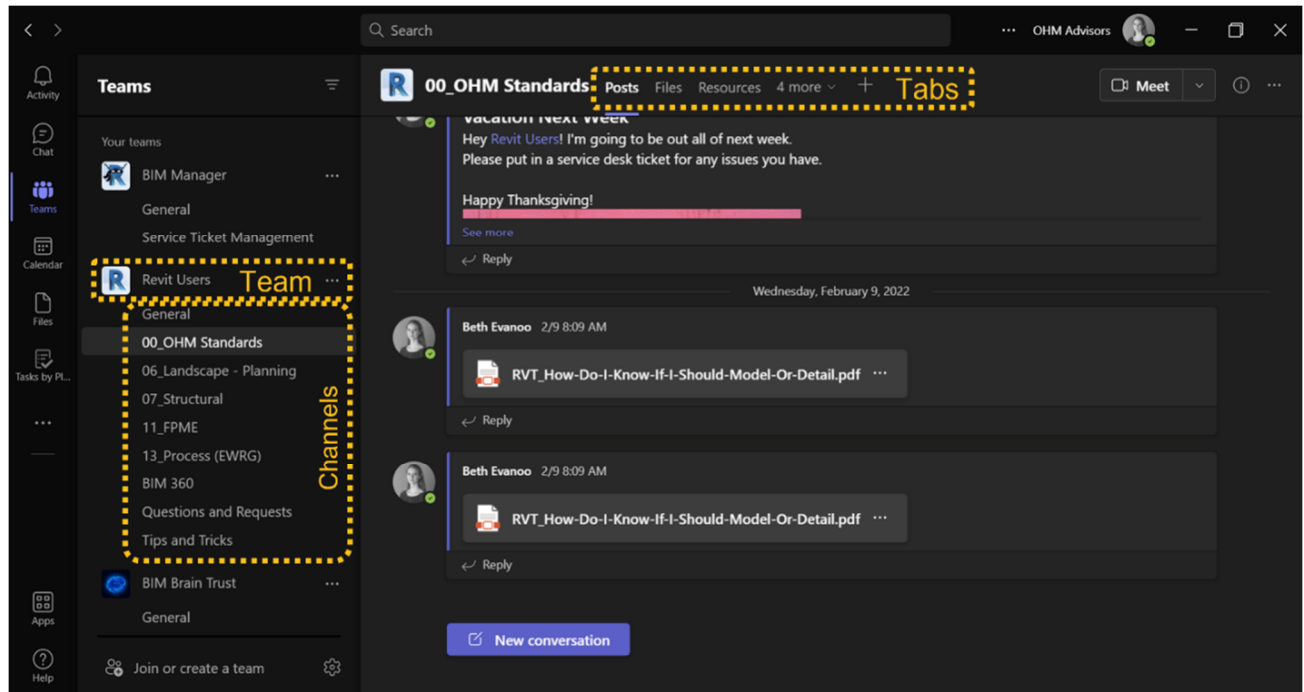
External Training Tools

There are numerous external training suppliers. Some have free resources *(outlined below)* as well as more in-depth, paid content. There are several types of services, including On-Demand, Live Training, Webinars, and Custom Classes.

WHEN?

Driving Progress at Your Company

Just-in-time Training (JIT)

Train on specific topics just before users are getting ready to use that feature.

…"it's about learning new skills at the point of need, rather than studying a lot of information (some of which may not be relevant to a particular employee), "just in case.""

- Nicola Wylie

"Just-in-time means making only what is needed, when it is needed, at every stage of production."
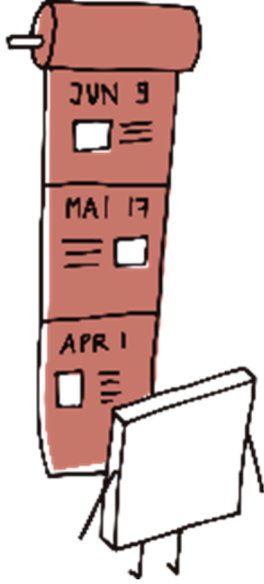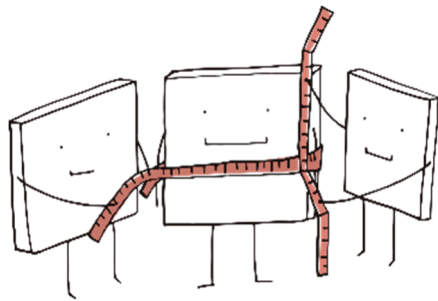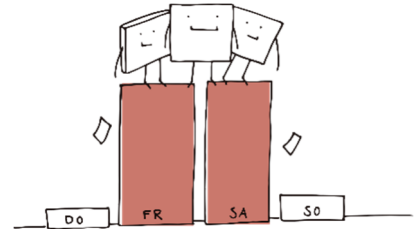
- Toyota

- Provide links to relevant videos
- Short, internal video or live training showing the process
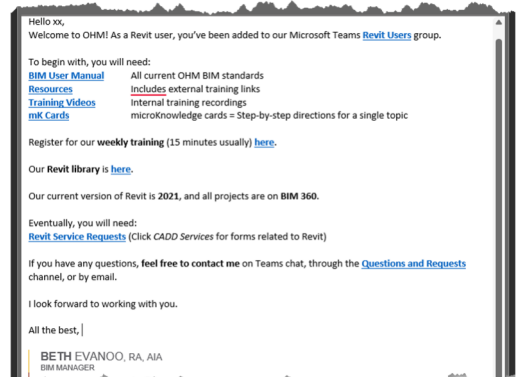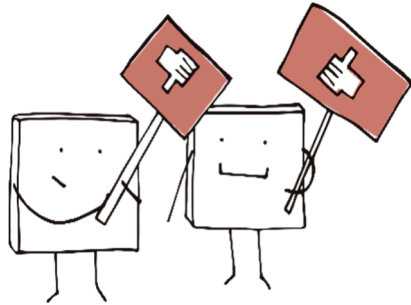- Visual references for reminders

Testing Users

- Internal self-assessment *(survey distributed to users)*
  - Develop or find levels of mastery *(Revit example)*
  - Pro: Cheap, Quick, Easy
  - Con: Low Accuracy
- External assessment companies *(see above)*
  - Pro: High Accuracy
  - Con: Expense, Time Commitment
- Internal "tests" *(example projects with specific tasks)*
  - Pro: Personalized, High Accuracy
  - Con: Continual Time Commitment
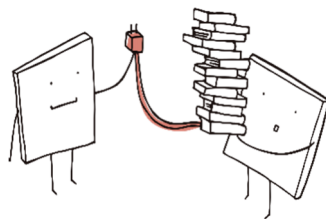
Onboarding New Users

- Provide links to internal and external training resources
- Provide explanations of file and resource locations
- Create an email template
- Record welcome videos

Hello xx,
Welcome to OHM! As a Revit user, you've been added to our Microsoft Teams Revit Users group.

To begin with, you will need:
BIM User Manual   All current OHM BIM standards
Resources   Includes external training links
Training Videos   Internal training recordings
mK Cards   microKnowledge cards = Step-by-step directions for a single topic

Register for our weekly training (15 minutes usually) here.

Our Revit library is here.

Our current version of Revit is 2021, and all projects are on BIM 360.

Eventually, you will need:
Revit Service Requests (Click CADD Services for forms related to Revit)

If you have any questions, feel free to contact me on Teams chat, through the Questions and Requests channel, or by email.

I look forward to working with you.

All the best,

BETH EVANOO, RA, AIA
BIM MANAGER

Get Feedback

- Teams/Slack channel for questions and requests
- Surveys *(Microsoft Forms / Google Forms / Survey Monkey / etc.)*
- Use **"What are your questions?"** instead of "Any questions?"
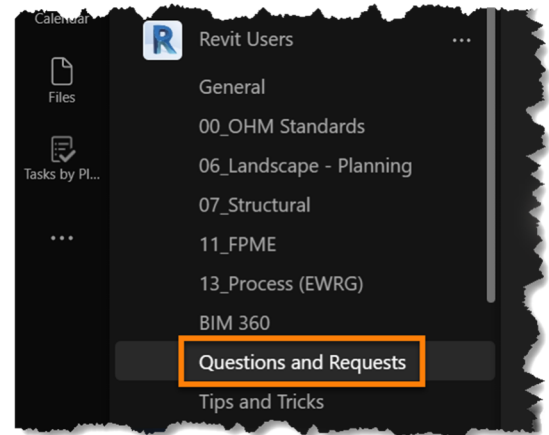
Conclusion

Training is an ongoing endeavor. Software changes. People come and go. It is fundamentally important to define your company's "why". Keep your end goals clear and work toward those ends. Review your strategy often and adjust it as necessary.
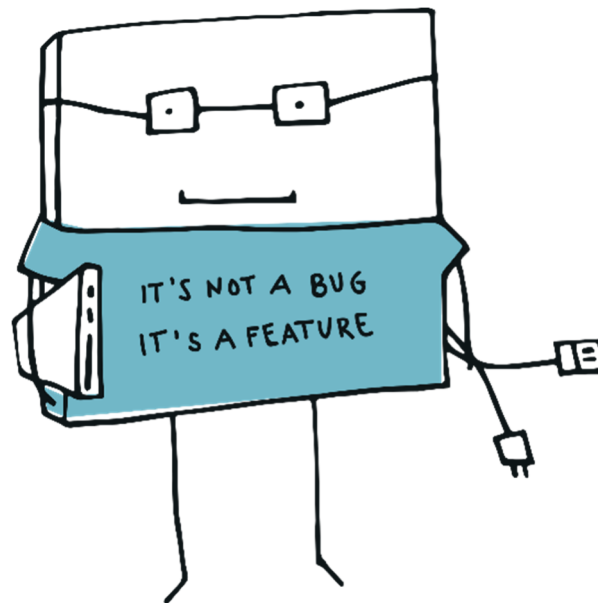

IT'S NOT A BUG
IT'S A FEATURE

Additional Resources

https://www.growthengineering.co.uk/what-is-microlearning/
https://www.growthengineering.co.uk/what-is-just-in-time-learning/
https://www.ispringsolutions.com/blog/just-in-time-training
https://tinyurl.com/videosecretweapon
https://cft.vanderbilt.edu/guides-sub-pages/learning-styles-preferences/
https://www.edgepointlearning.com/blog/top-10-types-of-employee-training/

WHY?

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