

**Session #704 – Read Me First: *Designing Effective Job Aids***  
**February 3, 2010 from 11:00 am to 12:00pm**  
**Susan Boyd**

**Description:** A job aid provides concise information or an easy-to-follow set of instructions to perform a specific task or procedure. Job aids are known by a variety of names including cheat sheets, quick reference cards, performance aids, getting started guides, flowcharts, checklists, or “Read Me First” notices. Regardless of you call them, the purpose of a job aid is to help the user quickly and easily accomplish a goal such as connect a digital camera to a computer, fill out an accident report, or find client information in the new database system. The two key words that define a job aid’s value are the words **quickly** and **easily**.

**Objectives:** In this interactive session, we will:

- Discuss the benefits of job aids
- Illustrate the various types, media and formats for job aids
- Identify design and implementation tips.

**Your Instructor: Susan Boyd** has over 30 years experience in the training and computer education field and is a member of the International *Who's Who in Information Technology*. Susan has extensive experience in planning and managing training projects, and has directed and participated all phases of the projects including: needs analysis, course development (online and instructor led), training the trainers, course delivery and follow-up.

Susan is a national conference speaker and has presented sessions at: Training Solutions since 2001, the e-Learning Conference, Online Learning Conference, ASTD Philadelphia Chapter Technology Learning Conference, ITTC, TechLearn, and other training conferences. She has also presented online synchronous training webinars and has been a judge for the Brandon Hall e-Learning Awards since 2001. Susan is a published author of over 30 training articles in training journals such as *Training Magazine*, *ASTD Learning Circuits*, *Online Training Magazine*, *Technical Training*, *Training Directors' Forum*, *Inside Technology Training*, and *Technology for Learning*. She has also published **Accelerate Computer Learning with Analogies**, a book for trainers that contains over 700 analogies for computer concepts, as well as illustrations. You can order this book through Susan’s website at: [www.susan-boyd.com](http://www.susan-boyd.com).

Susan is a firm believer and practitioner in using creative training techniques and analogies as aids in learning motivation, comprehension and retention.

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**Follow-up: Resources and a Creating a Job Aid Checklist are posted for you at:**  
[www.susan-boyd.com/training2010.pdf](http://www.susan-boyd.com/training2010.pdf)

Slide 1

**Designing Effective  
Job Aids**

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Slide 2

**Susan Boyd**



- **Position:** President, Susan Boyd Associates, a computer training consulting company
- **Industry Background:** Over 30 years experience in designing and delivering training programs for computer applications.
- **Online Learning Expertise:** 6 years experience using online training programs to supplement instructor-led training.
- **Contact info:** [www.susan-boyd.com](http://www.susan-boyd.com)

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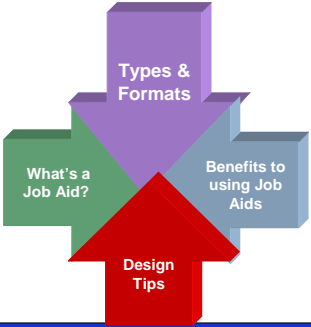
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Slide 3

**Our Session Objectives:**



The diagram consists of four arrows pointing towards a central point. The top arrow is purple and labeled 'Types & Formats'. The left arrow is green and labeled 'What's a Job Aid?'. The right arrow is blue and labeled 'Benefits to using Job Aids'. The bottom arrow is red and labeled 'Design Tips'. There is a small icon of a notepad and pen in the top right corner of the slide.

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Slide 7

**Examples:**

**Needs Analysis Worksheet (Sample Questions)**

- Brief Description of the training:
- Business Need for this training:
- Objectives for the Learners:
- Topic areas to be covered
- Numbers of Learners:

**Look Up Table**

Program Name	Unit Number
Behavior Management	8211
Community Apartment	8080
Education	8150
Group Homes	8060
Life Skills Program	8180

**Decision Tree**

Questions to Consider

Questions to Consider	Yes or No?	If Yes, Recommended Job Aid Type
• Do the visual conditions or materials exist?	Yes	Decision tree
• Are there different alternative steps to perform the task based on the conditions?	Yes	Decision tree
• Are the instructions used responses by providing the user information?	Yes	Checklist
• Is there a graphic response with text response that need to be followed or performed, such as?	Yes	Step-by-step instructions
• Can the response be demonstrated in a series of steps or a single-step answer?	Yes	Flowchart or graphic map
• Should the process be repeated for conventional needs through visual or graphic map?	Yes	Checklist or graphic map
• Are there any on-going that the user can follow for the job?	Yes	Look-up table
• Do the visual conditions or materials exist to be followed or performed, such as?	Yes	Look-up table
• Is there a need for a task to be performed or information to be presented for a process or a procedure?	Yes	Worksheet or form
• Will the document be maintained or enhanced at a later time?	Yes	Worksheet or form
• Is the task complex?	Yes	Reference sources
• Does the user have a significant amount of background?	Yes	Reference sources

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Slide 8

**Examples:**

**Checklist to Develop a Job Aid**

- Complete the Needs Analysis
- Gather the Information
- Meet with the Project Team
- Create a mock up
- Create Job Aid
- Pilot the Job Aid
- Implement the Job Aid
- Evaluate the Job Aid

**Using Job Aids**

**Table of Contents**

Performance

Quick and Easy

- 1. Determine When to Use a Job Aid ..... 1
- 2. Select the Type of Job Aid to Use ..... 5
- 3. Select the Appropriate Medium ..... 5
- 4. Design the Job Aid ..... 9
- 5. Implement the Job Aid ..... 12
- 6. Evaluate the Job Aid ..... 13

References & Resources ..... 14

Job Aids

- Needs Analysis Worksheet for a Job Aid ..... 15
- Checklist of Activities to Develop a Job Aid ..... 16

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**Examples: Graphic Chart**

**Ergonomic Stretches for Dimension Assembly**

**Stretching Guidelines**

- Hold each stretch for 20-30 seconds.
- Repeat each stretch 1-2 times.
- Stretch daily - As often as needed in task (repetitive) or non-task.
- Stretch to the point of mild discomfort, NOT pain!

1. Neck Side Benders

2. Triceps

3. Biceps

4. Posterior Deltoids

5. Shoulder Roll

6. Prayer Position

7. Rotation

8. Lower Back Stretch

9. Chest Stretch

10. Palm Stretch

11. Wrist Flexion

12. Wrist Extension

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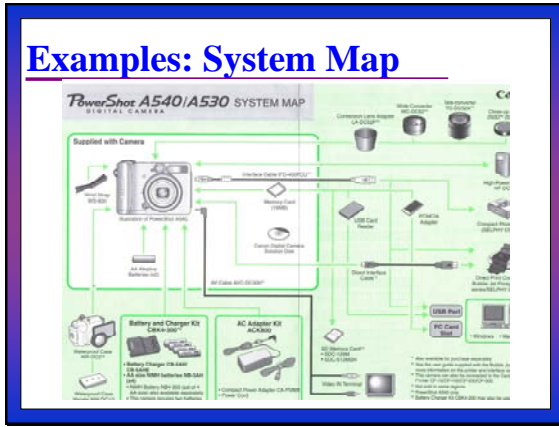
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**Team Activity:  
Benefits**

1. Form a team with 3-5 people near you.
2. Find out who is the Team Recorder.
3. Brainstorm and list benefits and advantages of Job Aids.

**Team Recorder:**  
Has been in training the **shortest** amount of time

**Time** – 2 minutes

**Prize** – Team with the most items wins!

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**Benefits**

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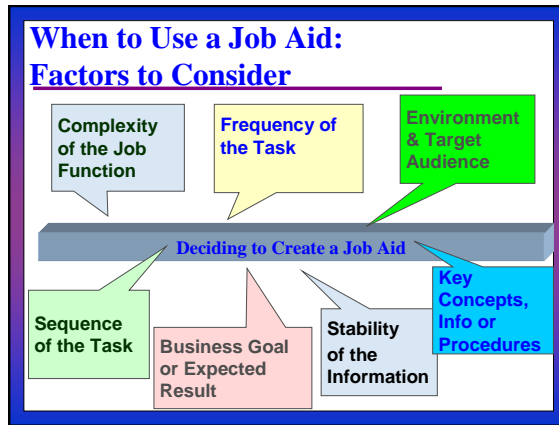
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**Types: Which Job Aid to Use?**

Criteria	Job Aid Type
There are defined alternatives or variables for a process	Decision Tree
There is a consistent set of tasks to be done, but the sequence is not essential	Checklist
There is a specific sequence that must be done	Step-by-Step Instructions
There is an advantage of using pictures, rather than words	Flow Chart or Graphic Map
There is a need to gather information and document in a consistent format	Worksheet or Form

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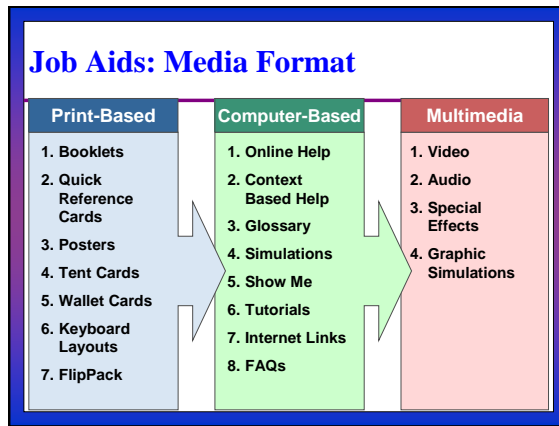
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**Team Activity:**

What formats are you currently using for Job Aids?

What *innovative* Job Aids have you seen/used?



**Prizes** – to the first **3** people who stand up and share their ideas on *innovative job aids*.

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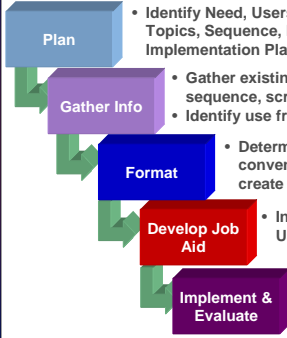
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**Designing the Job Aid**



- Plan**
  - Identify Need, Users, Team (SME, Graphics), Topics, Sequence, Budget, Format, Access, Implementation Plans & Maintenance.
- Gather Info**
  - Gather existing documentation, process flow, sequence, screen shots, graphics, examples
  - Identify use from a learner's perspective.
- Format**
  - Determine size, layout, conventions. Mock up samples, create template for final.
- Develop Job Aid**
  - Include only necessary content. Use clear language and Graphics.
- Implement & Evaluate**
  - Test internally, then pilot. Gather feedback, enhance, communicate, implement & evaluate and improve!

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**How Can You Apply This Learning?**



- Review your Bright Idea Sheet
- Share an idea with a person next to you.
- Prizes to the first 3 people who stand up to share an idea.

– Remember to check out the Resources & Job Aid Checklist Posted on My Website:

» [www.susan-boyd.com/training2010.pdf](http://www.susan-boyd.com/training2010.pdf)

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**Raffle Drawing**

**Please complete  
Evaluation form**

"You can't teach people everything they need to know.

The best you can do is position them where they can find what they need to know when they need to know it."

--Seymour Papert

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## Contact Info



**Susan Boyd**

**Thank You!**

**Susan Boyd Associates**

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Don't forget the follow-up resources are posted for you at my web site:

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