

## Tools That Help People Succeed Resource Guide



# Glossary

## App for Mobile

Application developed for specialized use on a mobile device(s) to aid the user in doing their work.

## Best Practices or Tips Document

Curated set of information gathered from those who perform the skills or tasks.

## Chat Bot or Another Artificial Intelligence (AI) Tool

Intuitive and intelligent virtual assistants for websites, certain social media pages, and messaging apps.

## Checklist

Set of job tasks that are (usually) completed in sequential order.

## Choose Your Own Adventure

Real work situation(s) are presented to the user. They make selections based on the information provided. The selections determine the path or next course(s) of action, accordingly. (See also, Recursive Question Tool and Scenario or Situational Practice)

## Decision Tree or Flow Chart

Set of questions that are written to address specific work situations or scenarios. Based on the response to a question, a different question, additional guidance, or solution is presented, accordingly. Call centers and customer service departments use these mechanisms to resolve customer complaints and to troubleshoot issues with an item.

## eBook

A book written specifically for providing information relevant to the skills and tasks needed to perform the work. Write the eBook with the intention of being read on a computer or mobile device. The eBook may contain things like: Clickable links, cross links, reference materials such as glossary or index—whatever is needed to make it as easy to navigate and find the process or procedure right when the users need it.

## EPSS (Electronic Performance Support System)

App or other type of software solution that aids users in performing job tasks or functions of the job successfully.

## Flashcards

Electronic or printed cards that contain one item each. Use flashcards for things like: Learning definitions, identifying parts or assemblies, recognizing people or places, etc.

## Glossary or Other Searchable Reference Tool

Alphabetical list of phrases, terms, or words, with explanations, that relate to specific subject matter or text.

## Images with Markup

Photo, diagram, or other image is marked up with numbers, callout text, directional arrows—whatever is needed to clarify what the user is to know or know how to do. (See also, examples provided in the *What Works?* lesson and the [Snagit™ Basic Single Template Example](#), [Snagit™ 5-Step Basic Template Example](#) in this resource guide.

## Infographic

Highly visual document that uses imagery and color to represent things like process flow, timeline, sequence, procedures, key information, organizational charts, etc.

## Interactive PDF

PDF crafted only for use as a digital document. Intention is to use it to provide a series of links to relevant forms, procedural documents, internal systems, directories, digital manuals, websites, etc.

## Interactive Video

Video that supports user interaction. The video plays as expected, but will include clickable areas, or "hotspots," that perform an action when clicked. These actions might be brief quizzes or a prompt to consult another resource before proceeding. (See also: Stop Action Video)

## Job Coaching

Pair two (or more) members of staff to complete the real-world experience needed to complete the work. The *coach* is there to keep everyone safe on the job. Also, qualitative feedback, support, and encouragement based on progress and other relevant metrics. (See also: Peer Mentoring)

## Narrated Video

As it relates to job aids, brief video clips that provide exactly the information the user needs to complete a task or tasks. For example, close-ups, specific information about a part or procedure, this is how you start the machine, etc.

## Peer Mentoring

Like job coaching, this is peer-to-peer learning on the job.

## Process Map

There are many ways to craft a process map. For example: Checklist, diagram, icons, illustration, infographic, step/action tables, etc.

## Quick Reference Guide (QRG)

Like so many items found in this Glossary and provided on the Job Aid Selection Tool, there are no specific rules or standards for crafting a QRG. The goal is to keep it brief while providing exactly what the user needs to perform the work task(s) successfully. For example: Diagrams with callout text, interactive PDF, If this .../Do that... tables, glossary, index, etc.

## Quests or Scavenger Hunt

Options for crafting quests and scavenger hunts are many and diverse. For example, quests could be crafted using a tool like Goosechase Kahoot, or PollEverywhere. Then, the players complete the quest entirely online. Or, the quest might be a combination of real-work situations worked through on paper first to reveal online clues or locations then completed using an online tool that tracks completions. The tool might also award badges and display a leaderboard, too.

## Scenario or Situational Practice

Real work conditions presented to the users for learning how best to respond. Use the tools to work through a series of different paths and conditions. Real-world practice with less risk than trying things on actual customers or equipment.

## Spaced Repetition

None of us have the ability to remember several complex procedures the first time having been exposed to them. Spaced repetition exposes users to the information across time. The idea is building long-term retention that supports the recent learning.

## Step Action Tables

List each required element, or step, accompanied by what the user is to do, what the user clicks, or relevant codes used. In other words, the details on how to proceed.

## Stop Motion Video

Originally used to craft videos of inanimate objects "in motion". The motion effect is achieved by making a series of changes to the inanimate object and filming each one. Apply this concept to demonstrate how something changes as it progresses. Use each stopping point to explain what just took place and where the user is going next. For example, starting a machine, changing décor, how to and do-it-yourself content.

## Voices of the Experts



“Human beings are not meant to remember details that aren't used consistently. A job aid is essential to supporting performance on tasks that are not performed often. For example, I would hope to find a job aid for re-lighting my furnace pilot light if needed, so I can complete that task safely and quickly.”

-- Meg Bertapelle

“A job aid contains (external) information that a person applies on the job, reducing the need to memorize while enabling accomplishment.”



“Enabling Accomplishment: Tom Gilbert (makes a) distinction between behavior (what you do, actions) and accomplishment (what got done, results). So "accomplishment" is my shorthand for a job aid that makes it possible for someone to achieve a worthwhile, job-related result that they could not have been achieved without the job aid.”

-- Dave Ferguson



“What are the users likely to need help with? And what would the optimal “help” look like? Thinking about what the users would find most helpful goes a long way to conceiving good performance support.”

-- Carla Torgerson

This may include...

- Short just-in-time, interactive content
- Quick video
- Brief checklist

“For an idea as to what is needed in job aids, visit your staff at work. While there, you're likely to find *cheat sheets*, sticky notes, and reminders used in completing work tasks.”



“Ever use Google? Call upon Siri or Alexa? We use them every single day--usually without even thinking about it as performance support.”

--Dawn J Mahoney CPTD



“Always include a way for the user to communicate back with the author/creator of the performance support tool—for all of the reasons. (e.g., change in procedure, errors, omissions, further questions)”

--Mike Taylor

“Chatbots and voice assistants can guide workers to a solution using natural language processing and all hands-free. With these features being used in so many applications, L&D needs to scramble to leverage this technology for performance support.”



“Why don't we save class time and focus on developing better job aids to use at the point of need? For too long L&D has acted as order takers to “create training” for a topic. We are automatically biased toward designing a class or creating a course because that was the “assignment” we were given.”

“The key to effective performance support is that it can be introduced in situ without pulling a person away from the task at hand.”

--Duncan Welder

# Read More About It

## Blog Posts & Websites

How to Create Job Aids that Skyrocket Your Team's Performance [Techsmith](#)

How to Document a Process in Just a Few Clicks [Techsmith](#)

Performance Support Tools Your Employees Can Start Making Today [Techsmith](#)

10 Types Of Performance Support Tools From Quick Reference Guides To Mobile Apps (Narum, 2018) [eLearningIndustry](#)  
*Nuts and Bolts: Learning Engineering? Instructional Design?* Jane Bozarth PhD eLearning Guild [Link](#)

*What Is Performance Support And Why Should You Use Performance Support Tools?* (Pandey, 2016) [eLearningIndustry](#)

*Job Aids 2.0: The Next Generation of Job Support Disrupting Workplace Learning* (Tejaswi, 2018) [Whatfix](#)

[TrainLikeAChampion.com](#)

[Ensampler.com](#)

[DavesWhiteboard.com](#)

A Handy Guide to Understand Job-Aids [CommLab](#)

RETHINK: Training Materials as In-the-Moment Job Aids (Owen-Boger, 2019) [Turpin Communications](#)

## Books

*Job Aids and Performance Support: Moving From Knowledge in the Classroom to Knowledge Everywhere* (2nd Edition) (Rossett, Schafer, 2006) [Link](#)

*A Handbook of Job Aids* (Rossett, Gautier-Downs, 1991) [Link](#)

*Job Aid Basics* (2<sup>nd</sup> Edition) (Willmore, 2018) [Link](#)

*Designing Training Job Aid Collection* (ATD, 2016) [Link](#)

*Innovative Performance Support: Strategies and Practices for Learning in the Workflow* (Con Gottfredson, Bob Mosher, 2010) [Link](#)

## Research Reports

*Informal Learning Takes Off* (Jane Hart, 2014) [Link](#)

*Artificial Intelligence Across Industries: Where Does L&D Fit?* (Jane Bozarth, 2018) [Link](#)

*Learning in the Workflow* (Jane Bozarth, 2019) [Link](#)

## Voices of the Experts



"Job aids are not new. People have relied on job aids since prehistoric times, when the details of fire tending, skinning, and cooking adorned cave walls."

"A job aid is a repository for information, processes, or perspectives that is external to the individual and that supports work and activity by directing, guiding, and enlightening performance."

-- Allison Rossett & Jeanette Gautier-Downs *A Handbook of Job Aids*

"Even when a job aid isn't the solution to a problem, it usually will be an effective way of boosting application and enhancing performance. Think of job aids as training reinforcement. They remind performers of what to do or how or when to do it—all things they were supposedly trained on."

-- Joe Willmore *Job Aid Basics* (2<sup>nd</sup> Edition)



"Things have changed significantly, especially over the last decade. Workers are accessing learning opportunities through many in-house and external avenues, including electronic performance support tools, Google searches, YouTube videos, infographics, and virtual reality lab experiences. We can gather and parse data in ways and in volumes unimaginable to those working in the field even 10 years ago. No longer just responsible for building courses, the ID is now called on to help create apps, build dashboards, track informal learning, link sensor data to training data, and embed analytics in the workflow."

-- Jane Bozarth PhD *Nuts and Bolts: Learning Engineering? Instructional Design?*

# Job Aid Selection Tool Job Aid

Begin by analyzing all aspects of the circumstances. Ask questions like:

- Who are the learners/users?
- Is the job aid part of the overall learning strategy or the only learning strategy?
- What are the outcomes expected from the learning?
- Who is available to craft the learning content and/or job aid?
- How will we know that it worked?
- What do the learners/users need most?
- What applications and tools are available for crafting an effective job aid?
- What type of job aid will be most effective and be most accessible for use on the job?

Based on the results of the analysis, determine which situation best describes the need from the B Column. Then, place an X in each of the columns that represent a type of job aid that may be possible to craft with the tools, people, time, and budget available. Also, what will be the most efficient and effective for the learners/users *on the job*.

Note: A full page version of the Job Aid Selection tool is provided in this Reference Guide and may also be downloaded as a Google Sheet by clicking this [link](#).

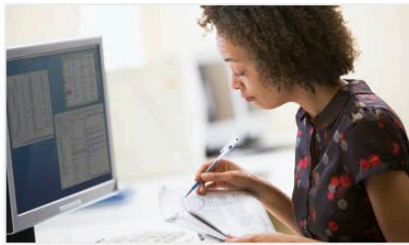
Job Aid Selection Tool																									
	App	Best Practices or Tip Document	Chat Bot or other AI Tool	Checklist	Choose Your Own Adventure (recursive question tool)	Flashback	EPSS (Etc: Performance Support System)	Flashcards	Repetitive Practice	Glossary or Other Searchable Reference Tool	Images with Markup	Infographic	Interactive PDF	Interactive Video	Narrated Video	Peer Mentoring	Printed Handout	Process Map	QR Code (Quick Reference Guide)	Quizzes or Scavenger Hunt	Recursive Question Tool	Repetitive or Spaced Practice	Situational or Scenario Practice	Step-Action Tables	Sign Motion Video
Client or customer training																									
Compliance training																									
In lieu of training class or elearning course																									
Navigating complex circumstances																									
New procedure using known process or tool																									
New procedure using new process or tool																									
Onboarding new employees																									
Operating a new app or tool																									
Post-training reference tool																									
Refresher training																									
Urgent or emergent learning needs																									

# Snagit™ Timeline Template Example

Timeline job aid was crafted using Snagit templates added to the tool in 2020. This template is provided to allow for the addition of your images (Meaning, diagrams, icons, illustrations, photos, etc.), key text, and custom color palette. And, the process is accompanied by relevant images that align to key step text displayed on the right. When complete, the job aid is saved in one of several formats, including .jpg, .png, .pdf, etc.

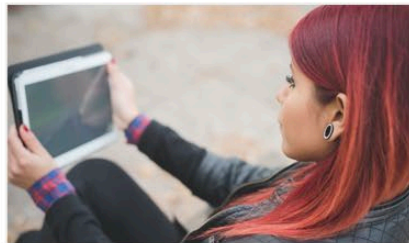
## Timeline Template

*Craft a Timeline Job Aid in Just a Few Steps*



**Day 1**

After the offer has been accepted, send a note of Welcome, with key next steps, to the new employee.



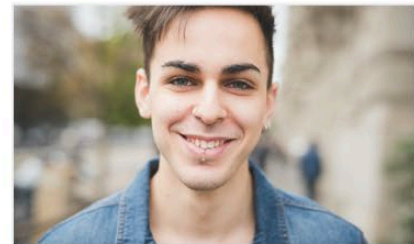
**Day 7**

Add the new employee(s) into the HRIS system to enable processing of equipment needs, etc.



**Day 10**

Verify that the new employee(s) entry badges, email address, and access to systems are in process.



**Day 5**

Invite the new employee(s) to their orientation session—onboarding too if the information is available.



**Day 8**

Order the new employee's office equipment, re-configure work area, if needed,

Made with TechSmith Snagit™



## Snagit™ Basic Single Template Example

Use this template style of job aid to provide a large or larger image with callouts, arrows—whatever most effectively features and highlights things like: Parts, areas, indicate direction, process flow. Then, the area below the image allows for linking key text to the highlighted items in the image. Note: Image could be an illustration, closeup photo, diagram, etc. And, the process is accompanied by relevant images that align to key step text displayed on the right. When complete, the job aid is saved in one of several formats, including .jpg, .png, .pdf, etc.

### *Diagram a screen grab, label parts, indicate sequential order*



1 Instructive text about color 1.

2 Instructive text about color 2.

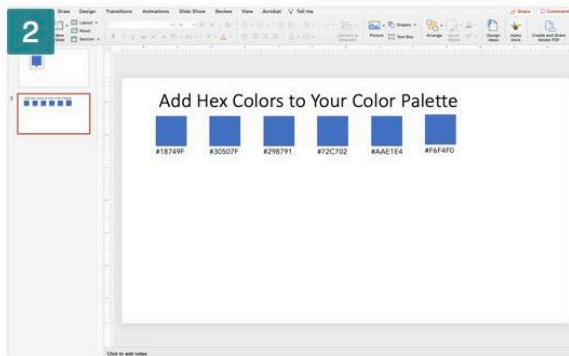
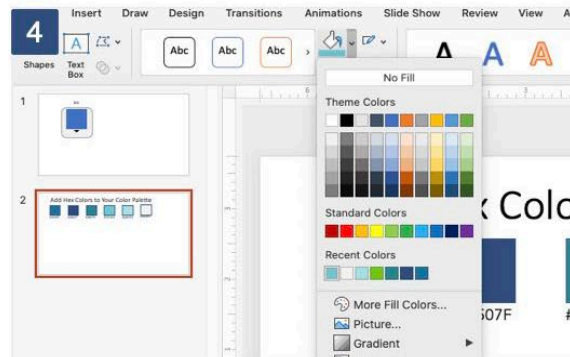
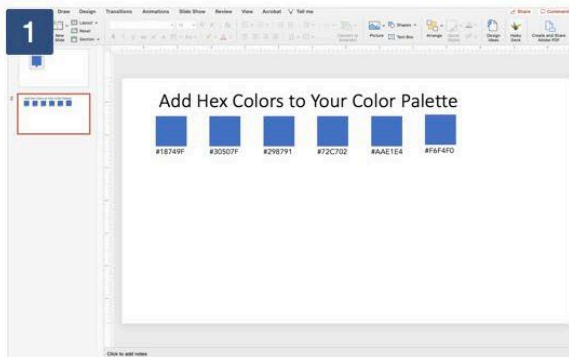
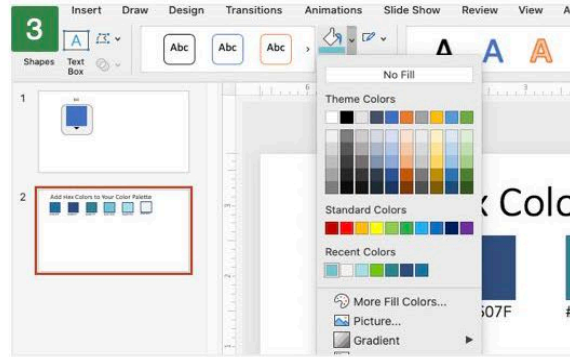
3 Instructive text about color 3.

4 Instructive text about color 4.



# Snagit™ 5-Step Basic Template Example

Just as with the previous two examples this job aid was crafted using a Snagit template. Use this style when the goal is to demonstrate what to do in the order something needs to be done. And, the process is accompanied by relevant images that align to key step text displayed on the right. When complete, the job aid is saved in one of several formats, including .jpg, .png, .pdf, etc.



- 1 Add shapes that will display the colors to be used in the custom palette.
- 2 Copy the Hex Color # code.
- 3 Click Shape Fill.
- 4 Click More Fill Colors.
- 5 Paste the Hex Color # into the designated field. Press Enter. Click OK.

Created by Dawn J Mahoney CPTD

Made with  
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