

Client Logo

Client Name

Program or Project Name

Produced by Montage Learning 2022



Summary

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Table of Contents

1. Persona
2. Program Solution
3. Program Strategy
4. Program Build
5. Next Steps



Client Overview

Character
Graphic

Client Company

Add a quick summary about the client's company.

- What do they do?
- Who are their clients?
- How big they are?
- Processes defined?
- Culture?
- Technical Tools?



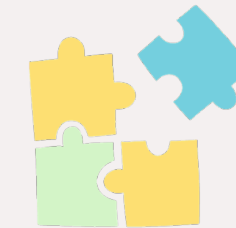
Needs & Problems

Summarize/synthesize the needs and problems of potential client here.



Outcomes

What are the goals or success criteria for the solution? What is an ideal outcome after a solution is implemented?



Recommendation

What Montage products or services help resolve their needs or problems? How? Why? Potential metric impact?



Impact

Who or what do these needs or problems effect? How does this affect the business objectives?

Client Overview

Solution

What product or services does the client need or signed for (refer to SOW). List and summarize here.

Technical requirements? Align with client.

Stakeholders

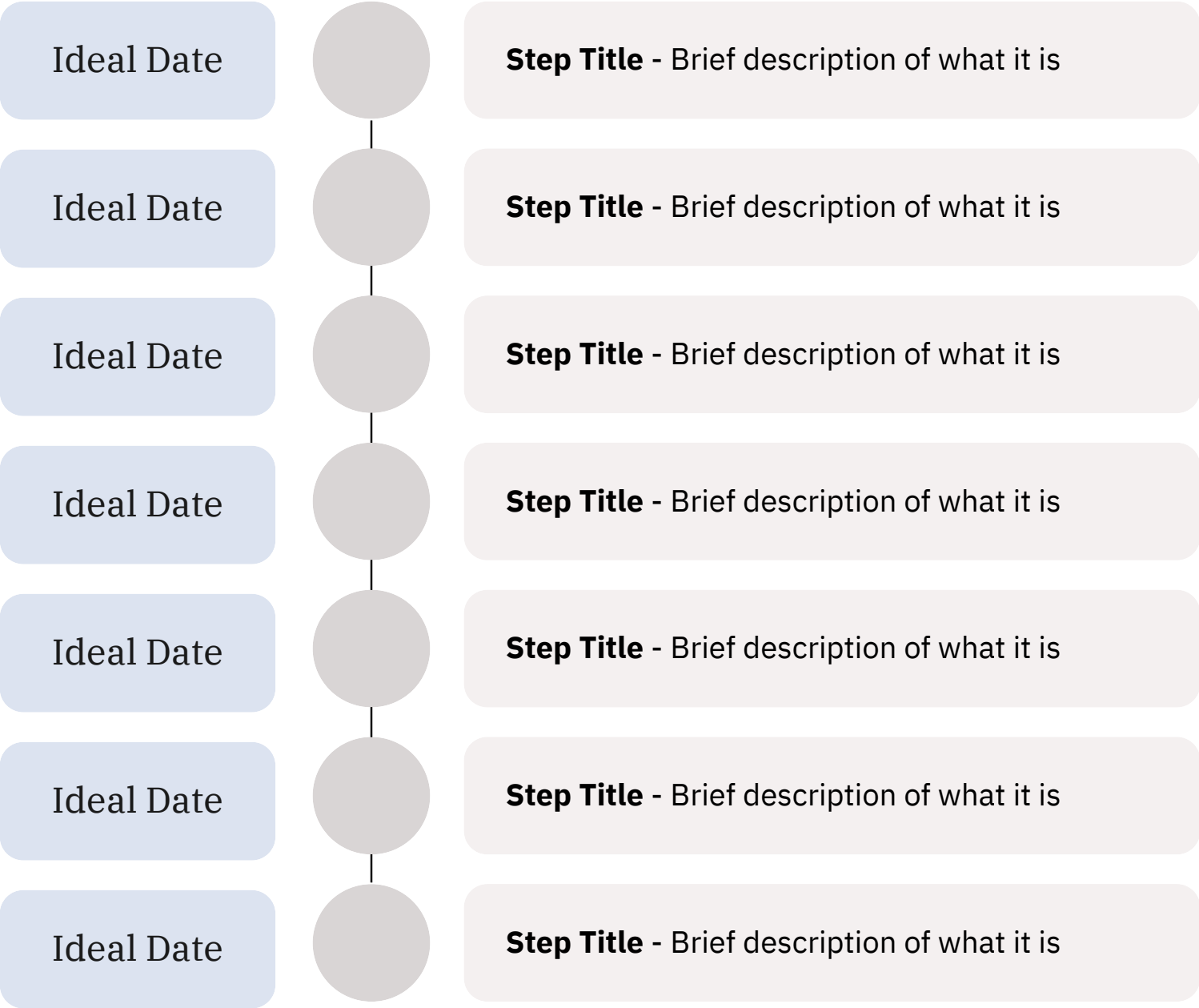
List stakeholders here.

Deliverables

At the end of the project what will the client receive?

Timeline

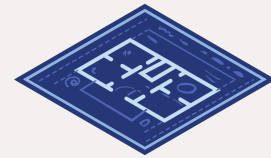
From {date} to {date} Map out initial steps here.



How We Build

Stages of Building

Summary We follow a staged approach in developing learning solutions. This allows us to move rapidly and assess the content needs for your solution quickly. It also allows for adjusting the project to any unforeseen obstacles and to plan ahead in our development.

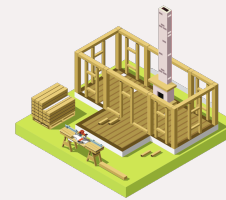


YOU ARE
HERE

Plan

We build a blueprint of your learning solution. This involves co-design through workshops where we work to understand goals, actions towards those goals, available content or resources, and common mistakes. Beyond workshops, our activities may include audits of content. Once the plan is established, we may need to break down our execution into multiple phases.

By the end, you will get a comprehensive plan or “blueprint” which includes a summary of activities, a solution design and strategy, implementation plan, and a curriculum outline.



Foundation

Using our Plan, we aim to build the foundation for your solution. Sometimes this involves multiple phases like auditing and transitioning content into a platform, and creating drafts of content for version history. We aim to build a strong backbone that is easy to maintain and keep growing. The goal is to create a Knowledge Base for learners, having the right content in an easily accessible space. We may build prototypes to test out content and platform.

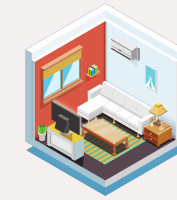
By the end, you will have content in text format that is suitable for your learning platform, easy to update and publish. It is not optimized for learning, but focuses on accessibility for your learners.



Functional

Once the Knowledge Base is established, we edit text content for a better learning experience. The goal is to make it easy to read in a short amount of time (many employees only have 20 minutes per week for learning!). We have a content strategy that breaks down content into a simple format that lets learner grasp concepts in a minimal amount of time. This may include simple interactions like quizzes, tasks, or basic activities. We may build prototypes to test out content and platform.

By the end, your Knowledge Base materials will be optimized for a great learning experience. Text is broken down and simple interactions incorporated where necessary.



Decor

While optimizing your Knowledge Base, we look for opportunities to deepen engagement with content. In order to do this we use graphics like illustrations, gifs, short videos or even build short sims (complex interactions). Depending on the content goals, this may be necessary to achieve them.

By the end, you will have graphics or complex interactions that support your text material and help learners further engage with the material.



Our Content Strategy

How it works

Today, in our fast-paced technology driven workplace, your employees are more productive than they ever were, but they do not have the time to sit for 1+ hours to complete trainings.

Our focus tends to be creating microlearning. Employees typically have less than 20 minutes per week or, if you're lucky, 5 minutes per day to complete any learning and apply it. We want to create a learning solution they can use, and return to throughout their day. We want to make them feel like they have the resources to be successful.

Knowledge Base

Learners need a way to get the answers when they need them without have to track down someone in the know. A knowledge base provides them with a self-serve online library of information in context and a place to learn about your product, service, department, topic, or concept.

This may require creating a content strategy or content map that outlines how to structure the content, so it is easy to locate. We also want it to be easily digestible, so readability is a key factor (also for accessibility needs like screen readers).

Examples

- Primarily Text Format
- Articles
- Use Cases
- Templates
- How-tos

Meaningful Interactions

Learners need the opportunity to practice in a spontaneous way as people do in their day-to-day. These interactions can be found alongside other materials in the Knowledge Base.

How we break down meaningful interactions:

- Experience - Create a situation that mimics their workday
- Error - Allow them to experience the consequences of their decisions and mistakes
- Emotion - Make them care about the situation and elicit emotion by creating something they care about.

Examples

- Short Simulations
- Use Case Storybook
- Narrative Job-Aids
- Role-playing Activities



Sam has a question about a new process, but doesn't know who to go to. They consult the Knowledge Base. Their goal is to understand X process and how-to perform it. They take a quiz to test their understanding of the process.

Knowledge Base

Why use this new Process

Process How-to

Process Quiz

Now Sam needs to understand how this new process might impact their clients and teammates if not done correctly. They find a short sim to practice the consequences and mistakes that can be made. This helps them apply their learning, understanding the impact and how to avoid these mistakes.

Knowledge Base

Why use this new Process

Process How-to

Process Quiz

Short Sim

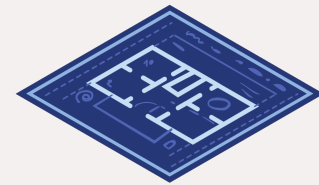


Build Phases & Content Strategy

YOU ARE
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How it works together

Summary Here we outline how our building stages and content strategy work together. During the Plan and Foundation stages, we want to establish a solid Knowledge Base. Next, during Functional and Decor, we focus on developing Meaningful Interactions around the content in the Knowledge Base, further engaging your learners.



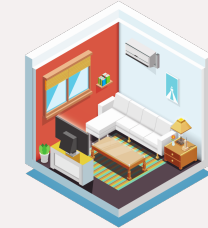
Plan



Foundation



Functional



Decor



Knowledge Base

Meaningful Interactions



Your Build Objectives

Building for You

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Objective

During this stage, what is our objective for the client?

Objective

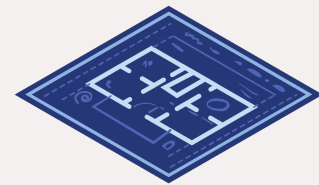
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YOU ARE
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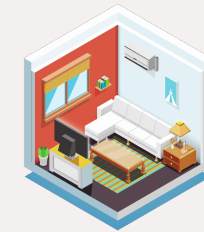
Plan



Foundation



Functional



Decor

Knowledge Base

Meaningful Interactions



Summary

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Agenda

1. Client Overview
2. Project One-Pager
3. How We Build
4. Our Strategy
5. Next Steps



Persona



Character
Graphic

Name

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam. Pellentesque interdum id justo eu facilisis. Nulla imperdiet eros sem, et lobortis risus eleifend eu. Praesent sit amet laoreet magna, eget pulvinar nunc.

Goal(s)

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Cause

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Reflection

What feels real about this persona?
How so? Why?

What surprises you about what you see here?

What would you add or change?

How might this differ compared to...?

Obstacles

Challenges Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Effect

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Program Overview

Program Name

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Goal

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Stage / Topic
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Program Stage or Topic

Stage/Topic

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Goal

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Who

Personas Involved Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Actions

Tasks or Actions taken towards Goal Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Obstacles

Things in the way of Actions or Goal, including Common Mistakes Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Goal(s)

Trying to Achieve Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Support

Resources available to support Actions and Goal Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.



Solution Overview

Solution

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam. Pellentesque interdum id justo eu facilisis.

Goal

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Component 1

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Component 3

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Goal

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Solution Map

Solution Alignment

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Stage / Topic Title ⋮	Component 1 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 2 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 3 Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Stage / Topic Title ⋮	Component 1 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 2 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 3 Lorem ipsum dolor sit amet, consectetur adipiscing elit.
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Stage / Topic Title ⋮	Component 1 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 2 Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Component 3 Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Components

Component 1

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Goal

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Format

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When

When to use this component taken
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Recommendations

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Impact

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Examples

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Program Strategy

Blended Learning Best Practices

Summary Blended (hybrid) learning is a combination of offline (face-to-face, traditional learning) and online learning in a way that the one compliments the other.

Goal

Move extensive information into a self-serve module or knowledge base or glossaries. Make more use of the time spent in-person using activities to reinforce skills needed to implement programming or as youth deep dives

Pre-Session

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

During Session

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Post-Session

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Ask Yourself

- What happens before a session?
- How it is defined?
- What tollgate is required before moving on?

Ask Yourself

- What happens during a session?
- Why is it important?
- What tollgate is required before moving on?

Ask Yourself

- What happens immediately after a session?
- What are key takeaways? Reflect on session? How can I apply it?

Example

Examples specific to client Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Example

Examples specific to client Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Example

Examples specific to client Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.



Program Strategy

Content Structure Best Practices

Summary Basic content structure that Montage uses for most types of content. This helps keep content development consistent and easy to maintain.

Goal

Leverage content structure to easily produce content for the blended learning model and breakdown content into manageable/consumable segments.

Main Message

We want your main idea at the forefront. The main idea can take many forms—a video, an illustration, text, a quick text adventure game, a simulation or even an activity. Criteria for the modality/media is set by learning objective and how quickly we can deliver the idea to the learner with the greatest impact (memorable, meaningful, and motivates the them to be curious to discover more).

Important Details

Details that support and elaborate on main idea. (Key steps, action items, FAQ, typical mistakes, how do I do this?) Help learners dive a little deeper into the main idea using supporting details or examples. Using scenarios to further a concept or step-by-step instructions or a list of category summaries or explicitly stating the key takeaways with a brief explanation are a good fit here. Modality or media might typically be a short piece of text formatted in an easy-to-read format (bulleted, concise).

Related Resources

Enriching knowledge, but not vital to their job. (Supporting content, history of, background info, where can I learn more about this on my own?) This can include links to related articles about the topic, links to other modules, a piece of media that shares some interesting information about the topic but it isn't necessary to achieve the learning objective but to build engagement, suspense, and motivation for learners to keep exploring the topic.

Assessment

Simple check for understanding.
(Knowledge check, quiz, survey)

Reflection

Provide a space for learners to reflect on a prompt based on the content

Activity

Provide any activities or actions to further deepen the concepts (Develop portfolio, self-assess with rubric, use case worksheets)



Assessment

Rubric

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam. Pellentesque interdum id justo eu facilisis.

Goal

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Knowledge Area	Knowledge Topic	Emerging (1)	Developing (2)	Proficient (3)	Advanced (4)	Expert (5)	Score	Notes
Identified Knowledge Area	Identified topic	Know	Know	Know	Know	Know	Example Scoring	Notes to improve score
		Do	Do	Do	Do	Do		



Evaluation Example

Rubric

Summary Assessment is key to growth. During evaluation, Alex can self assess using this rubric. The RA or mentor can use the same rubric to asses Alex's performance. And the firm can asses the resources available to the learner based on performance.

Know Does Alex understand the task, its process, and if they can explain it?

Do Can Alex use their understanding of the task to actually perform it, successfully, without guidance or error?

Goal

Rubric is designed to be used by multiple parties to assess individual learner performance as well as the curriculum efficiency.

Knowledge Topic	Associate Task	Emerging (1)	Developing (2)	Proficient (3)	Advanced (4)	Expert (5)	Score	Notes
Identified Knowledge Topic: Initial Investigation	Identified Task: Draft EEOC Charge	<p>Know</p> <p>AA does not understand what the task is and its process</p>	<p>Know</p> <p>AA understands what the task is but does not understand the process</p>	<p>Know</p> <p>AA understands what the task is and its process</p>	<p>Know</p> <p>AA understands what the task is, why it is important and its process</p>	<p>Know</p> <p>AA understands what the task is, why it is important, its process, and can teach others</p>	<p>Scoring: 3</p>	<p>Great job! Just pay close attention to the best practices.</p> <p>Know: Alex was able to talk about the task knowledgeably and also was able to describe the process that needs to be followed.</p> <p>Do: Alex was able to draft the EEOC, but needed to ask RA for advice on section and to review their work.</p>
		<p>Do</p> <p>AA requires guidance and help in completing task</p>	<p>Do</p> <p>AA requires guidance in completing task</p>	<p>Do</p> <p>AA is proficient in completing task with minimal supports, but some errors occur</p>	<p>Do</p> <p>AA can complete task on their own with few errors</p>	<p>Do</p> <p>AA can successfully complete task with no errors</p>		



Build Overview

Build Phases

Summary Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam. Pellentesque interdum id justo eu facilisis.

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Time Range

Phase 1

Goal Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Basic How-to Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Includes these topics/components

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Time Range

Phase 2

Goal Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Basic How-to Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Includes these topics/components

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Time Range

Phase 3

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Basic How-to Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

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Build Overview

Phase 1

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Priority

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Item 4 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Nice to Have

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Item 4 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Implementation Recommendations

Item 1 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

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Item 4 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.



Phase Overview

Phase 1

Goal Introduce Appinium platform and blended learning strategy into the program workflow. Build a simple skeleton that can be fleshed out over time as content is developed.

Basic How-to Leverage blended learning strategy to create basic structure for sessions and prioritize what can be built in allotted timeframe.

Includes these components

- Mentor Training sessions
- Session strategy (blended learning strategy, pre/during/post, part of program strategy)

Priority

Item 1 Identify what content we currently have and can use.

Item 2 Align available content per mentor training session.

Item 3 Structure content based on blended learning strategy structure.

Item 4 Build basic Learning Plan with content to be used in Appinium.

Item 5 Collect feedback and sentiment from mentors during sessions.

Week of Aug 1

Item 1

Item 2

Week of Aug 8

Item 3

Week of Aug 8
+ Aug 15

Item 4

Week of Aug
22/29?

Item 5

Notes

This phase is about testing the Appinium platform and blended learning strategy, receiving feedback to improve, and to help myPath adopt these strategies going forward. This does not require the content to be "complete".



Components

Component 1

How it works Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam vel lorem ac ex finibus volutpat non sit amet quam.

Goal

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Persona
Character
Graphic

Step 1

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Step 2

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Step 3

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Step 4

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Next Steps

Do Now

Summary Here are our recommended (ordered and summarized) next steps based on our detailed build phases in order to build out your curriculum.

Goal

Create a curriculum framework that can be easily developed and maintained yet remain effective in its learning delivery.

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Phase Timeline

