The Montage Method

Montage Customer Fit

Types of Learning & Development Departments

What makes up a typical Learning & Development department?

Corporate

- Hierarchy of roles per role per department, e.g.: Learning Specialist, Learning Designer, Senior Learning Designer, Lead Learning Designer, Learning Design Manager, Head of Learning Design Team, Director of Learning Design
- Teams within: Design and Development, Program Management, Operations (Technology), Program Delivery/Implementation, Executives (Leads/Directors/Heads of Teams)
- Motivation is mostly based on business impact and goals, less about learner's experience with a solution
- L&D Departments hierarchy tends to hinder creative solutions, in-depth research about the training or problem area, and timely decision making.

Startup

- Varies based on organization maturity and knowledge of learning and development:

    - Someone within a team or department is interested in helping their colleagues grow, so they will develop content when they can and distribute in an ad hoc fashion
    - Startup hires one or two L&D professionals usually L&D Manager and Instructional Designer, most come from more organized larger departments and continue to work in this fashion without developing better solutions that address a startup's behavior and growth (missing design thinking/agile approach)
    - Adding a Corporate mindset for L&D can help set up basic structures or processes and help align L&D with the larger business
- Motivation tends to be retention of employees, growing pains for employees and organization, both employee-centric though based on business concerns/goals (scaling or growing the business).
- Scaling the business is a primary focus but tends to create the gaps that L&D can help fill with training or other solutions by partnering with teams.

Customer <> Montage Fit

How does Montage fit into an organization?

- Best fit is Startups
- Lack of L&D allows us to help establish best practices and give them a simple process to follow to continue building programs without us
- We are training individuals (our stakeholders on projects) how L&D works to create good content for their people
- Help them understand the difference between when to use a learning program, change management (all learning has some form of change mgmt) (part of discovery)

How can a company make L&D an advantage to their success?

- Montage helps them understand the impact a learning program can have on their business by discussing success metrics
- Montage educates them on what being learner-centric means for their people
- Montage helps them develop a basic L&D practice to continue development of other programs
- Montage helps them shorten the time is takes for them to build successful programs

Customer Criteria

What are some basic requirements a company needs to work with Montage?

Needs	**Why is this Important?**

- Focused on a specific problem that requires L&D intervention - Clear need for one of our products or services - No L&D department or L&D limited resources	- Helps Montage understand if they understand the problem, and how far Montage needs to go during the discovery process - Helps Montage understand if shifting or realigning is needed
Budget	
- Has a budget already set aside for project (willing to share with us so we can try to fit our services into it) - Willingness to invest in learning programs and see long-term benefit	They are ready to invest
Culture	
- Value developing employees - Open to new ideas - Willing to try a solution - Open and available to collaborating throughout the content development process - People-focused culture - Has organizational goals set that include people goals	- Their culture values people and is willing to invest in developing them - Shows whether or not this is a vanity project for the stakeholder or has real business/people impact importance
Organization/Team Size	
- Startup 30-200	Work better with those who are open to new ideas and creativity in solutioning
Processes	
- Clarity around internal processes and a basic methodology that most employees understand or know about - Processes documented - Methodology documents	- Arguments about processes and methodology get in the way of discussing the problem/solution - Documentation helps us ask questions and understand their org better - Documentation helps us develop better content - Documentation doesn't need to be completed 100%, a first version helps us understanding them as a business

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Method Resources

- Miro Board: Montage Method - Deliverables
- Google Sheet: Blueprint
- Google Slide: Project Status Report
- Typeform: Persona Survey
- [Montage] Client Project Preparation Communication
- 5 Reflecting on the Experience - Surveys and Debriefs (Learner Experience, Client Debrief, Team Debrief)
- Montage Template [Your Company Name] [MODULE] Module Name
- TEMPLATE [Montage] Short Sims

Process Walkthrough [Summaries, Questions, Activities, Deliverables]

SALES

Summary: Understand client need, propose a path to a solution for client, and align on next steps.
Assets: Business Case (Client Overview, Project One-Pager, How We Build, Our Content Strategy, Build & Strategy, Client Build Goals)
Goal: Signed SOW.

Get to know what type of house they need to build.

Questions to be Answered
• What is the assumed problem that needs to be solved? • Why is it a problem? • How is the problem observed? What is the frequency? • Who does this problem impact? Who the most? • Are there technical requirements or limitations need to be considered?

- Tell us a bit about your leadership or cultural values on learning and development of employees?
- How do you work? What tools and systems do you use? How would you like to communicate?

Activities: What happens

1. **Outreach**
   1.1. Customer reaches out to Montage OR Montage discovers customer
   1.2. Customer becomes lead
   1.3. Montage and Customer set up time to discuss their needs
   1.4. Montage assess customer fit based on Customer Criteria and Questions to be Answered
      1.4.1. BAD FIT Montage passes on opportunity
      1.4.2. GOOD FIT Montage develops Business Case to propose solution
      1.4.3. NO MATTER FIT Montage sends information regarding product or service they may be interested in in the future, examples:
         1.4.3.1. Onboarding One-Pager
         1.4.3.2. Industry One-Pager
         1.4.3.3. How we Build & Content Strategy
   1.5. Montage create Business Case
2. **Business Case**
   2.1. Complete *Questions to be Answered*
      2.1.1. If you CAN NOT answer a question, consider reaching out to client with the question or make an assumption that the client can react to
   2.2. Make a copy of the **Miro Board: Montage Method - Deliverables**
      2.2.1. Use *Questions to be Answered* to fill out Kickoff Agenda, Client Overview and Client Build Goals
   2.3. Export as PDF and edit down to slides identified below in Deliverables
3. **Align and Sign**
   3.1. Write up **SOW** to reflect the **Business Case**
   3.2. Outline in detail as much as possible including things we can not do or will not do
   3.3. Try to give them a roadmap of activities for each phase we believe we can accomplish given the current information
      3.3.1. Let the client redline anything they think is too much
   3.4. Send both **SOW** and **Business Case**

Deliverables: How to build

Miro Board: Montage Method - Deliverables

Business Case
1. Include these slides, fill out Kickoff Agenda, Client Overview, Client Build Goals
    a. Title
    b. Kickoff Agenda
    c. Client Overview
    d. How We Build
    e. Our Content Strategy
    f. Build & Strategy
    g. Client Build Goals
2. Export as PDF
 	
Statement of Work (SOW)
1. Outline each phase we can complete based on current client information
    a. PLAN
    b. FOUNDATION
    c. FUNCTIONAL
    d. DECOR

PLAN

Summary: Build a Plan of the learning solution and propose to the client.
Assets: Project Kickoff, Persona, Journey Map, Blueprint
Goal: Gather enough information to Plan development of a solution, submit Blueprint to client.

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.

Questions to be Answered
Discovery Timeline Setup (Answers to help set up a discovery timeline) ● Who can we talk to that has firsthand experience with or impacted by the problem?

- What does the current environment look and feel like? (current technology, platforms, communication styles, company culture, etc)
- Do you have solutions already in mind?
- Have you done root cause analysis of the problem?
    a. If yes, what was the result?

Content Design Deep Dive

- What goal(s) are people trying to achieve?
- What obstacles or challenges do people face?
- What mistakes do people make?
- What do they need to know in order to apply it to their work?
- What resources do they use to accomplish it?
- Persona development via **Short Sim Survey in Typeform**

Success Measurement/Data

- What competencies (benchmarks) do they need to achieve this? (problem area)
- What will learners be doing once they have successfully implemented their learning?
- How will we measure success after learners apply and action knowledge?

Activities: What happens

1. **Project Kickoff**
    1.1. **Preparation**
        1.2. Questions for Client
        1.3. Who should be involved in the project? Why?
        1.4. Montage prepares for Kickoff by setting up:
        1.5. Shared Google Drive (external collaboration with customer)
        1.5.1. Naming Convention = “[Montage] Client Name”
        1.6. Google Folder in Montage Shared Google Drive (internal collaboration)
        1.6.1. Naming Convention = “INTERNAL Client Name - Program/Engagement Name”
        1.7. Asana Project
        1.7.1. Naming Convention = “[Client Name] Program/Engagement Name”
        1.8. Internal Slack channel
        1.8.1. Naming Convention = “client-clientname”
        1.9. External Slack channel via Connections (if needed)
        1.9.1. Naming Convention = “ext-clientname-program/engagementname”
        1.9.2. Invite stakeholders as Guests
        1.9.3. Project Kickoff Deck (Intro to project, potential timeline, how to build solution, Customer responsibilities, Montage responsibilities)
        1.10. Open **Miro Board: Montage Method - Deliverables**

1.10.1. Fill out Business Case Slides > Project One-Pager

1.11. Montage sends out Client Preparation Communication

[Montage] Client Project Preparation Communication

1.12. Kickoff

1.12.1. Montage presents Business Case/Project One-Pager to client

1.12.2. Discuss the next steps and workshops necessary to complete project work

1.12.3. Schedule weekly recurring Project Status Updates

1.12.3.1. Montage setups Google Slide: Project Status Report

1.12.3.2. Place this deck in External Client Google Folder

2. Persona (Survey and Feedback)

2.1. After Kickoff, Montage sends email including context communication (why, how to fill out, deadline) with link to **Persona Survey via Typeform**

2.1.1. Montage should expect results within 3-5 (max) days

2.1.2. Montage reviews results and synthesizes results into **Persona** in **Miro Board: Montage Method - Deliverables**

2.1.3. Synthesis and Persona slide should be completed and discussed internally before the scheduled Read-Back

2.2. Montage schedules (if not already) Persona Read-Back

2.2.1. Attend Persona Read-Back, present Persona

2.2.2. Montage presents Persona

2.2.3. Montage follows questions on slide to facilitate discussion about Persona:

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

2.2.3.2. What surprises you about what you see here?

2.2.3.3. What would you add or change?

2.2.3.4. How might this differ compared to...?

2.3. Montage takes answers to questions and feedback to iterate on Persona for final deliverable

3. Journey Map (Workshops)

3.1. Discuss and realign with the client on the focus and problem we are to solve

3.1.1. Montage will establish an ABT statement to help focus these working sessions

3.1.1.1. ABT Example: Sam (our Expert) has a highly sought skillset **AND** comes across many opportunities, **BUT** is not sure how, when, or what is needed to leverage these opportunities, **THEREFORE** 10K provides a platform where Sam can easily learn how.

3.1.2. IF THE PROBLEM OR PROGRAM IS TOO LARGE, breakdown into different segments, each segment will require its own Journey Map

3.2. Walkthrough how the journey map is setup in **Miro Board: Montage Method - Deliverables**

3.2.1. Stage title - What is this staged called? (You can include information about this stage such as length of time, description, etc)

- 3.2.2. Stage goal - At this stage, what is the overall objective that needs to be met in order to more to the next stage?
- 3.2.3. Goal (Persona) - What is the persona trying to accomplish?
- 3.2.4. Actions (Persona) - What actions are required to take to accomplish their goal?
- 3.2.5. Content/Resources - What content or resources are available to help support their actions in accomplishing their goal? (What might be needed?
- 3.2.6. Common Mistakes - What are common mistakes that persona makes when trying to achieve goal?
- 3.2.7. Technical Needs/Requests - What platforms features are needed to support achieving the goal?

3.3. Begin workshops with establishing the different Stages and Stage Goals

3.4. Choose a Stage and work down the map, the most important areas to accomplish with client are: Goal, Actions, Common Mistakes

3.5. After completing the Journey Map, translate the Map and any resources provided by the client into the Curriculum Tab of the Google Sheet: Blueprint

- 3.5.1. This is to establish the Stage or Topic or Sequence breakdown the solution will take

3.6. Share Google Sheet: Blueprint with client for feedback

- 3.6.1. Iterate as needed

3.7. NOTE: The Journey Map should help different the Solution Strategy and Content Format - for example, as you see the needs unfold per Stage, determine best course of action either in-person, blended learning, short sims, etc

4. Prototype and Test (User Testing)

4.1. Identify a Stage and piece of the Journey Map that would help illustrate the potential solution

4.2. Explain to the client how this would work and how you would like to test it

- 4.2.1. Determine User Testing setup
  - 4.2.1.1. Who should test
  - 4.2.1.2. Why they should test
  - 4.2.1.3. What is the goal of the testing
  - 4.2.1.4. What does success look like
- 4.2.2. Create schedule for testing
  - 4.2.2.1. Start, end, synthesis, results, next steps

4.3. Implement testing with User

4.4. Synthesize results

4.5. Present results back to client and gather feedback

4.6. Iterate on potential solution as needed

5. Blueprint 5.1. *NOTE: The Blueprint includes Implementation Plan, Implementation Timeline, Curriculum Outline, Feedback Log - **A complete Blueprint requires Journey Map to be complete*** 5.2. Transfer Journey Map into Curriculum Tab of Google Sheet: Blueprint 5.3. Then create an Implementation Plan 5.3.1. Breakdown the design, development, and iteration of each content of the Curriculum in the Sequence Tab 5.3.2. After breaking down the Curriculum into Sequences determined a Timeline for getting it done 5.4. The Feedback Log Tab is available to capture either client or user feedback 5.4.1. It is included to easily compile feedback along the Timeline and Sequence to help make prioritization transparent
Deliverables: How to build
Miro Board: Montage Method - Deliverables 1. Persona a. Requires results from **Short Sim Survey in Typeform** 2. Journey Map Google Sheet: Blueprint 1. Curriculum Tab a. Requires a complete Journey Map 2. Sequence Tab 3. Timeline Tab 4. Feedback Log Tab

FOUNDATION

Summary: Begin development of Knowledge Base for solution.
Assets: Knowledge Base, Text Content Template, Learner Experience Survey
Goal: Launch Knowledge Base for solution.

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.

Questions to be Answered

• Do we have all the resources necessary to develop content? (Do we need all the resources to begin? What is the minimum to begin developing?)
• Will the proposed solution resolve the problem or meet the success metrics?
 	
• Is the Customer available to give Montage timely feedback?
    ○ Types of Feedback Montage requires:
    ○ Is the content correct?
    ○ Is the content clear?
    ○ Is the content structured in an easy to read and understand scaffold?
    ○ What level of knowledge is required of a learner to be able to understand?

Activities: What happens
1. Knowledge Base 1.1. Using the Google Sheet: Blueprint we gather all resources and content related to each part 1.2. We then structure the content as text-only and linked resources following the Blueprint layout 1.2.1. The goal of this is to get a structure up, filled with content as soon as possible to get users/learners engaging with it as soon as possible 1.2.2. Use the Module Template Montage Template [Your Company Name] [MODULE] Module Name or a modified version of it to structure content 1.3. As we finish each Sequence in the Blueprint, we share with client for review and feedback 1.4. Review client feedback and incorporate 1.4.1. After one round of feedback and iteration, we look to finalize the content with the client 1.5. Finalize content and publish to users/learners 1.5.1. Include Learner Experience Survey 5 Reflecting on the Experience - Surveys and Debriefs - use judgment where and when this should appear for users/learners, for example: include at the end of a topic section

Deliverables: How to build
Knowledge Base 1. Follow a specific Sequence to ensure timely delivery of content 2. Use Module Template Montage Template [Your Company Name] [MODULE] Module Name or a modified version of it to create draft text 3. Text-only and linked resources are built during the FOUNDATION **Learner Experience Survey 5 Reflecting on the Experience - Surveys and Debriefs** 1. Implement either in client's LMS, learning platform or discuss with them how they would like to make this available

FUNCTIONAL

Summary: Optimize Knowledge Base text content and build simple interactions for solution.
Assets: Knowledge Base, Text Content Template, Meaningful Interactions (Simple - Tasks, Quizzes, Activities), Learner Experience Survey
Goal: Launch optimized content with simple interactions in the Knowledge Base.

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.

Questions to be Answered
Tone & voice (optional) - used to better understand the writing style for optimized content, e.g. can we use humor? What type of humor? • What values are important for the brand to maintain and act accordingly? • What three adjectives might we use to describe the brand as a person? • When asked about your brand, what do you want your users to say about it?
Activities: What happens
1. Knowledge Base

1.1. Review the current content of the Knowledge Base
1.2. Design a standard content structure to optimize content for learning based on Module Template Montage Template [Your Company Name] [MODULE] Module Name
1.3. Present standard content structure to align with client for next steps
1.4. Design a Optimization implementation plan
    1.4.1. Add to Blueprint
1.5. Execute Optimization implementation plan
    1.5.1. Per each sequence completed, send to client for review
    1.5.2. After one round of review, look to finalize content
1.6. Finalize content and publish to users/learners
    1.6.1. Include Learner Experience Survey 5 Reflecting on the Experience - Surveys and Debriefs - use judgment where and when this should appear for users/learners, for example: include at the end of a topic section

2. Simple Interactions

2.1. Simple interactions include quizzes, tasks, and activities
2.2. When reviewing the Knowledge Base suggestion areas to use simple interactions
    2.2.1. Quizzes to check for understanding
    2.2.2. Tasks that learners can do
    2.2.3. Activities for in-person content

Deliverables: How to build

Standardized Content Structure & Template

1. Based on Module Template Montage Template [Your Company Name] [MODULE] Module Name
2. Use the basic structure of Main Message, Important Details, Related Content - adapt and modify per client usage based on content/user goals
3. If modified, redeploy template to client as modified with instructions on how to use

Optimized Knowledge Base

1. This aims to push the content further into a better learning experience for users rather than just a Knowledge Base
2. Content should fulfill content/user/business goals
3. Typical goal is to create microlearning segments for each topic that this optimized

Learner Experience Survey

1. Implement either in client's LMS, learning platform or discuss with them how they would like to make this available

DECOR

Summary: Identify opportunities to further develop engaging complex interactions.
Assets: Meaningful Interactions (Complex - Graphics, Gifs, Short Videos, Short Sims), Learner Experience Survey
Goal: Launch complex interactions in the Knowledge Base.

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.

Questions to be Answered
Branding of Content ● Do you have a branding that you'd like to use for the learning content? ● Branding colors? ● Marketing materials we should reference? ● Who should be involved in aligning the look and feel of graphics/videos?
Activities: What happens
1. Knowledge Base 1.1. While reviewing the Knowledge Base for optimization, make note of content that could be supported or enhanced through visuals 1.2. Be targeted with visual usage, try to use in a minimal way to support accessibility of the content **2. Branding of Content** 2.1. IF GIVEN BY CLIENT, clients may already have a look and feel that should be used in learning content (e.g. it may follow their branding guidelines) - use their given standards 2.1.1. Create a mood board using client given branding to align with client 2.2. IF NOT GIVEN BY CLIENT, design a up to 3 mood boards that include sample graphics, colors, and fonts for clients to choose from **3. Graphics** 3.1. Use Canva to develop simple graphics and videos 3.1.1. Job Aids - decide on a layout and size to be used consistently throughout the content 3.1.2. Simple videos - use these to engage learners with content that requires a visual story or narrative or important message

3.1.3. Badges - create a standard circular badge as an achievement for learners that complete content

4. **Complex Interactions**
   4.1. Capstone Projects
      4.1.1. This is typically tied to a major program that requires multiple stages of knowledge and possible certification tests
      4.1.2. This includes hands-on activities, tasks, and a culminating project at the end of the learning program
      4.1.3. This is structured based on the program's goals
      4.1.4. Designed with client through workshops
   4.2. Short Sims
      4.2.1. Requires an interview with SME first to help narrow short sim focus, focus on understanding common mistakes around a goal
      4.2.2. After interview, draft short sim using TEMPLATE [Montage] Short Sims
      4.2.3. Build draft version of short sim in Branchtrack
         4.2.3.1. Create simple graphics in Canva and add to draft in Branchtrack
         4.2.3.2. Send to client for review and feedback
         4.2.3.3. Integrate feedback
      4.2.4. Finalize short sim flow and graphics
         4.2.4.1. Send final sim to client for review and feedback
         4.2.4.2. Have they sign off
      4.2.5. Export/Publish short sim (SCORM, HTML5, embed, etc)
   4.3. Rubric
      4.3.1. Designed based on the need for self-assessment or leader assessment other than quizzes
      4.3.2. Designed to be aligned with goals, actions, and deliverables of a specific role
      4.3.3. Use Rubric slide from Miro Board: Montage Method - Deliverables to create a sample to get client alignment
      4.3.4. Recommend aligning with client on the key goals/qualities that should be used in rubric to identify successful learners

Deliverables: How to build

Complex Interactions

1. These are only recommended and built based on the goals of the content and for the best learner experience
2. Used to increase learner engagement with specific

Learner Experience Survey

1. Implement either in client's LMS, learning platform or discuss with them how they would like

to make this available 2. Recommend implementing individual LES for each complex interaction to gauge relevance and efficacy

HOUSE WARMING

Summary: Recommend a maintenance strategy and engage in project debrief with client.
Assets: Team Debrief Survey, Client Debrief Survey
Goal: Understand how the project went from the Team's and Client's perspective.

Welcome them to their new home and show them around.

Questions to be Answered
Maintenance ● How do you plan to keep content up-to-date? Schedule? ● Do you have content owners identified?
Activities: What happens
1. Schedule a Closeout Meeting with client to discuss maintenance and debrief **1.1. Maintenance** 1.1.1. Tour client through content and deliverables 1.1.1.1. Find out best way to deliver the content deliverables outside of the LMS or learning platform 1.1.2. Discuss with client best practices for maintenance 1.1.2.1. What is needed for maintaining content 1.1.2.2. Content owners 1.1.2.3. Maintenance plan/schedule 1.1.2.4. Maintenance intake and prioritization **1.2. Debrief** 1.2.1. Ask client what went well, what could have been better 1.2.2. Either ask them to fill out the Client Debrief Survey 5 Reflecting on the Experience - Surveys and Debriefs during the meeting instead of discussing 1.2.3. OR send them the Client Debrief Survey post meeting (usually this option has zero client responses/engagement post-project)

1.3. **Post closeout**

1.3.1. Internal team completes Team Debrief Survey

5 Reflecting on the Experience - Surveys and Debriefs

1.3.2. Schedule a internal debrief meeting

1.3.3. Compile Team Debrief Survey responses

1.3.4. Review responses during meeting

Deliverables: How to build

Team Debrief Survey

- Available as Typeform or Google Forms (we prefer Typeform)

Client Debrief Survey

- Available as Typeform or Google Forms (we prefer Typeform)