Selecting and Implementing Knowledge Transfer Technology: A Case Study

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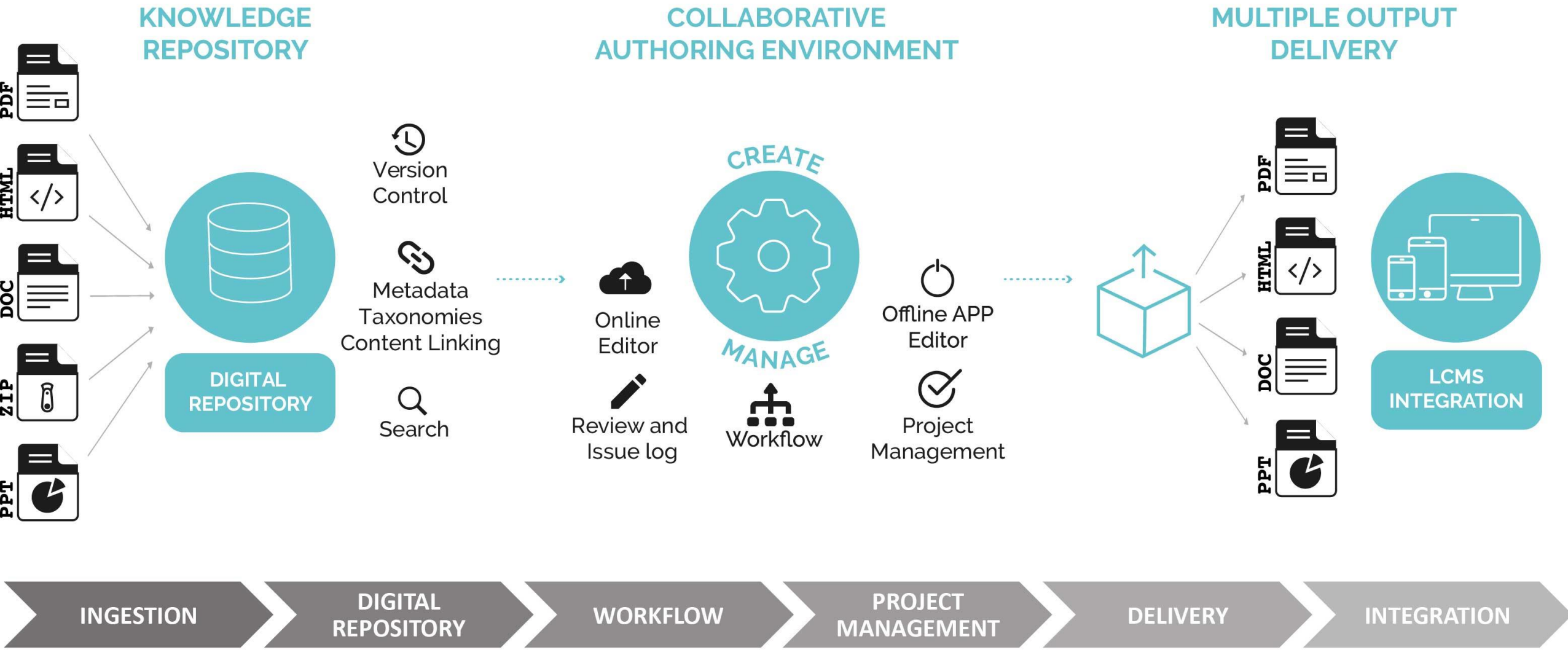
Pete Radice
Learning Technology
Merck

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Overview of eXact learning solutions technology

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Version Control

Metadata Taxonomies Content Linking

Search

COLLABORATIVE AUTHORING ENVIRONMENT

CREATE

MANAGE

Online Editor

Review and Issue log

Workflow

Offline APP Editor

Project Management

MULTIPLE OUTPUT DELIVERY

PDF
HTML
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LCMS INTEGRATION

INGESTION | DIGITAL REPOSITORY | WORKFLOW | PROJECT MANAGEMENT | DELIVERY | INTEGRATION

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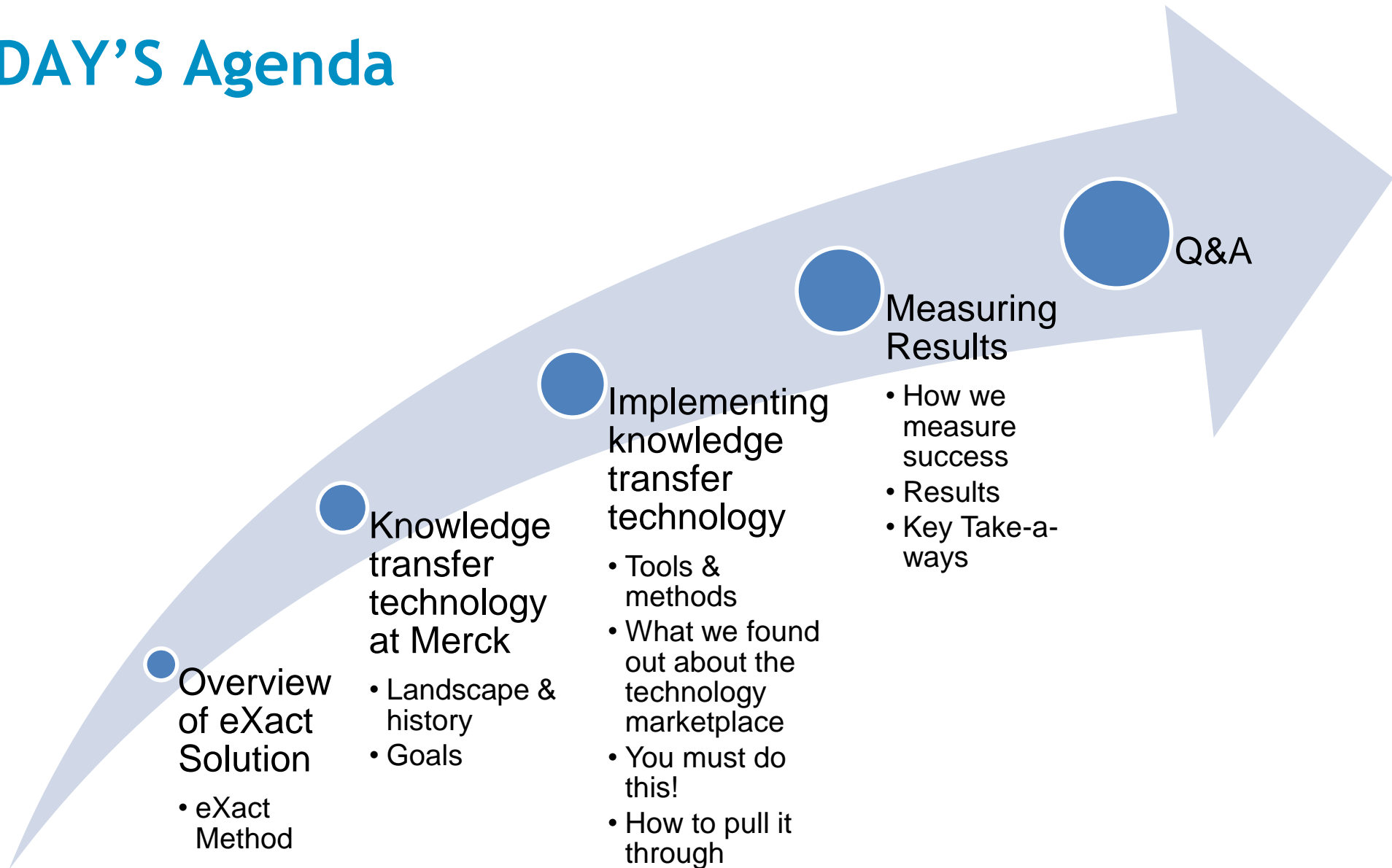
How To Ask Questions

- Submit your **_questions_** or **_comments_** about the discussion to our presenters using the **Questions** tab on your control panel.

Recording and slides will be sent out after the webinar.

TODAY'S Agenda

Overview of eXact Solution
- eXact Method

Knowledge transfer technology at Merck
- Landscape & history
- Goals

Implementing knowledge transfer technology
- Tools & methods
- What we found out about the technology marketplace
- You must do this!
- How to pull it through

Measuring Results
- How we measure success
- Results
- Key Take-a-ways

Q&A

Who we work with

Examples of sectors

- **Pharmaceutical & life sciences**
- **Professional services industry**
- **Aerospace & defense**
- **Education & Training**
- **Technology**
- **Regulatory**

Examples of Awards in last 12 months

Planning and Alignment → Discovery → Vendor Evaluation → Vendor Selection → Implementation Recommendations

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Planning and Alignment → Discovery → Vendor Evaluation → Vendor Selection → Implementation Recommendations

Determine Internal Business Drivers

- Key business drivers
- Critical business/talent challenges
- Expectations for learning technology and feasibility

Achieve Executive Alignment

- Gain agreement
- Gain direction
- Refocus if necessary
- Gain support

Deliver Task Force Toolkit Training

- Equip project team with a Technology Selection Toolkit
- Review process and project plan

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Planning and Alignment → **Discovery** → Vendor Evaluation → Vendor Selection → Implementation Recommendations
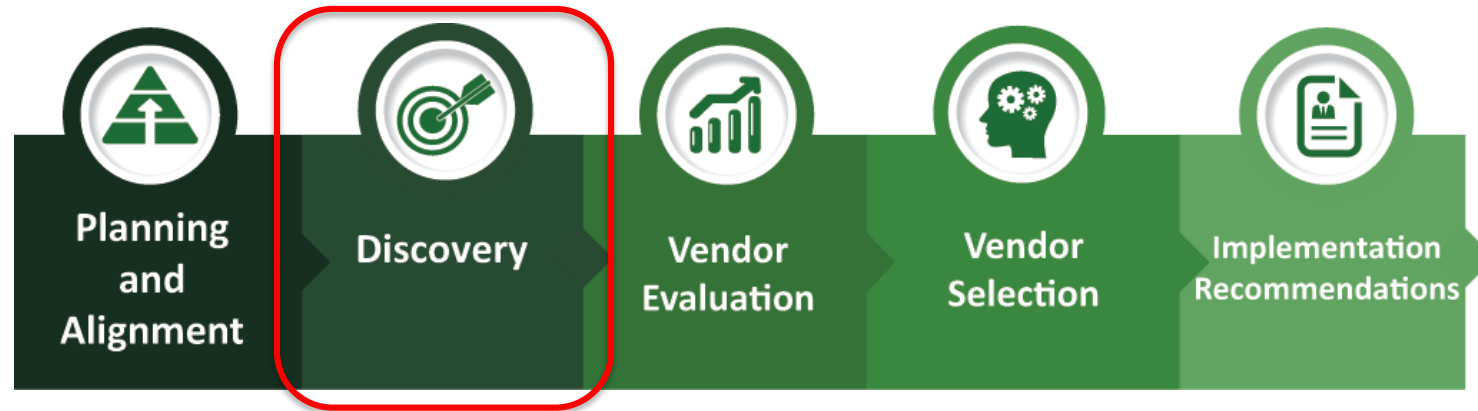
Technology Market Overview

- Provide overview of the learning technology market for core team and HR and leaders, executives and other business leaders

Determine System Requirements

- Discuss high-level user functional and technical requirements
- Survey/interview stakeholders to determine additional end user requirements

Use Case Development

- Facilitate development of use-case scenarios
- Develop functional and technical requirements based on completed use cases
- Define most critical functionality
- Define integration requirements

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Planning and Alignment → Discovery → **Vendor Evaluation** → Vendor Selection → Implementation Recommendations

Initial Vendor List

- Develop a list of solution providers (usually 3-5) that meet high-level technical and functional requirements and who will be invited to participate in the RFI/RFP process

Develop RFI and/or RFP

- Develop the RFI/RFP by leveraging the prioritized requirements, use cases and company profile and technology Client to distribute RFIs/RFPs

Shortlist and Evaluate

- Based on the RFI/RFP responses, invite 3-4 vendors to conduct on-site use-case demonstrations

- Support onsite use-case demonstrations

- Score vendor demonstrations using a demo scoring template

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Planning and Alignment → **Discovery** → **Vendor Evaluation** → **Vendor Selection** → **Implementation Recommendations**

Final Selection

- Technology selection scorecard
- Scoring ensures that technology and functional requirements are met
- Scoring ensures that technology solution links to business drivers

Contract Negotiations

- Comparative pricing and total cost of ownership tools and research
- Support negotiations and leverage additional insights using solution provider profile information and market intelligence

Planning and Alignment → Discovery → Vendor Evaluation → Vendor Selection → **Implementation Recommendations**

Change Management

Plan change management efforts:

- Communications
- Risk Mitigation
- Stakeholder Analysis
- Define a detailed implementation plan

Implementation Strategy

- Develop technology roadmap
- Establish technology governance to ensure business-driven decisions technology implementation
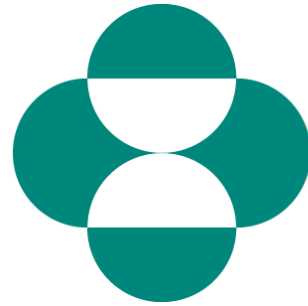
Merck/MSD is a global healthcare company that delivers innovative health solutions through its prescription medicines, vaccines, biologic therapies, and animal health products. 125+ years

"Success is not built on Success. It's built on Failure. It's built on Frustration. Sometimes its built on catastrophe." - Sumner Redstone

SO WHAT HAPPENED?

- Merck Purchased an Enterprise LCMS – 2012
- Merck Learning Transformation – 2013
- LSS (Learning Support Services) – 2014
- System Implementation – 2015
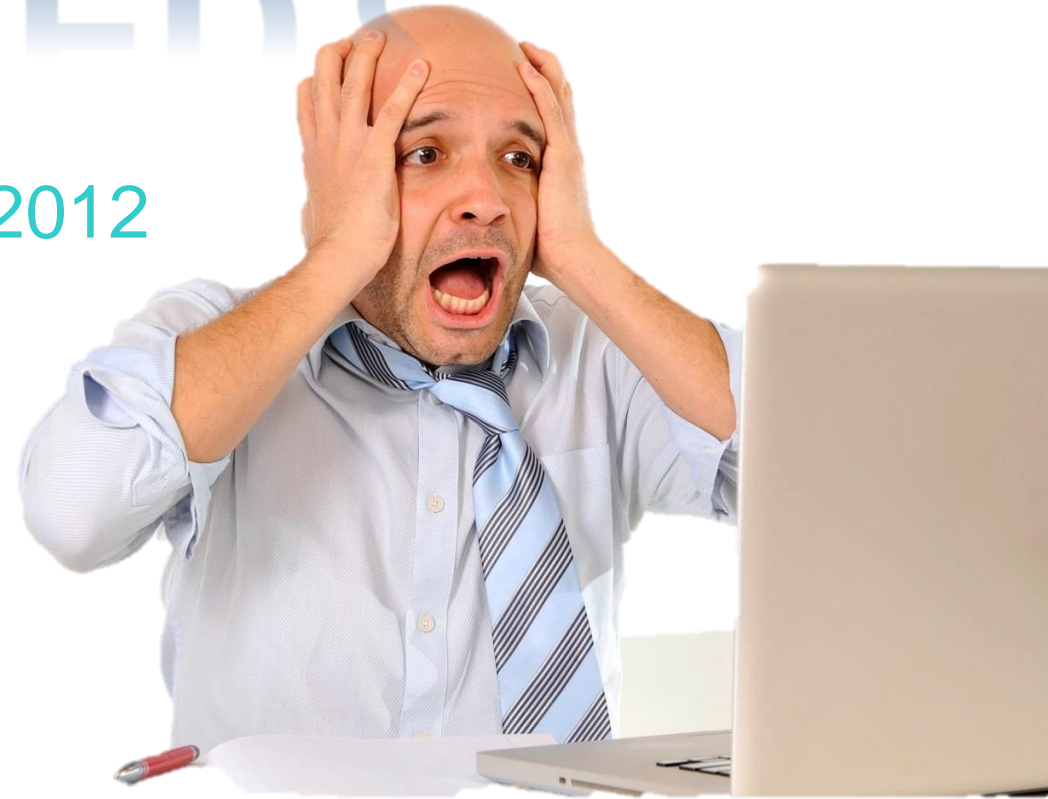
Goal Statement:

Cultivate a flexible, best of breed toolkit to support LDD's E2E content management strategy by leveraging an LCMS tool and capability.

This includes:
- Defining user requirements for LCMS to store, classify, tag, repurpose and reuse bite-size learning content
- Evaluate our current development tools ability to enable strategic capabilities; standardize & align usage, and identify gaps
- Ensure all tools integrate with LCMS tool, enabling the flexibility to swap tools in and out of the toolkit based on emerging needs and future capabilities (mobile, prescriptive, bite-size, etc.)

What We Wanted

- **One place** to store everything (cloud internal external)
- **Collaborative Environment** where everyone involved in the development of Learning content can work together both inside & outside
- **Project Management** Capabilities
  - Create a Project team
  - Assign Roles & Tasks
  - Reviews & Approvals
  - Comments & Notifications
  - Automated workflows
- **CDN** (Distributed Network)
  - Support for video
  - Worldwide access
- People to **Use It**!

Key Milestones

△ = Activities   ✦ = Key Milestones   **2016**

| Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |

- Design, build interim solution
- Implement Interim Solution for Tagging / Course Archive
- Work on coherent "Big Picture" strategy roadmap, that includes Mobile, Bite Size, Adaptive, Video, Social & virtual
- Finalize E2E Content Management Strategy
- BRS gathering, VOC, BP & Gap analysis,
- Finalize LCMS Business Requirements
- RFI/RFP start
- Vendor/Tool/Solution assessment
- Procurement vendor review & selection
- Vendor Selected!
- Data privacy / Risk assessment*
- IT Resources & Planning*
- Vendor contract completed
- RFI/RFP Complete
- DISCOVERY
- Sys config / POC
- Training & Communication
- System availability

Coordination and Planning   **Procurement: & Assessments**   **Implementation**

Coordination and Planning

(Do this first!)

- **Metadata** Tagging Strategy & Dictionary

  - Classification of assets is critical ...to your ability to be able to search and find things

  - Involve input from every part of the business

Universal Metadata Best Practices:
1. Start collecting metadata as early in the process as possible
2. Get metadata input and review from multiple roles in the project
          (emphasize input from SMEs)
3. Constantly monitor how your users are using metadata to make adjustments and fine tuning to how you are using metadata overtime

Procurement:

- At Merck, most projects requires an RFP process with at least 3 proposals for review.

  - We settled on sending out 5 RFI's, 2 LCMS & 3 CMS's

  - Created a rating system to document and evaluate Vendor presentations. Excel spreadsheet with a weighted multi rater input

LCMS Requirements Rating Scale for Vendor Evaluation	Rating
They don't do it	1
They do it but they don't do it well	3
They do it but they only meet requirements	6
They do it and they are really good at it	9

LCMS Requirements Categories Weighting	Description	%
Users	Flexibility of user functionality to access different types of data	15.0%
User Interface / Reference / Language	Simplicity of use and ability to customize user interface	10.0%
Tracking	Lifecycle and collaboration functionality	7.5%
Task Management	Workflow and ability to assign tasks	7.5%
Tagging / Searching/Legal	Asset identification and retrieval and data retention	15.0%
Security	System security & user roles (authors, read only, reviewer, etc)	10.0%
Publishing	Make assets available in variety of formats	5.0%
Notification	Notification for assigned tasks or changes to assets (updates, additions, deletions)	10.0%
Integration	Integration with other systems	3.75%
Migration	Data migration from other systems	3.75%
Development	Content authoring capabilities	2.5%
Architecture / Storage / Updates	Storage capacity, internal vs external storage; system updates	7.5%
Additional Capabilities	Miscellaneous or other capabilities not covered elsewhere	2.5%

%	CMS1	CMS2	LCMS1	eXact	CMS3	Max Score
15.0%	9	9	6	9	6	9
10.0%	6	6	6	9	3	9
7.5%	3	6	6	9	3	9
7.5%	6	3	6	6	3	9
15.0%	6	9	6	9	6	9
10.0%	9	9	9	9	6	9
5.0%	3	3	9	9	6	9
10.0%	3	3	3	6	9	9
3.75%	3	3	6	6	3	9
3.75%	6	9	6	6	6	9
2.5%	1	1	3	3	1	9
7.5%	6	6	6	6	3	9
2.5%	1	3	6	9	1	9
100.0%						
	5.7	6.3	6.1	7.9	5.0	9.0

🟩	+
🟥	-
🟨	??

CMS1

Pay by user (not unlimited access)
Social media type interface
Tracking - no check in / check out
Security - single sign on
Notifications - not clear on whether they have this
or not

LCMS1

Development tool -
Publishing to all formats +
xAPI +

CMS2

Unlimited access
Would like to see if they can upload a .story file
Microsoft cloud +
Help notes on right hand side of screen
No support for languages
No searching within documents
Not really a LCMS, but rather a CMS
Can expiration date functionality be used for records
retention expirations?
Can provide a person to assist with migration

eXact

More integration with Storyline maybe than other tools? +
Notifications +
Microsoft Office 360+
xAPI +
In alignment with our flexible tool kit approach +

+
-
??

A PHASED APPROACH FOCUSED ON YOUR BUSINESS NEEDS

Configuration
- Configuration workshop
- Initial training

Personalization
- Maturity phase
- Non-standard integrations
- Legacy-data migration
- Custom functionality development

Utilization
- Growth & Adoption
- Value add opportunities
- Change management

EXACT LEARNING SOLUTIONS IMPLEMENTATION METHOD

Project launch & discovery → Requirements definition → Legacy-content review → POC & initial training → Technical design → Configuration → Functional testing → Training → UAT & coaching → Release planning → Go live → HYPERCARE

Discovery

2 day Discovery session, you must do this, and do it in person.

1. Deep dive discussions into as-is and to be states

2. Swim Lane Exercises (Business Process Map)

3. Requirements Documentation (system)

4. Metadata Application profile

5. Project Management/Planning sessions

Proof Of Concept & Pilot launch & Training

- 4 days of FTF training / POC

- 2 day regional trainings US/UK/AP

- Hyper-care Sessions

- Social Learning Community

- Support

DBU Planning, Training, and Roll out

- Bite-sized Training Module (Video)
- Job Aids
- Hyper-care Sessions
- Social Learning Community
- Support

How have we measured our success?

3 major accomplishments

- Adoption & Utilization of the system.
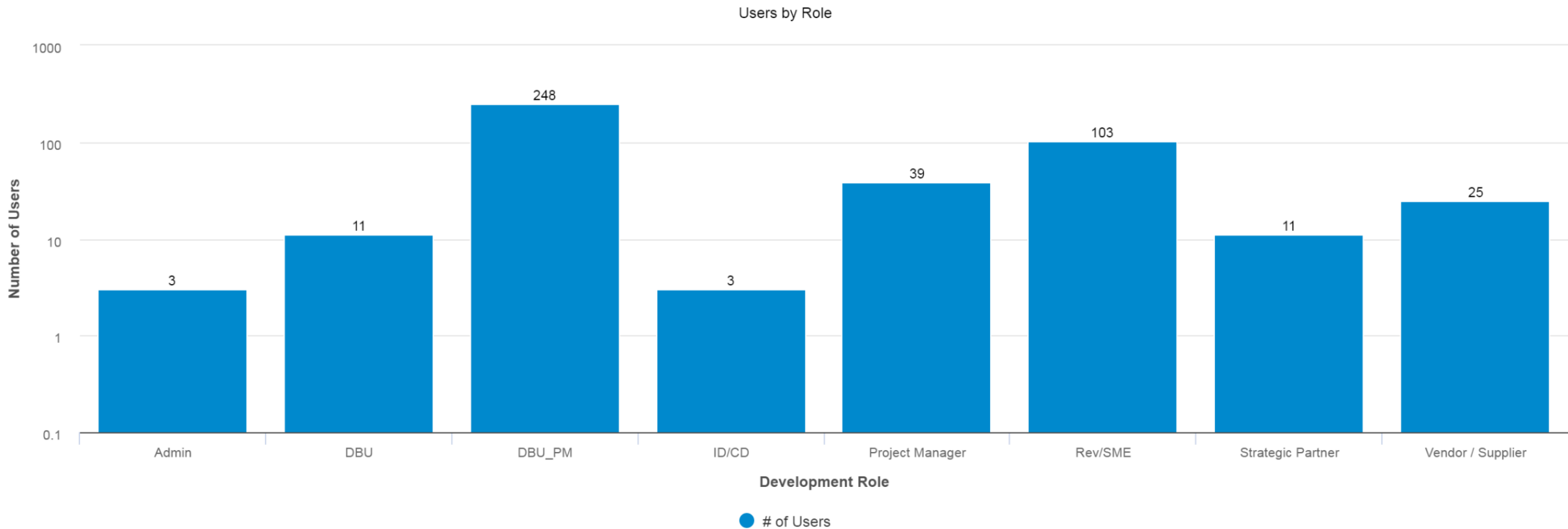- Integration with Enterprise Learning Portal
- Integration with Enterprise LMS
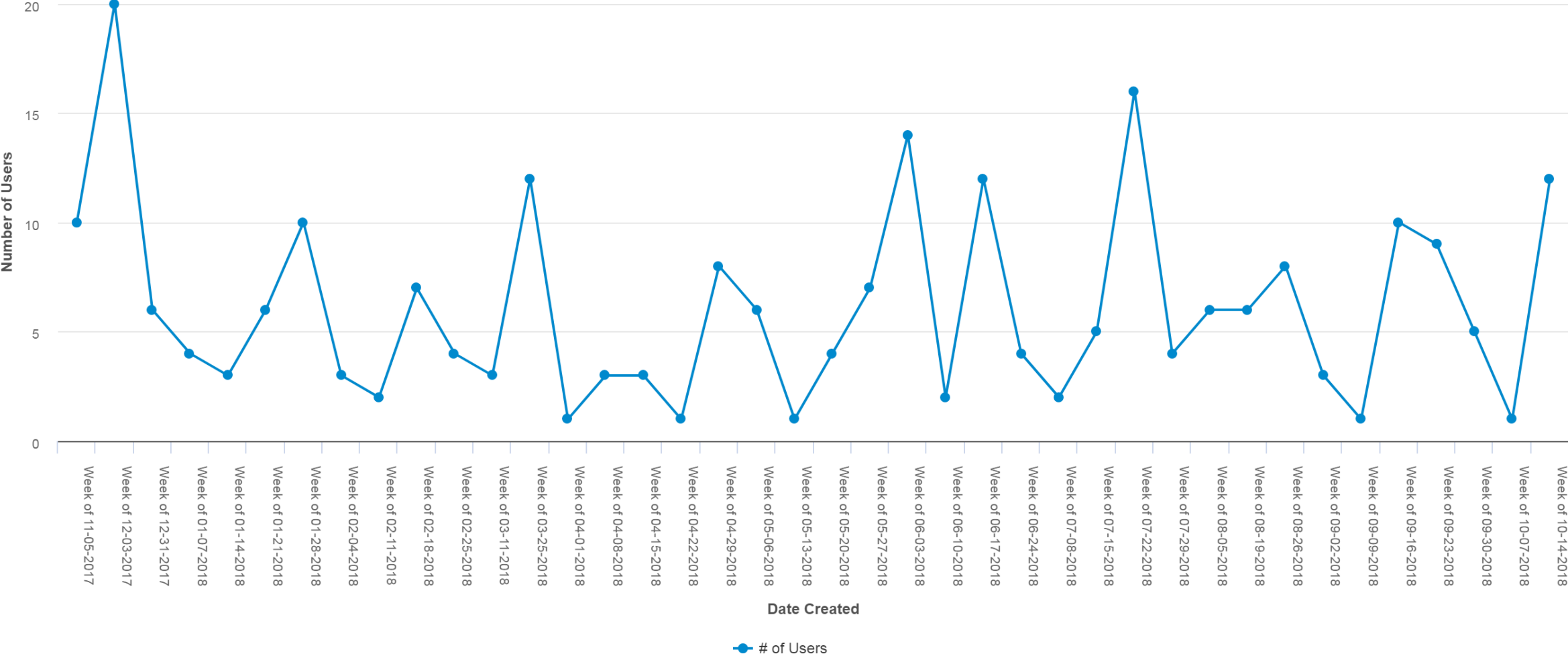
- Users By Division
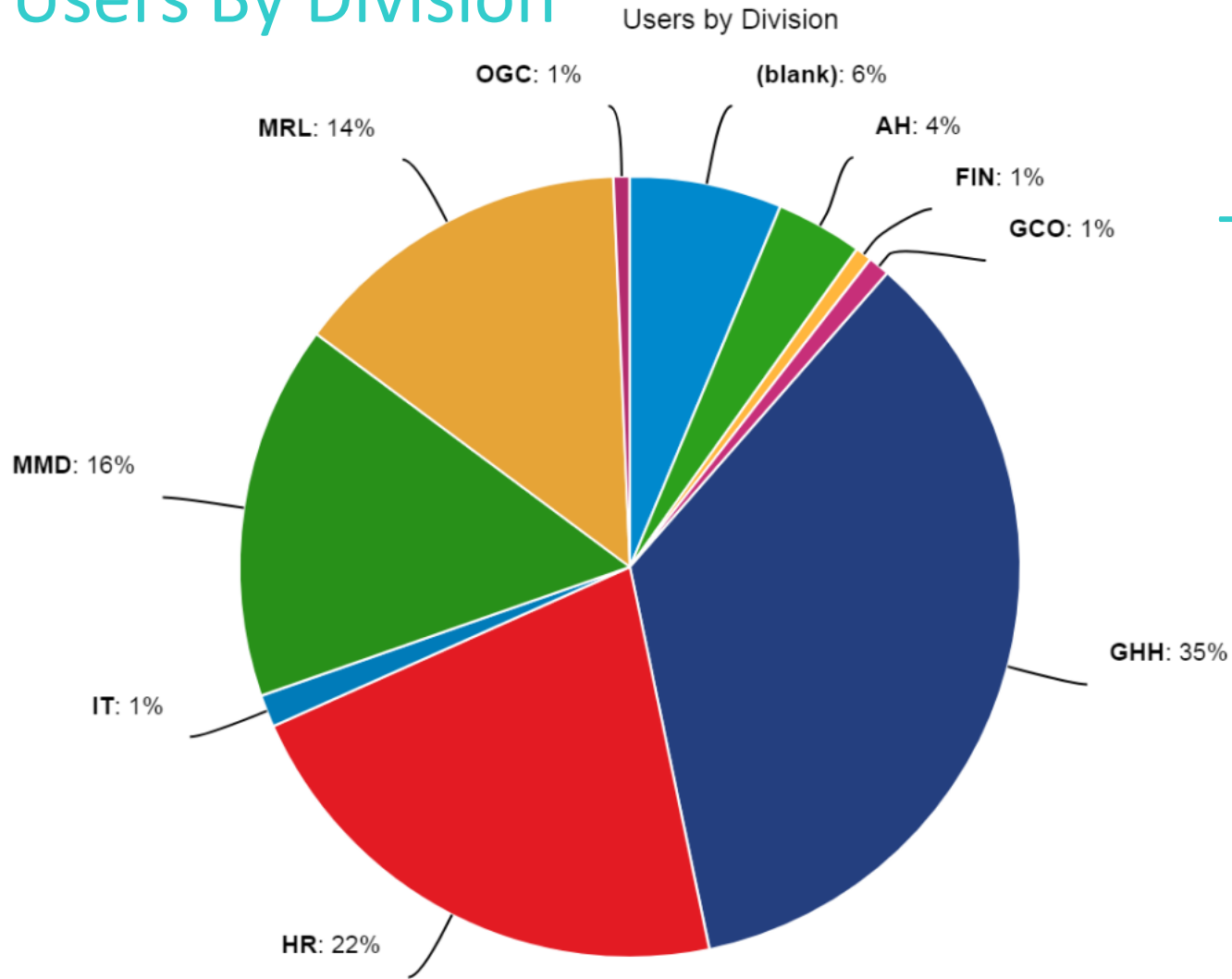
+445 Users total users

Number Of Users by Role

Users by Role

New Users Per Week

New Users Per Week

Do's & Don'ts / Key take-aways

Do's

- Make sure you are ready for Transformation

- Define your measure of success

- Trust the process, and take the time to do it right the first time

- Involve as many folks from the business as possible

- Use an assessment tool to help find the right partner

- Pull though and support your implementation with hyper-care

- Create a user community so everyone can contribute support

Don'ts

- Worry, you may not get it right the first time

- Try not to rush things, go as fast as your business allows

- Don't cut corners, especially in the Discovery & Planning

- You'll never be able to force anything on anyone

- Stop, anything, (supporting, solving problems, improving the experience)

QUESTIONS?

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eXact learning solutions
Visit our online site for demos, and more information
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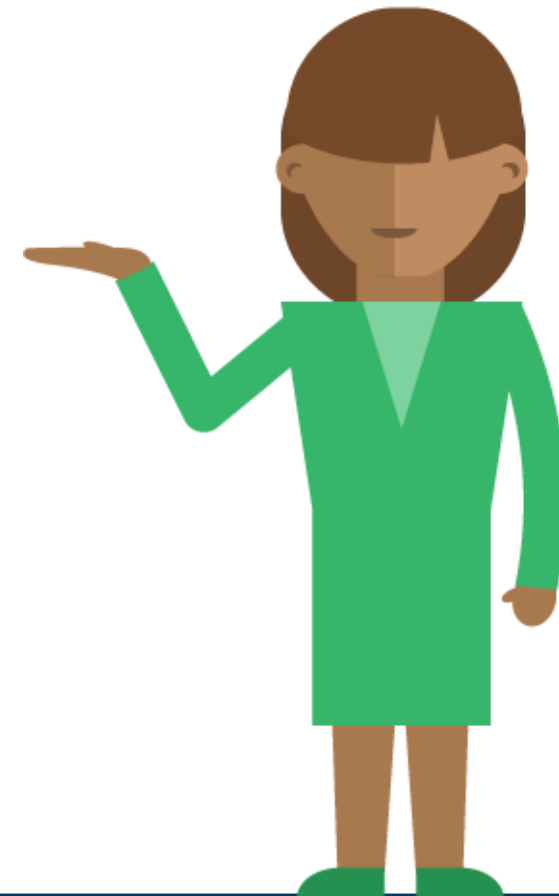
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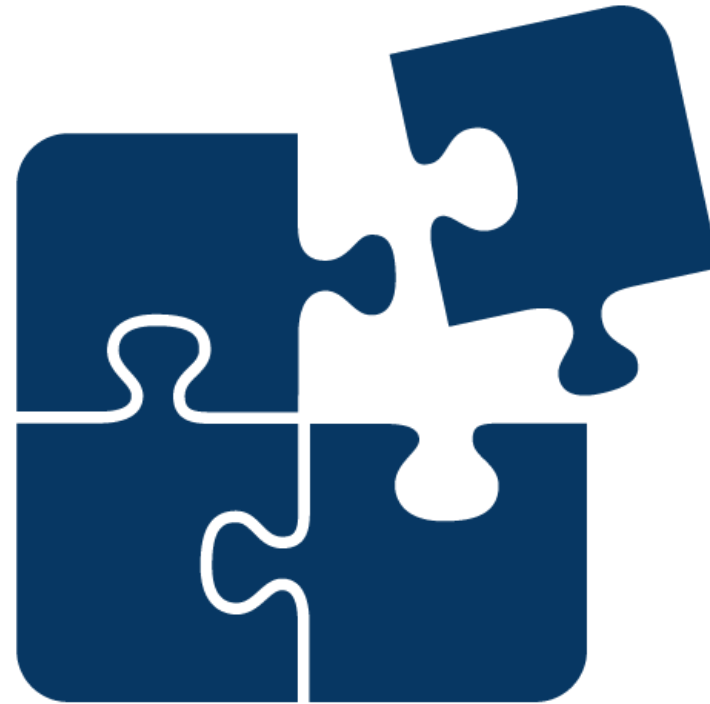- Maturity Model
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