

**This presentation was created to give you the ideas and support to present “Rethinking New Product Training Development” in your company. I hope you get the opportunity.**

**You have my permission to use these slides and to alter them to suit your specific needs. You are free to add slides, delete slides, and modify existing slides.**

**Get the “narration” ideas from the “White Paper” located here:  
<http://www.Mr-PBET.com/Training-Resources.htm#Papers>**

**You are free to distribute the related white paper, referred to above, “Rethinking New Product Training Development.” However, please do not modify it in any way.**

**Putting in a good word for PBET in general is welcome! Any specific good words for Solid Performance Solutions are especially appreciated.**

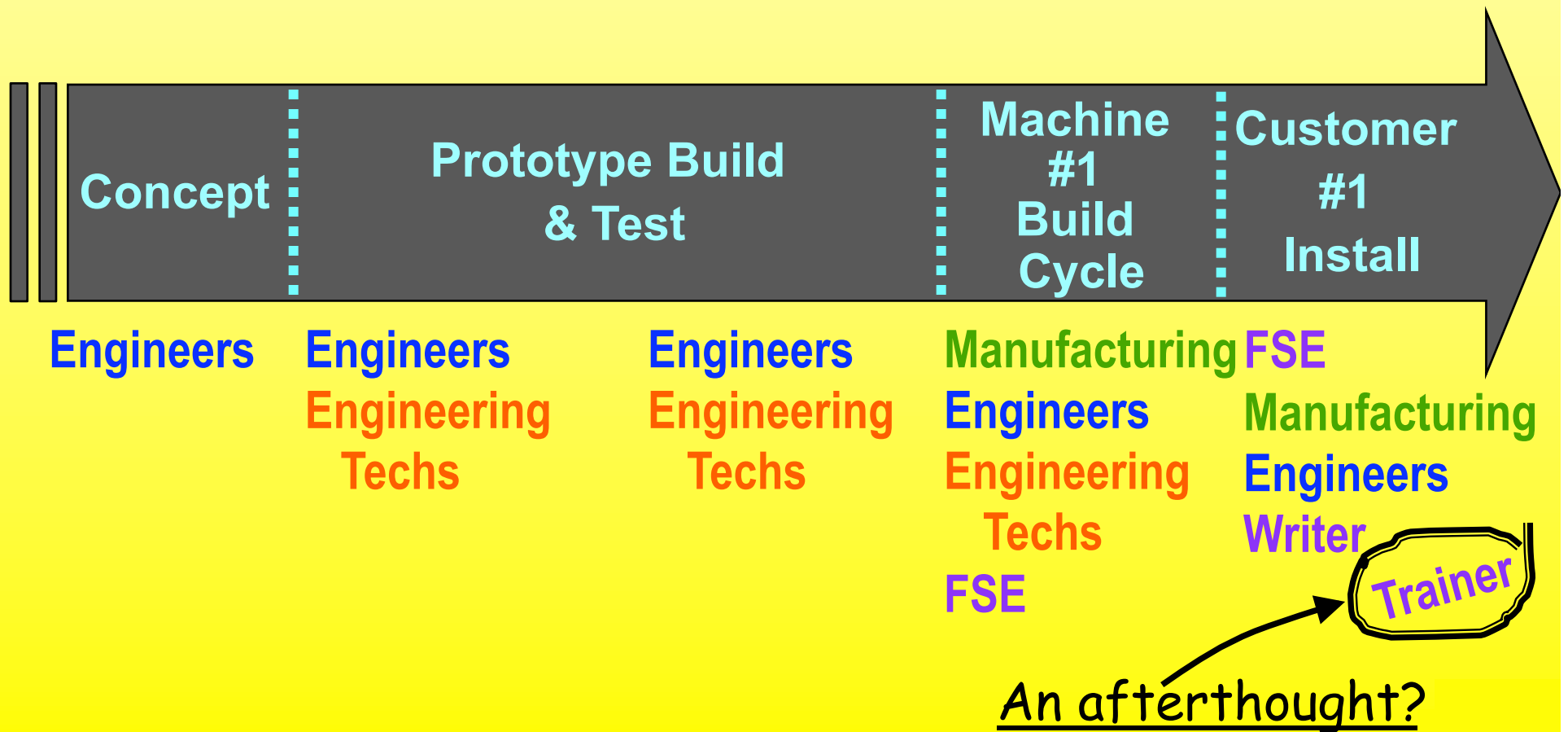


# Rethinking New Product Training Development

**It needs a customer support perspective**



# Typically Too Late: Training is an Afterthought

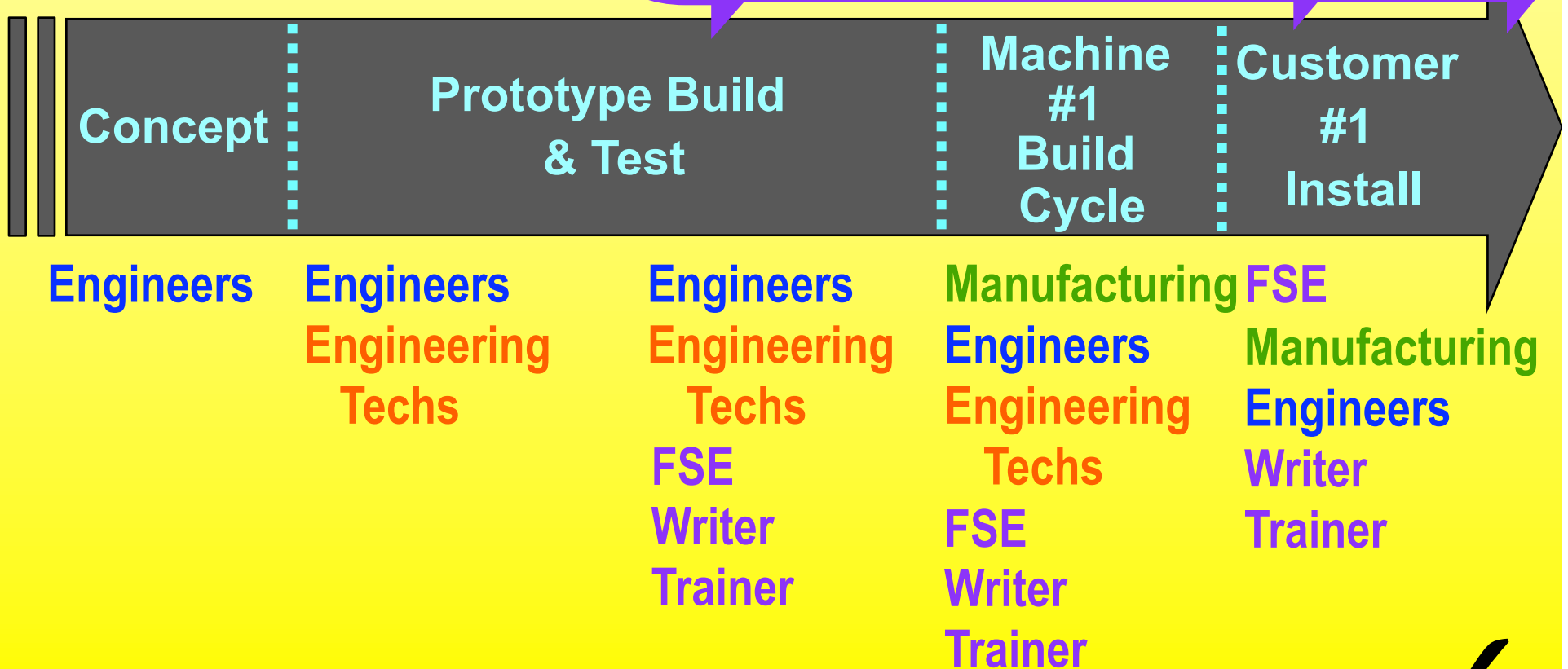


# Earlier is Better

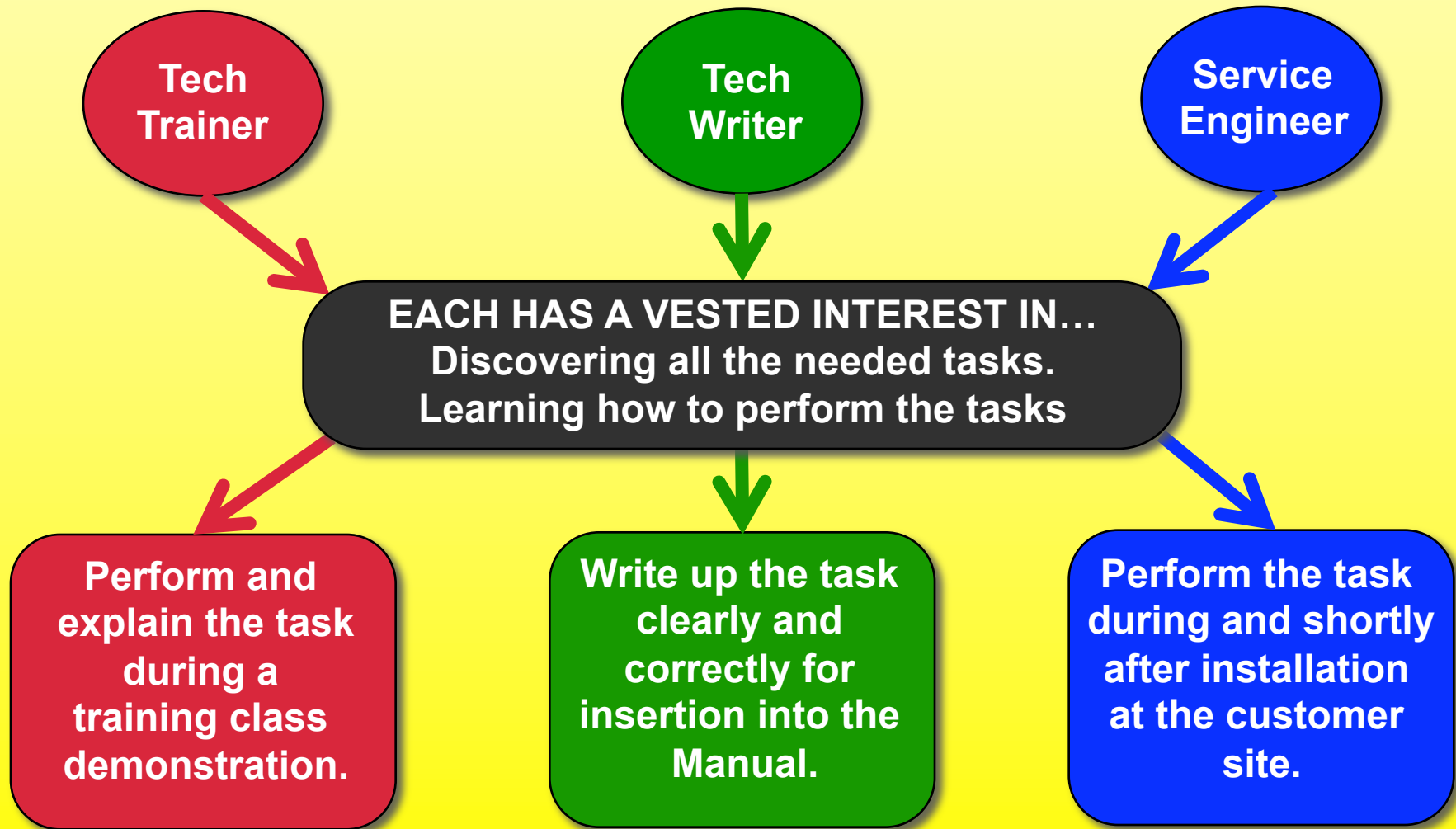
TYPICAL ENTRY = LATE, JUST BEFORE / DURING INSTALL

- Technical Writer
- Training Developer

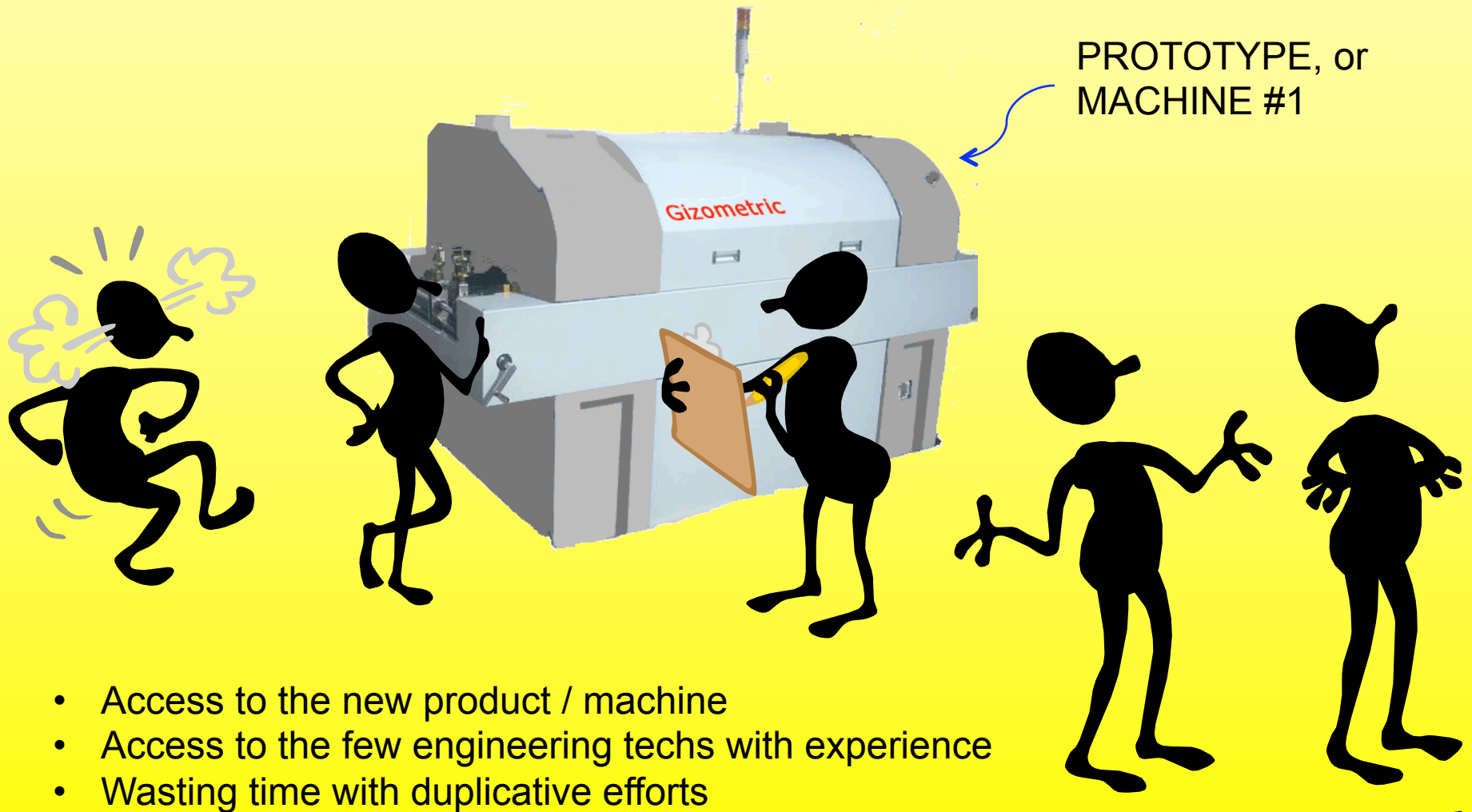
RECOMMENDED ENTRY = MID-PROTOTYPE BUILD



# Vested Interests



# Typically Too Competitive: Fighting for Scarce Resources

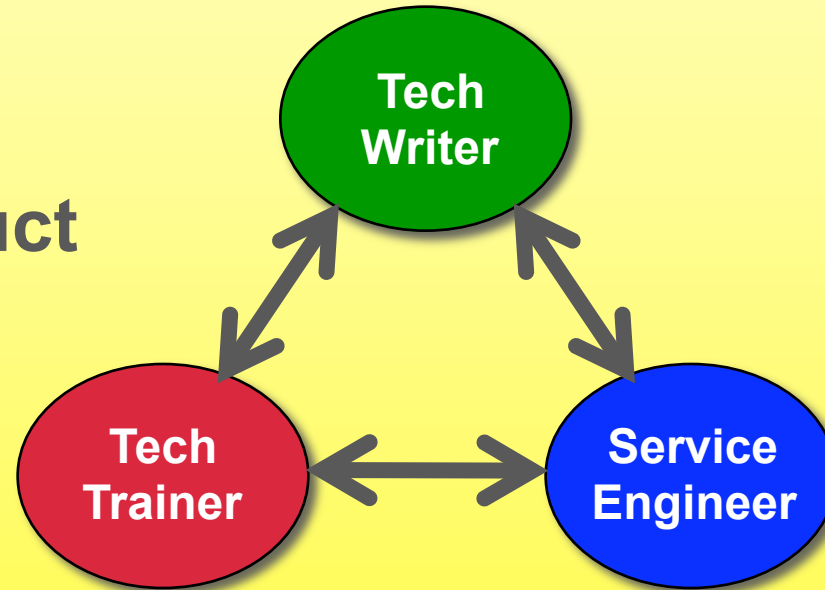


- Access to the new product / machine
- Access to the few engineering techs with experience
- Wasting time with duplicative efforts



# Try Collaborative: The New Product Customer Support Development Team

The New Product  
CSDT



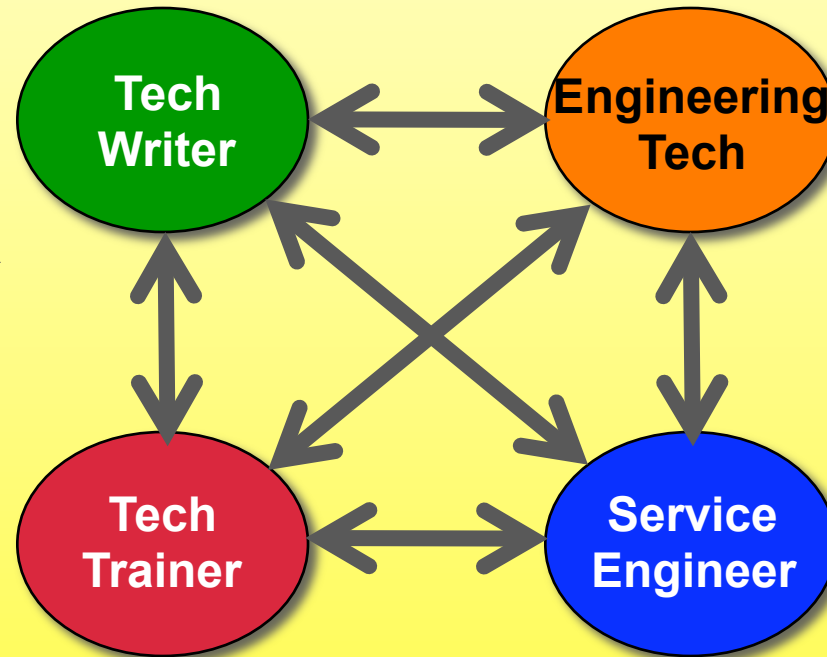
## Step 1: Agree to Work Together

- Learn the machine together by
  - Working on the machine together
  - Working with engineering and manufacturing techs together
- For the purpose of ...
  - Helping the writer to draft accurate procedures
  - Helping the service engineer to prepare for installation
  - Helping the trainer with certain analysis questions



# Collaborate with Engineering

Give Engineering  
Half a Day of Work  
Each Day During  
the Prototype  
Build Stage



## Step 2: Agree to Work Collaboratively with the Engineering Lab Techs

- For half of each day, you will work with the engineering techs in the prototype build area, supporting them. As a win-win for both engineering and the CSDT this should get you regular access to the equipment and give you a chance to learn while plotting your CSDT activities.
- For (the other) half of each day, work on the CSDT activities.

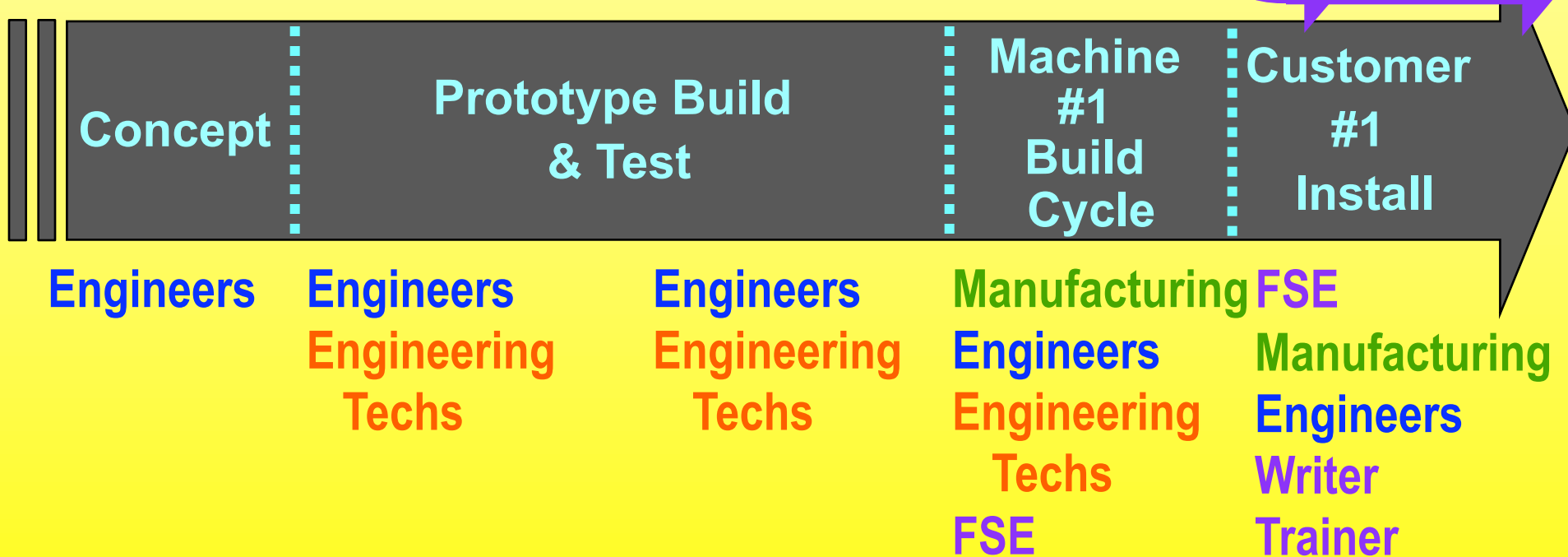




# So, Instead of This...

TYPICAL ENTRY = LATE, JUST BEFORE / DURING INSTALL

- Technical Writer
- Training Developer

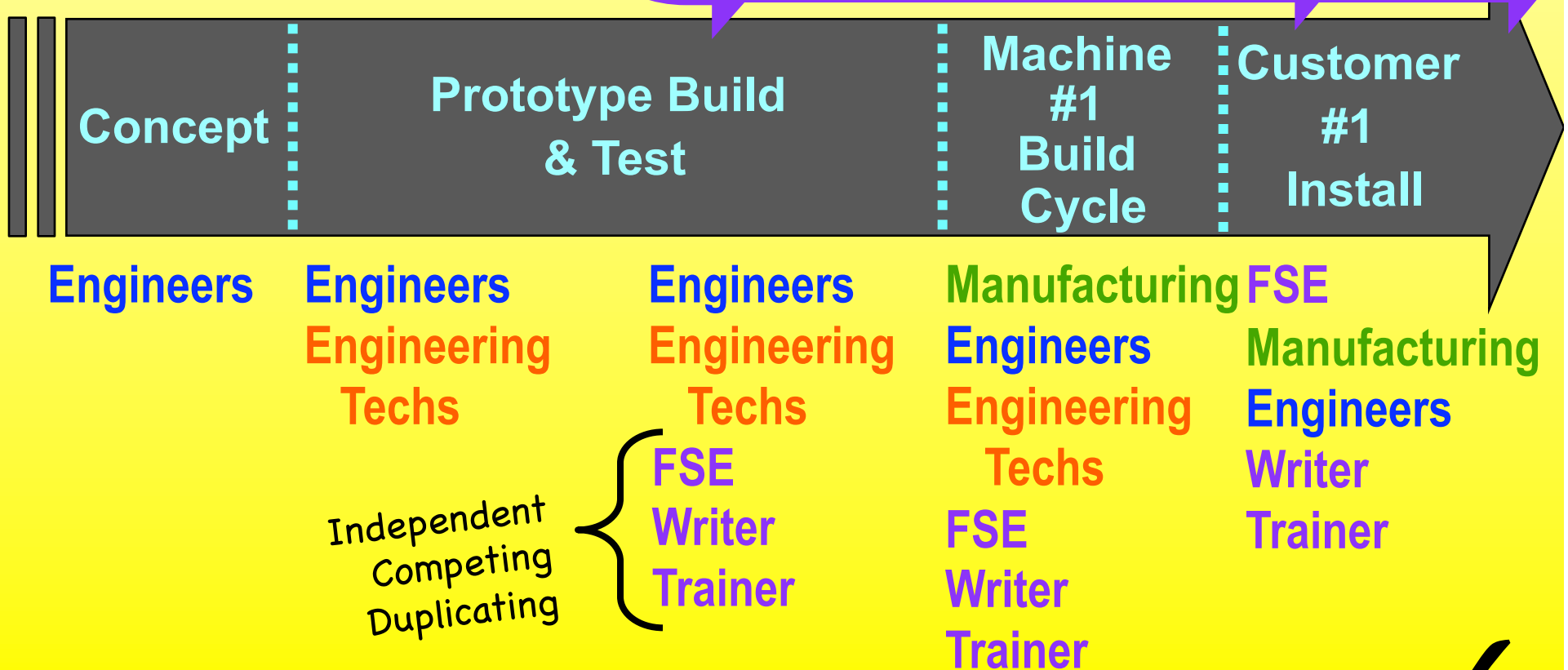


# Or Even This...

TYPICAL ENTRY = LATE, JUST BEFORE / DURING INSTALL

- Technical Writer
- Training Developer

RECOMMENDED ENTRY = MID-PROTOTYPE BUILD

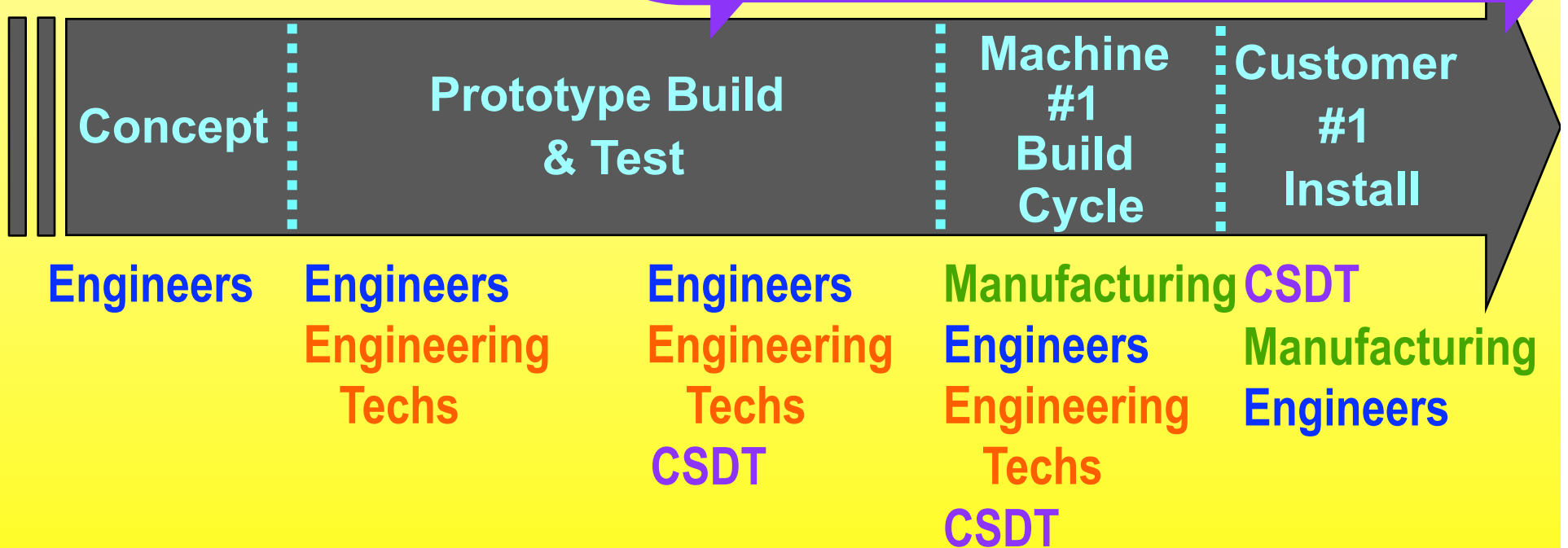


# Start Earlier AND Collaborate

RECOMMENDED ENTRY:

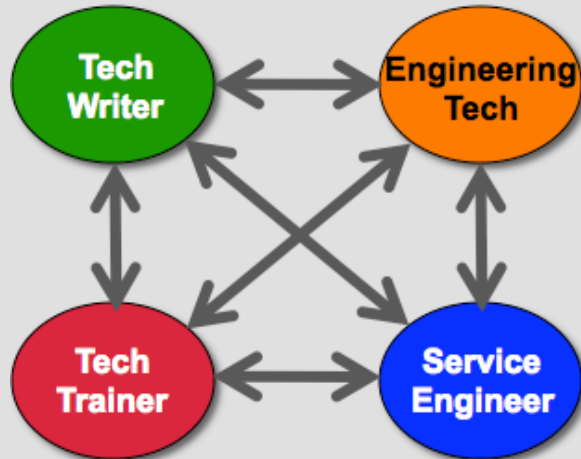
CSDT= Customer Service Development Team

MID-PROTOTYPE BUILD



# General Work Plan

Half of Day

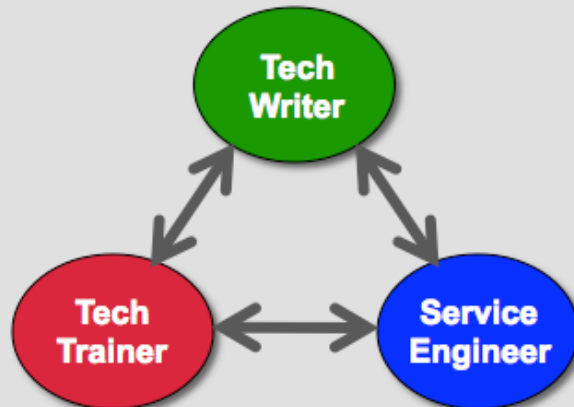


Help Engineering At Prototype

## Benefits

- Earn right to be at machine & to use some of engineering's time
- Hands on experience for learning
- Collect information for "lists"
- Have some input about nomenclature

Half of Day



Develop Support Materials

## Benefits

- Work on task analyses together, sometimes with engineering tech
- Collaborate creating the "lists" beginning with a list of all tasks
- Leverage each other's expertise



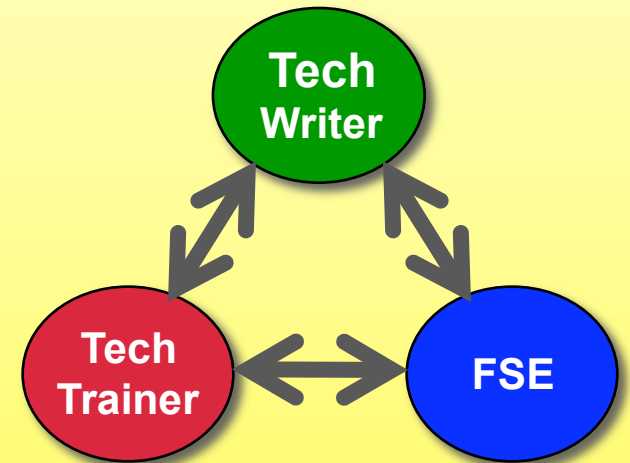
# Some Suggested “Lists” (Tables)

1<sup>st</sup> - List of Assemblies and Functions

2<sup>nd</sup> But MOST IMPORTANT - List of Tasks

Other Possibilities:

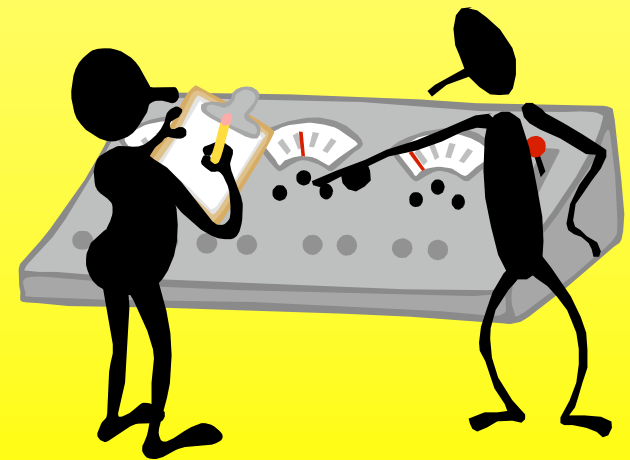
- List of Assemblies and their Sub-Parts
- List of Sub-systems and Assemblies
- List of Hazard Points & Hazard Descriptions
- List of Facility Specs
- Sensors, Conditions, Expected Readings
- List of Items for Daily Checkout
- List of Operator Level Error Messages and Recommended Responses
- Circuit Breakers and What they Control
- Operator Screens and Their Indicators and Controls



# A Major Activity of the CSDT

**Task Analysis:** For Each Task on the Task List

- ✓ Should be easier with three people equally concerned
- ✓ Take turns playing different roles:
  - The expert performer (could also be the engineering tech)
  - The writer-observer
  - The verifier (tries out the draft)
- ✓ Once you have an accurate draft, the tech writer can take over and ensure a final version gets into the manual



# Support From the Top Starts With Equal Commitment to ...

- ❖ a smooth installation of a new product where “smooth” equals a machine that passes customer acceptance on schedule, where communication has been clear, and the activity has been clean.
- ❖ an equipment manual that is complete (has procedures for all tasks the customer will need to perform), correct (free from errors), and clear (easy to use and understand).
- ❖ a training course that enables the customer’s trainees to become successful performers of agreed upon tasks and thus able to take responsibility for the new equipment.



# Steering Committee

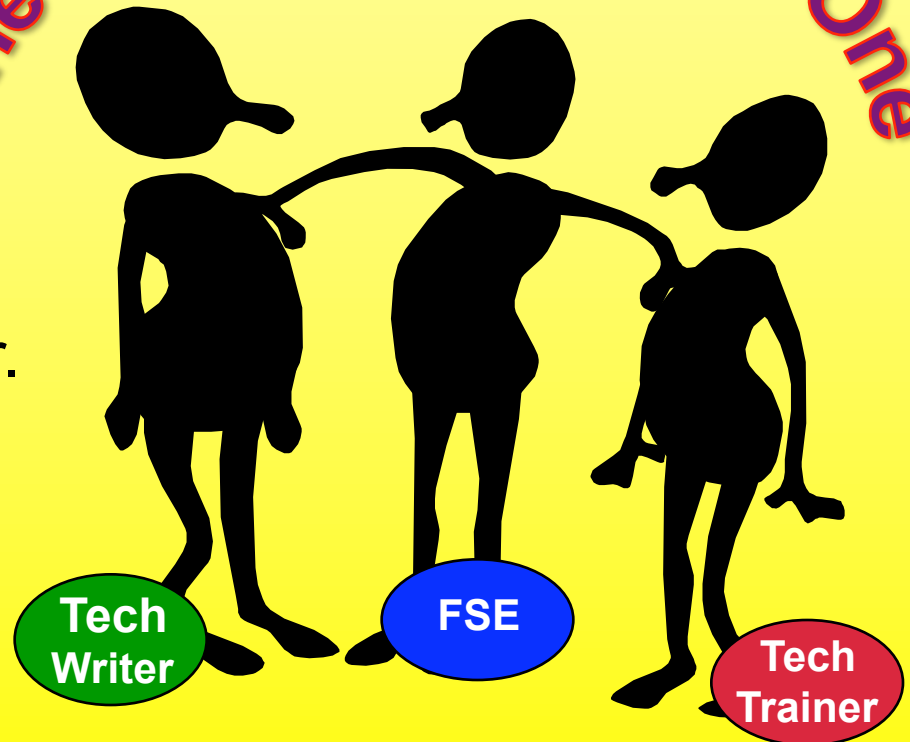




# Working as a CSDT Member

- Learn Best Practices in Cross Functional Teams.
- Get Started by Creating a Team Charter.
- Communicate Well With the Other Team Members.
- Collaborate with One Another.
- Learn the Elements of PBET that will Help You

One for All and All for One



# Resources

**[Mr-PBET.com/Training-Resources.htm](http://Mr-PBET.com/Training-Resources.htm)**

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