



Involving SMEs in rapid eLearning authoring

Case studies and best practices on training subject matter experts (SMEs) to capture their own content using Adobe® Captivate®

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With some reluctance, I accepted the assignment to explore how subject matter experts use Adobe Captivate to create eLearning modules. I'm an instructional designer by training, and I have extensive experience designing courses on dozens of topics. I have always considered my instructional design and eLearning expertise to be rather specialized. A subject matter expert is a professional who has expertise in the training topic, but does not necessarily have training expertise. Asking an SME from another department who doesn't have any background or experience in eLearning to develop an eLearning module just didn't seem right to me. But as I started to collect data and interview organizations who were having SMEs capture their own content using Adobe Captivate as part of their eLearning development process, I realized it could work, and some organizations have made it work better than their traditional processes. In fact, the closer I looked, the more I realized how many subject matter experts are becoming eLearning contributors when they are given easy-to-use eLearning tools that focus on creating great content, not on creating code.

One of the surprising statistics that came out of this study is that 71% of the nearly 100 organizations surveyed have subject matter experts using Adobe Captivate. Let's look at a few of these organizations and find out how SMEs are using Adobe Captivate to accelerate the eLearning development process.

Valero Energy: SAP integration training

Valero Energy Corporation is a Fortune 500 company based in San Antonio, Texas. As the largest refiner in North America, Valero has an extensive refining system with a throughput capacity of approximately 3.1 million barrels per day. Valero has approximately 5,800 retail and wholesale stores in the United States, Canada, and the Caribbean under various brand names including Valero, Diamond Shamrock, Shamrock, Ultramar, and Beacon.

Valero had 200 locations that needed to integrate SAP. With the traditional training method, this project would have required a live trainer to be at one location each day for 200 days, which means it would have taken more than six months to complete the training. So instead of providing live training, Valero decided to use Adobe Captivate simulations to create demonstrations, practice exercises, and an exam. The Adobe Captivate simulations could be deployed to all 200 locations simultaneously, as soon as they were complete.

The SMEs on this project were the people who knew the software best—the project manager and the IT architect. The training department provided a copy of Adobe Captivate to the SMEs and set up all the capture preferences and styles on the SMEs’ machines. The SMEs did a raw capture of an entire task and made sure they captured every message as well as every screen. Valero trained its SMEs to capture more than what is necessary to create the Adobe Captivate module, which is important to prevent the need to recapture screens later. Valero has found that all of its SMEs learned the capture process in less than 30 minutes.

According to David Lauber, eLearning specialist at Valero Energy, “The SMEs used to teach us to use the SAP software and then we’d develop the entire Adobe Captivate module. But the problem with that process was that they were teaching us to use a computer system that we would only use once. Now the SMEs can do the screen capture in minutes, whereas teaching us the SAP software took much longer. It is a big timesaver for everyone to have the SMEs perform the screen capturing.”

Once the SMEs captured the screens, the training team interviewed the SMEs and recorded their answers and explanations. That recording was used to write a script. Then a professional voiceover talent read the script for the final product. The training team added video and interactions to the Adobe Captivate movie to create a high-quality, professional product.

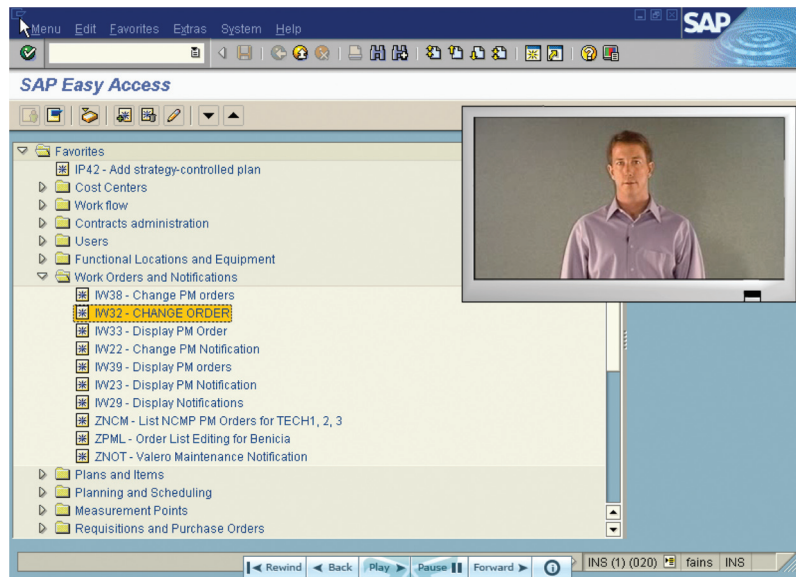


Figure 1. A Valero Energy sample SAP training screen with video.

By using this streamlined process, the Valero Energy team went from producing one Adobe Captivate movie per month to producing five or six per month. The movies that Valero now produce are the same length or longer and often have greater complexity than those produced with a traditional process.

Approximately 40% of our survey respondents had similar reasons for having SMEs capture content using Adobe Captivate.

The primary reason respondents have SMEs use Adobe Captivate is that the SMEs know the material best and can do the screen capture faster than they can teach the instructional designer the material. Most of the respondents provide IT and software training, and their subject matter experts learn the screen capture process quickly and easily. Also for the majority of respondents, capturing content is only the beginning of the eLearning development process. The training department takes the SMEs' work as raw material and uses it to create a robust and interactive eLearning product.

A federal agency: Trainers become Adobe Captivate experts

I interviewed a federal agency, who requested its identity be concealed. This agency trains professionals all over the country to use a proprietary software system. In the past, all the training was done in the classroom, but budget cuts required this group to find a new way to do training. The trainers needed to change their role from being experts conducting face-to-face classes to creating Adobe Captivate modules that they could distribute. For those who were accustomed to teaching face-to-face, eLearning was a big change. But despite some natural fear, once the trainers saw the reaction of the participants who were using the eLearning materials, they quickly changed their minds.

The first step was to train all 20 of the trainers and SMEs to use Adobe Captivate. According to Cindy, the agency's distance learning specialist, "Once we trained them, they were amazed at how easy it was."

The agency's training group's development process includes:

- Needs assessment
- Objective writing
- Outline development
- Storyboarding
- Scripting
- Screen captures
- Adding captions and interactions
- Audio recording

Once an SME was assigned a topic for a course, Cindy worked with that person to create a plan for completing the course. The SMEs could choose which parts of the process they wanted to do, and Cindy and others in her team would do the rest. Some of the SMEs were better at writing; others were more comfortable using the tool. Some SMEs liked doing screen captures, and others liked recording their voice. All the SMEs were experts on the proprietary system they were teaching. They all worked together, using their unique talents to complete the courses.

One unique aspect of this organization is the way they do storyboarding. They print screen captures and spread them on the floor or on a large conference table or post them on the wall. Then the course team writes captions on the printed screens. They may or may not use them all. Then they write the audio script on the bottom of the printed screens. They move and change the screen captures until they all agree on how the course is going to flow. This storyboarding method is important because it gets everyone on the same page and prevents rework. Without it, the team would be capturing screens over and over again. This method enables them to perform the screen capture process once and get everything they need the first time.

Successfully integrating SMEs into the development process

Four clear best practices for integrating SMEs in the eLearning development process emerged from our survey and interviews:

- The SMEs must be trained on Adobe Captivate.
- Work processes must make the best use of everyone's time.
- Standards and templates are important for consistency and quality.
- Coaching and support helps the SMEs succeed.

Adobe Captivate training

Nearly 50% of survey respondents said that they do one-on-one training for their SMEs. The next most common training method is for organizations to hold their own classes.

When training SMEs on Adobe Captivate, it is important to train them only on what they need to know to perform their tasks. Training them on the whole product will likely overwhelm them. Usually, the only thing SMEs need to know is how to capture screens, and if they are trained well, they can give instructional designers and eLearning professionals a great head start in creating Adobe Captivate modules. Adobe Captivate also has built-in tutorials, and Adobe offers free online eSeminars.

Work processes

Based on our survey, 55% of respondents take raw material from SMEs and edit and enhance the Adobe Captivate file. In addition, 55% of respondents provide written instructions or guidelines to SMEs for creating Adobe Captivate files.

One reason these organizations are successful having SMEs use Adobe Captivate is because they establish a work process that makes the best use of everyone's time. Since the SMEs know the software, they can quickly do the screen captures and explain the content either verbally or in a rough storyboard. The training developers can then take the raw file and create professional courses in a short period of time.

Another commonly used process is having the SME and the training team work together on a storyboard and script. Then the SME captures screens according to the script and sometimes does other tasks. The training team edits and enhances the SME's Adobe Captivate files to produce a final deliverable.

Standards and templates

About 40% of survey respondents provide templates (or styles) for their SMEs who use Adobe Captivate. The templates include:

- Branding elements
- Screen colors and elements (such as borders and buttons)
- Text styles and colors
- Caption styles and colors
- Capture preferences (which can now be easily be shared by exporting or importing the preference settings via the file menu in Adobe Captivate 3)

Having these styles established makes the SMEs' job easier because they don't have to think about what color or shape to make the caption or what font to use. They can simply capture screens and use Adobe Captivate to explain their content.

Coaching and support

Approximately 70% of respondents said they provide coaching to SMEs who use Adobe Captivate, and several organizations mentioned that they provide phone or in-person support. This type of coaching and support works well because the SMEs are not typically Adobe Captivate experts, nor are they eLearning experts. Providing SMEs with individual coaching and support helps them participate in the process without bogging them down.

Consulting Partners: Implementing an electronic health record system

Consulting Partners (a MODIS company), an award-winning learning solutions consulting firm in Dallas, TX, was engaged by a major health care provider to produce interactive web-based training modules for their rollout of an electronic health record (EHR) system. The audience for the EHR training included 18,250 employees and 3,700 physicians. Although the entire audience required similar training, physicians required a different degree of detail and pace than hospital staff, so the team created two versions of many of the eLearning modules.

“Providing SMEs with a tool that makes it easy for them to share their knowledge can really streamline the training development process.”

Randall Bean,
Senior eLearning developer,
Consulting Partners

The SMEs on this project were almost exclusively nurses and physicians. These people knew what it was like to work in a hospital, and they provided critical knowledge that was essential to the success of the EHR implementation. Converting to an EHR system is a massive undertaking, and the combined team recognized the need for a training tool that is flexible and easy to learn, and that could also output small FLV files that are compatible with the organization’s learning management system (LMS). Adobe Captivate fit the bill perfectly.

The client’s development process included having the SMEs identify training needs. The SMEs used Adobe Captivate to storyboard and capture recordings of the EHR application. The training developers then refined the content, wrote audio scripts, and added studio-recorded narration and closed captioning before the module was loaded in the LMS.

According to Randall Bean, Senior eLearning Developer for Consulting Partners, “Providing the SMEs with a tool that makes it easy for them to share their knowledge can really streamline the training development process.”

Because the client’s timeline for rolling out the EHR system was rather brisk, Consulting Partners’ training developers continuously looked for new ways to streamline or shorten the development cycle. For example, Randall’s team began using a free, open-source automation tool called AutoHotKey (available at www.automhotkey.com) to expedite routine editing and configuration tasks in Adobe Captivate. In many cases, editing tasks that normally took up to ten minutes to do manually could be performed via automation scripts in 30–40 seconds. Saving time on the routine tasks frees the training developers to spend more time developing other media and enhancing the Adobe Captivate modules.

10 Tips for SME use of Adobe Captivate

Based on the data I collected in surveys and interviews, here are the resulting top tips for having SMEs use Adobe Captivate to successfully develop eLearning content:

1. Good eLearning content requires several different skill sets and is best developed with good collaboration between SMEs and the training department.
2. Establish a work process that makes the best use of everyone’s time. Clearly outline the SMEs’ responsibilities as well as the training department’s responsibilities.
3. Don’t inundate SMEs with intricate details about Adobe Captivate. Just tell them what they need to know to perform their tasks.
4. The larger the pool of SMEs, the greater the need for style guides and templates to ensure consistency.
5. Design your scripts and storyboards the way Adobe Captivate works—on a slide by slide basis, rather than as a whole process.
6. Set up Adobe Captivate on the SME’s computer, or create a space in your department for the SME to work with Adobe Captivate. This way, you can properly adjust the capture settings, and if the SME is working in your department area, the training developers can easily assist them.
7. Have SMEs capture more than you need so you can delete what you don’t need. This works much better than trying to recapture or insert additional captures.
8. Shift your attitude from being *the* department that develops *all* the training alone to helping the SMEs share their expertise. Help the SMEs help you.
9. Provide your SMEs with the opportunity to see a learner who is using their course. This will help them accept eLearning and Adobe Captivate.
10. Have fun and encourage creativity. Once SMEs learn Adobe Captivate, they will likely have some great ideas about making the training interactive and fun.

Summary

After hearing many of the success stories from organizations who have SMEs use Adobe Captivate as part of their eLearning content development process, I see now that having SMEs perform the screen capturing as well as other tasks for IT training can help an organization create better eLearning modules faster than with a traditional process. By giving SMEs a role in the training development process, along with easy-to-use Adobe Captivate software, you can improve relationships across your organization and significantly increase productivity.

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