

People Connections Checklist

Make People Connections

The Project Manager and Sr. Instructional Designer (sometimes the SME too) meet with these people

Color Coding: Yellow = mandatory, Blue = based on training need, Orange = PM Alert

X	Contact	Resource Needed
—	Marketing Manager <i>Name</i> <i>Email</i> <i>Phone</i>	<ul style="list-style-type: none"> • Company Style Guide (fonts, colors) • Access to approved marketing lifestyle photos, logos, and product photos
—	Training Manager <i>Name</i> <i>Email</i> <i>Phone</i>	<ul style="list-style-type: none"> • eLearning templates, PowerPoint, Word Template for Course Guide • file location for video storage
—	LMS Administrator <i>Name</i> <i>Email</i> <i>Phone</i>	<ul style="list-style-type: none"> • LMS SCORM requirements • Final LMS Quiz format and % passing requirement • Course Certificate (on LMS), if needed • Student Login / Recordkeeping • Testing Server – Access • Dates for: Test Server Plan and Launch Date
—	Customer Service Manager <i>Name</i> <i>Email</i> <i>Phone</i>	if training is for customer support team, find out what types of information and formats are most useful to them as resources
—	Product Engineer <i>Name</i> <i>Email</i> <i>Phone</i>	is mandatory for accurate and updated: specifications, preventative maintenance, or tear-down procedures, and replacement parts
—	Outside Expert (Manufacturing Rep) <i>Name</i> <i>Email</i> <i>Phone</i>	is mandatory for: product specifications, preventative maintenance, or tear-down procedures and replacement parts. Ask for diagrams, or product specifications
—	Safety Officer <i>Name</i> <i>Email</i> <i>Phone</i>	Is mandatory for teaching safety including: PPE, safe operating procedures, federal regulations, OSHA, and safe product usage

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—	Product Manager <i>Name</i> <i>Email</i> <i>Phone</i>	are valuable since they will have access to all types of product documentation that you can place in the online library
—	Chemistry Lab Technician <i>Name</i> <i>Email</i> <i>Phone</i>	are helpful for providing excellent content for graphics and videos of the chemical testing
—	Field Manager <i>Name</i> <i>Email</i> <i>Phone</i>	are great at identifying the most common errors they see happening which are great case studies
—	Customer Service Representative <i>Name</i> <i>Email</i> <i>Phone</i>	are great at providing real-life scenarios and problems people on the front lines face for good case studies
—	Global Training Leader <i>Name</i> <i>Email</i> <i>Phone</i>	can offer suggestions on how to accommodate “localizing content” for wording, graphics or people interaction pictures that are more culturally sensitive for distribution to other countries
—	Legal Reviewer <i>Name</i> <i>Email</i> <i>Phone</i>	<p>PROJECT MANAGER RESPONSIBILITY Establish a good working relationship with the Legal Reviewer</p> <p>Provide them with the PowerPoints in PDF format so they can see the visuals and speaker notes Provide a reviewer comment sheet. Retain their comments for proof your team incorporated into the final product.</p> <p>NOTE: Attempt to get a once-through review of the materials as PDFs, so you do not have to go back and re-work audio narration, video and PPT slides.</p> <p>Offer to let them see the final product prior to the launch, with a caveat that they have no more than 5 business days to review – save their revision notes to show how their comments were incorporated into the final version.</p>