

## Assignment 2

### Converting legacy FrameMaker documentation to the new official branding

#### 2.1 Instructional Need and Goal Statement

##### Background

In mid 2007, Xerox Corporation released a new branding identity for the company – the largest rebranding effort in the company’s history. The look and feel of all customer- and internal-facing deliverables was completely overhauled. All new materials are *required* to have the new Xerox look and feel going forward from the middle of 2008.

As part of the rebranding effort, it became mandatory that all new documentation must go through an approval process before being released. The Xerox Branding Office was established to coordinate the rebranding rollout and the review / approval process.

Xerox, like any established company, has a lot of legacy materials that are reprinted when the need arises. Since it is now company policy that anything published after mid-2008 must use the new branding it is causing a lot of confusion regarding legacy content. Could it go out “as is?” The Branding Office decided that legacy content was included in the new policy and required rebranding. This decision is causing major problems since converting documentation to the new branding uses time and money that is not available.

##### Instructional Need

As part of the process of developing the new official Word and FrameMaker templates for my group, Global Knowledge and Learning Services (GKLS), I was confronted with the problem of document conversion head-on. A group that I worked with needed a 500-page document rebranded and wanted me to give them an estimate on how much that would cost.

Manually copying and pasting chunks of information from an old document into the new template is a long and laborious process that is very expensive (and boring). Since every section is manually worked on, there is plenty of opportunity for errors to be introduced into the rebranded documentation. Another solution to speed up the rebranding process needed to be found.

Looking for off-the-shelf tools to assist with the conversion, I came across an add-in to FrameMaker called Paragraph Tools. Initially difficult to set up, this tool reduced the time to convert a document by about 90% - a very large savings. Since I was the only person doing this conversion (a “1-off” thing I assured myself), I only wrote down the steps in a notebook in case I needed them later.

As the author of the new official templates, I started getting a lot of calls about converting legacy FrameMaker documentation. I created a sheet from my notes, but this proved to be insufficient for the needs of the authors in my group. In discussions with my manager,

**Comment [HMG1]:** Background useful is understanding context for your project selection.

**Comment [HMG2]:** I wonder how many corporations make decisions like these without considering the ramifications?

**Comment [HMG3]:** Instructional need clear; training an obvious solution.

it was decided that some training needed be developed that would walk authors through the mechanical and mental processes needed for them to perform the conversion process successfully *and* without having to consult with me.

### Goal Statement

My manager has requested that I provide training to GKLS authors on how to independently and properly convert legacy documentation. The goal statement is as follows:

*GKLS authors, who are required to convert legacy FrameMaker documentation to the new Xerox branding, will use Paragraph Tools and FrameMaker to independently create officially branded documentation from legacy documentation that will pass Xerox branding requirements.*

**Gagne's Learning Domains:** Intellectual skills – specifically discrimination, applying rules, and solving problems.

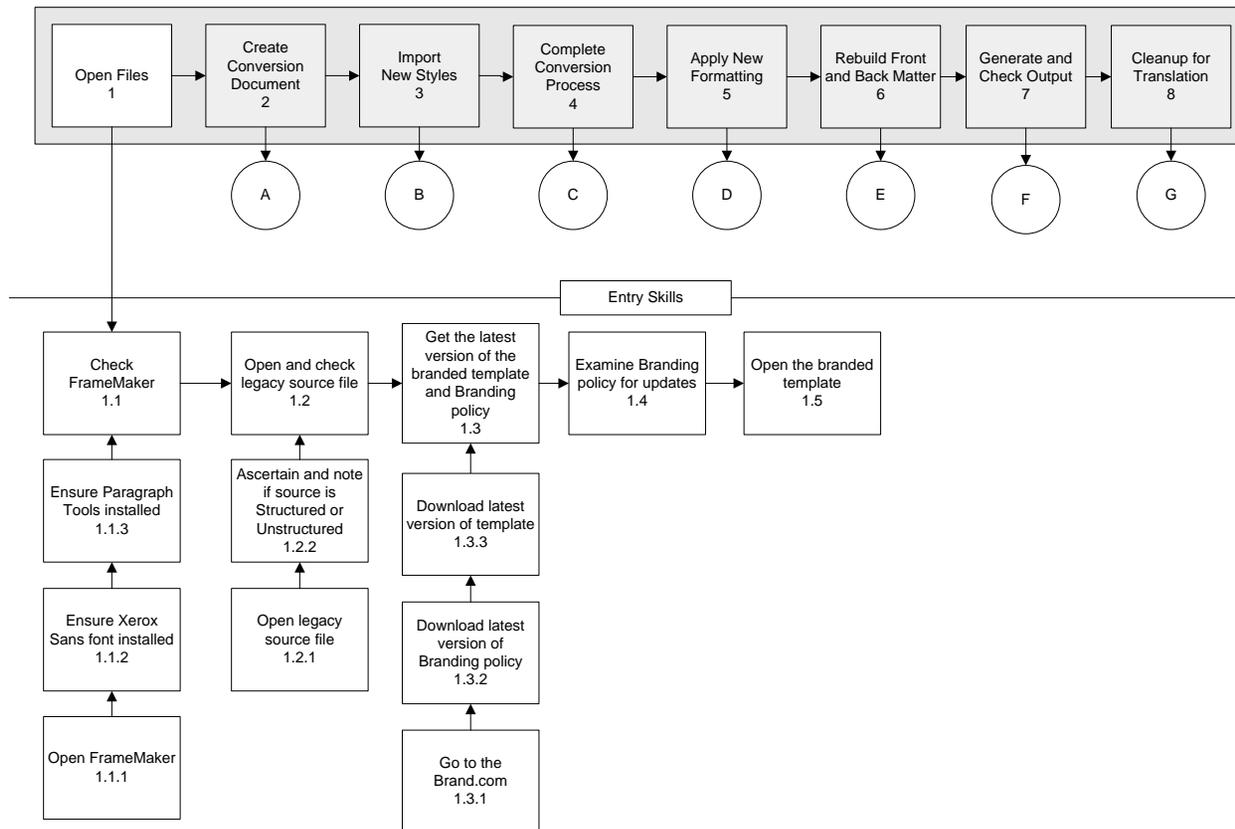
**Comment [HMG4]:** I agree with this classification.

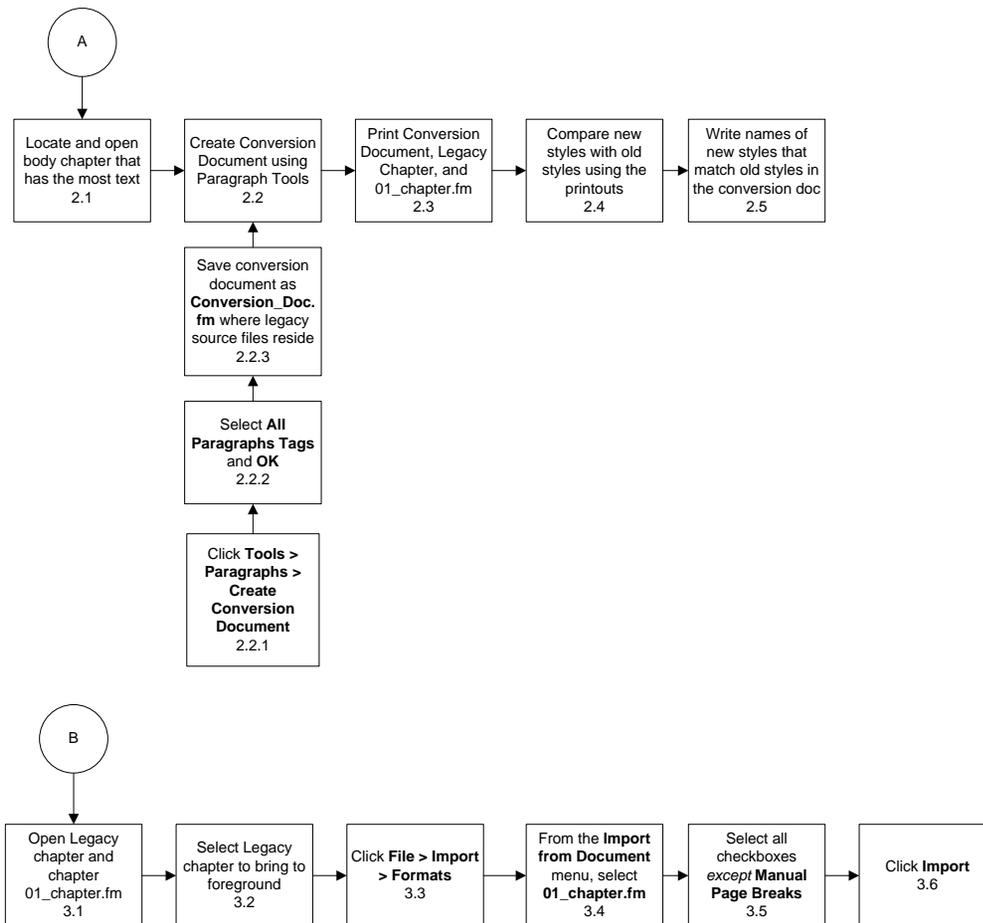
## 2.2 Instructional Analysis

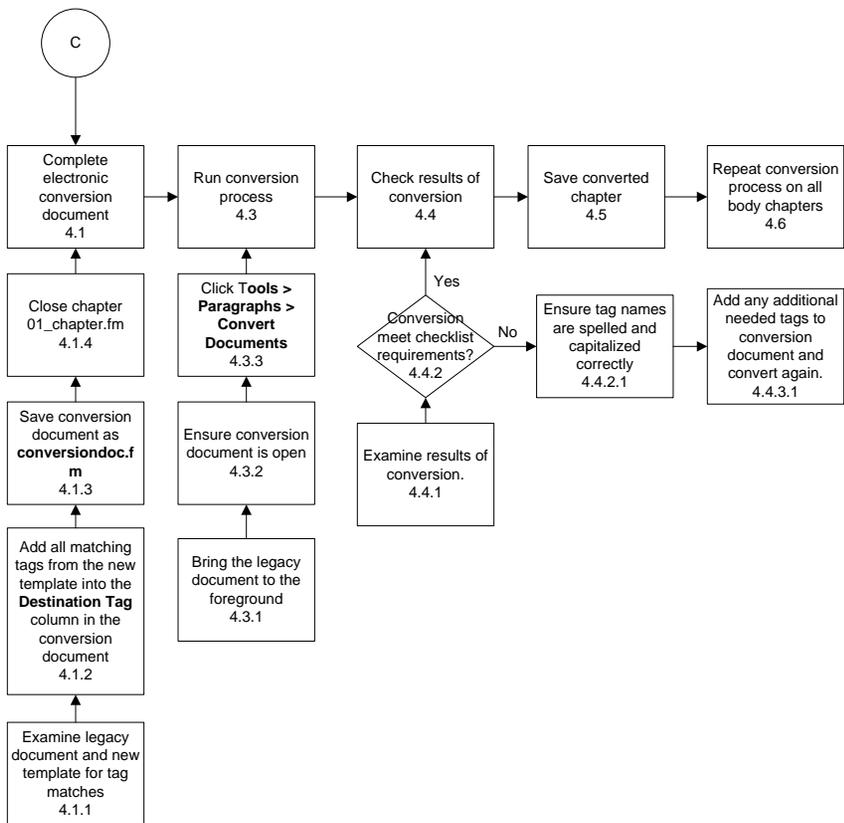
Comment [HMG5]: See the pdf for my comments.

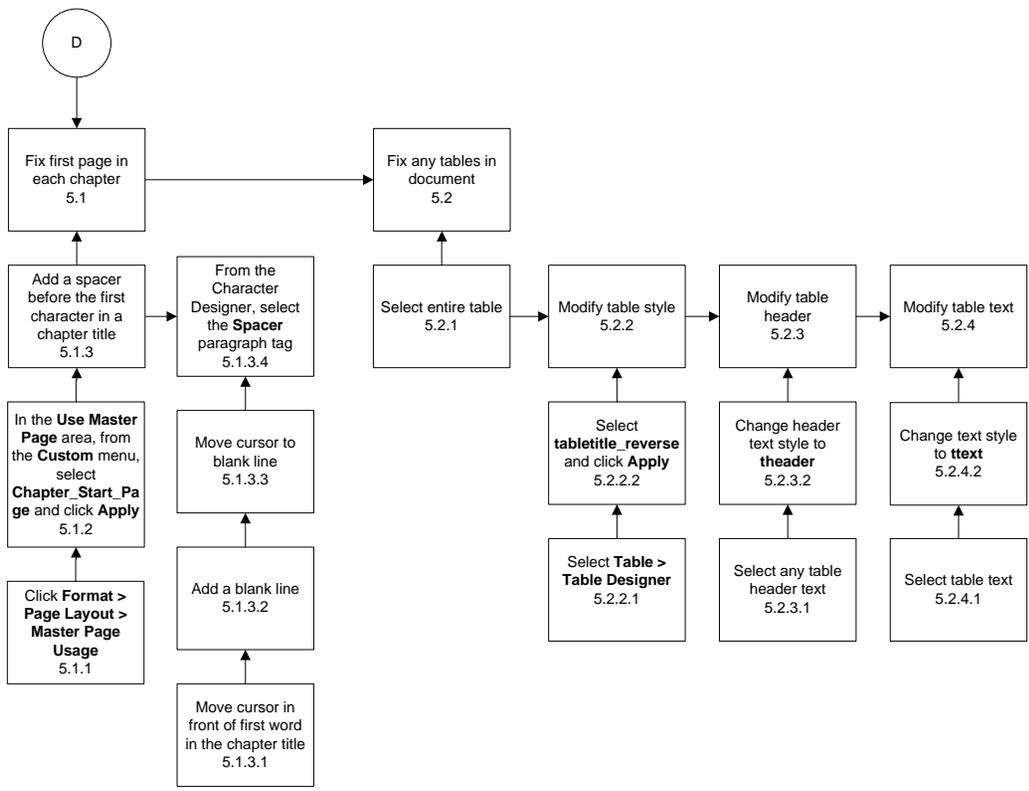
An analysis of the skills, subordinate skills, and entry skills are documented in the following flowcharts.

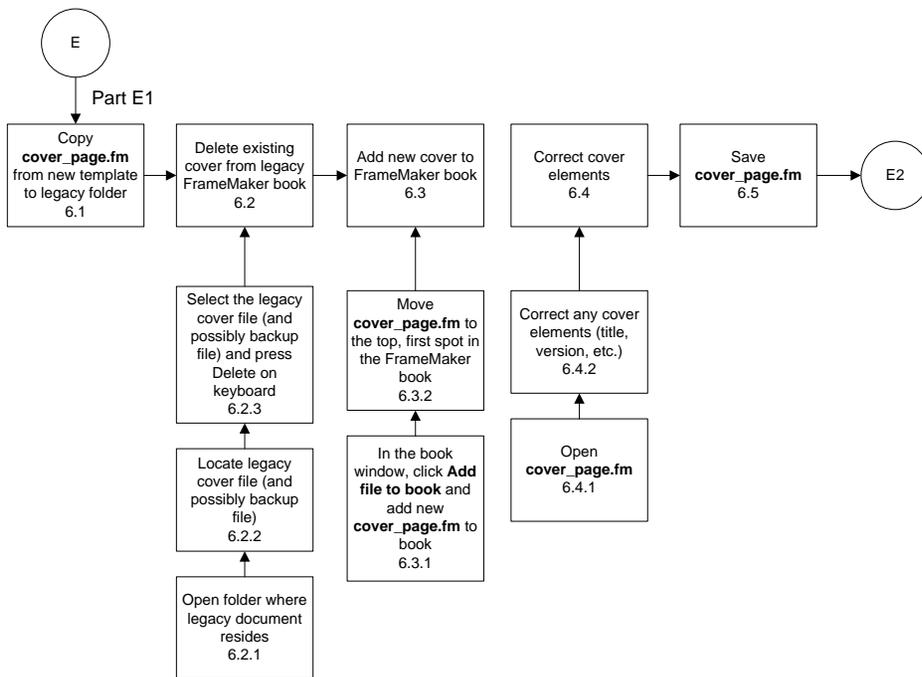
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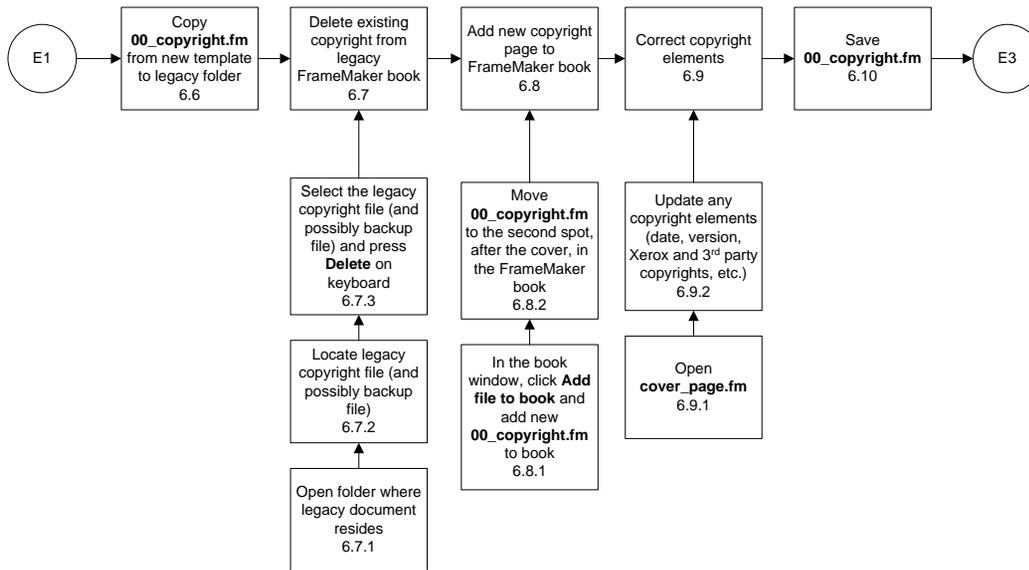






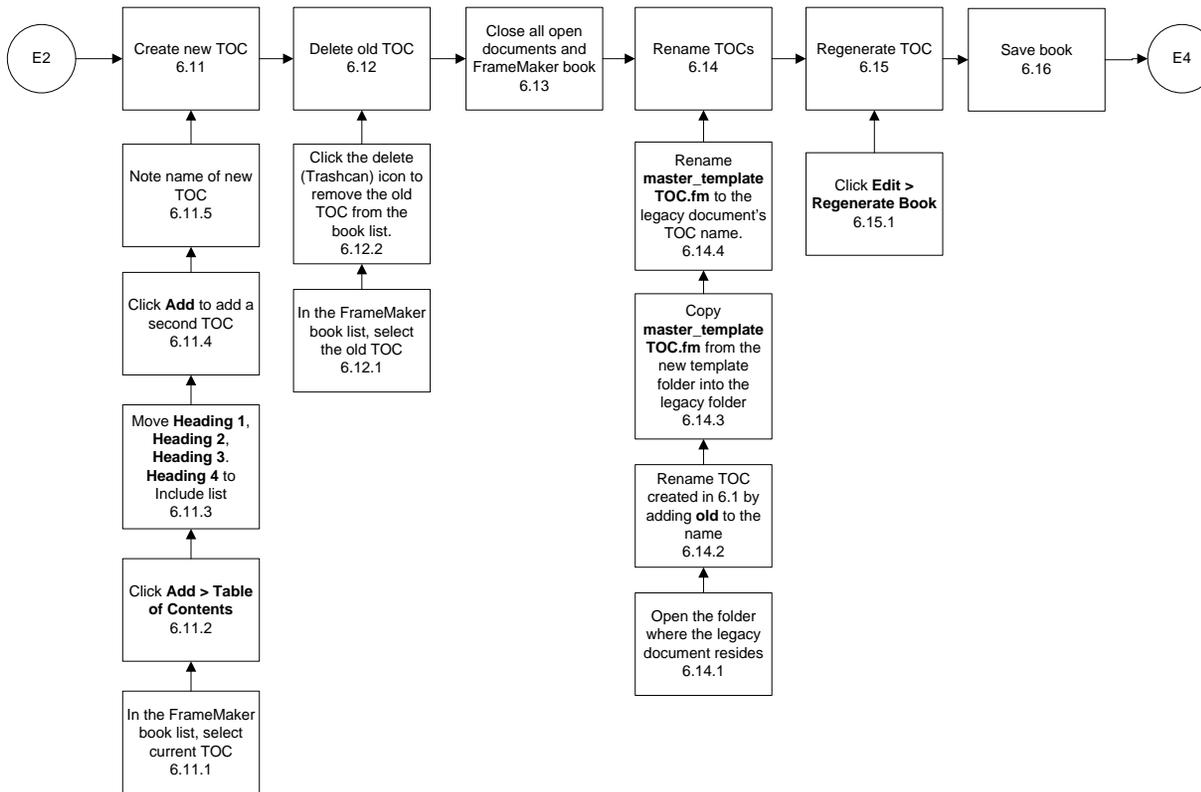
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Part E2



E

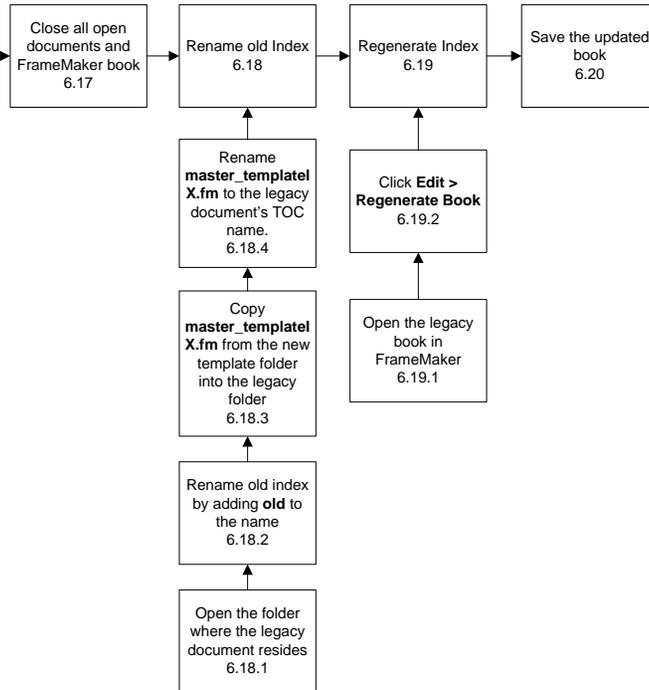
Part E3



E

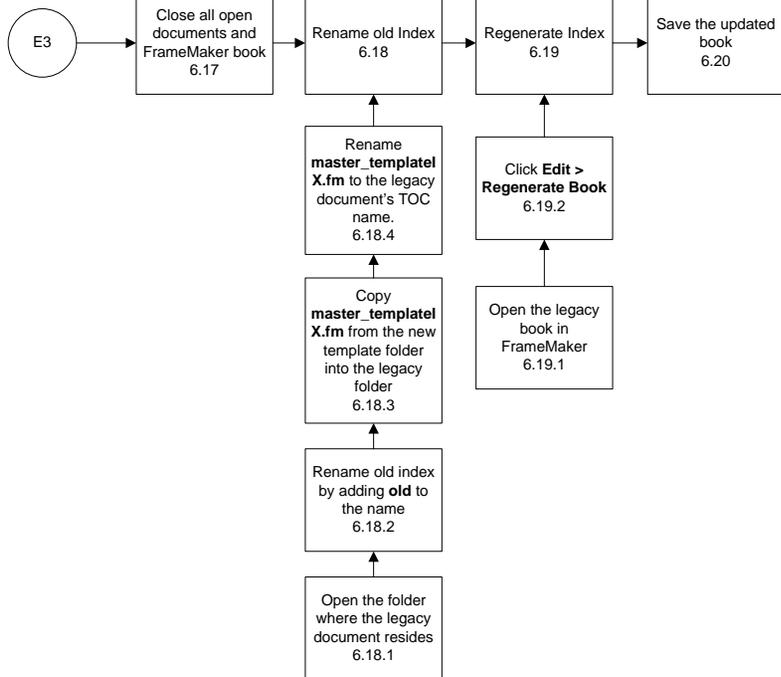
Part E4

E3

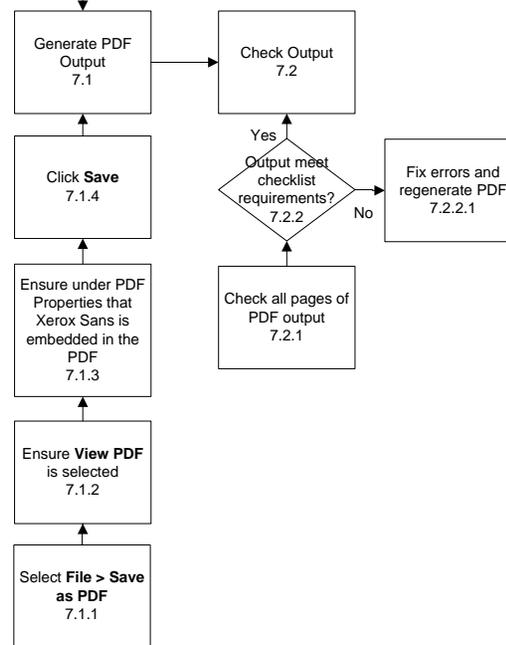


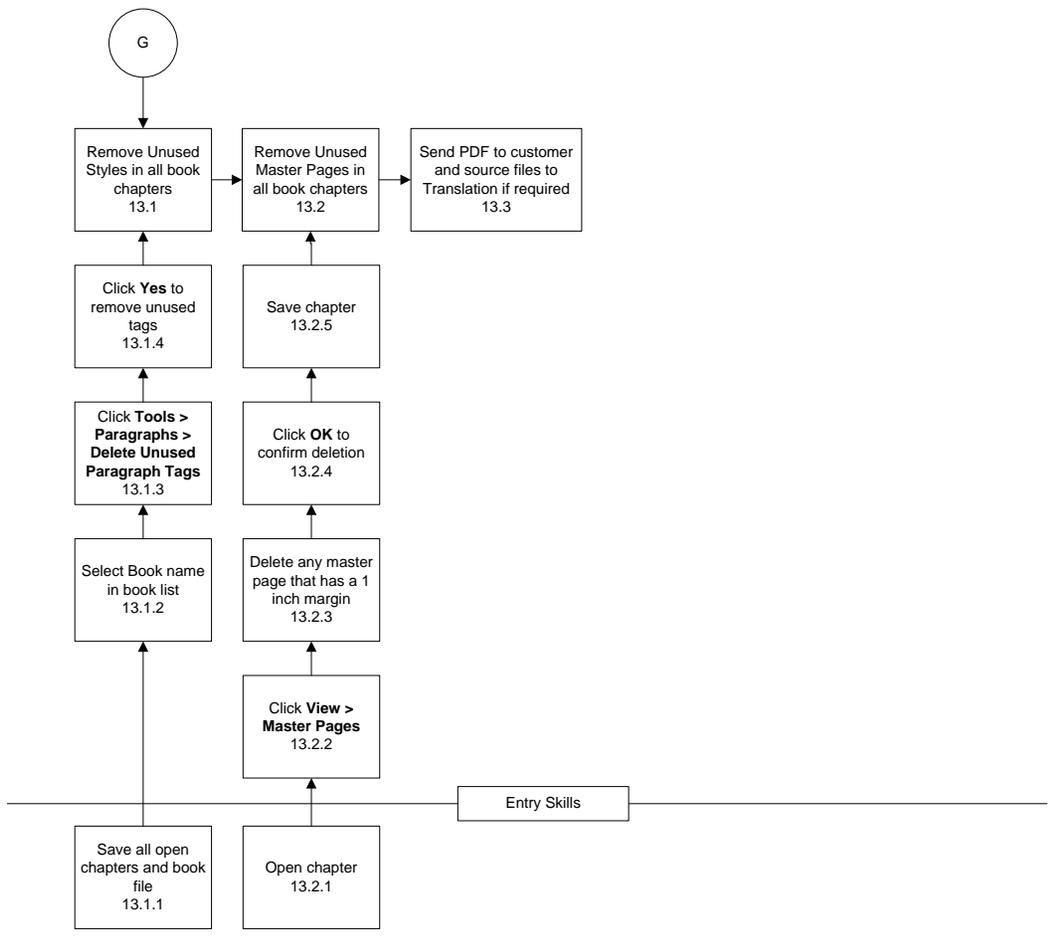
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Part E4



F





## 2.3 Learner and Context Analysis

Comment [HMG6]: Excellent descriptions here of learner/context analysis.

### Target Audience

The target audience consists of 42 Global Knowledge and Learning Services (GKLS) employees of Xerox Corporation who are located at the Xerox Campus in Rochester, New York. (Additional target audiences are Translation Services, located in Welwyn Garden City, England, and Customer Publications in Wilsonville, Oregon.) This Rochester target audience ranges from 23 to 62 years of age and are almost equally split between men and women. All have technical authoring backgrounds and specialize in areas such as customer documentation, technical documentation, customer training, technical illustration, or translation. The levels of the target audience education range from “on-the-job experience” to Masters degrees and all GKLS authors have the required entry skills with FrameMaker.

I interviewed two managers and three employees about the problems surrounding the conversion of legacy FrameMaker documentation. All agreed that the process was very time consuming and thus expensive. Little or no funding is provided from program budgets to cover rebranding, yet there is a corporate requirement for conversion to be done.

I shared a draft of the Instructional Analysis with the five people I had interviewed. They agreed that this would be very valuable training for all authors in the corporation. One of the managers was anxious for her group to start using the training as soon as possible since she had a large number of legacy documents to convert. She also asked if I had spoken with higher levels of management about this project. She felt that training should not be limited to just the Rochester employees since Xerox is looking at all the possible ways to save limited funds.

### Prior Knowledge

The entire target audience is familiar with Structured and Unstructured FrameMaker but, of the five people I spoke with, none were very familiar with the new branding requirements. Part of the training would be to familiarize participants with the new branding standards since they will be required to recognize material that would not pass the branding process.

### Learner Attitudes

Xerox employees are used to receiving training in a variety of methods which include, but are not limited to, instructor-led, CBT, self-paced workbooks, and online. As with most employees, they are more motivated when the training is directly related to their job and improves their efficiency. As a whole, the GKLS group is very positive about receiving training and the group I spoke with felt that this particular training would be timely and seen in a positive light. The two managers I spoke with have expressed support for the program and the three employees seemed quite enthusiastic as well.

### Context: Learning Environment

GKLS Rochester has state-of-the art conference rooms with either projection systems or large plasma monitors and access to high-speed wired and wireless internet. While instructor-led training is possible using these facilities, it is not always practical since only about 30% of the target audience have laptops that they could move into a conference room. About 80% of the target audience use dual monitors when working with FrameMaker on either their laptops or desktop computers.

The 42 employees in the target audience are spread over at least six facilities in Rochester (Buildings 111, 129, 139, 218, 300, and 200) and to make the training practical, it will take place in an individual's own work cube using their own equipment and copies of FrameMaker and Paragraph Tools.

Developing the training as self-paced and only completed as needed (there is no need to take the training if they will not be doing legacy conversions) will ensure maximum retention of the information with minimal distractions. Since each employee has access to high-speed Internet, the delivery systems for training are not limited to just print materials.

#### **Context: Performance Setting**

It has been determined that there is a need for this type of training. Since the training is only on an “as needed” basis it will not require stand-up training. Independent, self-paced training would be the best fit. Currently, the development of this training program has strong support from two managers on the management team and as the training development continues, they will champion the training across Xerox nationally and internationally.

Target audience participants will use the training on an intermittent basis and will be able to lean on the training as “refresher” information if they have continuing needs for legacy document conversion. As some participants gain confidence, they can serve as mentors to authors entering GKLS as new employees. It is also anticipated that a forum, such as a Wiki, could be set up as a clearinghouse for FAQs and a location where updates to the training materials can reside.

[2.1 Instructional Need/goal analysis: 20/20](#)

[2.2 Instructional analysis: 57/60](#)

[2.3 Learner/context analysis: 20/20](#)

[Brian: excellent work, one of the best in the class. It's clear you have a good understanding of this piece of the ID process.](#)

[Peer review: excellent - given what was submitted, you obviously did the best you could – 20/20](#)