

Wiki-Based Training for Process Change

When two large pharmaceutical firms merged, they had to standardize and streamline their processes for registering pharmaceuticals with different regulatory authorities. A unified process and tools had clear business advantages: better management of the submission calendar and operational efficiencies.

This was solid business strategy, but users faced steep hurdles in order to realize the benefits:

- Six sites worldwide with less than 50 people
- Business processes, procedures and systems to be standardized between the two organizations
- Operations governed by a fluid submission calendar, making training in groups difficult
- Complex software with a reputation of requiring users to learn many exceptions
- Migration from paper to electronic submissions over several months, making sustained focus on the new process difficult

How did we accomplish this impact and address the hurdles?

We started by clearly defining the end state we wanted to observe. From that end state, we derived the metric for training success as completing the major kinds of actual submissions in a controlled environment. A business manager pulled actual work samples that represented 95% of work volume. The majority of time users spent learning needed to be hands-on with these training cases.

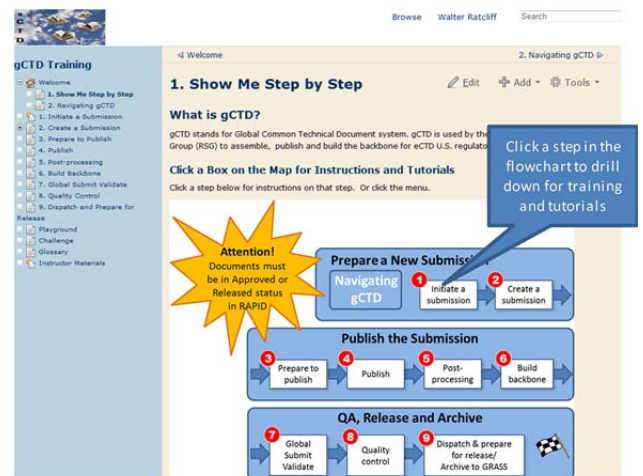
We also knew that people would need training just-in-time and that they would not be able to apply the new skills frequently enough to develop fluency. This pointed to a web-based solution, but the solution would need to be updated frequently. Conventional web-based training would be unjustifiably expensive for the relatively small audience.

The solution we chose was a training wiki. A wiki is a collaborative website (in this case on the intranet) that allows the easy creation and editing of interlinked web pages using a web browser. We provided the organization and initial structure and content to which users could easily add and modify.

How was the training wiki structured?

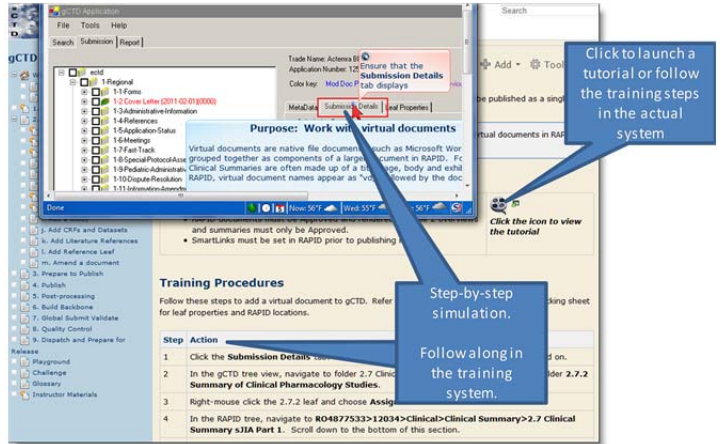
The training wiki presents a learning environment with four components.

1. Step-by-step procedures. This path walks you through each step of the business process. The wiki displays a picture of the business process (at right). By clicking a task in the picture, users drill down to a task sheet with procedures for completing that part of a submission. They can also click a link to run an interactive simulation of the task.
2. A “playground.” At any time in the training, or after learning a task, the wiki provides a set



of data for different submissions and links to a sandbox training system. The wiki also provides worked examples.

3. A “challenge experience.” At the completion of training, or anytime the trainee feels ready, the wiki presents a complex submission to complete independently. Managers use this exercise to judge readiness.
4. A problem/solution space. Users can submit problem situations either with or without solutions. A moderator validates or adds a solution, ensures that it fits into the template and publishes it, giving credit to the originator. Wikis come with the ability to search within the wiki space. Queries return training, examples and problem solutions.



During a pilot with super-users, we observed participants using the wiki content “live.” Each participant successfully published six submissions in the sandbox. To build added confidence, we divided participants into teams to create trouble scenarios for the other team. Each team beat expectations by fixing all the issues in less time than expected.

In the end, what did this collaborative approach accomplish?

As it turned out, we did not need to “sell” the new business process. The simplicity and hands-on structure of the wiki sold the process for us. Second, the structure of the wiki allowed those who don’t do electronic submissions every day to quickly get up to speed when needed. Third, the framework provides tools to ensure readiness. Finally, nearly all of the content can be quickly modified by users without specialized training resources.

In sum, the training wiki was a flexible, cost-effective and collaborative method of engaging a community of users in adopting a business process change.