



Learning Blueprint

Field Sales Onboarding

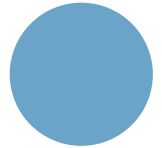


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Discovery Phase



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This document summarizes the results of the research used to conduct content and system analyses to support the creation of a standardized onboarding system for learners (aka transfers and new hires) of the Sales and Marketing teams within Big Pharma.

Note: the terms “learner” and “new hire” are used interchangeably throughout this presentation.



Introduction

Big Pharma Onboarding: Success Indicators

Business Constraint

- The launch and spin-off of a new company from within Big Pharma is driving an organizational need to expedite and innovate.
- Remote onboarding may be the new business model.
- There are multiple sources for each team's onboarding content, as well as multiple ways to disseminate crucial onboarding information across teams and hierarchical roles within Sales, sometimes resulting in confusion and duplicative work.

What Success Looks Like

- A standardized platform, with a look and feel similar to a website, has been created to house content, and outline a learning path for all roles onboarding with Sales & Marketing.
- The platform is a "go to" hub for "all things" onboarding; from what to expect on day one, to professional development recommendations for achieving job mastery.

Big Pharma Onboarding: Success Indicators

Business Constraint

- The business must acknowledge and incorporate roles, content and systems that will (and will not) be transferred from Big Pharma to the new organization.
- Creating clarity and support for new hires and transfers, whilst developing efficiencies for delivery due to the new “flat” organization requires a new system and process.
- Creating a new Big Pharma-branded curriculum for three major roles: Women’s Health, Biosimilars and CTL/CTRs would be duplicated and lengthy.
- Aligning mission, vision, values & messaging across the new organization, beginning with onboarding, is crucial.

What Success Looks Like

- Onboarding and course content has been reviewed for accuracy and relevancy across all roles and teams within Sales & Marketing at Big Pharma.
- Curricula is now housed on the website, with a clear learning journey associated with each role, eliminating the need to update "spreadsheets" containing links to content.
- Survey feedback reinforces all of the above.

Workflow Challenges: The Use Case

The purpose of this slide is to identify current state challenges according to key stakeholders (ie., who will find the proposed solution useful), then provide examples of how they will use the site during their normal workday.

Workflow Challenges – Current State

- New Hires/Transfers (NH/T) often don't receive vital onboarding information and/or equipment until after their first day.
- New Hires/Transfers are often confused about accessing so much (unorganized) content housed in mylearning.
- L&D Operations spends hours reaching out to ensure everyone is in the loop and to organize and troubleshoot content.
- L&D Operations spends crucial meeting time answering (out of scope) logistics questions.
- Business Leadership and Mentors are concerned about alignment with messaging & training before, during & after onboarding.
- Business Leadership and Mentors want to minimize duplication of effort in onboarding, and want to "put Big Pharma's best foot forward" with new hires.

Proposed - Future State

- New Hires/Transfers' first official communication may include a link to the onboarding "portal" that provides them with necessary steps for getting set up as an employee and completing their onboarding training.
- L&D Operations provides portal access to NH/T, referring FAQs to the site. Maintenance required is minimal and may include updates directly to content (ie., slides or MyLearning courses) without having to make many changes to the portal. Feedback is received via the website, allowing for analysis and quick action.
- Mentors & Business Leaders utilize the portal as a resource, referring NH/Ts to the site for FAQs, as well as gaining a clear understanding of scope of content, so there is minimal overlap and duplication of effort.

Desired Business Outcomes – (aka Requirements)



A new onboarding structure, process, roles, curricula & systems has been created on a single platform.



New hires & transfers feel supported with onboarding process and system that is easy-to-use and allows for autonomy.



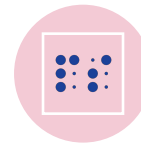
Repurposed and rebranded onboarding content has been completely transferred from Big Pharma.



The onboarding process and system is familiar, requiring minimal upskilling and maintenance.



Content has been aligned in such a way that provides clear messaging, vision and mission from onboarding to mastery.



The system & process supports role/content scalability, community and collaboration.

Resources & Deliverables

To date, Big Pharma resources have performed the following (checked) items. Additional Big Pharma resources will be needed to complete the rest:

- ✓ Discovery & Analysis: Complete learner evaluation of current onboarding process. Results included in the blueprint.
- ✓ Discovery & Analysis: Complete a systems analysis, to be used for delivery of Big Pharma onboarding content. Results included in the blueprint.
- ✓ Discovery & Analysis: Complete a curriculum analysis, to be used to create and maintain alignment of “Big Pharma” branded content during onboarding, including designing a “weekly” schedule across all roles. Results included within the blueprint.
- ✓ Design Blueprint: Recommend a process and system that will house and organize onboarding training and content, utilizing current productivity tools and systems. Results included in the blueprint.
- Development: Create a system or website that provides a clear learning path for Big Pharma new hires.
- Development: Adapt, rebrand and repurpose training content for Big Pharma’s new onboarding system or website.
- Implementation: Upload content to the new system or website, perform train-the-trainer sessions for Big Pharma learning and development and leadership so they can maintain and/or integrate the content into their onboarding plans.
- Evaluation: Build an evaluation and feedback process into the system.
- Evaluation: Perform a user feedback evaluation after piloting.

Identified Risks

The following risks have been identified. Please see Risks & Mitigation Plans slide within the Analysis section for responses to each risk.

- **Resource availability.** Currently, there is only one contractor assigned to the analysis and design of this project. Their contract ends March 31, 2021. There are no other developers currently assigned.
- **Resource availability.** Currently, there are only two (2) dedicated Big Pharma L&D employees dedicated to onboarding all Sales and Marketing roles.
- **Resource availability.** Currently, MyLearning, Office 365 and Sharepoint are being used to track and house eLearning for Big Pharma onboarding and will be transitioned to Big Pharma. It is unknown if all features are being used to track and remediate and guide new hires through onboarding, and any additional costs associated with that.
- **Scheduling.** There is a limited amount of time to design, develop and launch Big Pharma's new sales onboarding program.
- **Technical Difficulties.** Development within a new platform may present the team with technical unknowns that will need to be addressed, including but not limited to: access to systems, the need for upskilling, transitioning from Big Pharma to Big Pharma, remote work issues, tech support time constraints.
- **Proprietary and/or Confidential tagging.** Content may or may not require proprietary tagging or PII tagging.
- **New Role Identification.** There is a possibility that new roles will be created for Big Pharma Sales.
- **Alignment.** There may be content from other Big Pharma professional development programs to consider, such as Summit workshops, mentoring and clinical training programs, etc.



Project Constraints



Key Constraints:

- **Time:** Big Pharma will be C-I-C through to June with all associated constraints in play.
- **Time:** Limited time will be available to dedicate to live, synchronous onboarding, due to resource constraints.
- **Resources:** The new Learning and Development team for Big Pharma Sales and Marketing onboarding currently consists of two people, plus a contractor.
- **Resources:** Repurposing and rebranding the current, relevant onboarding training from Big Pharma to Big Pharma.
- **Resources:** MyLearning has been identified as the LMS to house eLearning, and Big Pharma will utilize Office 365 productivity tools, including Teams, Sharepoint, etc.
- **Scope:** The onboarding training is for existing Women's Health and Biosimilars sales representatives and associated roles that have transitioned to Big Pharma.



Analysis Phase



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This section summarizes the results of the research used to conduct systems and content analysis to support the creation of a standardized onboarding system for New Hires and Transfers of the Sales teams within Big Pharma.



Introduction

Analysis Summary: Five Principles of an Onboarding System

1 Foster a supportive, yet self-guided learning path

2 Expedite proficiency for transfers, new hires & recent grads

3 Define learning paths for each role: outline explicit onboarding tasks & learning goals

4 Provide focus, clarity and single source of truth for all users

5 Design for ease-of-use & scalability for all users

Why is a learning portal the best solution for Big Pharma onboarding?

The design is based on interviews and feedback from New Hires as well as business and L&D stakeholders. Resulting in five guiding principles.*

These results, along with sound pedagogical, systems research & determined quality standards, will inform decisions, and shape the new hire and transfer learning journey for Big Pharma Field Sales in the US.

*See appendix for research & reasoning behind each principle.

Analysis: Methodologies

Focused Interviews & Feedback Surveys were conducted alongside L&D Operations over a period of eight weeks with a variety of stakeholders and resources. Some key questions posed are listed on the next slides. The sessions included:

1. Leadership Sessions (Field Sales Managers & Mentors) consisted of primarily discovery and fact-finding discussions, with key questions regarding curriculum and overall goals for new hire onboarding woven throughout.
2. Interviews with Resources & Stakeholders: Discussions were held with Big Pharma stakeholders (L&D Ops, IT), as well as Big Pharma counterparts. The discussions took place as needed, were in-depth and any prior decisions made were adapted to new information.
3. Weekly Onboarding Touchpoints: L&D Operations held weekly touchpoints with their first onboarding cohort every Monday morning to discuss training progress, blockers, and suggestions for the next cohort. There was also discussion regarding the Big Pharma to Big Pharma transition, from an onboarding point-of-view.
4. Feedback Survey w/New Hires/Transfers: L&D Operations submitted a short “three-question” survey, with an opportunity to provide open-text feedback, to the first cohort. Results are pending and will be added to the appendix when available.



Analysis: Key Questions & Answers

What is/are your vision/goals for onboarding new hires to an Big Pharma team?

“The ability to align with business initiatives for professional development (eg., the Summit Workshops).”

“The ability to provide consistent messaging to their new hires from day one.”

“The ability receive vital onboarding or other technical support contact information.”

“The ability to view a clear, organized learning path that is linked to all role-related training content, including “MyLearning.”

“The ability to minimize duplication of effort in onboarding.”

“The ability to put Big Pharma's ‘best foot forward’ with new hires.”

Analysis: Key Questions & Answers II

Based on prior onboarding processes and the current delivery method (remote), what would you want to keep and what would you change to onboarding at Big Pharma?

“The ability to repurpose training content that is transferring from Big Pharma.”

“The ability to create/utilize similar informational resources available at Big Pharma, which will also support our roles at Big Pharma.”

“To devise a system that is adaptable and scalable for whatever the future may hold in terms of hiring (eg., hiring college grads, or adding training modules).”

“To devise an onboarding system that requires minimal implementation & maintenance, due to the flat organizational model at Big Pharma.”

“The ability to maintain remote, self-guided training; as face-to-face onboarding will most likely not return.”

Analysis: Key Questions & Answers III

- Goals for the Big Pharma L&D organization may include creating learning portal that supports all onboarding roles for the Field Sales Teams, how would this portal support the learning goals for Big Pharma?

Learning Goals for managers, mentors, transfers and new hires include:

- Compare and contrast similarities and differences between former and new organizations.
- Utilize informational resources and FAQs to find answers to questions more quickly.
- Expediate training using an organized, tailored, accessible curriculum vetted at Big Pharma.
- Remove confusion and create alignment on expectations, etc., with managers and mentors.
- Provide self-guided training in a familiar, 21st Century online environment.
- Provide additional context surrounding the onboarding process – ie., remove ambiguity and provide a “go-to” hub for onboarding support.

Analysis: Key Questions & Answers IV

Goals for the Big Pharma L&D organization may include creating learning portal that supports all onboarding roles for the Field Sales Teams, what would you consider your “must haves” or “nice to haves” for such a system?

As a result of all sessions, we determined five (5) “must have” guiding principles that the portal should adhere to:

- Foster a supportive, yet self-guided learning path
- Expediate proficiency for new hires, transfers and recent grads
- Define learning paths for each role; outline explicit onboarding tasks *and* curricula
- Provide focus, clarity and a single source of information for all users
- Design for ease of use & scalability for all users

The following were considered as “nice to have” or “future considerations” for a learning portal:

- The ability to add learning phases, or information about training beyond onboarding
- The ability to copy and adapt to other onboarding roles within Big Pharma

Analysis: Assumptions Identified

Assumption 1: Identification of systems and curricula that will be available to sales roles is current and ongoing through June 1 at minimum. *The assumption is that decisions regarding 'need' and 'budget' are ongoing during C-in-C.*

Assumption 2: Curricula for each onboarding role was defined for a pilot cohort. Curricula used was previously researched and vetted for each Big Pharma role prior to moving to Big Pharma. *The assumption is that each job description will remain the same for the spin-off.*

Assumption 3: Onboarding content includes all materials and resources available to each role, whether created by L&D or not. For example, any MyLearning coursework sourced outside Big Pharma or no longer owned by original author; or any training available for the productivity tools used by Big Pharma. *The assumption is that although L&D will own & maintain some specific content for onboarding, there is other content that will not fall under the purview of L&D – but will still be posted in the portal as part of a holistic onboarding solution. (Links for which will refer to original content whenever possible.)*



Analysis: Additional Findings

During interview and feedback sessions, there were some key findings that may affect design and development of the Big Pharma Onboarding Portal:

1. During the onboarding cohort touchpoints, we identified additional content (L&D and other) used by each role to support their work.
2. During the onboarding cohort touchpoints, we began discussions surrounding availability and accessibility to other resources outside of L&D; some of which may have been available at Big Pharma; however, may or may not be available to Big Pharma.
3. During discussions with Big Pharma L&D, we determined that a full audit of MyLearning may be a necessary part of identifying all courses that will be used at Big Pharma. To be completed during design and development.
4. During discussions with Big Pharma L&D Ops and IT, it was determined that IT will only be available for very minimal support.
5. During discussions with Big Pharma L&D and IT, only internal productivity tools will be available to L&D for development (to create an onboarding portal).
6. During discussions with Big Pharma L&D and IT, some systems have been identified as “not transitioning over,” however, some system/transition decisions have yet to be made.



Learner Personas vs. User Profiles

The differences between learner personas and user profiles have to do with the differences between a “curriculum” and a “system.” Specifically, learner personas outline who, what, why, how and when in creating training, activities or other modules; by speaking to learning style, modalities, preferences, etc.

User profiles address who, what, why, how and when for everyone that will be using a system. User profiles are based on use cases for individual stakeholders, while also fulfilling business requirements for the org. More notably, user profiles can consist of learners - and anyone else using the system, whereas learner personas are created to paint a specific picture of the type of learner the curriculum is designed for.

Learner Personas

- Seasoned New Hires
- Transfers
- Recent Grads

User Profiles

- New Hires
- Transfers
- L&D Operations
- Business Leadership
- Mentors

Meet Renee & John



Like Big Pharma, Big Pharma wants more than just an onboarding program.

The Big Pharma Learning Journey must offer an **EXCEPTIONAL** onboarding experience that helps new hires and transfers answer **FIVE KEY QUESTIONS**.

The Big Pharma Onboarding program must:*

- Align and complement Big Pharma vision, mission, values.
- Outline learning paths that are role-specific.
- Provide a framework for long-term success in their role.
- Provide contact information and other resources that may be needed during onboarding.
- Act as a resource and single source of truth for new hire managers and mentors.

What do we believe in around here?

How will my own skills and strengths fit within the team?

What is my role?

Who are my partners?

What does my future here look like?



John



Renee

Learner Persona #1: Renee

Meet Renee – An Account Executive

- Held Roles at Big Pharma for 20 years
- Former CTL, Former Chemist
- Graduated from Georgetown University
- Majored in Chemistry
- Has built a variety of customer relationships
- Comfortable with Big Pharma technology
- Wants to understand the constraints of her new role
- Wants to understand the differences/similarities between her past and present roles



What does Renee (Learner 1) care about?

The following qualities are important to Renee in an onboarding program...



- Connected to company, leaders, and peers
- Eager to contribute to building foundational processes
- Easy access to live support and inside information
- Partnership with people of similar backgrounds and experience
- Transparent and frequent communication

- Connecting the dots between old and new roles, customers, constraints
- Clear learning and performance expectations
- Visibility into the entire onboarding journey
- Explicit milestones each step of the way
- Understanding the why and how its connected to building the new co mission and vision

- Knowing where to go, what to do, when and how for support
- Learning by doing while on the job
- Mistakes avoided by asking the right questions, and meeting training expectations
- Knowing exactly what to write and say (or not) and how to say it in front of customers (to maintain compliance, business constraints)

- Modern learning techniques and delivery methods may require some upskilling
- Deconstructing new co org models to make sense of them
- Removing complex blockers and understand the underlying reasoning and intent behind decisions
- Relevant content broken down into small pieces, distributed, and available just-in-time
- Easy access to tools, systems, and resources

Learner Persona #2: John

Meet John – A CTL / CTR

- New to the workforce
- Recent graduate from Temple University
- Majored in psychology with a minor in biology
- Studied abroad in Asia his junior year
- Fluent in two languages
- Completed his MBA
- Comfortable with mobile tools
- Expects on-going feedback for his development

What does John (Learner 2) care about?

The following qualities are important to John in an onboarding program...

Connection

- Connected to company, leaders, and peers
- Immersion in cultural norms
- Belonging
- Easy access to supportive community
- Partnership with people close in tenure
- Transparent and frequent communication

Clarity

- No guessing what the role requires
- Clear learning and performance expectations
- Visibility into the entire onboarding journey
- Explicit milestones each step of the way
- Knowing who and what to go to when and how

Confidence

- Understanding the why and what's in it for me
- Learning by doing
- Safe-to-try simulations
- Mistakes tolerated
- Multiple cycles of practice and feedback
- Knowing exactly what to say (or not) and how to say it in front of customers

21st Century

- Modern learning techniques and delivery methods
- Balance of independent and social experiences
- Personalized, flexible, and playful
- Content broken down into small pieces, distributed, and available just-in-time
- Easy access to tools, systems, and resources

User Profiles: Meet Everyone Using the System

The Big Pharma Learning Portal will not only be used by New Hires and Transfers; it will also be a key resource for Managers and Mentors, as well as the primary delivery method that L&D Operations will use for onboarding.

The Onboarding Portal must:*

- Align and complement enterprise onboarding activities.
- Align and complement functional and role-specific onboarding.
- Provide a framework to accomplish this alignment.
- Inspire the new employee and manager to integrate company, organization, team, and role-specific onboarding to decrease time to productivity.
- Provide scalability, with potential to bridge ongoing employee development beyond the first 90 days.
- Act as a resource and single source of truth for new hire managers and mentors.

How soon will my new hire be able to begin work?

I'm supposed to Mentor a new hire, what do they already know?

Where can I direct my new hire for questions about _____?

Who do I call if I haven't received my work laptop yet?

What other resources are available to support my work?

* Source: Creating an Exceptional Onboarding Journey for New Employees, GALLUP

New Hires & Transfers



Roles

New Hires are either users hired from within the industry or hired directly out of college and may or may not have had exposure to similar onboarding or learning systems.

Transfers from Big Pharma will have had at least some experience navigating complex intranet systems; however, they may be more used to “white-glove” (or face-to-face) assistance with onboarding to a new role.

User Priorities

During our discussions, we heard the following from users who were in the process of onboarding with Big Pharma:

1. They wanted a system that was easy-to-use, familiar.
2. They wanted a system where they could find answers to their questions, or at least contact information so they could find someone to help.
3. They wanted a system that could help organize their MyLearning content, as logging into MyLearning resulted in an overwhelming list of courses.
4. They wanted a “one-stop-shop” for everything needed to onboard and prepare for their jobs.

L&D Operations

Role

Currently, there are two (2) members of the L&D Operations team, which is responsible for onboarding all of US Field Sales Representatives for Big Pharma. This puts a restriction on the amount of time available to train and/or communicate with each cohort and/or each new hire individually.

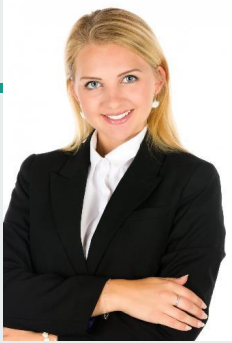
User Priorities

During our discussions, we heard the following from the L&D Operations team:

1. They wanted a system that was easy-to-use, familiar.
2. They wanted a system that required little to no maintenance.
3. They wanted a system that was flexible, and was able to link to or interface with peripheral systems that Sales uses.
4. They wanted a system that utilized current productivity tools, requiring little to no involvement by Big Pharma IT.
5. They wanted a system that would support self-guided instruction for new hires.
6. They wanted a system that would support the new “flat” organizational model, yet still provide an exceptional onboarding experience.



Sales Managers & Mentors



Roles

Mentors The Mentor is a key member of the Field Readiness Program for the new Account Executive at Big Pharma. Frequent engagement with mentor to review and pull through the learning curriculum is critical to solid preparedness for customer interactions.

Sales Managers (Directors) provide key direction for building a business, as well as support for each sales new hire, whether it's for customer interactions, contract negotiations or other compliance issues.

User Priorities

During our discussions, we heard the following from Sales Managers and Mentors supporting their new hires:

1. They wanted a “one-stop-shop” for their new hires.
2. They wanted the ability to provide messaging, vision, mission during onboarding; that is aligned throughout the building of their business.
3. They wanted a program that put Big Pharma’s “best foot forward.”
4. They wanted the ability to scale and/or provide their own tailored experience for their new hires.
5. They wanted the ability to view a resource and understand what their new hire was doing during onboarding.



Curriculum Analysis

Overview

The purpose of the curriculum analysis was to:

- Define the different training tracks (each role),
- Identify the process for which each New Hire will access content,
- Identify repurposed content from Big Pharma,
- Identify content that will not transfer from Big Pharma,
- Identify any productivity content that could be added to the portal (ie., links to Teams training videos).

Out of Scope

Although we felt that a detailed audit of the MyLearning courses was necessary to determine access and ownership, for example; it is out of scope for this blueprint due to accessibility, resource and time constraints. It is recommended that a course audit take place during design and development of the learning portal, however; as it will certainly inform the role-based product training.

[*Curriculum list for SAEs \(link here\)](#)

Curriculum Analysis: Roles/Tracks



*See appendix for a full course list for each role.

Curriculum Analysis: Current State



Phase 1
“OWN IT”
(Compliance)

Phase 2
**“BRING YOUR
FIRE”**
(Product)

Phase 3
**“RISE
TOGETHER”**
(Acct Mgmt)

Phase 4
“KEEP MOVING”
(Prep for Field
Readiness)

- Self-guided Study
- Field Knowledge & Awareness
- Field Policies
- Veeva
- Mentor Check-in
- Director Check-in

- L&D Touchpoint
- Marketing Strategy Touchpoint
- Self-guided Study
- Medical Backgrounders
- Product PI/Exams
- Competitor Backgrounder
- Mentor Check-in
- Director Check-in

- L&D Touchpoint
- Marketing Touchpoint
- Self-guided Study
- Account Management
- Ecosystem
- Payer
- Mentor Check-in
- Director Check-in

- L&D Touchpoint
- Self-guided Study
- SME-led discussions
- Director certifies Field Readiness

Systems Analysis: Overview

Overview

To understand the systems available to use at Big Pharma, we first needed to have a discussion with the Big Pharma side of L&D to discuss which systems were currently being used for sales training, and which systems would be available to us after spin off. We also held discussions with the new Big Pharma IT team. Here are a few key discoveries:

- MyLearning would continue to be used at Big Pharma, and the new L&D team was currently in the process of transitioning ownership of relevant curricula to Big Pharma. However, this did not address how these transitioned courses would be updated after the move (eg., by the author at Big Pharma or by Big Pharma L&D); and should be considered a risk during design/development as linking out to them from the portal could be affected.
- Discussions held with Big Pharma L&D and Big Pharma IT revealed that MyLearning courses could have a single course code, however, that code could potentially cover hours of training. Thus, a detailed audit of all courses (MyLearning, et al), would be highly recommended. This audit could prove to be very useful for New Hires, in that time recommendations could be made for completing course content during the onboarding period (eg., it's difficult to tell how many individual hours should be scheduled for training, with such varying lengths).
- The Office 365 Productivity suite would continue to be used at Big Pharma, and accessibility to Sharepoint for development could be arranged as soon as needed. (It should be noted that IT was relieved to know they would not be needed for development, as they are currently building out their team.) Other systems created for or moving to Big Pharma are listed on the following slide.

Systems Analysis: Available Content Platforms

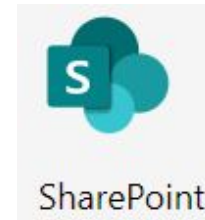
The following internal content platforms will be available to use at Big Pharma:

- Workday Learning (MyLearning)
- Teams
- SharePoint (Sites)
- SPARK
- Excel & Powerpoint

However, there is only one platform from the list above that will support the five guiding principles:

- Foster a supportive, yet self-guided learning path
- Expediate proficiency for new hires, transfers and recent grads
- Define learning paths for each role; outline explicit onboarding tasks *and* curricula
- Provide focus, clarity and a single source of information for all users
- Design for ease of use & scalability for all users

That platform is Sharepoint. Sharepoint will allow Big Pharma L&D Operations to create a delivery system that organizes content in an easy-to-use, familiar, scalable way.



Risks & Mitigation Plans

The following risks have been identified. Please see Risks & Mitigations slide for responses to each risk.

- Resource availability. Currently, there is only one contractor assigned to the analysis and design of this project. Their contract ends March 31, 2021. There are no other developers currently assigned. Mitigation: Investigate and procure additional resources according to blueprint.
- Resource availability. Currently, there are only two (2) dedicated Big Pharma L&D employees dedicated to onboarding all Sales and Marketing roles. Mitigation: To accept and work within this constraint, developing processes and systems with this in mind.
- Resource availability. Currently, MyLearning, Office 365 and Sharepoint are being used to track and house eLearning for Big Pharma onboarding and will be transitioned to Big Pharma. It is unknown if all features are being used to track and remediate and guide new hires through onboarding, and any additional costs associated with that. Mitigation: To investigate all systems currently available to Big Pharma, through the lens of onboarding process/system development.
- Scheduling. There is a limited amount of time to design, develop and launch Big Pharma's new sales onboarding program. Mitigation: To accept and work within this constraint, developing key milestones and limiting scope.
- Technical Difficulties. Development within a new platform may present the team with technical unknowns that will need to be addressed, including but not limited to: access to systems, the need for upskilling, transitioning from Big Pharma to Big Pharma, remote work issues, tech support time constraints. Mitigation: To review each risk as they surface, developing a mitigation plan as needed.
- Proprietary and/or Confidential tagging. Content may or may not require proprietary tagging or PII tagging. Mitigation: Determine an overarching policy for handling proprietary material, including identification, tagging, disclosure, etc.
- New Role Identification. There is a possibility that new roles will be created for Big Pharma Sales. Mitigation: For this charter, those roles would be onboarded using as much repurposed content as possible, with managers and mentors taking over role-based training until such a time any new content for that role is created.
- Alignment. There may be content from other Big Pharma professional development programs to consider, such as Summit workshops, mentoring and clinical training programs, etc. Mitigation: Make sure the messaging and content is seeded within onboarding, thereby achieving alignment - from onboarding to on the job training, during mentoring to mastery of job responsibilities



Design & Methodology Recommendations for a Holistic Solution



[Introduction](#)

[Applying Design Thinking to a Holistic Solution](#)

[Applying the ADDIE Model to a Holistic Solution](#)

[High Level Design: The Learning Experience](#)

[High Level Design: Guiding Principle Outcomes](#)

[High Level Design: Learning Solution Requirements](#)

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This section summarizes the strategies and recommendations for the (high-level) design and development of a holistic solution.



Introduction

Applying Design Thinking to a Holistic Solution

- ✓ Empathize – Interviews and surveys were conducted with learners and other users: to determine current onboarding processes and identify pain points...
- ✓ Define - The feedback will be incorporated to make intentional design decisions; for a new way of organizing multiple resources, as well as to refine and focus the curriculum for each role...
- ❑ Ideate – The entire Big Pharma L&D team will be a part of the design and development process; utilizing iterative development methods, with regular reviews...
- ❑ Prototype – Prototypes have already begun, with the L&D Operations team having begun the foundational groundwork in creating presentation “modules” for the first onboarding cohorts – beginning March 1...
- ❑ Test – It is recommended that a number of feedback systems be put into place; beginning with the pilot cohort, continuing with 60 or 90-day surveys (following Kirkpatrick’s model), to a platform-based feedback button that will send an email to the site owner...
- ❑ Implement – It is recommended that formal training sessions and/or handoff of the onboarding site occur for all stakeholders, tailoring each training to their role as a user. (eg., videos for New Hires, recorded-live handoff for Big Pharma L&D)...

Applying the ADDIE Model to a Holistic Solution

ADDIE is a development model that is commonly used in organizations as a methodology for research, design and development of curricula and/or learning systems:

Analyze – Refer to the “Discovery” and “Analysis” sections of this slide deck to understand the workflow challenges, use cases, desired business outcomes, risks, constraints, methodologies used, learner and user profiles, curriculum and systems analyses. In other words, the majority of this blueprint outlines a comprehensive analysis for this initiative.

Design – For this initiative, the framework for designing the solution has begun; however, much of the design work is to come, and will be a result of the course audit and creating comprehensive training modules for each role.

Development – It is expected that the Development of this solution will be quite fast, allowing for rapid prototyping, review and iterative execution. It has been said that instructional design primarily consists of “90% analysis and research, and 10% development.”

Implementation – There are several recommendations for conducting a smooth handoff: piloting the site with a cohort or two, garnering their feedback, making introduction videos for New Hires and users, as well as recording a live training session for managing the site (for L&D Operations). Ultimately, the final delivery will be in the hands of Design and Delivery.

Evaluation – It’s recommended there be an informal, summative “certification” of field readiness, along with a system to provide overall feedback – for the site, and for the curriculum. Ultimately, evaluation decisions will be in the hands of Design and Delivery.

High Level Design: The Learning Experience



High Level Design: Guiding Principle Outcomes

What are the results when following the five guiding principles below?

1. Foster a supportive, yet self-guided learning path.
2. Expediate proficiency for transfers, new hires, and recent grads.
3. Define learning paths for each role: outline explicit onboarding tasks and learning goals.
4. Provide focus, clarity and a single source of truth for all users.
5. Design for ease-of-use and scalability for all users.

New Hires are guided through a robust knowledge base, discovering and choosing what they need to succeed along the way.

1

By applying science and focus, New Hires will have a clear idea of what to expect, what to accomplish and how to be successful.

2

Clear field readiness expectations have been set with managers and mentors, resulting in a clear path for all.

3

Behavioral science methodologies have been applied to create peak performance before, during and after onboarding.

4

A learning workflow has been created, including self-guided and guided experiences; it is scalable, personalized and adaptable.

5

*See appendix for research & reasoning behind each principle.

High Level Design: Learning Solution Requirements

Learning Solution Overview

Overall Learning Solution Goal: Provide a single interface to curated tools and curricula for all Big Pharma U.S. Field Sales Roles.

Learning Solution Objectives:

- Fosters a supportive, yet self-guided learning path.
- Expediates proficiency for transfers, new hires, and recent grads.
- Defines learning paths for each role: outlining explicit onboarding tasks and learning goals.
- Provides focus, clarity and a single source of truth for all users.
- Designed for ease-of-use and scalability for all users.

Design & Development Options

What are recommended design/development options?

A Sharepoint website is the recommended platform because of its familiarity, ease-of-use, accessibility and scalability to all users in the organization. SPARK or other platforms could be added to create a more robust learning community, however, these platforms also require additional resources to develop and maintain; resources that are not currently available for the new company, Big Pharma. Sharepoint is the best solution for the new company in its current state.

The main concept is to be a single point-of-entry for new hires, transfers and recent grads to obtain critical onboarding information, enterprise training, product training and business skills building. The site will also provide access to training on productivity tools used within Big Pharma for quick ramp up into their roles.

It is also recommended that content for managers and or mentors be created (or repurposed), to support new hire onboarding. For example, providing access to the mentor training or sales manager playbooks (mentors and managers only).

Recommended Learning Approach

A module-based curriculum (6 weeks) residing on an easy-to-use, scalable platform, where new hires can access new information at their own pace: via video & curated course checklists, with information for attending mentor and director check-ins, as well as live, synchronous meetings.

Content Source(s)

Currently the content exists in multiple venues: links listed in excel spreadsheets, MyLearning courses, PowerPoints, etc. It is recommended that a full course audit take place during design.

Specific Requirements

- Easy to use, update and maintain
- Connectivity to all linked content
- Ability for learners to provide feedback while using the platform
- Menus that allow for role selection

Learning Solution Measurement Plan

- Site utilization data, including searches
- MyLearning etc. course tracking
- User feedback surveys (final module), platform feedback
- Field readiness certification



Appendix

[Big Pharma L&D Organization & Vision](#)

[Design Thinking Strategy](#)

[The ADDIE Model](#)

[Applying Gilbert's Behavioral Engineering Model](#)

[Survey Feedback \(Flagship Cohort\)](#)

[Five Guiding Principles and their Outcomes \(Breakouts\)](#)

[Other Learning Experience Design Principles](#)

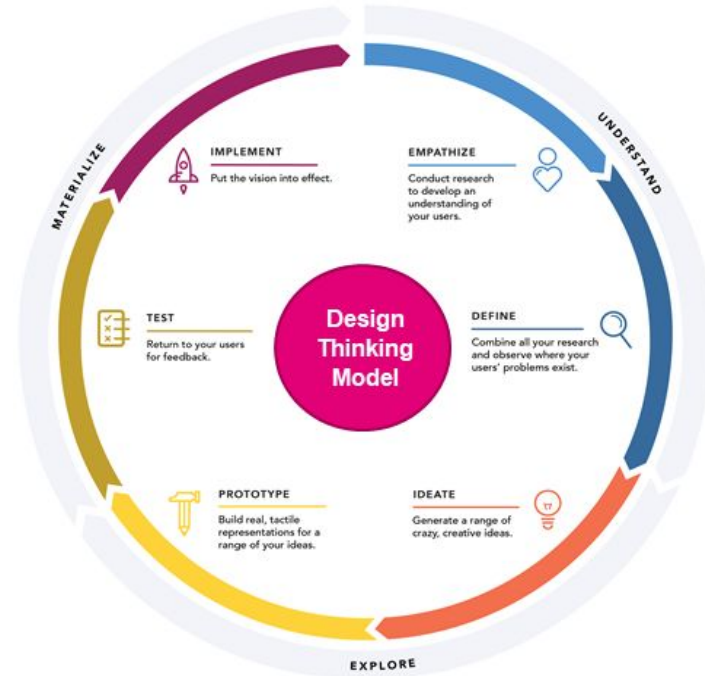
[Other Research and Resource Links](#)

#Click Slide Titles to Jump to Topic#

Design Thinking Strategy

A five-phase description of the design innovation process is described by Plattner, Meinel, and Leifer as: *(re)defining the problem, needfinding and benchmarking, ideating, building, testing*.^[22] Plattner, Meinel, and Leifer state: "While the stages are simple enough, the adaptive expertise required to choose the right inflection points and appropriate next stage is a high order intellectual activity that requires practice and is learnable."

The process may also be thought of as a system of overlapping spaces rather than a sequence of orderly steps: inspiration, ideation, and implementation. Projects may loop back through inspiration, ideation, and implementation more than once as the team refines its ideas and explores new directions.



<https://www.nngroup.com/articles/design-thinking/>
https://en.wikipedia.org/wiki/Design_thinking#Representations_and_modelling

The ADDIE Model



ADDIE is a development model that is commonly used in organizations as a methodology for research, design and development of curricula and/or learning systems. Each letter of “ADDIE” signifies an important step:

- Analyze the instructional goals, target audience and required resources.
- Design a learning solution that aligns objectives and strategies with instructional goals.
- Develop learning resources, validate and revise drafts, and conduct a pilot test.
- Implement the learning solution by preparing the learning space and engaging the participants.
- Evaluate the quality of learning resources and how well they accomplished instructional goals and objectives.

Survey feedback

Survey feedback from the first Big Pharma onboarding cohort included these additional findings and comments:

Question 1: How confident are you in applying what you have learned during Field Readiness?

- I am very confident in applying what I've learned. I'm not as comfortable with how I will apply the info I've learned, but I'm certain that's part of the transition to a new role.
- Very Confident
- Very confident
- V. Confident

Question 2: What was the most useful thing you have learned?

- The conversations regarding practical application of the information was most helpful. Those additional sessions were very helpful.
- Decoding the Hospital module was very informative
- The content Matthew Stafford and Matt Forney shared around crafting relevant and compliant emails
- The weekly touchpoints with the team. Especially, the session lead by Matthew Stafford, Jim Altomare and Matt Forney on email communication, engagement, etc.

Survey feedback

Survey feedback from the first Big Pharma onboarding cohort included these additional findings and comments:

Question 3: Please comment on anything you would recommend changing or including as part of a learning portal dedicated to Field Readiness?

- Not much other than what I've shared in the past. It may be helpful to have a reference sheet that tell you where to get to information based on needs (for example, the difference between Hera and Genesis and what information is available at each site.)
- I believe the myLearning based training is the foundation of all the basic competencies of the AE role. The informal training such as the HFAE and Payer AE calls were also extremely helpful. The second piece to Field Readiness will be the mentor relationship and how that mentor translates the training into practical action. An idea would be to bring the mentors together and give them maybe a checklist of different topics to cover in the mentor conversations as the new hire may or may not know the different things to ask about what is relevant to the position.
- Need to add any and all HCEI training for relevant products. This is a critical aspect of AE role.
- Continue the self-serve format broken down into segments. Perhaps include exact course numbers and live links. Continue with weekly huddles and the spirit of "what else do you need?". Also, really valued having the mentors included in these discussions.

Reason #1: Foster a Supportive & Self-Guided Learning Path

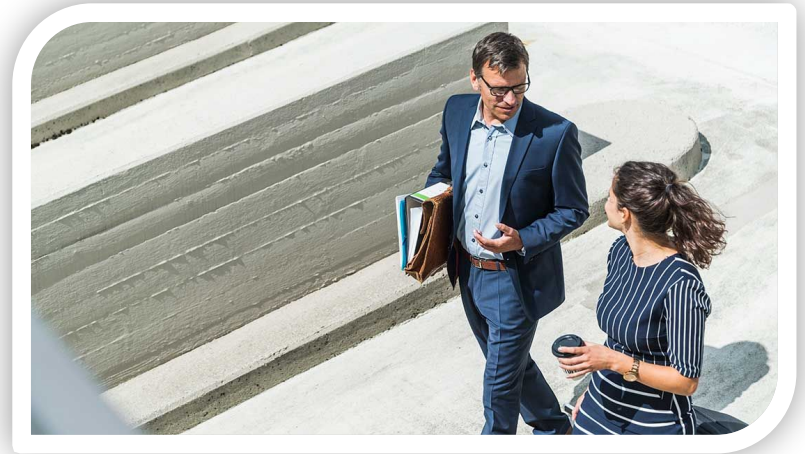
TODAY

New Hires currently receive a PowerPoint slide deck and an Excel spreadsheet outlining their online learning curriculum. They're also expected to attend live training sessions held by L&D Ops, Mentors, and their upline managers. Neither include much scaffolding information, ie., onboarding technology, productivity tools info, etc.



TOMORROW

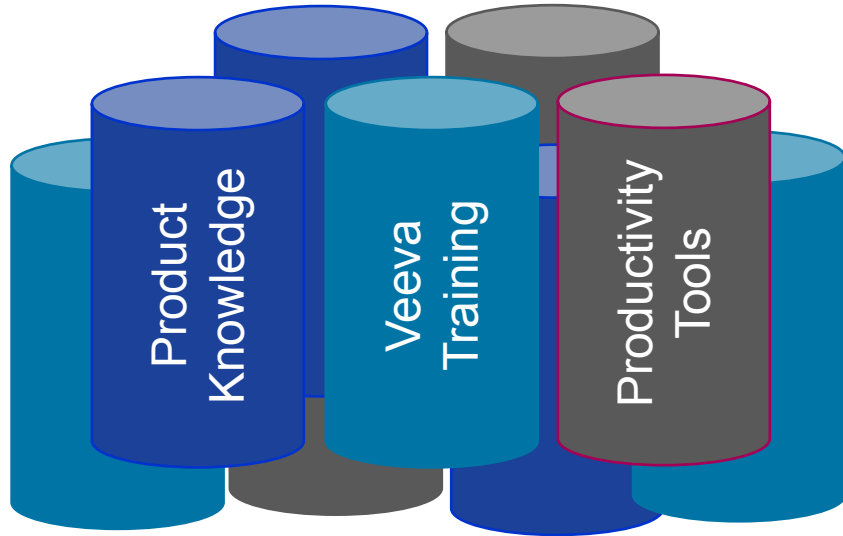
New Hires are guided through a robust knowledge base in diverse topics; including peripheral / productivity tool training if needed; discovering and choosing what they need to succeed along the way.



Reason #2: Expediate Proficiency for New Hires, Transfers & Recent Grads

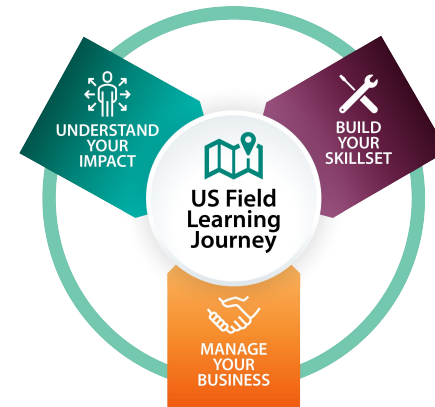
TODAY

New hires develop their knowledge from silo to silo; not only is it daunting, but time-consuming; creating a steep learning curve that can delay field readiness.



TOMORROW

Behavioral science teaches us how people create and sustain peak performance. Applying this science to the design of the new hire program will expedite proficiency and create continuous cycles of performance improvement. New Hires will have a clear idea of what to expect, what to accomplish and how to be successful; without wasting time hunting down tools and resources.



Reason #3: Define Learning Paths for Each Role

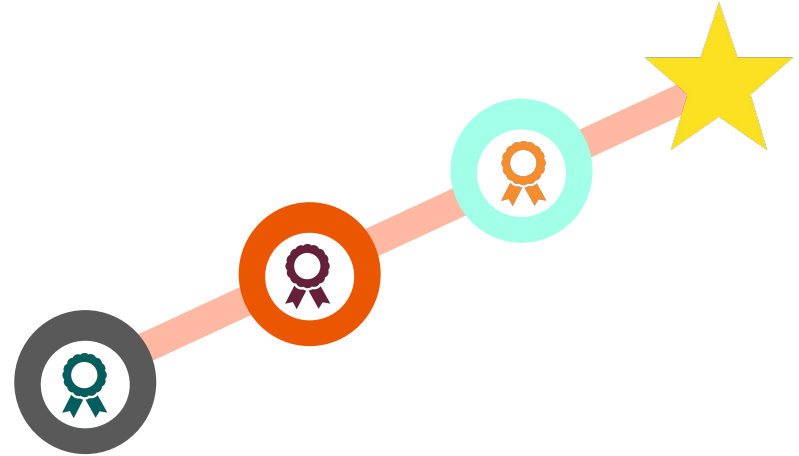
TODAY

We spend time and effort on disseminating all information for each role for each cohort. We also set up live, synchronous training sessions for each role, with each stakeholder. Efforts for both can not only be time consuming for a team of two; but for each stakeholder involved.



TOMORROW

Clear field readiness expectations have been set with managers & mentors. A module-based curriculum has been standardized and tailored accordingly, using checklists and videos throughout.



Reason #4: Provide Focus, Clarity and Single Source of Truth

TODAY

We over-index on requiring new hires to consume vast amounts of information and certifying how much they know up front, with the responsibility of “context-making” and “knowing what to know” falling squarely on their shoulders.



TOMORROW

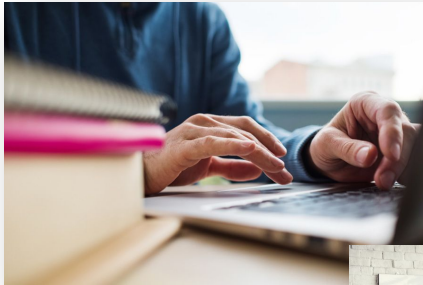
New Hires will receive a link that provides access to a comprehensive curriculum, as well as FAQs for onboarding technology and other productivity tools – all in a single website specifically designed for their roles.



Reason #5: Design for Ease of Use and Scalability

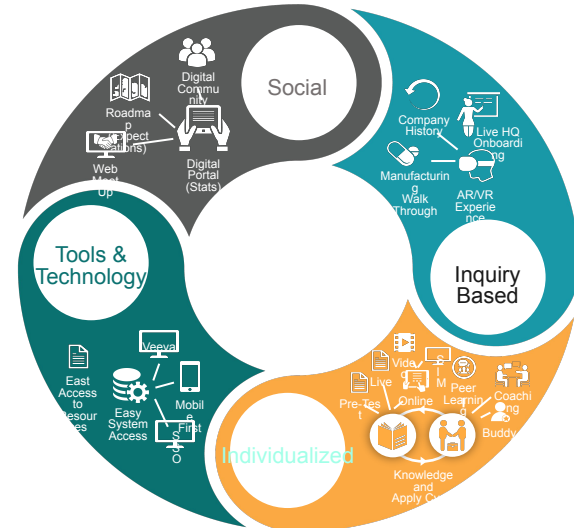
TODAY

Learning has many parts and pieces, and almost exclusively occurs on a computer, synchronously or asynchronously.



TOMORROW

Each module has been carefully crafted with all users in mind, with access to any needed scaffolding (eg., access to mentor training or productivity tool training links) for seamless ease-of-use.



Other Learning Experience Design Principles

This learning solution aligns to other solutions in flight, so it is important to ensure a cohesive experience for the learner as they move between and amongst these programs.

Learning Principles

Big Pharma Field Sales Onboarding

Blooms Taxonomy- Level for the program

All courses have been designed to touch on all levels of Bloom's with an initial focus on the Apply, skill build – level. The learning content builds upon basic information and then apply it to their role and work environment. Once Apply has been established, it opens the door for additional learning and application in the Analyze, Evaluate, and Create levels in their new role environment.

Kirkpatrick's Model of Evaluation: Four Levels of Learning Evaluation

Best known for analyzing and evaluating the results of training and educational programs. It takes into account any style of training; informal or formal, to determine aptitude based on four levels of criteria: Reaction, Learning, Behavior and Results.

Audience – Enterprise, division, or role based.

Content will be relevant and applicable to those who are onboarding, who manage the site, and who manage the onboarding cohorts, regardless of where the learner sits in U.S. Field Sales for Big Pharma.

Simple/MVP - Learning resources are accessible in a standardized format, which meets basic user requirements including universal design.

Yes. A SharePoint site is recommended as the preferred solution to provide for a one stop learning platform. An MVP approach will be used for launch.

Easy to navigate - Learning content and experience are designed in a way that is easy to navigate.

Yes

Use of existing content Curation first approach to learning content, before commissioning/purchasing additional content.

Over 500 in house courses have been identified, and should be audited for accessibility and relevancy during design/development.

Cost – Designed for the new, flat organization – to save resources and costs.

Budgeting is currently underway, with the bifurcation plan of a Big Pharma Vendor. This individual should be well-versed in educational systems, curricula design and development.

Other Research & Resource Links

Internal

External

- [Gallup Perspectives](#)
- [BoozAllen case study](#)
- [Human Performance Modeling: Thomas Gilbert](#)
- [How First Impressions Make a Lasting Impact](#)
- [Make-your-new-hire-immediately](#)



Thank you