



Client Onboarding Solution

Context

PM.us offers a subscription-based software as a service solution for project management.

PM.us is seeing a drop in subscription service users after 3-6 months. When users do stay past the 6-month mark, they tend to remain with the company long term.

Users report having a hard time navigating the backend of the software, especially when setting up large or long term projects.

Target Audience

The target audience is small business owners and project managers. They are detail-oriented, organized, problem solvers who value relationships. Because of their attention to detail and the importance of time, they will not continue with a solution if they do not see quick results.

Delivery Constraints

PM.us wants to track user progress. They want to know who is completing the training and if/when they drop off. SMEs only have about 5 hours per week to dedicate to the project. The backend of the software is sensitive data. They don't want the training to be easily accessible to the public. The software is updated constantly. The team runs in sprints and releases improvements and fixes bi-monthly.

Analysis

The solution will provide the project managers with continuous support for the PM.us software that is not time-consuming. The users need to learn how to use the backend of the software in a fast, easy manner that helps them feel confident in their longer, larger projects.

The project managers are busy, yet detail-oriented and need easy to use, fast learning experiences that will help them use the software right away.

Showing quick progress with their mastery of the software will motivate the learners to use it and continue with their subscription. Therefore, short bursts of information in the form of microlearning will provide fast, easy ways to teach learners what they need to know. The learners will also need their learning to be in autonomous choices that fit their current needs.

Learners will access their learning and training through the PM.us app. They will receive updates and alerts through the app when new information has been added.

Learning Objective

Users will be able to set up a long-term project in the project management software using the microlearning video content in the app.



Design

Project Requirements

- Cost: \$30,000
- Timeline: see chart below

Time	Task
1 week	Kickoff and needs analysis
1 month	App development
1 week	Alpha testing and stakeholder feedback
1 week	Revisions
1 week	Beta testing
1 week	Revisions
1 week	Soft launch
1 week	Revisions
1 week	Train admin on app maintenance

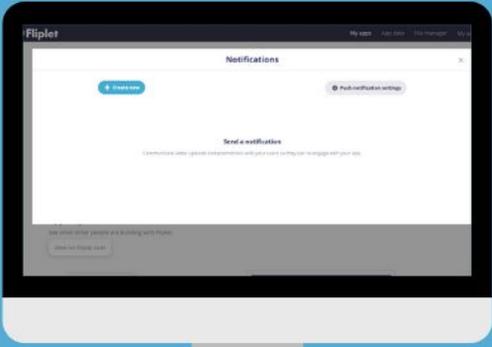


Development Tools

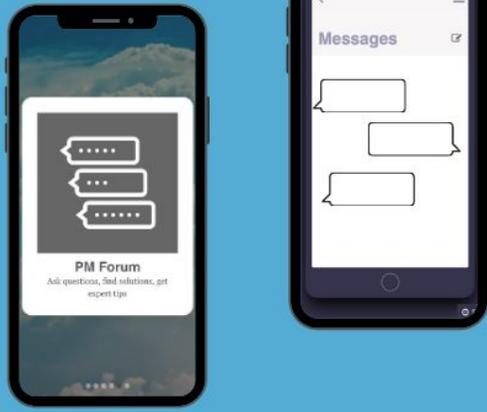
A Fliplet mobile app will house the learning content.



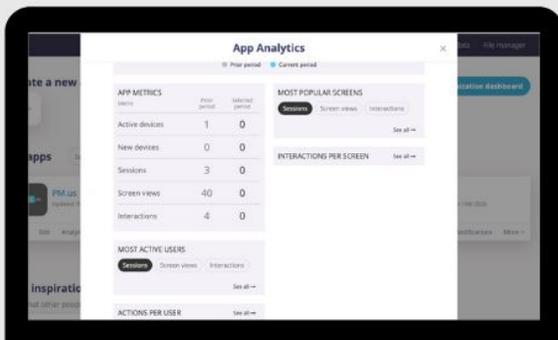
Admin can easily update with new information and send push notifications when new content is added or to make announcements.

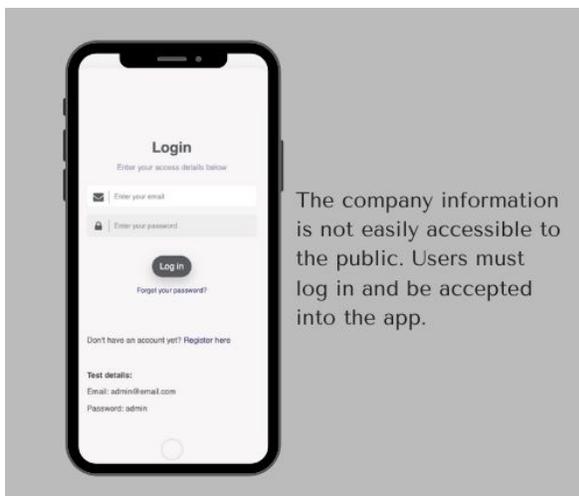
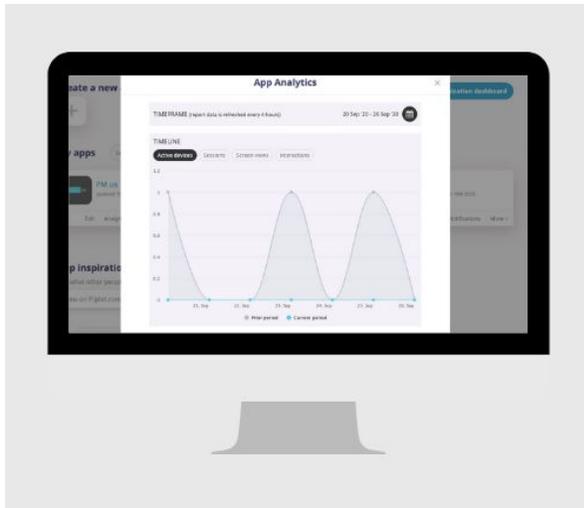


Users can connect with their team or other users using the chat or forum features.



With app analytics it is easy to track users and their interactions.





Instructional Strategy

- The app makes it possible to release short micro-learning lessons (5 minutes or less) in video and article form as well as forum discussions on an as-needed basis.
- Real-time updates to the software system can be rolled out using alerts in the app, letting the users know there are new features along with tutorials if needed.

- Users can easily be social using the forum and chat features. This will also help with learning since they can pose a question in the forum and receive helpful responses from their peers.
- These strategies will influence quick successes which will encourage continued use.

App Instructional Content Outline

Section	Activity	Video Length	Content
Module 1: Log in to the software	Create a log in	2 min	Users will be walked through creating a login and entering the PM software.
	Basic navigation	3 min	Users will receive a high-level overview of the software and how they will be using it.
Module 2: Open a new project	Planning a kick-off meeting	3 min	Users will learn how to enter kick-off meeting notes and plans in the PM software, as well as scheduling the meeting.
	Define the project and list tasks	3 min	Users will learn how to enter the project details into the PM software. Users will learn how to list and

			reorder tasks.
	Plan running order	3 min	Users will learn how to use the PM software "post-it notes" to organize and reorganize tasks to find the critical path of the project.
	Add contingency	3 min	Users will learn how to apply contingencies to the critical path as well as other parts of the project.
	Add other users	3 min	Users will learn how to add other users to the project, assign roles, and appoint tasks.
	Editing user capabilities	3 min	Users will learn how to adjust other user capabilities and functions in the PM software.
Module 3: Gantt chart	Add weeks	3 min	Users will learn how to add timeframes to the PM software Gantt chart.
	Add critical and floating tasks	3 min	Users will learn how to add and edit tasks that are already on the Gantt chart.

Module 4: Monitor progress and costs in the Gantt chart	Color in chart	3 min	Users will learn how to track their project by coloring in the chart.
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Assessment Strategy

Users will be informally assessed on successfully posting a project to the PM software. We will know the app is successful when we see a 50% increase in customer retention and extension of software subscription past the 6-month mark.

Once a learner has completed a micro-video, they will be prompted to the appropriate section of the PM software and fill in their corresponding information.

The app will intuitively send out reminders at intervals when users are not active in the PM software. The reminders will prompt them to the next video in the queue or offer the chat or forum feature to help learners along.

Project Sign Off

Name

Role

Signature



Name

Role

Signature

