Training Action Mapping Worksheet

 Design action-oriented training to support goals



## “Action mapping” is a technique developed by training expert Cathy Moore that you can use to ensure that the learning resources you create serve the needs of your training audience. Often, training focuses on what trainers think people need to know. This allows for way too much unnecessary information that doesn’t support a clear objective. The core of action mapping is to first focus on what people need to do. Once you’ve thoroughly defined this, all the information in your resources should focus on supporting what people need to do.

## Use the Training Action Mapping Worksheet, adapted from www.Cathy-Moore.com by PHII, to map out potential training topics and objectives.

## Instructions

1. Identify the organizational goal that’s driving the training need. Make sure this is action-oriented and not about increasing knowledge.
2. Identify actions that users need to perform in order to reach your goal. For each action, identify why users aren’t performing this behavior. Is it due to a lack of knowledge, skills, environment enablers and/or motivation?
3. For each action, design practice activities that users can perform to practice the desired actions.
4. Identify the minimum necessary information that users need in order to perform the practice activities. Consider how this information addresses user knowledge, skills, environment and/or motivation.

## Helpful hints

* Remember, the goal of training is not just to provide information. Rather, the goal of training is to support individuals in taking action. This action is a key step in achieving your goals.
* Refer back to your **Learner Personas Worksheet** to consider the perspective of your users in mapping your training actions.
* As needed, use your Action Mapping Worksheet to build out a comprehensive training plan (see **Training Plan Template**).
* **Bolded text** (as used above) indicates that the resource referenced is available elsewhere in the IIS Migration Toolkit.

# Training Action Mapping Worksheet

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| **Organizational goal**: Write a SMART goal for your training. Be specific! |
| [For example, “increase immunization rates by ensuring that physicians can use new and improved clinical decision support functionality” is better than “learn more about the new IIS.”] |

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| **Actions: Write up to five (5) actions** that need to occur for your goal to be achieved. Below each action, select the reasons that this action isn’t occurring yet by circling the letter corresponding to knowledge (K), skills (S), environmental enablers (E) or motivation (M). |
| [For example, “physicians need to access and interpret the patient’s immunization evaluation and forecast.”]  |     |     |      |     |
| K S E M | K S E M | K S E M | K S E M | K S E M |

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| **Practice activities:** For each action, **write three (3)** **activities** that can be practiced by someone who needs to learn how to perform the action. **Draw arrows** from each practice activity to related actions – some activities may support more than one action, and vice-versa. Remember to focus on activities that solve the problems of knowledge, skills, environment or motivation identified above. |
| 1. [For example, “view immunization record during sample patient encounter.”] 2. 3. | 1. 2. 3.  | 1. 2. 3.  | 1. 2. 3.  | 1. 2. 3.  |

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| **Information**: For each activity, **write up to five** **(5)** **pieces of information** that your audience will need to support the activities. Does it exist already? If not, jot down some potential formats for this information (text, eLearning, video, graphs, flow charts, images, conversations, etc.). Draw arrows from each piece of information to the activities supported. |
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# Training Action Mapping Worksheet: example

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| **Organizational goal**: Write one business goal of your organization that can be achieved in the next year. Be specific! |
| Migrate to a new IIS platform to improve functionality and better leverage immunization information to support immunization goals. |

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| **Actions: Write up to five (5) actions** that need to occur for your business goal to be achieved. Below each action, circle the reasons that this action isn’t occurring yet by circling the letter corresponding to knowledge (K), skills (S), environment (E) or motivation (M). |
| Identify inefficiencies and challenge workflows. | Identify roles within organization.  | Identify mentors / collaborators within network. | Develop new standard operating procedures (SOPs).  | Engage stakeholders to identify needs. |
| K S E M | K S E M | K S E M | K S E M | K S E M |

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| **Practice activities:** For each action, **write three (3)** **activities** that can be practiced by someone who needs to learn how to perform the action. **Draw arrows** from each practice activity to related actions – some activities may support more than one action, and vice-versa. Remember to focus on activities that solve the problems of knowledge (K), skills (S), environment (E) or motivation (M) identified above. |
| 1. Food ordering activity2. Onboard new provider data interface (shadowing or activity)3. Map out current workflows and identify challenges | 1. Role identification exercise2. Work with manager, AIRA, PHII to identify people in other jurisdictions that have similar roles | 1. Role identification exercise2. Work with manager, AIRA, PHII to identify people in other jurisdictions that have similar roles | 1. Food ordering activity2. Onboard new provider data interface (shadowing or activity)3. Map out current workflows and identify challenges | 1. Onboard new provider data interface (shadowing or activity)2. Map out current workflows and identify challenges |

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| **Information**: For each activity, **write up to five** **(5)** **pieces of information** that your audience will need to support the activities. Does it exist already? If not, jot down some potential formats for this information (text, eLearning, video, graphs, flow charts, images, conversations, etc.). Draw arrows from each piece of information to the activities supported. |
| Find or create food ordering activity New Provider Data Interface Shadowing Procedure resource (needs to be created)Quick Reference Guide - Data Interface Essentials for new providers (needs to be created)Resource on principles of systems thinking (YouTube video)Workflow map | Role identification exercise worksheetsNew provider onboarding: Job aid or process map needed from a person who sets up new interfaces (used as guide when shadowing) | Role identification exercise worksheetsWorkflow map: Will need an example workflow map and information on how to create workflow diagrams (shapes, formats, etc.)Contact information for other nearby jurisdictions (and/or jurisdictions with a similar IIS) | Find or create food ordering activityKnowledge of interoperability and data exchange should impact several of the activities.Workflow mapDiscuss workflow challenges with IIS staff and providers | A list of contact information for collaborators, mentors, and participants in tests, shadowing, and other exercises.New Provider Data Interface Shadowing Procedure resource (needs to be created)Workflow map |

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