

# **Monkey See, Monkey Do**

by Shirley Lee, VP Communications

Ever have to develop something quickly and make sure it was adequate for the need it was to fill? Was it be possible to include some elements of FUN to make it interesting and still create it using a rapid design process? Should the fun elements be games, question and answer (Q&A), teamwork, or some other fun activity? My answer would be YES! [Sherri Quesnel's article](#) last month regarding onboarding programs got me to reminiscing about a program I was once involved with, below is my story.

Once upon a time, when I worked in the Information Technology (IT) world, I was called upon to develop a quick system orientation course to be part of an onboarding program for new call center employees. We wanted the course to be fun, unique, first thing in the morning, and be delivered just-in-time (during 3<sup>rd</sup> week) in a half-day format.

## **Onboarding Process**

The new employees for the course were already onsite and the course was to be delivered in their 3<sup>rd</sup> week. The employees had already completed week 1, which was corporate orientations and selected computer training classes. Week 2 was reporting to their team and being assigned a mentor, along with doing self-paced telephone technique courses. In week 4, the new employee would be taking calls, independently, in the call center. The week 3 system orientation course was to decrease their concern over preparedness to help callers. In this course, they would get introduced to the top questions from customers contacting the call center as well as call center support systems.

## **Rapid Design**

Knowing the course had to be developed in about a week and knowing our audience well, I decided to use a process that incorporated items we already had. We had graphs showing which computer systems that the majority of customers called the most on and what their top questions were. Those graphs became the basis of our slide show along with transitional slides when changing system topics. Then I pulled and formatted the top questions and answers from our solutions database. Those became sections in the workbook by system name. Additionally, there was a section for supporting systems. Supporting systems were those used by the call center staff to provide answers to customers (solutions database, phone system, email system, ticketing system, etc.). This supporting section consisted of quick reference guides and web URLs where detailed documentation could be found. It was not pretty, but with dividers the course workbook was more than adequate for our audience.

Since the course would be extremely fast-based (most IT folks I've met prefer it that way), I decided to adopt a "monkey see, monkey do" approach for the actual classroom time. This means, the facilitator does something and then the participants repeat it and ask questions for clarification. I ran this approach by some of the IT folks providing me with data for the workbook and they liked it. Therefore, to let the participants know when they walked into the room and sat down that this course might be different than any other they had experienced, the workbook cover did not have the usual computer on it. Instead, it had a coconut tree with a monkey sitting in it and the title of the course in large print. We also decided to come in early and decorate the computer classroom with stuffed monkeys to continue the theme from the workbook cover.

## **Making it Fun**

We bought several inexpensive "barrel of monkeys" games and took the monkeys out of them. To encourage questions, each time a participant asked a question they were given a monkey. Participants thought the monkeys were cute and were trying to come up with more questions in order to get the most. The race for monkeys some times got a little out-of-hand, so we had to ask them to quiet down, stop laughing (yes, laughing in a computer class), and please allow us to move to the next agenda item.

At the end of the session, we tallied the monkeys on a board. The person with the most monkeys at the end of the session got a "big banana award" (plastic banana on a string). The award winner had to wear his banana the rest of the day. Needless to say, the banana attracted attention and caused people to ask questions about it and the system orientation. Every participant got to exchange each monkey they received for as many pieces of hard "penny candy" as they had monkeys from a basket of fruit-flavored treats.

## **Delivery Roles**

The course used a multi-presenter format, which was primarily lead by two facilitators, who swapped out roles every hour, and a few subject matter experts (SMEs) for about 20 minutes each. The two primary roles were presenter/introducer and reward-giver. The facilitator was responsible for presenting particular slides, introducing each SME presenter, and keeping the session on-time. The reward-giver handed out monkeys to participants for questions, so the presenters could concentrate on answering questions and keeping their presentation flowing in the time each was allotted.

Subject Matter Experts (SMEs) were introduced when a high call system came up on the agenda. The SME would be from the group that supported the particular system and they would demonstrate their system. One reason for using an SME was to introduce the new employees to a person they could contact, if they got a question in the call center they could not find an answer for. Additionally, if they asked the SME any questions on the system during the course they knew they would get the best answer possible.

The first facilitator would start the course with a statement similar to this. "After this orientation you will have come into contact with the systems most used at this company and the questions most asked by users of the system. You will not know all there is to know but you will know how and where to get questions about these systems answered in a timely manner. Additionally, you will have seen the system screens and know how to maneuver in the system to lead most users through their steps. This orientation will keep a quick pace in order to deliver the most information possible in the shortest amount of time. Therefore the approach we plan to use is Monkey See, Monkey Do, which means the facilitator or subject matter expert will show and tell system steps and you will then repeat what you are shown. Afterwards, as well as after discussion of top calls on each system, you are encouraged to ask as many questions as you can think of. Since we want you to learn as much as you can about the key systems we support in the call center, we will consider all questions worthy of reward. At the end we will tally your results and reward you as a way to verify we met your needs related to answering your questions."

## **Using Teamwork**

The last half hour of the workshop, the participants were put in pairs. As a pair they were to decide which system (user or support system) they would like to investigate further. Then as a team, they would try different things and discuss the results. If they had a problem, they would call a facilitator with their new question.

## **After the pilot**

Many of our senior employees saw the course workbook the new employees had and requested their own copy for their reference shelf. Additionally, the session sounded like so much fun, even some of the senior members of the call center asked to attend the next one as either a participant or volunteered to be in the SME rotation. To accommodate this request, each time a system orientation course was scheduled, an email went to the entire call center group. In the email, the date and time of the session was stated with an invitation to anyone who wanted to attend and could get approval from their support team to just show-up. Sometimes we had senior employees sitting two to a computer because so many wanted to come and the new employees needed the hands-on experience more than they did. We also published the agenda, listing the systems to be taught with approximate times, and asked for SME volunteers to call by five days prior to be put into the schedule as a system presenter. If we did not get an SME volunteer in that time, we went to the system's support team so they could assign an SME to the session.

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**About the Author:** Shirley Lee is a consultant/facilitator who helps organizations increase employee, communication, and system capacity to produce results. She has been a member of Dallas ASTD for five years and currently serves as VP of Communications. Shirley designs and facilitates a variety of team building, problem solving, and productivity improvement events. Her programs include managing time, facilitating meetings, project management simplified, workspace or group organization, the problem solving process, and team-building. More information on her is available on her website: [http://www.geocities.com/slee\\_rightfit/](http://www.geocities.com/slee_rightfit/) or by calling her at 214-457-5736.