Onboarding Course: Topic 5 “The Handoff”

SME Interviews:
Mark XXXXX, CEO
Robert YYYYY, Art Director

TOPIC 5: The Handoff

- Communication between team members
- Debunking assumptions

My Interview Questions

Introductory Re”MARK”s

- Hello and welcome!
- Sometimes it’s best to start with the worst case scenario and work our way back from there to identify what went wrong and how it could’ve been handled

differently. In your experience, what have been, in your experience, some of the most unsuccessful handoffs?
    - What made these handoffs unsuccessful, how do you know?
    - If you could go back in time, what could you have done differently? What about your team members?

- Generally speaking, what are some rookie mistakes ID's make in regard to "the handoff"?

BEFORE

- I want you to use your imagination to put yourself in the instructional designer's position.
    - Here's the scene: *You, the ID, have just completed a major deliverable in the instructional design process. You've received the SOW/design document, analyzed the content, and written Storyboard A. You're excited to share your work with the client and are preparing for the meeting.*
    - What does a good handoff meeting agenda look like? What's covered and how long should you spend on each item?

- The ID has finished Storyboard B, it's been reviewed by the Learning Design manager, and now she's preparing for the Handoff Meeting. What are some best practices for preparing for this meeting? Besides Storyboard B, are there any other documents or links that she should have available before beginning the meeting.
- Should handoff meetings always include the artistic director and/or can they just be with one member of the development team? How can the ID find out which team members to include in the handoff call?
    - From my own experience from the BLM paleontology video, I had a handoff meeting with Robert alone. However, I know that at least four team members spent time working on development for that video: Robert, Leslie, Ethan, and Cari.

DURING

- Walk me through what a successful handoff meeting looks like.
- What's the right balance of ID talking, the client/Dev talking?
- How often should the ID ask "do you understand?" or "do you have any questions"?
- Rookie IDs may have a hard time determining where to be firm and where to acquiesce, as it relates to client suggestions for changes. What's your advice on determining how best to respond to suggestions for changes when
    - They seem within the scope of the project, but not what the ID had in mind?
    - They seem outside the scope of the project, and the ID has to convey a "no"?

AFTER

- Put yourself back in the ID's shoes.
    - Here's the scene: *The handoff meeting is over and you are noting your empty nest. The course is out of your hands now, it's time to move on… But wait! Before you can switch gears to a new task, there's still some work to do.*

- What are some actionable items you need to complete after the meeting?

- Regarding handoff to our development team, how will the ID know when it's time to step in again to review Prod A?
    - Will they be tagged in a Teams post?
    - How long is too long to wait to review Prod A?
    - Does the ID also review Prod B and Gold? At these stages, what is the ID looking for?
    - When is it time for the ID to "let go"?

- What are some best practices towards communicating review edits to the developer?
    - Communication 101 between team members?
    - Most communication about the course will take place in Teams. Should post-handoff communication occur in the General channel, the fileshare, other? Does it matter?
    - Is it safe to say that the ID's suggestions for change will be taken seriously, or is it more up to the dev team's discretion to make those changes? Whose the final authority?
    - From my own experience thus far, I've been told by Cari and Robert that specificity is key.
        - For the BLM paleontology video, I viewed Prod A and noted that there were many items that required adjustment.
        - I was a little worried that the *quantity* offered was "too many" suggested edits, there were about 20-25 editing actions that I named. I also was concerned about the *quality* of the suggested edits–the details offered.
        - Cari said she thought the quantity and quality were preferable because they were specific and she could envision how much work she needed to do.
        - What do you think, about the quantity and quality of post-Prod A review suggestions by the ID?

Closing Re”MARK”s

- Now that we’ve discussed the before, during and after of the handoff, could you summarize for me what are some of the most important takeaways the learner should leave with?
    - What content must be emphasized?
    - What content, if any, is optional? (Given the scope of the course is 10 mins)

- Is there anything else you’d like to add?
    - If you think of anything, you can always reach out to me on Teams or email, britte@bubold.com

- Thank you!

Interview with SME: Mark, CEO

- Sometimes handoff is with production and sometimes handoff for client to review. You’re handing off a deliverable for them to review. And now they have a deliverable. The challenge is the same: to clarify what you need, how much time they have to do it, any design considerations for style, things that have been covered for production but also where you’re at in the process. Tell them to focus on the content, it’s at 60% and we’ll make it pretty later, we have to have the script approve at 90%, Making sure where the guardrails are with the client has been a far harder…because we just don’t get that follow up with them. The internal handoff, theres less risk cause they’ll always come back to us when theres less clarity. The one case where ive seen it did not go well: there was not communication, there was just an edits list. The risk is that if…i dont learn that lesson the hard way, production runs with it and spend a lot of time and creates something gorgeous and its not what you meant. The thing i want to guard against is that simple, electronic handoff. Lets just do this through email…easy to misinterpret and can get people going in the wrong direction. Never rely on email for a handoff. Email will back it up, but you also want to have that conversation with them, its worth while. There will be times that its stressful and you think “im just gonna send that email, they get it” and there might be times when that works but for new hires, i dont want them to evene attempt it. Theyre going to learn through the dialogue experience of “oh, im glad you asked!” this relationship this rapport is improved because of this conversation. So that handoff is about that relationship building which is as much internal as external, as it is about checking that box so operationally we've covered everything because theres just so many subtleties.

- Rookie assumptions: the term video has been misinterpreted in different ways. Sometimes people will call eLearning a video, meaning animation, or like a rendered powerpoint (with BLM) the term video…theres such a wide spectrum of what that could mean. Whether theres voiceover. So i think theres just these little elements of "this is the way we always do it" so im pretty sure thats the way we're gonna do it now. But then you see "oh gosh theres something different about this once that we just didnt take into consideration because we made an assumption it was gonna be the same.
- As the ID, you're the architect, so the handoff is not your last task. You're not gonna hand it off to dev and not look at it again. Youre gonna be a shepherd through the rest of the process through QA. youre gonna make sure the integrity of the design is maintained., and that the learning objectives are still being achieved. Most of the time the production team will not want to go far without you, and they know that., they'll feel uncomfortable trying to take it to gold without your involvement. So your final task is delivering gold to the client. So you're the architect and they're the contractor with all the electricians and plumber s but you check in to make sure the house is shaping up how you designed it. They're gonna run into road blocks, usually a grandiose vision if they have to push back, its too hard to execute, so try this instead, is a common one. This is what etheyre looking for, this is what theyre expecting to get back, well thats gonna take 30 hours and we only have 10.
- When you've won or gotten clarity with the client, thats got to be conveyed to production youve got to be a client advocate whether theyre right or wrong. Give them as much clarity is possible of why you dont want to do this or that. "Where are we in the process?" you could have time to give them two storyboards for two 20 min course (like rivian) but what you have to do is pause it.
- They have to get the chance to offer and receive critical feedback, the chance to own decisions, to sign off on other things that are more mundane, you have to be strategic in how you present that to them because you dont want to give them something so perfect that now theyre thinking okay i gotta give feedback but they didnt help shape it so its feedback on mundane stuff. And thats human nature they want to have that ownership, thas why storyboard A, throttle back, dont make it too perfect or youll lose the opportunity to get their enaggeemtn with it or youre inviting their engagement on mundane things which is a waste of time, they want to add value. You dont want them saying "oh its blue, i want it witha drop shadow." you want them to fix things, if theyre not fixing things then you theyre rubber stamp things…thats a risk because when they do engage they start fixing mundane things. I know its a little counterintuitive to give them something flawed but you want them to say early on "no thats not right", k now theyre engaged now theyre looking ,

theyre like “i gotta pay attention here” and yep theyre aware of whats right and whats wrong. Its a little manipulative, its strategic.

- You come prepared with specific questions about (something, just to get them involved, a chance to host a discussion where you ask why’s) you tee them up to have some owneerhsup, you tee them up for true collaboration …they have to feel heard. If they dont feel like youve listened too tem that is the one boundary that will crush you. If you ignored or forgot feedback, “yea we heard you but…” torpedo, they think “no youre not listening and im paying you to listen to me” thandoff is giving you a chance to show youre listening. To them, and give yourself easy fixes and now youre a hero to them but they feel like theyve helped fix it. Youve given boundaries, you still have control, as an expert in the field youre the learning expert, you need them to learnt o trust you, to trust the process, that we will get there together and its gonna be a great product in the end. The more you can engage…i dont like the convenience of an email and let’s just do it all electronically I think the rapport and trust is worth the time investment. Youre gonna need to learn how to build production trust. Dont go to them painting the whole mosaic for them cause thyre gonna be like “well it looks like youve got it all figured out, because they wanna have ownership too. The handoff is about sharing ownership and sharing responsibilities.
- JOB AIDE: Handoff agenda template
- The priorities are different for each segment in the process/timeline. Production is a little more consistent. There will be one more handoff after that initial one. Youre still the architect because production is not gonna take it (the deliverable) to the client, you are. So youll have to explain and tee things up and then youll have to take that feedback back to production. Youre going to have multiple more handoffs of edits lists, and theyre gonna have questions.
- Anytime you hand something off, you’re gonna want something in return. And it might even be to a vendor. We need this from you as a vendor. Overall, when you nad something off that youe designed anf you need something from comeone in return that meeting needs to be as clear as possible cause youre still not gonna get it all, youre still gonna have questions. But thats gonna be where you build rapport, where you, where they feel comfortable being honest with you and they trust you and it feels collaborative so theres so many parts to the handoff that are critical as you move a client from learning recruit to captain, those meetings are great opportunities.
- See this beautiful thing, we had ten handoff meetings before we got it. Thats why you need those meetings to be effective because thats where the wheels will wobble.
- “Its the handoff flashback’”?

Follow up Email with Mark

- Sometimes it's best to start with the worst case scenario and work our way back from there to identify what went wrong and how it could've been handled differently. In your experience, what have been, in your experience, some of the most unsuccessful handoffs?

Any handoff that discounts the importance of talking to each other. Virtual handoffs relying just on email or a tracking sheet are ripe for misunderstandings.

The main goal of handoffs: prevent project delays and rework!!

  - What made these handoffs unsuccessful, how do you know?

Language is imprecise and the ability to converse frequently reveals many things an email would not.

  - If you could go back in time, what could you have done differently? What about your team members?

Set expectations with clients and team members that handoffs can be efficient – but must be conducted verbally.

- Generally speaking, what are some rookie mistakes ID's make in regard to "the handoff"?

Two extremes – giving bare minimum detail… and giving the whole motherlode. To all things there is a balance. This is part of the art to our science.

BEFORE

- I want you to use your imagination to put yourself in the instructional designer's position.
    - Here's the scene: *You, the ID, have just completed a major deliverable in the instructional design process. You've received the SOW/design document, analyzed the content, and written Storyboard A. You're excited to share your work with the client and are preparing for the meeting.*
    - What does a good handoff meeting agenda look like? What's covered and how long should you spend on each item?

Recap objectives. Confirm progress and how product is meeting those objectives. Then focus on the review points that are most critical to that point in the process.

- The ID has finished Storyboard B, it's been reviewed by the Learning Design manager, and now she's preparing for the Handoff Meeting. What are some best practices for preparing for this meeting? Besides Storyboard B, are there any other documents or links that she should have available before beginning the meeting.

Make sure you know the must haves for SIGN OFF. This is a critical point to mark with client so they know changes to content, design, or whatever phase we are at will be scope change – so we cannot proceed without signoff and we can't delay because they are unsure about signing off. These are one of those points to prepare to get the client to understand our role in the partnership and their responsibility for consolidated edits, on time, and for sign off… so we can stay on schedule and on budget.

- Should handoff meetings always include the artistic director and/or can they just be with one member of the development team? How can the ID find out which team members to include in the handoff call?
    - From my own experience from the BLM paleontology video, I had a handoff meeting with Robert alone. However, I know that at least four team members spent time working on development for that video: Robert, Leslie, Ethan, and Cari.

Defer to creative director or production lead. Having one person at handoff is fine. Especially if it is a team leader.

DURING

- Walk me through what a successful handoff meeting looks like.

Where edits and deliverables are clear and we move forward without a risk of rework due to misunderstanding. Handoffs prevent REWORK.

- What's the right balance of ID talking, the client/Dev talking?

I'm not sure. This is highly dependent on situation.

- How often should the ID ask "do you understand?" or "do you have any questions"?

I'm not sure. This is highly dependent on situation.

- Rookie IDs may have a hard time determining where to be firm and where to acquiesce, as it relates to client suggestions for changes. What's your advice on determining how best to respond to suggestions for changes when
    - They seem within the scope of the project, but not what the ID had in mind?

We please our client. They are paying us for suggestions – but they own decisions.

-
    - They seem outside the scope of the project, and the ID has to convey a "no"?

Absolutely. That is something you can always say – I think this might be out of scope... and confirm. But it is important to voice that suggestion if that is how you feel.

AFTER

- Put yourself back in the ID's shoes.
    - Here's the scene: *The handoff meeting is over and you are noting your empty nest. The course is out of your hands now, it's time to move on… But wait! Before you can switch gears to a new task, there's still some work to do.*

- What are some actionable items you need to complete after the meeting?

Confirm notes. Confirm understandings of next step. Verify those take place. Follow-up or prepare to deliver if it is your turn to move the product forward.

- Regarding handoff to our development team, how will the ID know when it's time to step in again to review Prod A? **Prod should let you know Good expectation to set during handoff.**
    - Will they be tagged in a Teams post? **Whatever works.**
    - How long is too long to wait to review Prod A? **not sure – just keep in mind the edits will take time to make – so you have to leave time for production to complete suggested edits... But I also want to make clear that a Prod A – should be flawed and attempting to deliver perfection is a waste as it invites feedback on your perfect product anyway..**
    - Does the ID also review Prod B and Gold? At these stages, what is the ID looking for? **ID is the architect. Trust but verify.**
    - When is it time for the ID to "let go"? **There are always aspects of the design that should be negotiable. Balancing client desires, with expected outcomes... and of course – BUDGET.**

- What are some best practices towards communicating review edits to the developer?
    - Communication 101 between team members? **Be clear. Be concise. Be thorough. Again, part of the art to our science.**
    - Most communication about the course will take place in Teams. Should post-handoff communication occur in the General channel, the fileshare, other? Does it matter? **Not sure.**

- Is it safe to say that the ID's suggestions for change will be taken seriously, or is it more up to the dev team's discretion to make those changes? Whose the final authority? **Client. Directors.**
- From my own experience thus far, I've been told by Cari and Robert that specificity is key.
  - For the BLM paleontology video, I viewed Prod A and noted that there were many items that required adjustment. **Good**
  - I was a little worried that the *quantity* offered was "too many" suggested edits, there were about 20-25 editing actions that I named. I also was concerned about the *quality* of the suggested edits–the details offered. **Good**
  - Cari said she thought the quantity and quality were preferable because they were specific and she could envision how much work she needed to do. **Good**
  - What do you think, about the quantity and quality of post-Prod A review suggestions by the ID? **Not sure... art.**

Closing Re"MARK"s

- Now that we've discussed the before, during and after of the handoff, could you summarize for me what are some of the most important takeaways the learner should leave with?
  - What content must be emphasized?

    Handoffs prevent misunderstandings that lead to scope creep, rework or confusion over what edits/decisions have been made.

  - What content, if any, is optional? (Given the scope of the course is 10 mins)
- Is there anything else you'd like to add?
  - If you think of anything, you can always reach out to me on Teams or email, britte@bubold.com

- Thank you!

SME Interview with Robert

- The first storyboard: no one knows what to expect at that point: new IDs and developers, that first one is always a rough one because youre learning how to feel each other out, what expectations are there, sometimes you dont have the right questions, sometimes youre rushed to get through a 30 min meeting versus an hour. Theres alot of potential for things to awry.
- When a storyboard is produced, dev never sees it cause its silo'd off. Even if its sotroyboard a, it would nice to included in that, to see whats coming down the pipe. Have collaborative conversation about things we can do, accomplish, what we need. If youre developing a storyboard, wouldnt it be nice to have a template do develop that in so the client can solely focus on the content. Get Dev involved early on the frontend: maybe you need an icon, test something we can talk about and figure if we have capacity to handle.
- Know who you can go to on the dev team, see the org chart
- Rookie mistake: not knowing what the budget is right out of the gate, make sure you dont go above and beyond the budget, how many hours do you have as an ID?
- There should be tons of questions in that handoff, that first one, how am i supposed to design this? If the developer is not asking questions, theres a red flag there and we might need to come to a consensus at some point in the future. Start with a collaborativ conversation and center around a vision. You know the numbers, you know the scope.
- Bring the SOW into the meeting, the breakdown of hours. Get that from the bookkeeper or Mark.
- The danger in inviting a developer into that client meeting is they may not ask questions. I want to be there just to facilitate that conversation piece, wats gonna happen so i can delegate. Its being able to communicate effectively with my team of what needs to be done. If i have all the working knowledge there…
- The ID is speaking 70%, Dev is 30% for the first handoff, probably in that ratio.
- Take (hard, out of scope) feedback from the client to grace because she has the experience to do so, or mark, they can offload it from you, or give you the ammunition you need to communicate a "no" to the client. "Can we table this? We'll

get back to you on this, we'll take it internal have that conversation and bring it to you"

- After handoff actionable items: emails and communicating deadlines, when an item is due back for internal review. If youre waiting on something, ask dev to get it to you (some things get lost in communication, tags) Letting the client know what they expect to see this or that before the handoff meeting with them. So the ID is offering a sneak peak before they see what dev's done with it.
- The ID lets go at Gold after final review. The negotiation part of what he can accomplish. The ID is the last gate before it goes to the client.
- My personal advice is now you have this under your belt you know what to expect in the next one.

Potential Outline of Course

1. Let's start at the End
    a. Here's a beautiful eLearning course, the finished product
    b. Many handoffs between the instructional designer, development team, and the client have occurred to bring this eLearning to life.
    c. The handoff meetings must be effective because that's where the wheels will wobble.
    d. Let's go back in time…
        i. Clock rewinds (all subsequent media is 80s themed)
2. FLASHBACK I: PREPARING FOR THE HANDOFF MEETING(s)
    a. The ID is preparing for a handoff with the client
    b. "The Handoff Countdown" (Original song: "The Final Countdown" by Europe)
    c. Music video includes stick figure drawings of the action, lyrics that reflect the content, sung in character by Britte, closed captions necessary):
        i. What does a handoff meeting consist of?
        ii. Setting an agenda for the meeting
        iii. Always have actionable items
        iv. Send a follow up email(s) to stakeholders
3. FLASHBACK II: DEVELOPING RAPPORT AND EFFECTIVE COMMUNICATION WITH THE CLIENT
    a. The ID must establish trust with the client from the get go and steward them through the process

b. “Give Some Feedback to Me” (Original song: “Pour Some Sugar On Me” by Def Leppard)
    i. Using “Handoff” meetings to develop trust and rapport
    ii. Making space for client feedback that is generative, not redundant
    iii. Working with the client to send back deliverables so the project can continue on Bubo’s side
    iv. The art of reminder emails
    v. When to get the higher ups involved because the client isn’t providing their side of the deal

4. FLASHBACK III: WORKING CLOSELY WITH DEV THROUGHOUT
    a. The ID has handed their storyboard(s) off to Dev
    b. “Don’t Stop Reviewin’” (Original song: “Don’t Stop Believin’” by Journey)
        i. Remaining vigilant as “the architect” of the course, even after “the plans” have been finalized
        ii. Reviewing iterations of the course: Prod A, Prod B, Gold
        iii. Working closely with Dev
        iv. Communicating client feedback to Dev, and vice versa, several many times

5. FLASHBACK IV: THE “GOLD”EN HANDOFF
    a. The ID prepares for the final handoff–it’s over!
    b. Reprise: “The Final Handoff” (Original song: “The Final Countdown” by Europe)

Introduction/beginning instrumentals: Flash montage sequence of an instructional designer going through the ID side of making a course such as finalizing the SOW, analyzing the content, working with a SME, writing Storyboard A, reviewing Storyboard A with learning design manager and client, making edits and writing Storyboard B, reviewing storyboard B with learning design manager and client, getting the “ok” to send to production for the handoff, and the song begins as they prepare for the handoff with Dev team.

The Handoff Process Step by Step

1. Identify which Bubo team members you will be handing your Storyboard to, to begin development into a course

Notes

“Jump” by Van Halen –
And i know baby just how you feel
We got to roll with the punches…

Cant you see what i mean
Might as well jump
Go ahead and jump

Could turn jump into an acronym? Or dump, thump, bump… Maybe for ensuring that clients do their deliverable in a timely manner?

Be clear with the timeline
U
Make sure you both agree to the deadline
Project Management software

End of course:
Sweet Child O Mine = Sweet Client o Mine
“Where do we go” = “we’ll going for ‘Gold’”
(play after all is said and done and gold is handed over and the relationship between you is great because of all the trust building, communication blah blah)

“Pour some sugar on me” → “give some feedback to me”

“Don’t stop believin’” → “don’t stop reviewin’”

Source Material

https://phase.com/magazine/designer-and-developer-handoff-guide/

- The design handoff is a point in the product development process where developers implement the finished design. In order for a handoff to be successful, a good designer-developer collaboration is vital.
- But more often than not this phase doesn’t go as smoothly as it should. Let’s discuss why it happens and how to prevent handoff failure.

- **What are the underlying causes behind handoff failure?**
    - **Bad designer-developer communication**
        - Good communication is key in pretty much any relationship, so it makes sense that it's a requirement for a smooth design-to-dev handoff.
        - Communication breakdowns can result in all kinds of issues and misunderstandings—even in different interpretations of the same goals, which can lead to confusing or downright bad UX. And no product team has time for that.
        - Common problems caused by a bad designer-developer communication are:
            - Unnecessary, multiple feedback loops between designers and developers;
            - Unexpected quality assurance issues, or QA issues that are more time-consuming than anticipated;
            - Inability to leverage overlapping skills ;
            - Failure to properly take advantage of new tools that would likely make collaboration easier.
- Perfecting your design-to-development handoff
    - Now that we understand some of the common challenges, let's explore some ways to mitigate them.
        - Communicate early and often—and in the right ways
            - Failure to communicate is often one of the biggest causes behind an unsuccessful handoff. By communicating early and often, we can easily minimize these issues.
            - Teams should bring developers into the design process early, encourage regular discussions, and incorporate the developers' ideas into brainstorming and prototyping sessions.
            - Getting feedback from developers is vital because, after all, they are the ones who know best what is possible to implement and what is not.