

Boosting Operational Efficiency for L&D:

A Data-Based Recipe for Accurate Planning & Scheduling



Starting at 3:00PM (ET)



With Robyn A. Defelice, PhD



A close-up photograph of a hand holding a bunch of fresh vegetables. The vegetables include several orange carrots and two purple beets with their green leafy tops. The background is dark and out of focus, showing more green foliage. The lighting is soft, highlighting the textures of the vegetables and the skin of the hand.

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It Depends . . .





Little About Me



robyndefelice@outlook.com
Instagram: [@robyn.defelice](https://www.instagram.com/robyn.defelice)
www.linkedin.com/in/rdefelice





Templates



Customized





Benefits

- **Capacity**
- **Resource Planning**
- **Risk Assessment**
- **Champion Your Needs**
- **Reduce L&D Fatigue**



It Won't Define

- **Agility of Your Team**
- **Maturity of Your Team's Infrastructure**
- **Rogue Variables**

A professional video camera is mounted on a tripod in the foreground. The camera's LCD screen is visible, showing a live feed of a person in a kitchen. The background is a blurred kitchen scene with shelves and various items. An orange horizontal bar is located in the top left corner of the image.

Audits & Baselines

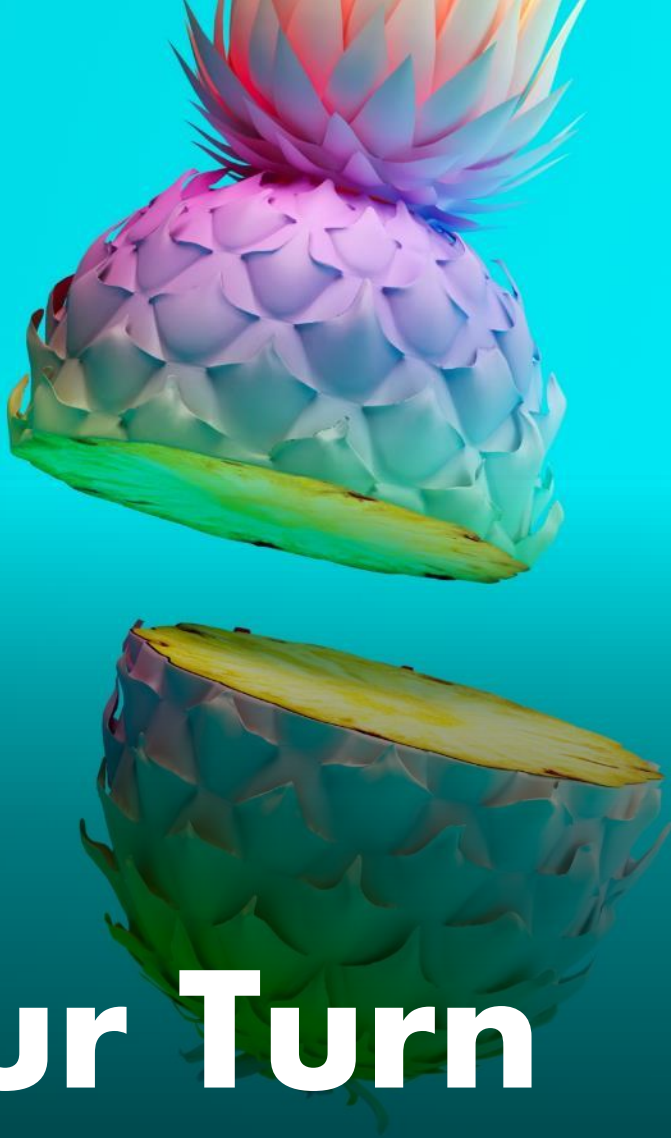
- **Team**
- **Templates**
- **Tools**
- **Relationship to Client**
- **Reactive vs Proactive**



Weighing Data

- **Define its variables**
- **Create its weights**
- **Test with various team members**
- **Create your baselines**

Review and adjust as your team, tools, tech, and talent change



Your Turn

Let's Get Parametric

Sr. ID/Manager – Been with company 7 years

- Oversees team of 3 Jr. ID
- Advanced understanding of authoring tools and delivery platforms
- Created the processes and templates the team uses
- Works ONLY with new clients

Jr. ID/Developer– Been with company 3 years

- Assigned specific departments to work with as lead
- Is the sub for project work for one other Jr. ID/Developer
- Is advanced with some authoring tools/delivery platforms but not all

Anatomy of Weighing (Simple Audit)



	Baseline Hours	Instructional Design Expertise	Content Matter Expertise	Authoring Tools Expertise	New Estimate
Sr.	150	0	.75 (112.50)	0	262.50
Jr.	100	0	.75 (75)	.25 (25)	200

NEED: New client, new content, large project

- Expert (0) – Can hit the ground running
- Intermediate (.25) – Needs some guidance to confirm/validate
- Novice (.75) – Will need ongoing support and collaboration

Anatomy of Weighing (Resource LOE)





Get Started

- **New Project – Track As You Go**
- **Current Project – Track the Phase Its In**
- **Maintenance/Sustainment – Don't Forget the One-Offs**
- **Break/Fix – The Most Reactive**



Discussion

THANK YOU!