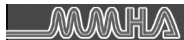


# E-Mentoring Tools

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## Online Career Action Planning and Performance Development



**Margo Murray**  
President & COO



**Deborah L. Stone**  
President & CEO

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Chief Learning Officer

Presented at the 2003 ISPI Conference, Boston, MA

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# Introduction and Background

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- Collaborative HPT project
    - Coaching and mentoring
    - Online tool development
  - Our focus today is not on the software, but the process of creating it—moving paper forms to online tools
  - The process we describe will work whether you're converting your own tools or contracting this work.

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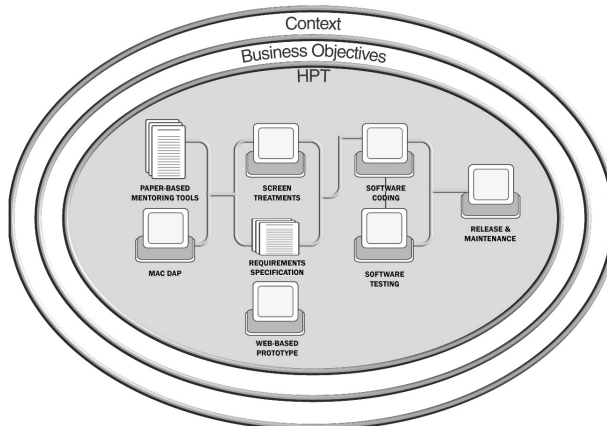
# Agenda

- ✓ Apply a collaborative prototyping model to convert a paper-based career action planning tool to a web-based platform
  - ✓ Specify the context for the effort
  - ? Specify the business objectives of the effort
  - ? Describe the role of HPT
  - ? Describe the process
- Discuss lessons learned

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# E-Mentoring Collaborative Prototyping Model



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## Context

### Environmental Scan

- Importance of coaching and mentoring
- What industries have done
- Importance of career planning, mentoring, and coaching in impacting the bottom line
- Various products available over the web
- None of the products were totally relevant, adequate, or efficient

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## Context

### Mentoring and Coaching Opportunities

**Pressures facing protégés and mentors:**

- Geographical dispersion
- Formalized mentoring relationships
- Release time
- Standard approaches
- Predictable results
- Support for large-scale involvement

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# Context

## An Online Performance Development Solution

### Online Coaching and Mentoring Tools:

- Accessible over the Web
- Allows for synchronous and asynchronous communications
- Allows formal and informal experiences
- Provides standard tools with embedded coaching and mentoring approaches
- Obtains standardized results

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# Context

## Conversion of Paper-Based to Online Tools

- Process logic
- Intuitive form design
- Consistent form design
- Level of interactivity
- Data storage

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# Business Objectives Strategic

- Provide a web-based planning tool for protégés and coaches
- Build on existing tools
- Employ an extensible approach
- Earn a return on the investment (ROI)
- Turn a profit

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## Business Objectives Tactical

- Professional graphic appearance
- Consistent and intuitive user interface
- Web hosting
  - Mac
  - PC
  - Internet Explorer
  - Netscape
- Reusable logic
- Release-ready product

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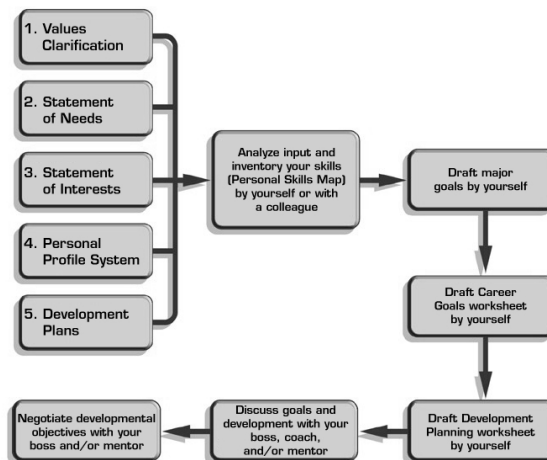
## HPT Factors

- Coaches and mentors don't typically play with people who create online tools—but they should!
- Tools must work as online systems
- Online development tools will impact organizations in positive ways
- HPT provides a methodology for this type of interdisciplinary effort

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## HPT Career Planning Process



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PAPER-BASED  
MENTORING TOOLS

# Paper-Based Mentoring Tools

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# Mac-Based DAP Background

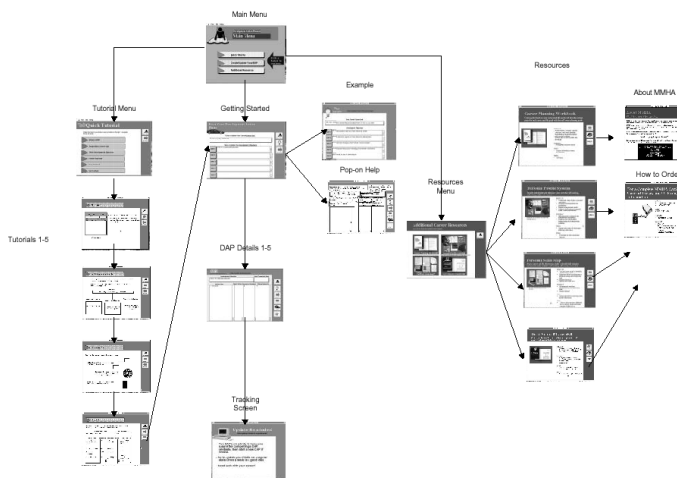
- Standalone Mac platform
- Coded by college student
- Inconsistent and unintuitive user interface
- Never released

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# Mac-Based DAP Reusable Program Logic



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## Screen Treatments

- Created treatments for major screens
- Specified navigational elements
- Used Interface Design Checklist to ensure quality
- Included treatments in the Requirements Specification

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## Requirements Specification

- Detailed screens and logic
- Approved screen treatments
- Identified options for encryption and E-commerce
- Revised Project Plan
  - Scope of Work
  - Estimated Costs
  - Schedule

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## Web-Based Prototype

- HTML files created in Dreamweaver MX
- Used screen treatments as graphics
- Links between pages simulated functionality of final program, with no back-end database
- MMHA suggested revisions prior to coding “live” version

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## Software Coding

- DLS programmers
  - Created database in MS-Access
  - Added form fields to prototype screens
  - Added ASP and Javascript to HTML pages
- Extended schedule to accommodate MMHA and DLS availability

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## Software Testing

- DLS ID tested functioning site against requirements in design spec and sent revisions to programmer
- Distributed group of testers in US and Europe
- Tested in multiple:
  - Platforms (Windows 95/98/NT/XP, Mac OS 8, 9, OS X)
  - Browsers (IE, Netscape, Omniweb, Mozilla)
  - Screen resolutions

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## Software Testing Continued

- Changes compiled on log, shared among client, ID, HTML programmer, back-end programmer
- Multiple iterations
- MMHA prioritized changes by:
  - Must have
  - Nice to have
  - Parking lot for next release

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## Release and Maintenance

- Rolled out in April, 2003
- Continuing to gather feedback for release 2.0

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## DAP Demonstration

[www.mentors-mmha.com](http://www.mentors-mmha.com)



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# Lessons Learned MMHA

- **Web design is not an exact science**
- **Appearance depends on many factors outside designer's control:**
  - **Platform**
  - **Browser**
  - **Browser and screen settings**
- **You need to choose your trade-offs between compatibility and uniform appearance**

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## Lessons Learned DLS

- Calibrate proposal and development methodology to project size
- Schedule lots of flexibility—then add more
- Specify revision process in Requirements Specifications
- Remember that even small projects need top-notch programmers
- Allow adequate time and budget for testing
- Well-designed paper forms expedite online repurposing

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## Summary

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# Open Discussion

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**Your questions and comments**

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