DESIGNING A JOB AID

Types of Job Aids

Job aids can be as small as a template on an answering machine or as large as a procedural manual. Allison Rossett and Jeannette Gautier-Downes, authors of *A Handbook of Job Aids*, maintain that job aids serve to provide information, support procedures, as well as coach perspectives, decisions, and self-evaluation. Most tasks entail either decision making, following procedures or linear sequences, or a combination of the two. Some of the more common job aid formats are listed below.

Steps

The step-by-step format presents information and directions in a specific sequence. The step format is most appropriate when the user must complete a series of linear procedures in which detail and sequence are critical to completing the task.

Forms and Worksheets

Forms and worksheets are similar to the step format in that they guide the user through a process in a specific sequence. They require user participation, however, and include blanks or spaces for the user to record responses. Forms and worksheets are most appropriate when calculations must be performed or when information is stored for future reference.

Checklists

Checklists are groups of items to be considered when planning or evaluating. They present guidelines for completing a task and are most commonly used to ensure consistency. Items are presented in a logical order but are not necessarily followed in that order by the user.

Decision Tables

Decision tables allow the user to make decisions and complete tasks based on a set of conditions. They are usually comprised of “if-then” statements that guide users to appropriate decisions. Decision tables are most appropriate when tasks or decisions are dependent on conditions that may vary.

Flowcharts

Flowchart job aids are similar to decision tables in that completing the task or deciding on a course of action is dependent on conditions that may vary. Unlike the decision table, however, questions in a flowchart can be answered with a
“yes” or “no.” Each answer the user provides leads to another decision point, which again is answered by a “yes” or “no.” The user follows the flowchart until enough questions have been answered for an accurate decision to be made or until a task is completed.

Reference Sources

Reference sources primarily provide information required for completing a task. Unlike the other types of job aids, they do not provide information to be followed in a step-by-step manner nor do they coach the user in a decision-making process. Examples of reference sources include telephone books and parts catalogs containing detailed information such as product and price data.

A job aid can also be a combination of two or more of the formats listed above. The type of job aid that is designed should be contingent on the type of task being performed. For example, using a decision table job aid when the task entails completing specific steps without decision dependencies would not be the most effective type of job aid, just as using a step format job aid would not support a highly complex decision-making task.

Analyzing a Job Aid’s Function

The Work

- What is typically done to complete the task?
- What is the order of steps, process, or decision making?
- What tools are used to perform the task?
- Are the same steps followed in the same order each time the task is performed?
- Are there times when the task is performed in a different order?

The Worker

- Keep in mind who will be using the job aid.
- What is the user’s experience level? If the user is new or has limited experience, you will need to include more detail in the job aid.

Determine the Job Aid Format

Decide what part of the task is being supported by the job aid. Will it provide the step-by-step procedures, guidelines to follow, or reference information? Visualize how the job aid will be consulted and how it should be structured. Consider the characteristics of the task and the user as you select the format to use. See What Type of Job Aid Should You Use?

What’s In a Job Aid
Consider the following as you work on your job aid:

**Content**

Include only the necessary steps or information required by the user. Ask yourself if the step or content is relevant to the task at hand.

Keep the information as simple and concise as possible. Present the information in small pieces. Write short sentences and use short words to describe or list the steps, processes, calculations, or decisions that need to be made.

Leave out “nice-to-know” tidbits of information, they only serve to clutter the job aid. Remember that the job aid should be a quick reference for the user. Place critical information in the first and last parts of sentences or sections of the job aid.

**Language**

Use language that the user will understand. Avoid long, unfamiliar words and jargon unless appropriate to the task and the user. Use verbs and actions words at the beginning of sentences wherever possible.

**Visual Elements**

Use drawings or graphics when appropriate to clarify information or provide more detail than words would allow. Graphics and illustrations should be clear and simple. Be consistent in the type of visual that is used. If you use a drawing in one step, use one in any subsequent steps.

Highlight critical points or steps by using bold or italicized text. Colors can also be used to highlight and code items or sections of the task.

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**What Type of Job Aid Should You Use?**

<table>
<thead>
<tr>
<th>If…</th>
<th>Then Consider a…</th>
</tr>
</thead>
</table>
| · The task consists of steps that must be completed in a specific sequence.  
· The user does not need to make decisions regarding the task.  
· The task or procedure is linear and there is only one path for the user to follow. | Step-by-Step Job Aid |
| · The task consists of steps that must be completed in a specific sequence | Form or Worksheet Job Aid |
| · The user needs to document information to be used to complete the task. |
| · The task consists of performing calculations. |
| · Information that is used to complete the task will be referenced at a later time. |
| · The task does not consist of steps that must be completed in a specific sequence. |
| · The task involves inspecting, observing, or planning. |
| · Consistency is an important factor. |
| Checklist Job Aid |

| · The task does not consist of steps that must be completed in a specific sequence. |
| · Several conditions or variables may exist. |
| · There are limited options associated with each decision variable. |
| · There are several yes or no decisions that must be made. |
| · The decisions must be made in a specific order. |
| · Completion of the task is dependent on the answer given at each decision point. |
| Decision Table Job Aid |

| · The task does not consist of steps that must be completed in a specific sequence. |
| · The task requires reference to data versus performing a process or procedure. |
| Flow Chart Job Aid |

| · The task does not consist of steps that must be completed in a specific sequence. |
| · The task involves inspecting, observing, or planning. |
| · Consistency is an important factor. |
| Reference Source Job Aid |

**SAMPLES OF JOB AID FORMATS**

**Step-by-Step Sample Job Aid**
The step-by-step format is used when the task must be completed in a specific sequence. This example provides additional information under some steps for the benefit of more novice users, making the job aid appropriate for employees of various skill levels.
1. Use the TNA Proposal template to plan your analysis.
   - Identify sponsor.
   - Determine the information to be gathered.
   - Determine the sources of data.
   - Access the TNA Proposal template.
   - Complete items 1 through 7 on the template.
   - Obtain signoff from the instructional designer.

2. Gather the data.

3. Analyze the data to identify needs.

4. Use the TNA Summary template to report your findings.
   - Complete items 8 through 10 on the template.

5. Obtain signoff from the instructional designer.

6. Save the report in the project directory.

Sample Worksheet Format
The worksheet format below includes space for the user to record information about the instructional strategy used for each lesson objective in a training course. The user can refer back to this information as the project progresses.

**Instructional Strategy Form**
The instructional strategy form should document the instructional strategy plan to be used for each objective. The strategy used should be determined by the lesson objective.

**Overall Course Description**
Course Title: _______________________________
Course Description: _________________________
Terminal Objective(s): ______________________

Team Information:
- sponsor __________________________________
- subject matter experts ______________________
- other individual(s) involved in the ISD process _____

**Instructional Plan Description**
The instructional plan description should be completed for each course objective.

Objective #1: _______________________________
Lesson Objective: __________________________
Description of instructional method(s) to be used: ______

Include conventional lecture, demonstration, individual study, programmed instructions, case studies, simulations, team teaching, etc.
Description of media devices to be used:
___________________________________
Include audiovisual aids, television, computers, etc.

Sample Checklist
The checklist below includes guidelines for developing a training course. Though the checklist for ISD is frequently used when step-by-step procedures are not required, this particular example does dictate the order of the guidelines. For example, the user would not develop a course before an analysis was complete.

**Instructional Systems Development (ISD) Checklist**

**Project Name:** ________________________________________________

### Analysis
- q Complete TNA Proposal
- q Receive sign off
- q Conduct needs assessment
- q Receive sign off

### Design
- q Develop a topic list and topic map
- q Complete course syllabus
- q Complete instructional strategy form
- q Receive sign off
- q Create assessment items
- q Receive sign off

### Development
- q Develop instructor guide
- q Receive sign off
- q Develop participant guide
- q Receive sign off
- q Develop media
- q Receive sign off
- q Develop pre- and post-tests
- q Receive sign off

### Implementation
- q Select and prepare appropriate facility
- q Prepare and gather materials

### Evaluation
- q Collect and summarize level one and level two data
- q Distribute level three action plans
Sample Decision Table

This decision table for customer service representatives covers several variables or conditions that may exist when a representative answers a call. In this example, there are actually nine possible conditions that have been identified. Each probable condition is listed so representatives need only identify the condition and follow the chart to find the appropriate action.

<table>
<thead>
<tr>
<th>If</th>
<th>And</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>The caller is</td>
<td>employed</td>
<td>Refer the caller to customer service employer accounts at ext. 5641</td>
</tr>
<tr>
<td>The caller is</td>
<td>employed</td>
<td>Refer the caller to broker sales at ext. 5487</td>
</tr>
<tr>
<td>The caller is</td>
<td>self employed</td>
<td>Refer the caller to customer service small groups at ext. 8745</td>
</tr>
<tr>
<td>The caller is</td>
<td>self employed</td>
<td>Refer the caller to small group sales at ext. 8692</td>
</tr>
<tr>
<td>The caller is</td>
<td>not employed</td>
<td>Refer the caller to customer service individual accounts at ext. 9632</td>
</tr>
<tr>
<td>The caller is</td>
<td>not employed</td>
<td>Refer the caller to individual accounts sales at ext. 9832</td>
</tr>
</tbody>
</table>

Sample Flowchart

This flowchart is an example of a job aid used when a performance problem is identified. Notice that the answer the user provides to the yes or no questions directs him or her to the correct path to follow in order to complete the task.

Sample Reference Job Aid

Reference job aids contain information users may need to perform a task. Below is an example that provides a listing of light bulbs for salespeople to refer to for part numbers, order numbers, and prices.

<table>
<thead>
<tr>
<th>Part No.</th>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>100253-4</td>
<td>Incandescent 80 watt</td>
<td>$27.50</td>
</tr>
<tr>
<td>100253-5</td>
<td>Incandescent 150 watt</td>
<td>$56.45</td>
</tr>
<tr>
<td>100254-10</td>
<td>Soft brite 75 watt</td>
<td>$21.23</td>
</tr>
<tr>
<td>Item Code</td>
<td>Description</td>
<td>Quantity</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>100254-22</td>
<td>Soft brite 95 watt fluorescent bulb</td>
<td>5005</td>
</tr>
</tbody>
</table>

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