

***BUSINESS  
SOLUTIONS***

A portfolio of representative Benchmark projects

## FOREWORD

*From its inception, Benchmark Publications Inc. has had as a corporate goal providing innovative solutions to business problems. Here are just a few of the projects designed, developed and implemented by Benchmark professionals. You'll notice a recurring theme in this collection: tools and techniques developed as part of the projects and passed on to our clients, to allow them to capitalize on their investment in our professional services after the end products or services are delivered.*

*Our strength is in choosing people with extensive broad-based experience in corporate and educational environments. Because of their creative problem-solving skills, research and analysis tools, and can-do management and operations expertise, BPI professionals are not limited by what they've done before.*

*Just as you count on the management team in your corporation to analyze and resolve business problems, you can count on BPI to fill in as your personal decision-support team.*

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# World Class Programming Education

## Situation

The head of IS at a major telecommunications corporation in the Capitol region made a public commitment to build a world class IS staff to develop and maintain enterprise-wide information systems that support the business. To meet the challenge, the hiring profile for new programmers was drastically revised. The training curriculum for new hires had to be just as drastically retooled. New-hire programmers and transfers had been herded into a twenty-week lock-step curriculum with few interim opportunities to assess technical skills. Top students were forced to wait for slower students before progressing, and slow students would frequently advance past their true skill level only to fail later. Testing came under serious scrutiny in response to problems with students' ability to perform on the job after leaving the training facility. The IS Education Center was charged with providing *world class* training.

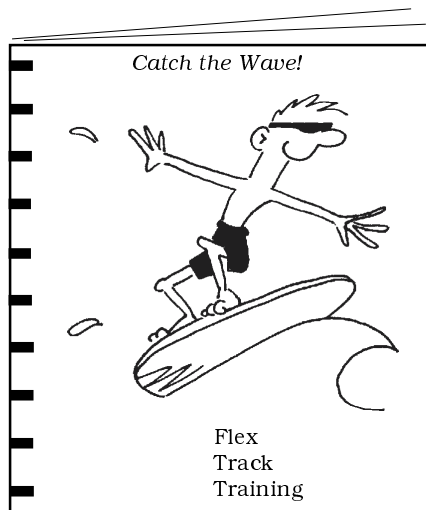
## Solution

The Benchmark Publications solution makes use of the best existing self-paced courseware, augments it with original courses where necessary, and adds custom wrap-around material that pulls the pieces into one whole, stamped with the corporate look and feel. BPI also managed the sourcing and evaluation processes and delivered an objective assessment of the top three to six vendors for each required course with recommendations and alternatives.

In response to the students' on-the-job productivity problems, EEO-compliant pretests and mastery certifications were developed. Basic data processing principles and cooperative problem solving were reinforced through innovative use of original games and hands-on exercises. One course requires students to assimilate specifics about their future work environments while still in training.

## The Team

Project Manager  
Instructional Designer  
Courseware Developers  
Research Analysts  
Technical Editor  
Copy Editor  
Computer Cartoonist  
Publishing Specialist  
Quality Assurance



## Project Deliverables

Instructional Design  
Curriculum Guide  
Vendor Selection  
Customization of Purchased Courses  
Original Courseware  
Three Original Games  
Train the Trainers  
Pilot Classes  
40-Volume Proprietary  
*World Class* Curriculum

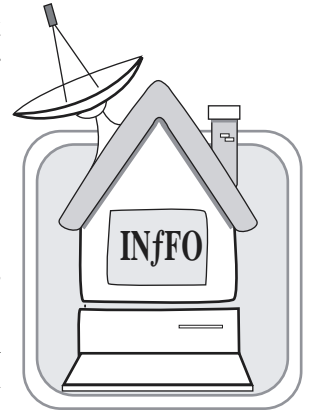
## Result

High-potential new hires complete the curriculum in less than half the time once required. Bottom line: New hires are learning more, faster and better than ever before with a more immediate ROI for the corporation. This curriculum was awarded a rating of eight college credits by the American Council on Education.

# On the Road Again

## Situation

Information Systems (IS) created and delivered more green sheet reports than anyone ever read. They arrived in field offices well after they were useful, and were largely ignored by the sales force. Yet the daily information about customer applications is vital to effective selling in this particular environment.



## Solution

IS Field Information Support developed a software program that runs on notebook computers, and uses dial-up communications to download up-to-date application decisions from the mainframe. This link ties Field Sales directly to the front end analysis of new business and customer accounts and keeps competitive information at the reps' fingertips. Field Sales can check on activity in local and national accounts before making the next sales call, and review account history and current status to plan sales strategy. Field Sales can also query the mainframe database or produce local reports from downloaded data for timely analysis.

Benchmark Publications was asked to design a training program for busy sales reps, taking into account both the amount of time they would be willing to take away from selling to learn the program, and their relatively unsophisticated knowledge of computers. Budget constraints precluded high voltage delivery mechanisms or even bringing the reps together in a large group, with all the T & E that implies. The challenge was to get their attention and hold it.

Using our Focused Learning<sup>SM</sup> techniques, BPI designed a very small book (it fits into a notebook computer) that takes the learner through just the steps necessary to get into and out of the system without confusion; to navigate the screens and system modules; to get Help; to enter and extract information and to communicate with the mainframe without fear. Readers learn what they have to know to use the system for day-to-day business tasks. Next, BPI designed a failsafe train-the-trainer package using a simplified scripting technique and low-cost visuals that even a non-trainer can use effectively. Last, BPI delivered the pilot training class in Los Angeles to a very small group of highly skeptical sales reps *in their office with the phones ringing!* The client program manager observed, and then gave the second pilot course herself. After BPI made minor final adjustments to the training kit, the program manager has used it in visits to every sales location (where she also had other business) to train the entire sales force.

## Result

The rollout of the software was smooth; calls to the help desk were kept at a minimum. BPI was asked to repeat the project for Phases II and III of the software rollout. This is from one of the initial reluctant trainees:

*"INfFO is a snap!"*

# Great Originals

## Situation

To meet the competition, this Corporation saw a need to train general line copier sales representatives on system selling. The current method was to send a system (top-of-the-line) sales rep and a technical support person on every call with the general line reps. The cost was staggering and the return very poor. With no time to give adequate product knowledge to these reps, a very short deadline for a major product launch, and a limited budget, BPI was asked to develop a plan to meet the need.

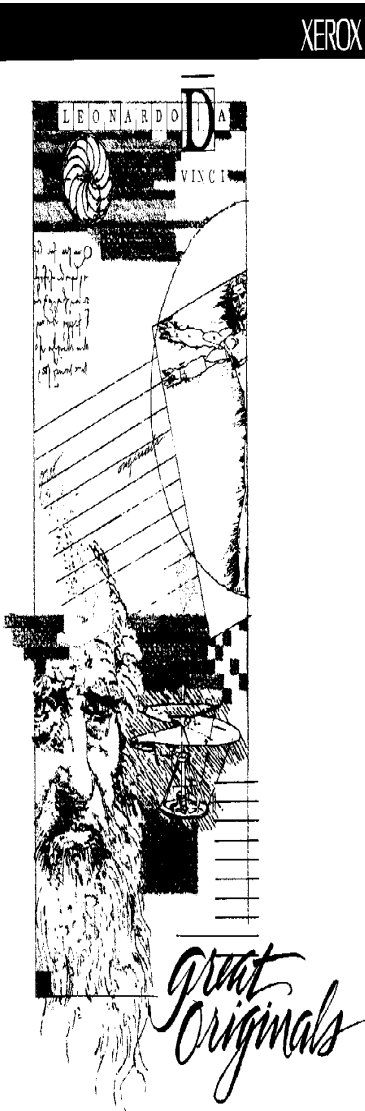
## Solution

A complete turnkey seminar for each district: the Great Originals campaign. The seminar kits provide everything necessary to run a value-added, entertaining afternoon demonstrating what this Company's equipment could produce (beginning with a slide show of the history of the printed page). Copier sales reps could bring their key accounts to the seminars, where one systems rep and one technical support person are available to answer questions for the district's entire potential customer base.

From invitation to follow-up, this event was designed so the personnel in the district offices could arrange and deliver the seminar with little or no preparation. The slide show was scripted, the placement of the demonstration equipment planned and mapped, seating arrangements, checklists (markers, easel, spare bulb for the projector and so on), handouts for attendees, questionnaires to gather marketing data and even the design of the printed demonstration documents were all delivered ready to go. A PC-based cartoon show as a door-opener broke the ice.

## Result

A few of the most costly personnel support the many and alleviate the need to try to train less sophisticated individuals in complex selling techniques. The product line is exposed to many more potential customers in a short period, with the technical expertise necessary to explain and plan systems installations.



# Back to the Future

## Situation

Three months after a major product launch, a quality problem threatened the credibility of the new flagship product. The sales organization was dispirited and skeptical of any corporate fixes. BPI was asked for some ideas. The time: two weeks before Christmas. The due date: January 2, in the branch offices.

## Solution

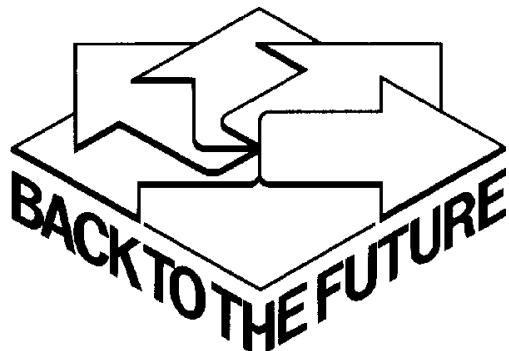
A complete product relaunch, carefully positioned to satisfy the critical field reps. Rather than a full-blown bells-and-whistles production, BPI addressed the quality problems head on and developed support materials designed to make palatable a tricky customer-installed field retrofit and induce the reps to make sure installed equipment was fixed before selling other, more reliable products, something they didn't want to do at all.

The relaunch stressed quality as a Company hallmark (as indeed it is) and provided incentive for a retrofit and sales blitz: a sales competition complete with a prepackaged introduction in the branch, with a script for the branch manager, overheads, kits for the reps and managers, posters and prizes, handsome two-color typeset customer training and competitive analysis guides all arrived in the branches on January 2nd.

## Result

This from one of the bitterest complainers, a senior branch manager:

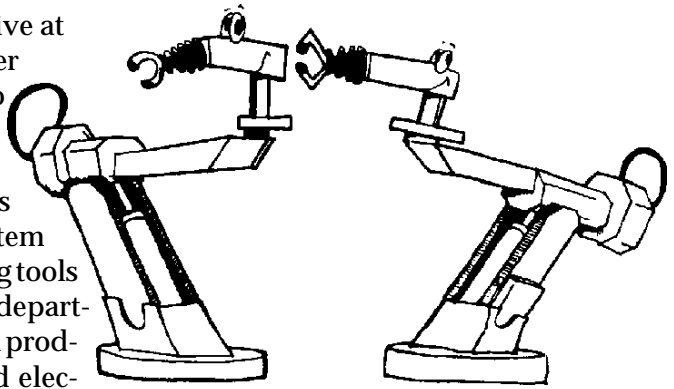
*"The Back-to-the-Future campaign was just what my people needed. The enthusiasm is great, and sales are up!"*



# Order-Ship-Bill

## Situation

As part of a process simplification initiative at a Fortune 50 corporation, the entire order entry-through-shipping work flow was to be automated. Desk procedures had never been documented, and the system had no functional or design spec. BPI was asked to integrate work flow and system procedures, and produce effective learning tools in a form that would be useful for every department from sales to transportation. The end product had to be delivered in both print and electronic form for easy in-house updating without special equipment.



## Solution

BPI assembled a team of professional communicators to spend a week on site, armed with tape recorders and a wide cross-section of corporate experience, to listen and learn about the company from the inside out. While there (in Indiana), we got hands-on time with the system, and came away with the means to tap into the test system by remote communications. For the next five months, BPI stayed current with system development on line and by telephone, and with work flow changes by telephone interview and Q&A sessions. Only tech review meetings and final copy meetings were conducted on site, keeping the disruption to the company at an absolute minimum. The first tangible result was a design document that identified the common basic procedures every discipline had to know.

Each remaining system module had a correlation to a business function, so the rest of the material designed itself. The end result for the print-based material was a comprehensive user tutorial/reference (with a quick reference to iron out the many emulation options). The managers received the entire document, complete with a management overview that explained changes they could expect to see in the way they did business after the cutover. Each department received a separately bound section of the encyclopedia that included basic procedures and just material relevant to that discipline. BPI also developed a train-the-trainer package (low-cost overheads and instructor's guide) that walked even the most inexperienced trainers (in this case, the managers) through an effective training session on the new OSB/work flow procedures. A BPI senior training manager delivered the pilot class; the client is now delivering standardized, professional training to its own users.

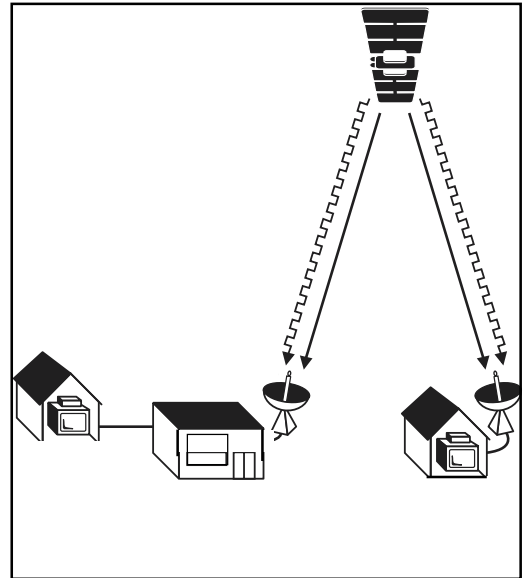
## Result

All deliverables, including handsome mainframe screen capture illustrations, were produced in the word processing package site-licensed to the company. The customer was so pleased, they asked BPI to handle a major revision for a subsidiary.

# A Satellite View

## Situation

This television programming company was a pioneer in the commercial satellite TV business as early as 1976, when it began sending its signal to cable companies via satellite. A fiercely competitive business, this cable and satellite television company changes virtually every day in a constant race to stay ahead of all the curves: new information technology; smart marketing, streamlined business processes. A young company in a young industry, this business has grown in every direction, so rapidly in fact that a manager of any given group couldn't tell you how another group operates, much less how the business works as a whole.



## Solution

Enter Benchmark Publications with an idea for bridging gaps and bringing seasoned staff and new hires alike up to speed in the intricacies of the direct-to-home business. A BPI team of researchers and writers interviewed key players and gathered work samples from all parts of the operation. BPI separated myth from fact and identified the critical points of contacts. From the Call Center to the Direct Marketing Group; from TV Programming to IT, Research to Finance to Vendor Relations—for the first time, how it all works separately or together was committed to paper, a living breathing document that will change as the company changes. But for a moment in time, the business was *benchmarked*, to coin a phrase. A project with multiple goals, BPI design, developed and produced a Manager's Guide to Operations, which gives a satellite view of the entire company: organizational responsibilities, cross-functional intersects, a glossary of terms that old-timers take for granted, but which slow the newbie's learning curve. Perhaps the most interesting sections are the simple, illustrated explanations of how the technology works—data, telephonic and satellite communications.

## The Result

A complex business is made plain in under 75 pages, in easy language and simple, attractive illustrations, but with a sophisticated look that fits the culture of this show-business oriented company. On the practical side, the entire product was delivered in bound hard copy to the managers, and electronic copy to the project lead for easy (continuous) updates. Bonus: In the process of contributing information for this book, managers were able to sort out some overlapping responsibilities and uncover opportunities for cooperation.



# Logistics Leads the Way

## Situation

Founded as a fast-moving entrepreneurial enterprise, the Company was a force in international trade more than a hundred years ago. During the age of mergers and acquisitions (the 1980s) the corporation became a major conglomerate, heavy with worldwide holdings. In the lean, mean '90s, senior management took a long look at where the profits were and decided to divest and restructure the organization, stripping it back to the core product lines. The most difficult task remaining is to integrate the once autonomous core businesses into one company with a worldwide perspective.

A central logistics advisory group was established to seek out opportunities to improve quality, increase productivity and reduce costs. Its charter was to use the corporate leadership position, buying power and ethical standards to forge supplier partnerships to serve the whole company. A permanent corporate entity was also established to direct the council's teams of planners/negotiators and to implement their recommendations. Change can be a painful, slow process. There was the inevitable strong resistance to the invasion of private fiefdoms. An obvious need surfaced immediately: to communicate the master plan to the separate businesses and report results effectively as company-wide agreements were put in place.

## Solution

Benchmark Publications Inc. was called in by the corporate logistics group to design and implement an internal communications plan. BPI's first step was to learn about the corporate culture, and in particular, about the logistics function as it applies in this corporation. The next step was to co-opt Corporation Communications as the vehicle to convey success stories quickly and accurately, to convince the holdouts to sign up. The third step was to design a project management tool kit for members of the multidisciplinary task force teams that gives every team the same background information on the corporate direction. The kit also offers basic information about business logistics; uniform tools and reporting frameworks, and useful tips on project management and team-building for first-time team leaders.

## Result

The corporate logistics group has already scored millions in savings to the company in little over a year. That good news is traveling fast: BPI has researched and written a dozen brief articles that have been published in the corporate newsletter in just the first two months of the assignment. The managing editor of the Corporate newsletter writes, "*With contributing editors like BPI, we'll have to publish twice a month!*"

# ~~TEAM 2000~~

# The BPI S/WAT Team

## Situation

A major voice-data system manufacturer required usability testing and QA for a new product. The test labs had long since been lost to downsizing. After a lengthy search for a vendor to test both equipment and user interface, the executive in charge turned to BPI.

## Solution

Building on the cumulative years of experience of individuals on the BPI team, from technical editing to facilities management to hardware manufacturing and QA, the BPI S/WAT Team was born. The S/WAT Team delivered these services:

- Analyzed the system, designed a test plan, developed tools and measurement criteria for usability and QA.
- Sourced, screened and qualified testers.
- Set up facilities and arranged for testers' orientation and productivity.
- Trained test monitors.
- Managed the testing process, using team-building techniques to keep the same test group relatively in tact for the entire battery of tests.
- Reported software/hardware bugs as they occurred.
- Tested fixes rigorously.
- Summarized findings and recommendations in reports to management.

## Result

BPI was asked to repeat the tests for four levels of software development and hardware changes. Each time, BPI built on the original tests where feasible, designed new formal and ad hoc tests and delivered thorough management reports. As a result, the system was deployed successfully in two major client Beta sites without significant incident.



# Just You and Your Computer

## Situation

Information technology has all but pushed aside the old ways of delivering information. Printing costs soar even as electronic communication becomes more accessible at rock-bottom prices. It has long been BPI's mission to stay ahead of the technology curve to deliver tomorrow's learning tools today.



## Solution

The simple quick reference card still has its uses, but for the past seven or eight years, BPI has been delivering answers to users' technical questions when and where they're needed, at the click of a button:

- sophisticated context-sensitive on-line *Help*
- side-by-side Q-card type integrated Help for custom designed software
- standalone application-specific Windows Help systems delivered on CD to end users along with the application software

The doorstep-style software or process manual is happily morphing into colorful, illustrated interactive on-screen instructions. Except for the few hard copies needed for show-and-tell by in-house managers, printing (if needed at all) is handled on the user side. There is joy in the forest as more and more of these essential documents are deployed over corporate intranets.

- Beta test for a fascinating interactive CD for Apple, NY Times and CBS. We developed the methodology and tools and ran the tests. BPI did timely, inventive regression testing right up to the golden master release.
- Animation storyboarding and hands-on interface evaluation for a commercial the Multimedia Encyclopedia CD. "Assets" were dropped or added based on our matrix.
- Storyline premise, interactive model building and scripting for a secondary education modeling program. BPI also contributed to the student materials and instructor guide.

## Result

Clients save money; our top-notch artisans gain great skills in state-of-the-art tools, and BPI continues to manage the interesting projects that keep our long-term talent pool on board.

# What Can We Do for Brown?

## Situation

The R&D division of this major transport company was in need of start-and-stop on-demand high-performance business communications support. This business unit was long accustomed to working with on-site programming and technical writing contractors. The long learning curve for these massive, rapidly changing leading-edge hardware and software systems coupled with high turnover of contract staff was a recipe for trouble. At the same time, the business requirements of the company were changing—becoming more stringent. New products could no longer be released without adequate user support.

## Solution

BPI weighed the reputed firm policy of hiring bodies in chairs against our own approach of assigning a team of the right people at the right level for every task, managed by a strong project leader and backed up by superior editorial support.

We proposed a compromise: At the front end, our top people on site to learn all about their operation and work with the in-house technical communications manager to plan a comprehensive education package. Meanwhile, back at our HQ, we built a mirror site that gave access to their test system as it developed, and permitted hands-on training of second-level tech writers and research associates to draft documents, test them, build Help systems, capture screens, handle editorial production and proofread.

## Result

BPI has been supporting three sizable project teams plus the Help desk, on and off, for more than six years. We've met every rollout date in spite of the circular nature of rapid development with its never-ending updates. The company has gained continuity, has actually saved 20-25% over comparable contract pricing, and is assured of an ongoing pool of communicators who understand the business and technology.



# Mainframe-to-Micro Tech Staff Migration

## Situation

As part of a reengineering project entailing the design of a new system, a proud, accomplished corporate systems group was to be moved from traditional mainframe programming to a 4GL application development environment. The group was both resistant to change and threatened by the new technology.

## Solution

Working closely with the training and systems management, BPI developed a population-specific prescreening device (Skills Assessment) to determine students' background technical knowledge and analytical aptitude for object-oriented programming. Recommendations for remediation or reassignment were a part of this segment of the program. As BPI was also building a computer-based training course and certification program for end users, the programmers' certification and training initiative was integrated into a company-wide program, *Can Do!*

Second, BPI designed a five-day course to introduce *Windows* in a LAN environment and object-oriented programming, built around the client's real-world applications. The course includes lecture, visuals and hands-on student exercises, a student workbook with problems and an instructor guide. The course is not a comprehensive 4GL training course; it is a thorough and effective introductory course designed to prepare successful students for the next step.

Third, BPI delivered a pilot class, and several train-the-trainer sessions to provide the client the in-house capability for ongoing training. (After the pilot class, it was decided to break the course into two parts.)

## Result

The Skills Assessment was so successful it was expanded to cover the entire programming staff in all locations. An interesting sidebar: Analytical skills proved to be a weakness in a surprising number of the test population, pointing the way for effective remediation and new hire screening.

The LAN/Windows trainer has successfully completed several solo flights.

The text "Can Do!" is written in a large, bold, black cursive font. The letters are thick and connected, with a dynamic, handwritten feel. The exclamation point is also large and integrated into the overall style.

The text "HomeTrac Certification" is displayed in a white, bold, sans-serif font. It is centered within a solid black rectangular background, creating a high-contrast, professional logo.

# One, Ringie-Dingie...

## Situation

A short time ago, a Baby Bell Regional telecommunications company and several of its key suppliers teamed up to devise a print-on-demand system that could respond seamlessly to the order entry system with exactly the right feature booklets to match an order. Orders of multiple features automatically generated one booklet containing just those features. The entire package was small enough to fit into a standard 5 x 8-inch marketing envelope. This innovative system was hugely successful except for one thing: feedback from the consumers indicating they still didn't understand how to use the features.

## Solution

BPI was invited into a highly competitive bidding process, in which we were asked to submit our ideas for a redesign of the instructions. Drawing on our experience of educating countless populations of all levels of schooling and technical sophistication we submitted a spare, clean sample that cut volumes of text from the old version, transformed the techie language into easy, conversational prose, and walked the customer step by step through each process.

The samples were thoroughly tested in focus groups and our design was accepted. Within the confines of the print-on-demand architecture and against the pressures of a review process dictated by official regulations and competing internal needs, we developed almost 300 of these booklets for consumer consumption.

## Results

One paramount corporate goal was the reduction of expenses for consumer education without compromising quality. Our streamlined version of the instructions saved the company \$1.5 million dollars in printing, paper and translation costs, we're told.

Dividend: The instructions BPI developed for BellSouth now have a home on the public internet. How's that for ROI?



# FACTS

## Situation

Sales reps for an international training company were tired of the constant battle to stay on top of the stacks of business cards, jammed Rolodexes, and piles of cryptic notes for key accounts. Sales managers were frustrated with the old-fashioned, inaccurate and time-consuming methods used to forecast their department's revenue.

## Solution

Information Systems decided to win the battle for Sales by developing a system for a laptop computer that tracks individual accounts, key contacts, decision makers and sales cycles. Users were provided a personal calendar, forecasting features and a tickler file to add notes and update an account's development—all this at their fingertips.

Account/Buying Center: Mont	Type: Prospect	Fortune 500: Y		
Division/Address Add	Account: Montana Publishing	Mail: Y		
Divis Maga	Type: P Prospect	Active Inactive		
Address 127	Industry: Communications	Cycles: 0 0		
Hot	Fortune 500: Y Key Mailing: Y	Items: 0 0		
Phone (785	Division: Remainders	t Forecast: N/E		
Accou Sales Line	Address: 1 Warehouse Row Pioneer Station Billings, MT 59102-4422	Quarter: 0/0		
	Phone: (406) 555-1212	Full Year: 0/0		
Sales Calls:	5 5 Delta	ts: 0 Sales Calls: 0		
Forecast Summary				
	03/93	04/93	05/93	06/93
	16	34	58	17
	6	21	24	5
	18/7			109/50
F1-Cancel F7-Exit F10-Save				
F4-Notes F5-List				

Benchmark Publications was asked to provide user-friendly documentation for computer illiterate users and faced the challenge of writing documentation for a multi-faceted program while the software was still in development. BPI designed, developed and produced a small software guide, which is not only a reference but doubles as a step-by-step tutorial. BPI also tested the system as it evolved—reporting bugs and glitches to ensure the program would truly be user-friendly.

## Result

Sales reps learned the software quickly and now spend their time serving customers, forecasting sales revenue and attracting new business instead of constantly digging out. Managers now predict sales revenue based on their rep's forecasts and marketing people have access to up-to-date information on key contacts for frequent mailings.

*"I'm really impressed with what the system can do. I think the salespeople and managers will find the program flexible and easy to use. It will revolutionize the way they organize their account information,"* one business manager reported.

*N.B. It takes superior "invisible" instructions for users to focus so readily on the product and its benefits.*

# HELP!

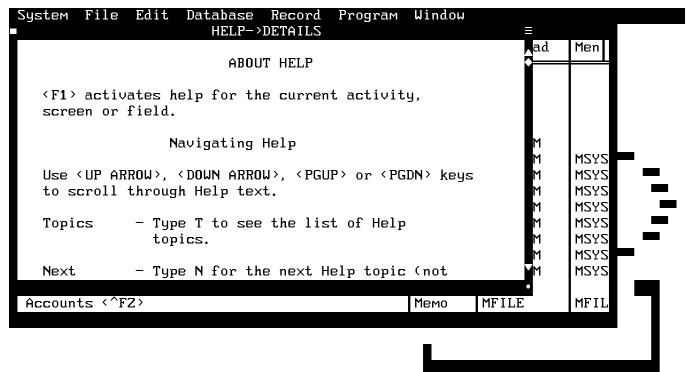
## Situation

Help is often not the least bit helpful. The tendency is to assign the responsibility for developing system Help to the software developers, who by necessity give it a low priority, yet the system can't be released without it—especially if the software has built-in hooks to Help. The user will surely press <F1> expectantly, and on some platforms can get into serious trouble if Help doesn't answer.

One common desperation measure used by programmers is to dump the user guide (or even the spec!) into Help. Another approach is to have software engineers write the Help for their own parts of the system, with the usual inconsistencies and varying degrees of language skills. Each screen has its own flavor and shape with no landmarks for the user to hold on to. Manuals and Help are two distinct beasts. Help is not a reference, nor is it a tutorial. Help is a right-here-right-now tool to work through an immediate problem. It can be extremely costly to hire outside talent to develop Help and integrate it successfully with the system.

## Solution

For a major distributed processing system, our professional staff worked on line to write brief, concise helpful tips, and to keep Help in sync with system development. Because we had developed the entire learning kit for the system, Help was just a subset of what we already knew. In more recent instance, Benchmark Publications worked successfully in tandem with developers, using the same development tool (FoxPro) to design, write and test an extensive Help system.



## Result

Because Help depends on the same knowledge base used to develop user guides and references, simply refiltered and reformatted, using one group to do both jobs reduces the cost considerably. Best of all, thoroughly tested, user-validated Help rolls out with the products on time, saving Customer Support untold hours of answering too-easy questions.



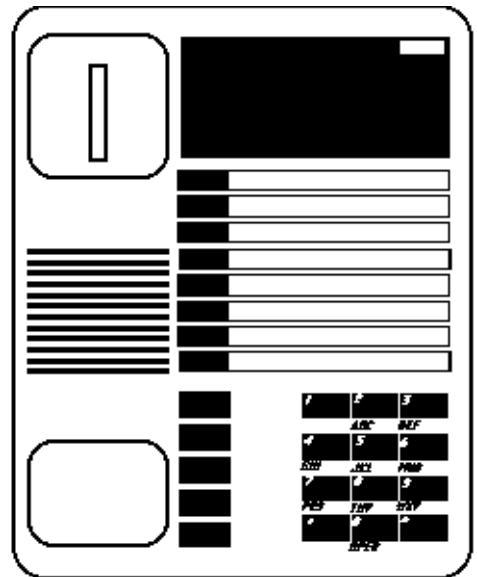
# Hello?

## Situation

The state-wide telephone company identified the small business community as a key marketing target (companies with 2-99 stations). The flagship product for penetrating this market is a small business Centrex network system. The company positioned telemarketing as the primary means of reaching the market. Pre- and post-sale customer interaction was to be reduced to a minimum, and had to yield enough information to allow accurate order fulfillment and instructions for installers. Dealer sales were to be supported as well. An overriding concern was that this was the company's first commercial product introduction.

## Solution

At the first meeting of the launch team, Benchmark Publications was assigned the Customer Education piece of the pie. Another group handled dealer and business center staff training, and the agency-of-record managed the advertising and presales brochures. BPI's art director and the agency each contributed to the look-and-feel of the entire program. BPI also designed and produced the presales installation questionnaire and a business replay card (BRC) to capture marketing and technical information (included in the agency's presales package). BPI's System and User Guides, quick reference cards and an installation QA BRC comprised the post-sales package. The System Guide enables the administrator (or owner) of the system to manage setup, configuration and training and handle minor troubleshooting. The User Guide is a simple step-by-step software and hardware tutorial.



BPI was also asked to design and supply faceplate cards and hardware-dependent quick references for the telephones.

## Result

The entire integrated rollout was an unqualified success. Sales exceeded 200% of plan in the first quarter.

# Do It Right First

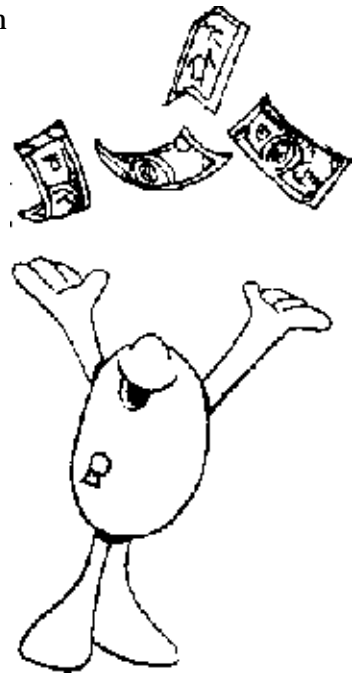
## Situation

For this major financial institution, Teller School is twelve weeks of basic training for new hires. With turnover at more than 52%, the School was overcrowded with a backlog of three to six months. In the interim between hiring and training, new tellers were assigned to the Branches and were often taught incorrect procedures and shortcuts they weren't ready for, with the predictable high incidence of error. When students did get to School, an astonishing number completed the entire course only to fail the final exam. The Branches blamed the Teller School for poor training and complained about not having time to retrain tellers after School; the teller training staff blamed Human Resources for hiring low potential people and the Branch for spoiling students with slipshod methods. Everyone was both right and wrong.

## Solution

BPI management consultants discovered three things: 1) certain basic banking skills require extensive practice for which there is not enough class time; 2) training was something less than uniform; 3) under the surface irritation, everyone was willing to try something new to solve the problem. We designed a self-paced Teller "Preschool" to be self-administered in the branch with only occasional intervention by a designated mentor (an experienced teller or supervisor). At regular checkpoints in the course, written exams were given to add to the students' portfolios. Pass/fail criteria were established and each checkpoint measured performance against those criteria, giving the opportunity to terminate training for an individual at any point in the course, rather than at the end. The mentor's role was clearly defined so tellers received uniform treatment and testing on all the same topics.

The Preschool stressed the Bank's philosophy of customer service and quality: *"Do It Right First."* Based on extensive research, standard methods for such simple tasks as using a calculator and counting money were devised, and students were challenged to drill and drill to pick up speed and accuracy, two of the most common complaints of Branch personnel. Plentiful illustrations were used to emphasize key learning points and stress security issues.

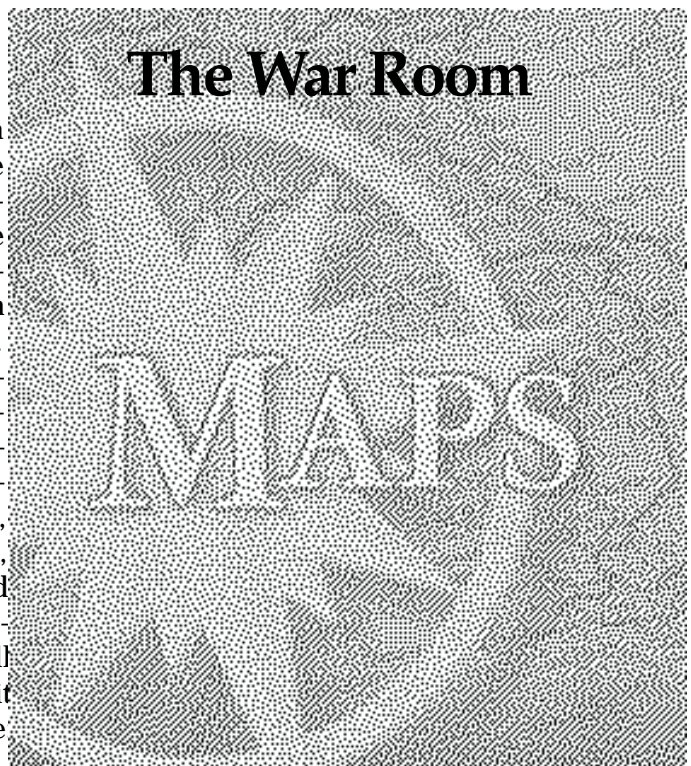


## Result

Tellers come to School with a complete dossier of their strengths and weaknesses, and tangible evidence of their skills. Those who can't meet the established requirements for basic terminology, standard procedures and at least minimal speed and accuracy are eliminated before taking up valuable space in the classroom. The Branch mentors are now part of the solution, not part of the problem—attitudes have changed in the School, the Branch and Human Resources.

## Situation

The leading vendor of multimedia technologies entered a joint venture with two of the foremost news organizations, one in newsprint and the other in broadcast journalism, to create the definitive retrospective on America's experience in Vietnam. Four creative groups worked together to amass material from valuable first sources: original TV coverage, original news articles and dispatches from war correspondents, Library of Congress archival papers, contemporaneous music, filmed speeches by world leaders and transcripts of broadcasts. Only one small thing had been overlooked until it was almost too late to get it done *Software/User Interface QA*.



## Solution

In a field so new, it's hard to find people with experience for such a job. Based on our earlier success with standard hardware/software test, and a recent multimedia animation evaluation program for an encyclopedia publisher, BPI was "volunteered" by a friend at the vendor company to join the team. With two months to cover six months work, BPI mobilized our S/WAT (Software Applications Test) Team and fearlessly charged ahead. (Does anybody have any idea how many hyperlinks can fit on one CD?)

First we examined the current software to determine the test topics and our best approach for meeting a tough deadline. Second, we designed a comprehensive software and interface test plan. Our multiple test suites were formulated to attack every function both technically and from a user point of view. Third, the BPI technical project leader set up a FoxPro database for logging and classifying bugs.

Last, the Team went to work in double shifts to exercise every link in every module; every function, every button, dialog box, menu—the whole arsenal.

## Result

By pushing hard, we were able to finish the alpha-beta test work for the entire CD program and write and deliver a complete report and electronic file identifying all the bugs we found. We managed to do this in time for the vendor to go to regression testing and golden master. You won't see our name in lights, but we're very proud to have been a part of this important work.

# Ka-ching!

## Situation

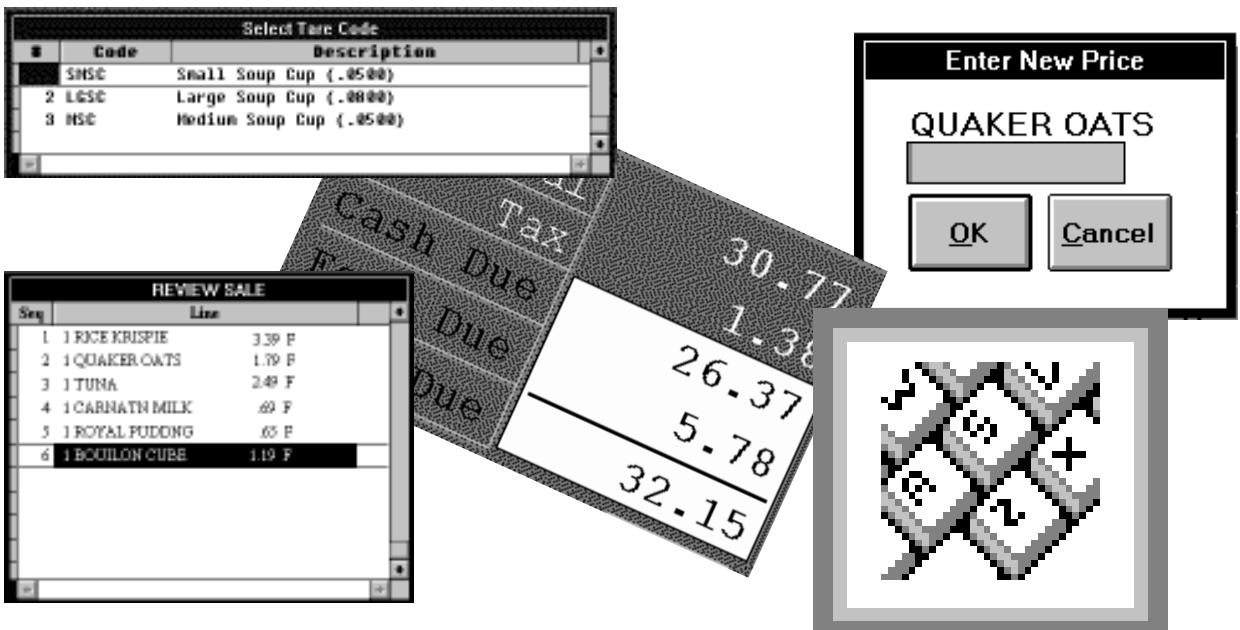
Automation faces some of its biggest challenges in the retail industry. Every retail establishment has its own culture, regulations, products and services to sell. How can hardware/software manufacturers mass produce products profitably for such a specialized market? Every installation requires custom tailoring, usually on site. How can you train users in chainstores across the country with each states' unique tax schemes and couponing restrictions.

## Solution

Not once, but twice BPI has been called on to solve training and documentation problems in the retail point-of-sale environment: once on the workstation vendor side, and once on the retail side. Each project was very different, although they shared a critical characteristics. Benchmark Publications technical and editorial staff worked together to design modular, open-ended documentation that can be customized on site.

## Results

On the vendor side, BPI's patented flexible design gives field engineers the tools they need to leave every installation with a fully operational custom system complete with custom documentation. On the retail side, having soaked up the POS language and methods, the BPI team was able to meet a critical deadline with technically accurate, user-friendly cash register operators' books that fit each state's requirements.



## Situation

A long-term client has been in the throes of evaluating all of its business processes. As part of that initiative, new standards of excellence are being developed in every part of the organization. We have been reporting these changes in articles for the worldwide organization's in-house newsletter. An opportunity arose to support one cross-functional team in developing their new standards as they worked together to define new criteria for supplier relationships in the transportation and distribution field.

## Solution

As with most team efforts, the project took on an extra dimension when it was decided the team should be made a part of the development process of defining the new quality/certification program and the portfolio that presents it. Working with a cast of dozens of people all over the country creates its own challenges, but with patience and a flexible attitude, we were able to design, develop and produce a portfolio for inside purchasing managers to give to their vendors to help them qualify for preferred status.

## Result

With every draft passing through so many hands, BPI was pleasantly surprised at how much content was untouched, including our great slug line (see top). At the same time, the team rightfully feels real ownership of the certification program and the portfolio.



## Situation

Apple Computer and a major university have designed and implemented a unique client/server application development toolkit for making administrative information accessible to students and others anywhere on the campus and from campus to campus across the country. The Macintosh is the development platform; Apple provided equipment, technical support and hours of expert hands-on development. An outgrowth of the project, the Project Mandarin Consortium, has extended the virtual campus from Berkeley to Boston. The advantage to the originating university is twofold: a recognized leadership position in innovative shared technologies in the academic community and access to new applications developed by other institutions for the Consortium free library. Aside from the satisfaction of carrying out its mission to *change the way people think, work, learn and communicate through personal computer technology*, how could Apple leverage its investment and justify remaining involved in this exciting project?

## Solution

Benchmark Publications designed and produced a "leave-behind" for Higher Education sales reps to show prospective Consortium members. The brochure is in keeping with the altruistic nature of the project and yet clearly demonstrates Apple's key role in the project and the advanced Apple technologies that made it possible.



# Office of the CFO

## Situation

A Big Five firm was preparing to roll out a new upscale technical practice aimed at senior management in their client companies, and at new equally high-level prospects. Early means of announcing the practice was a long seminar with a weighty presentation of extremely dense material. This audience is not especially techno-literate or even current with the new financial analytical tools. What was needed was a way to reorganize a three-hour presentation into digestible chunks that say the essentials once in a memorable way. The end result should be usable as an across-the-desk piece, a direct mail promotion or a leave-behind for practitioners.

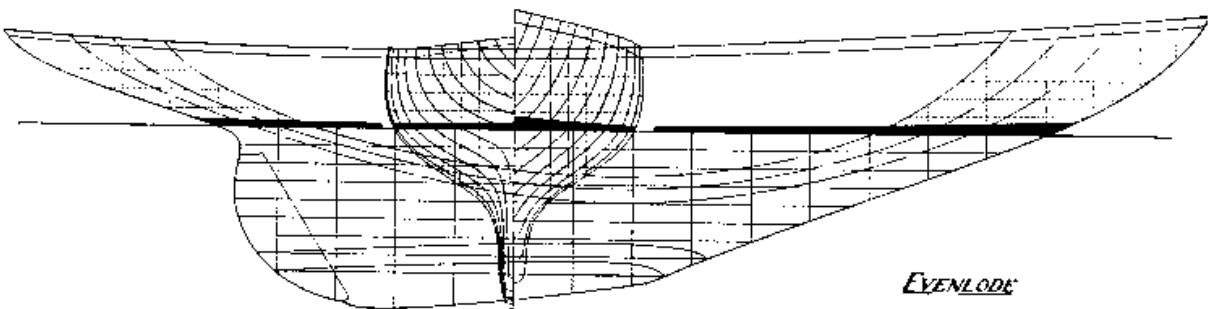
## Solution

Benchmark Publications was invited to work with the management team to define and refine the message; to find the right tone for the right people to articulate the purposes behind the new practice. In several shirt-sleeve working sessions, our client/vendor team hammered out the essential points of the practice. Then BPI's creative team shaped the information into a call to action for today's financial leaders.

BPI researched the varieties and flavors of financial methodology currently endorsed by top industry experts. We blended these new terms and concepts with the client's ideas into a highly visual presentation, organizing fairly complex ideas into an easy to assimilate form without insulting the reader.

## Result

The first printing of OCFO brochures "sold out" almost instantly. Feedback to our client project manager has been extremely favorable. The *Office of the CFO* brochure won the prestigious Women in Communications International Matrix Award.



# BUSINESS SOLUTIONS for...

- Change Management
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- Field Sales Automation
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- Technology Impact

...today and tomorrow.