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Alchemy Playbook

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Training Day Agenda

- Alchemy Playbook Overview
- Playbook Walkthrough
- Create Playbook content & Build Job qualifications
- Qualification Facilitation
- Next Steps and Session Close

Playbook Overview

What is Playbook?

Playbook is a mobile app that allows you to qualify which employees are able to perform any task in your facility. This one tool allows you to create job-specific training and deliver cross-training right on the floor. Playbook also records every employee that has passed job qualification criteria, enabling plant managers to find qualified workers for any unexpected personnel gap.

Why use the Playbook app?

Ensure OJT is consistent and correct

Create training on the floor

Easily track qualification

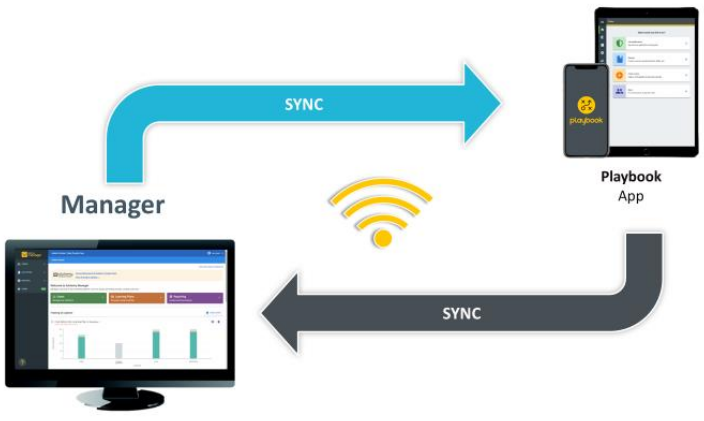
Find qualified people quickly

Three Essential Scenarios

Capture Training Content

Cover an absent worker

Cross-train workers



Sign in to Playbook

Playbook Admin vs Learner Mode

1 First time set-up

- Download the Alchemy Playbook app from your app store
- Input the customer name (at the end of your Manager URL)
- Sign-in with your Manager Username and Password
- Select your worksite and create your pin number

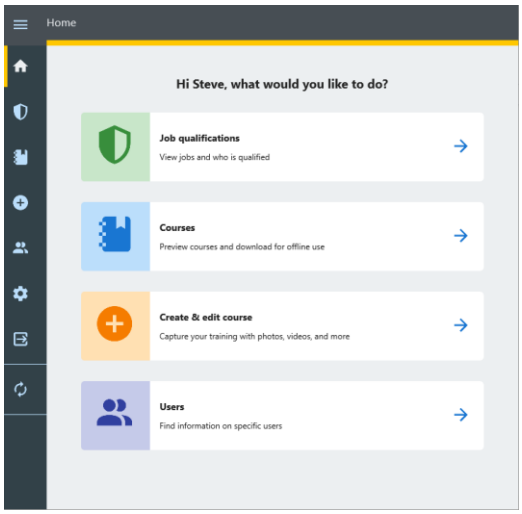
2 Signing into Playbook after set up

- Select your name on the accounts page of the app
- Enter your pin

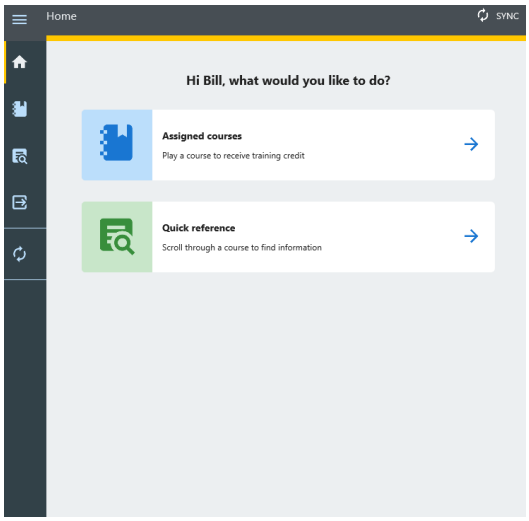
3 Playbook Admin vs. Learner Mode

- Playbook Admins will be able to access Job Qualifications, Courses, Create courses, and Users. This admin role is assigned in Alchemy Manager. (See Page 12 for more details)
- Playbook Learners will only see courses that are assigned to them (through Learning Plans or Job Qualifications) and Quick Reference view

Playbook Admin Home



Playbook Learner Home



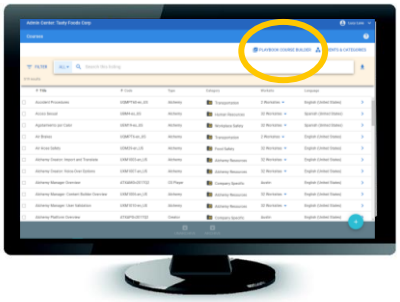
Create Playbook Courses

In App and in Manager Site

1 In App: Build Playbook Course

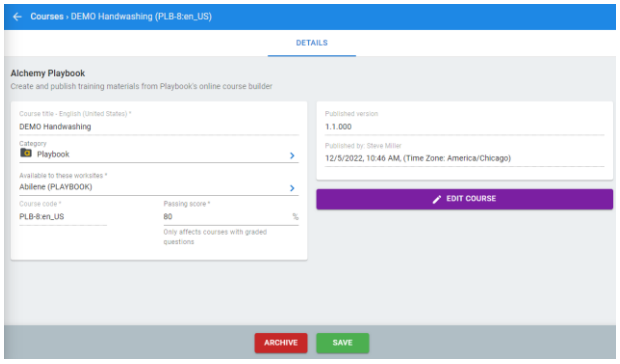
1. From the Home page in Playbook, select **Create & edit course**
2. Select **Create new course**
3. Give the course a title (start with TEST)
4. Add the following:
   - ❑ **Video and / or Photo**
   - ❑ **Text Instructions**
   - ❑ **Question**
5. Save as a draft or Publish course

2 In Manager: Build Playbook Course



1. Log in to your Manager website
2. From **Activities** select **Courses**
3. In the top right-hand corner, click **Playbook Course Builder**. Then select **Create new course** or **Load a Draft Course**

3 In Manager: Edit or Archive Published Courses



1. From **Activities** select **Courses**
2. Search or Filter to find Playbook Courses and select a Playbook Course
3. Change the Passing Score as needed
4. On the right-hand side, click **Edit Course** to edit and create a new version
5. At the bottom of the course details page, click **Archive** to remove it from your active course list

Best Practices for Playbook Courses

Course Design

1. Increase engagement by using videos and photos of your site and employees - Showcase the knowledge, skills and expertise of your employees
2. Keep each course short (approximately 5 minutes per course). Short courses will be easier to complete on the floor and help employees learn targeted information.
3. Plan ahead– create a course outline using the templates at the end of this Guide

Examples of content:

Text

- "Purpose Statement" and for Call Out statements (like "Safety First")
- Introduce a new topic
- Closing instructions – like 'Now you try"

Photos

- Take photos of your site and employees to increase engagement (don't rely only on online stock images)
- Obtain photo release waivers for employee photos

Documents

- Include documents that are not likely to change frequently, for example: equipment manual, emergency evacuation map, charts
- Don't include documents that are frequently updated, such as: SOPs, policies, work instructions

Videos

- Record video clips for each step in a process – in a live setting, short recordings are easier to do and easier to update later. It will also help break down a process into easy to learn steps!
- Remove audio from the video: remove background noise from the floor and learners will probably have difficulty hearing the video if they are on the floor.
- You can use other video editing programs to add captions to the video. Some additional programs that you can use to edit videos include: Youtube, MS Video Editor, Clip Champ

Questions

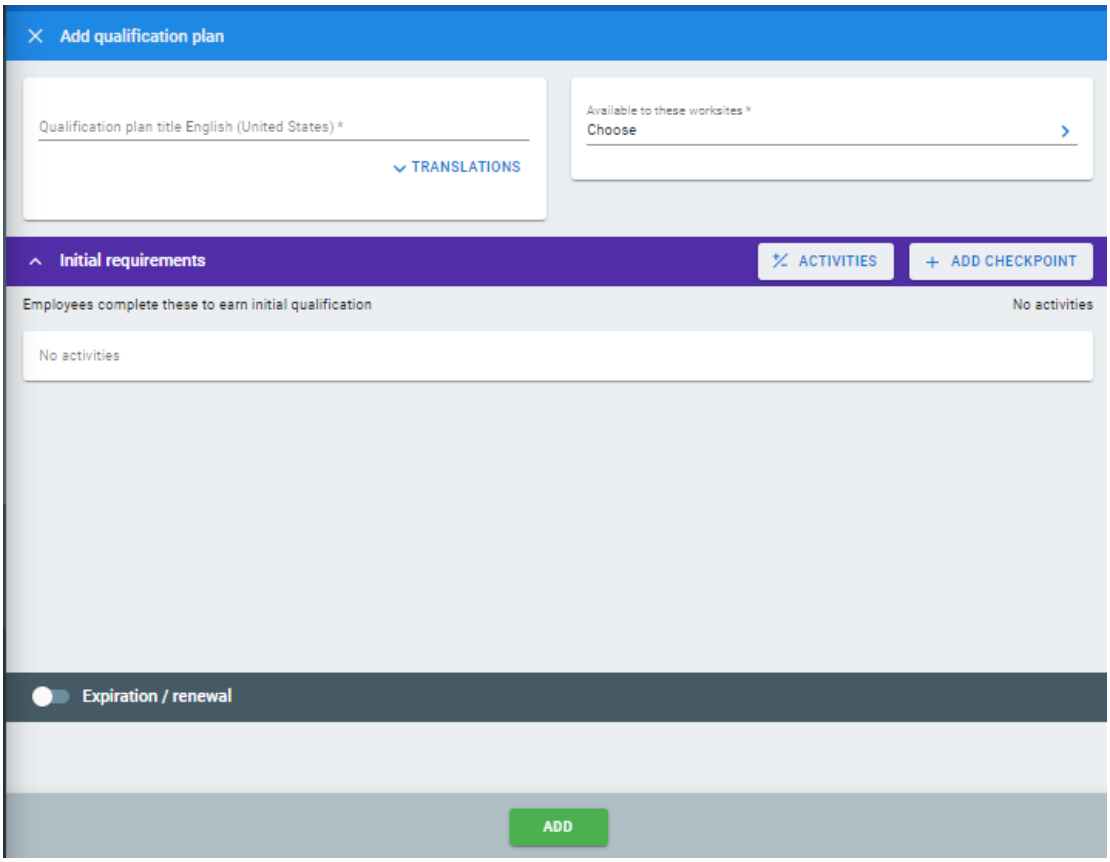
- Use data to determine what to ask (ex: incident data)

Build Job Qualifications

In Manager Site

1 In Manager: Build and Assign a Qualification

1. Log in to your Manager website
2. From **Activities** select **Job qualifications**
3. Under **Details** name your Qualification and select the worksite
4. Add **(+) Activities** and **Checkpoints** to the Initial Requirements
5. Set Expiration/Renewal
    - Select whether renewals require re-taking the Initial Requirements or require a different set of activities
6. Click **Add**
7. At the top of the page, select **Assignments** to add **Users**



Qualification Admin: Special Cases

Override the job qualifications

User Story #1: Qualify

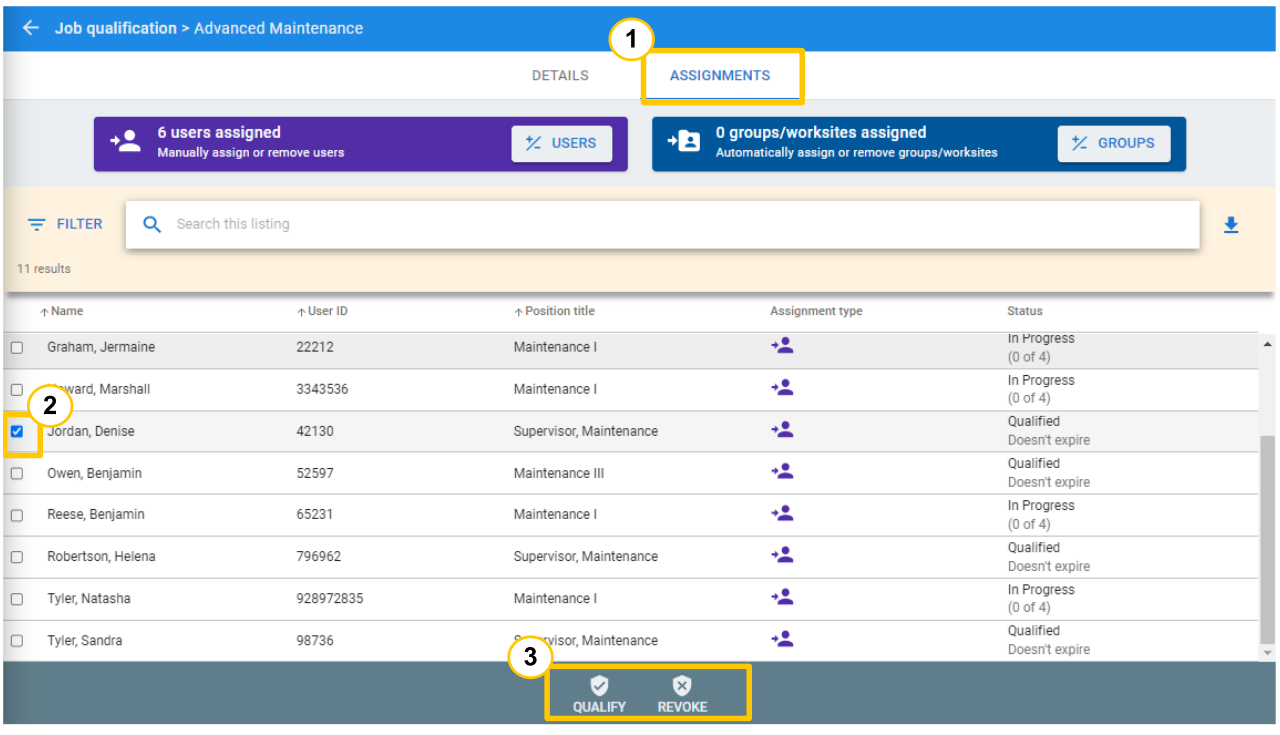
- Employee comes in from another worksite and is highly qualified with many years in the position. This employee doesn't have the qualification in Manager.
- Qualification admin can provisionally qualify this employee

User Story #2: Revoke

- Employee has passed qualification, but employee has demonstrated unsafe behavior
- Qualification admin can revoke qualification

In Manager: Provisionally Qualify or Revoke

1. Under Activities on the left-hand side, select "Job Qualifications"
2. Select a Job Qualification and Navigate to the Assignments tab
3. Select the user and at the bottom, select "Qualify" or "Revoke"
    - Provisionally Qualifying will allow the user to bypass the initial requirements to become Qualified
    - Revoking a qualification will change their status to "Revoked". (The only way they can regain their Qualified status is by Provisionally Qualifying them. Manage Revoked qualifications on a case-by-case basis.)



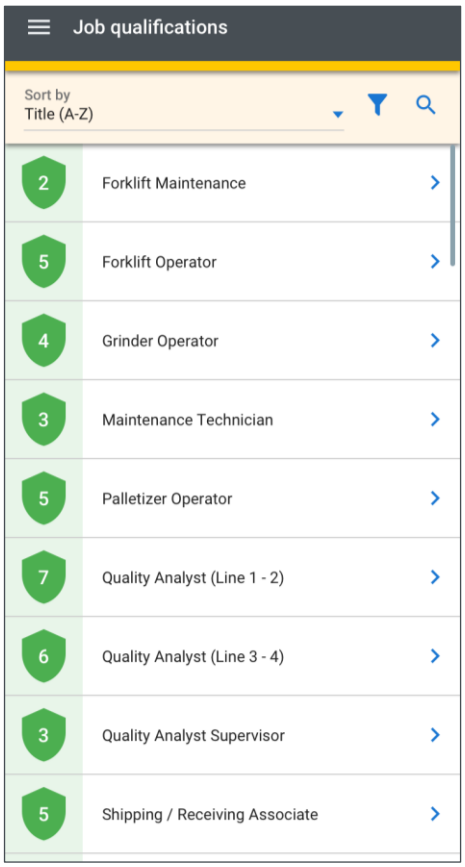
Playbook Qualification Facilitation

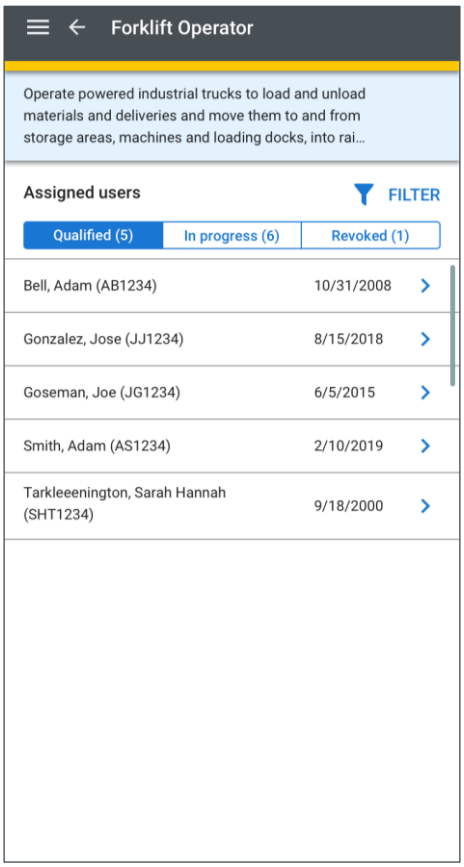
Hands-On in App

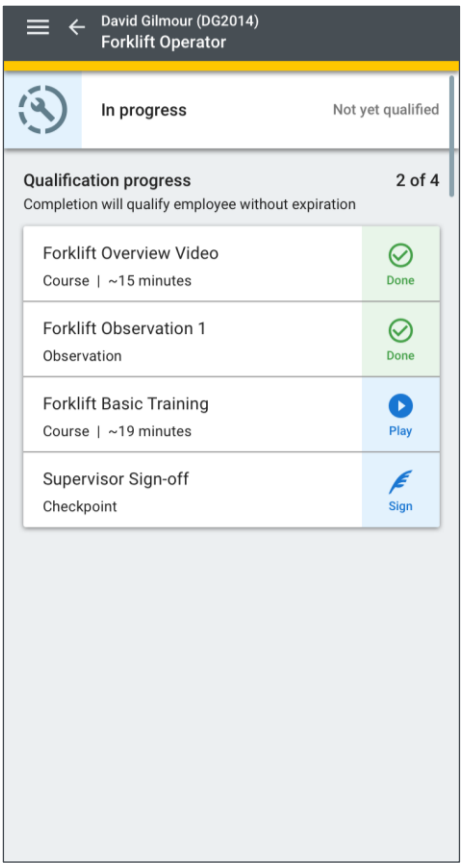
1 In App: Sync Data

2 Facilitate Job Qualification Training

1. From the Home page in Playbook, select **Job qualifications**
2. Select the qualification you built
3. Review In Progress users
4. Select a user and give them the mobile device to complete their required training
5. Sync







Best Practices for Getting Started

1 Identify positions to start with. Position = Job Qualification

- Identify the job positions most affected by absenteeism
- Select a job that requires on the floor training; make this the title of your first qualification
- Use the worksheet on pages 13

2 Break that position into its basic requirements.

Training Requirements = Activities

- Use the worksheets on pages 16-17

Decide the best method(s) to deliver instruction – for example, you can use:

- Playbook Course
  - Alchemy recommends microlearning – activities that are 2-7 minutes in length
  - Benefits of Playbook Courses: easy to make on the floor, easy to collaborate on drafts with others
- Check Points
  - Can be added when you create a Job Qualification in Manager
  - A Playbook Admin can sign at a checkpoint to confirm that an employee understands specific processes or is able to perform specific tasks
- Creator Courses
  - Benefits: easy to create a more robust course with remediations, narration, and Game Show for Player
- Alchemy Courses
  - Use your existing Alchemy Library

If you have Coach, Observations can be part of your Qualification!

- Requires both Coach and Playbook on your mobile device
- Need to sync both apps after use
- When you select an Observation from a qualification, the Coach app will launch on your device
- Login to the Coach app, find the Observation
- Conduct the Observation, sync in Coach
- Return to the Playbook app and sync in Playbook to pull down the credit for completing the Observation

Helpful Information

Learning Plans and Job Qualifications

Learning Plan

- Good way to set learning goals for specific groups, new users, or an entire facility
- Activities must be completed within a set time frame
- A **set start and end date** or number of days; can be reoccurring
- **Multiple Reporting options:** Learning Plan Matrix report (which can be scheduled), SMART Learning Plan Matrix and SMART Learning Plan Progress, and more

Continuous Learning for Safety

Job Qualification

- Activities must be completed to qualify for a specific job
- No time frame necessary to complete initial requirements; can set an expiration/renewal
- Can provisionally qualify or revoke users
- Can be tracked in the Playbook app as well as Manager
- **Reporting Options:** Export Job Qualification Matrix and a SMART report

Learning Towards Qualification

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Manager
Access Levels for Playbook

The Manager website provides varying degrees of access to the user database and reporting for trainers and administrators of your organization. There are three levels of administrative access, including one read-only level of access. There is also the User / Facilitator level of access, which enables your employees to access eLearning.

Capability	Playbook Admin	Silver+ with Playbook Admin	Qualification Admin	Platinum (Customer Admin) with Qual Admin	Diamond Admin
Playbook App Access	✔	✔	✘	✘	✔
Manager Access	✘	✔	✘	✔	✔
Create Playbook Courses	✔	✔	✘	✔	✔
Qualify Users	✔	✔	✘	✔	✔
Publish Playbook Courses	✘	✔	✘	✔	✔
Create/Edit Qualifications	✘	✔	✘	✔	✔
Provisionally Qualify Individuals	✘	✘	✔	✔	✔
Revoke Qualifications	✘	✘	✔	✔	✔
Assign Playbook and Qualification Admin	✘	✘	✘	✔	✔

Worksheets

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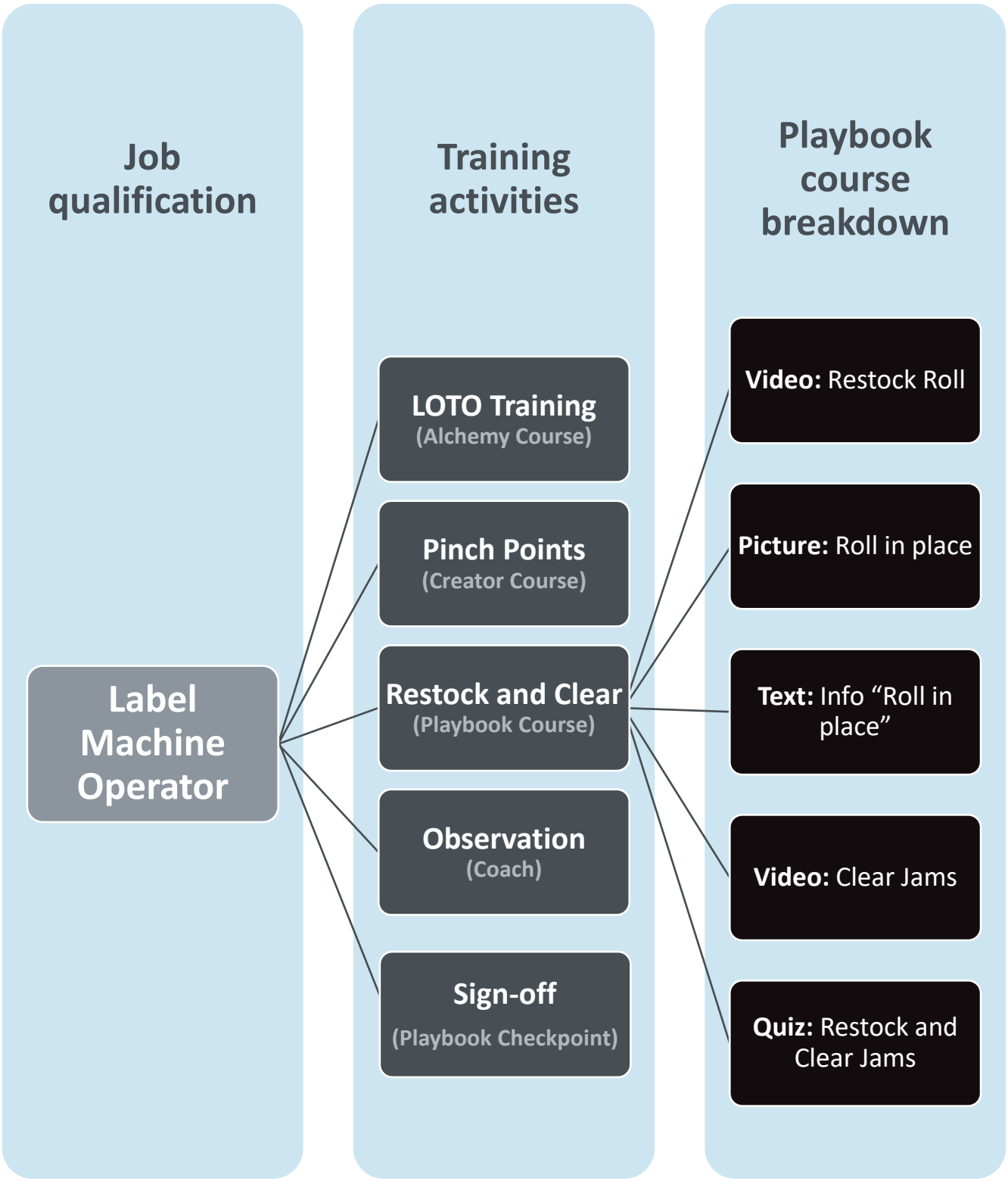
Qualification Example

Job Qualification Breakdown



Qualification Builder: Critical Positions

Individual Worksheet

1. List the five positions in which an absence creates issues with efficiency, productivity, or morale.
2. Star the three that are the most critical.
3. Guided discussion to identify useful examples for today's training

Position Name:

Position Name:

Position Name:

Position Name:

Position Name:

Qualification Builder: Example

Sample Worksheet

1 Position / Job / Task

Label Machine Operator

2 What skills / training does this job require?

LOTO Training	
Safety / Pinch point awareness	
Restock	
Clear Jams	

3 Job qualifications list (delivery method)

	LOTO Training (Alchemy course)
	Label 5000: Pinch Points (Creator course)
	Label 5000: Restock Labeler & Clear Jams (Playbook Course)
	Label 5000: Operation (Coach Observation)
	Label 5000 Sign-Off (Check point)

Qualification Builder: Example

Sample Worksheet

4 Playbook Course Breakdown

Playbook Course Name: **Label 5000: Restock Labeler & Clear Jams** Passing Percentage: **100%**	**Video: Restock Roll**
	Picture: Roll in place
	Video: Clear Jams
	Quiz: Restock and Clear Jams

Playbook Course Name: Passing Score:	

Playbook Course Name: Passing Score:	

Playbook Course Name: Passing Score:	

Qualification Builder

Individual Worksheet

1 Position / Job / Task

2 What skills does this job require?

3 Job qualifications list (delivery method)

Qualification Builder

Individual Worksheet

4 Playbook Course Breakdown

Playbook Course Name:	
Passing Score:	

Playbook Course Name:	
Passing Score:	

Playbook Course Name:	
Passing Score:	

Playbook Course Name:	
Passing Score:	

Alchemy Support

1-888-988-8832
Support@AlchemySystems.com

US/Canada Hours:
Monday – Friday
3:00 am – 7:00 pm Central

UK Hours:
Monday – Friday
9:00 am – 1:00 am

Helpful Information

Manager:

https://www.sistemlms.com/_____

Username: _____

Password: _____

Playbook PIN: _____

Free online training videos and tip sheets in Manager Help!