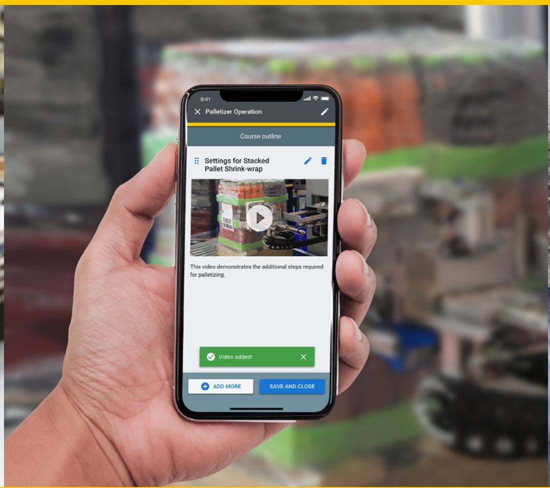
intertek alchemy

Playbook Guidebook



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Introduction

You have purchased Alchemy Playbook and will soon receive training on how to use it. That training will take you through the technical aspects of using Playbook which you will need, but this guidebook is designed to help you put together a plan for your Playbook implementation and to focus on some recommended best practices.

Playbook comes as a blank template, which is helpful to meet the unique needs of every organization, as nearly every worksite is different. But this does mean a defined strategy is helpful to realize maximum benefit from Playbook. Before you get started, you need to decide how you want to use Playbook, and at a high level, there are two different options available to you:

Option 1 — Use Playbook to create content, deliver on-the-job training (OJT), and track Job Qualifications for your employees. This option takes advantage of all Playbook has to offer and will require some more work and planning.

Option 2 — Use Playbook as a way to create content and deliver on the job training without actually tracking Job Qualifications.

Both are good options, and this document will focus on Option 1, but even if you only plan to use Playbook to deliver OJT, the information in this document will be highly beneficial. Keep in mind that you can always start with Option 2 and then move to Option 1 at a later date. Setting up strong, consistent protocols will help you create a strong program regardless of the option selected.

Definitions

Playbook

The Alchemy app that allows you to create, deliver, and track job-specific training right on the production floor. For purposes of this document the assumption is that if a client has purchased Playbook, they are also utilizing Alchemy Coach.

Playbook Course

A Playbook course is a course created through the Playbook app or through the course creation Playbook option in Alchemy Manager and is created to be used for on-the-floor training. These courses are intended to be highly visual, have no voice over (videos can have sound), and should be no longer than 3-5 minutes in length. Playbook courses are for learning in the flow of work training activities, which is different than classroom or eLearning training. Playbook courses are also for very specific job tasks, as opposed to general, overview training on a broad topic.

Coach

The Alchemy app that assists in validating that job tasks and training is being properly applied on the factory floor. When combined with Playbook, Coach can help you track progress as employees move through the Job Qualification process and can also be your final step in the Job Qualification to validate job task proficiency.

Standard Operating Procedure (SOP)

We recognize that you might use a different term at your company such as Job Safety Analysis or Job Hazard Analysis, but for the purpose of this document, we will use the term SOP.

Job Qualification

A Job Qualification is a listing of all the activities that an employee needs to complete before being qualified for a job/task. These can include training courses, Observations, Checkpoints, etc. A Job Qualification can include courses taken via Playbook, eLearning, Instructor Led Training (ILT), and Alchemy Player, and also can include Coach Observations and Checkpoints that include a signature sign-off. While eLearning and ILT courses can be tracked through Playbook they must be completed via Alchemy Manager. Job Qualifications can be assigned to employees and once the qualifications have been met, the employee will be displayed as Qualified within Playbook. Which employees are Qualified for which jobs is searchable within Playbook. Job Qualifications are created and assigned in Manager and can be viewed in Playbook. Job Qualification progress can be tracked in Playbook as well as in Manager.

Learning Plan

A Learning Plan is a set of training activities that can be assigned to an employee or a group of employees to track training. This could be annual, quarterly, monthly, or one-time training, such as new hire orientation. Learning Plans provide a clear way to assign and then report on training in the Alchemy Training System.

Checkpoint

A Checkpoint is an optional feature in Playbook's Job Qualifications that allows you to require a signature as a part of the qualification process. You can identify who is responsible to complete the Checkpoint and customize the language of the Checkpoint. Checkpoints help to drive accountability in your training process and provide a digital record of the signature.

Corrective Action

A series of steps that need to be taken to address the non-compliance discovered during the observation of an employee. These steps may include learning activities like courses, tests, and even a demonstration of the procedure, or a conversation with other experienced employees. Corrective actions are important because the supervisor/coach needs to ensure that the employee's non-compliant issue has been addressed and that the employee has worked on learning and practicing the skills before the next observation on the same topic.

Coach observation

CHAPTER 1

Getting Started

Before jumping in and creating courses and/or qualifications, consider setting up a Playbook team that will coordinate and roll out Playbook at your company. If you have multiple worksites, it might be wise to pull in key players from each site for consistency. Putting together a plan that can be duplicated across multiple locations will ensure success.

Who should be involved?

Executive sponsor — Identify an individual who will visibly and vocally support the project, help to make resources available, and communicate at the executive level on progress, roadblocks, successes, and next steps.

Corporate champion — Identify a key contact at the corporate level who will be responsible for the overall rollout. This does not mean that they will do all of the work, but instead, they will be the one(s) responsible for managing the process and need to have the authority to make sure the assigned tasks are completed.

Local champion(s) — Support at the plant level is essential as well for the rollout and the ongoing usage of Playbook, so having a key point of contact at the plant level is important.

Other members — Since courses and qualifications can cover a wide range of topics, it is recommended to have members from different parts of the plant involved:

- Operations
- Human Resources
- Training and Development
- Food Safety
- Workplace Safety
- Continuous Improvement

What resources do we need?

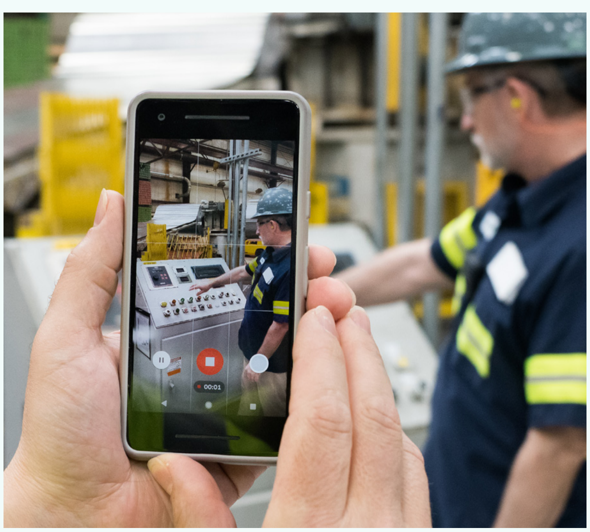
SOPs — Every organization has them, and they are the best way to start using Playbook, so make sure your team has easy access to them. It is recommended that you use Playbook as an opportunity to ensure that the SOPs are up to date and accurate. Simply copying and pasting might result in courses that are outdated as soon as you release them. Take the time to make sure they are correct.

Subject Matter Experts — Not everyone can be on the rollout committee but make sure you know who "owns" the different SOPs and that they are available to help as needed to provide details and make updates as needed.

Photos/Videos — Playbook relies heavily on visuals, so make sure you have people ready to take pictures and/or videos of the steps being described in the SOP. It is not necessary to have existing photos/videos, as Playbook is designed to facilitate this for you. This would require allowing cell phones or tablets out on the floor to document as needed. If desired, more sophisticated cameras, GoPros, etc. can be used as well, with that content easily imported into Playbook.

You will also need to decide if the bandwidth at your facility can handle video playback. If getting a good connection is an issue, you might want to stick with photos during this first run and add videos in the future. Or, you can download courses in advance to the tablet/phone to play back video-heavy courses in an area with limited or no wi-fi.

Reference **Addendum #2** for some best practices to utilize when taking photos and recording videos using your phone.



Photo/Video Editing Software — You don't need anything fancy, and most likely the software on your computer will work, but it all depends on how much editing you plan to do. Please note that photos or video clips cannot be edited once uploaded into Playbook. For example, if you plan to add a picture of all standard PPE, that collage of pictures showing the pieces of PPE required needs to be created before you can upload it into a course and will require the use of editing software.

Shared Drive Access — No one wants to reinvent the wheel, so set up a shared folder where users can upload photos and videos that might be shared across multiple courses and worksites. Using the PPE example from above, someone just needs to create one photo that shows all required standard PPE and then share it to be used in all of the courses being created. However, it might work best to upload those shared documents directly from your computer into a Playbook Course.

Time — This process isn't going to happen overnight, so make sure your team has the time needed to dedicate to getting Playbook up and going. This might initially require weekly calls/meetings that eventually turn into monthly check-ins.

Alchemy Access — During the time you and your team are creating training activities, everyone will require specific access levels to create courses and observations and to publish. Remember to determine early on who does what. Establish the appropriate access levels in Alchemy and review periodically. If after your Playbook + Coach launch, the core team's course creation responsibilities are different, you can adjust their access level accordingly. Customer Platinum level access is required to make these changes.

Devices — Based on the size of the plant, the recommendation is 1 tablet per 100 employees, and if you allow supervisors to have the apps loaded on their phones, that will allow additional flexibility.

- Have the tablets purchased (with protective covers), and ready to go before the plant is implemented.
- Determine who is responsible for downloading the Playbook and Coach apps.
  - Involving IT early in the process is always a good idea.
  - Will the apps be installed on each device or via a central mobile device manager (MDM)?
  - Will automatic updates be enabled? If not, how will app updated be handled?
- Establish a policy for checking out tablets.
  - Locked office or a lockbox?
  - Will there be a sign-out process?
  - Do they need to be returned before handing them off to another user?
- Establish a policy for maintaining tablets.
  - Who will keep them charged?
  - Where will they be charged?
  - Who will sync them at the beginning and end of the shifts (only applicable to Coach, as Playbook syncs automatically when connected to internet).
- What type of security/restrictions will be placed on the tablets?
  - Who will be responsible for setting them up?
  - Will the user have Internet browser access (required for launching hyperlinks)?
  - Will the camera be enabled (required for creating content in Playbook or uploading photos in Coach)?

Where do we start?

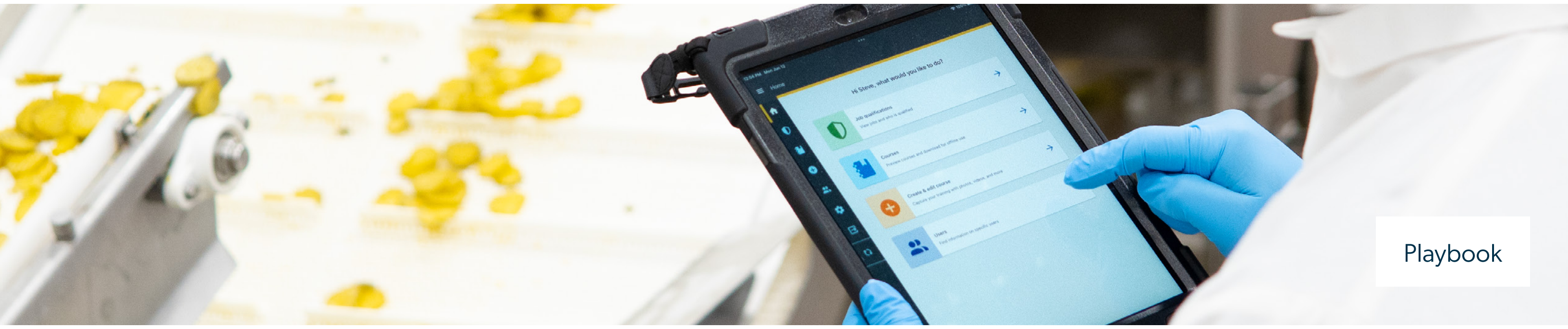
Start small and strategically. Build some grassroots support for optimizing your training efforts and that will help pave the way for the remainder of your launch of Playbook and/or Coach. Here are some recommendations:

- Start with the easiest process — start small and build up to the bigger tasks
- Start where you have the most injuries or near misses
- Start where you have the most absenteeism
- Start with an SOP that is shared across multiple locations
- Start with your personal favorite SOP

This decision is really up to you, but the important thing is that you get started and don't wait to start training until everything is created. All you need to get started is to have one course created or one Job Qualification built out.

CHAPTER 2

Building Playbook Courses



Consistency is key when building Playbook courses, especially if courses are created by multiple users and shared across locations. Keep in mind that Playbook courses are short learning bursts and should be NO MORE than 3-5 minutes long.

Even something as simple as how courses are named is very important. Your naming convention and course design are important for efficient governance, and keeping both of these consistent, will be the key to developing a system that is easily understood by all who utilize it.

Playbook Course Template (See Addendum #1)

It is recommended that you create a template to be utilized by all sites when creating Playbook courses. This doesn't have to be complicated but needs to include all of the components that are important to an SOP. Here are the recommended key elements, and most of this can be pulled directly from the SOP:

- **Course Name** — Determine a consistent naming convention and stick to it.
  - At a minimum include plant name, but also add division if applicable
  - Plant_Department_Area_job name_version
  - Example: AUS Poultry. Harvest Area One Puller
- **Purpose Statement** —This is a mini learning objective and should be no more than two sentences and MUST BE job or task specific. Only topics that are covered specifically in the course should be included in the purpose statement. If the topic is not covered in the course, do not include it in the purpose statement. Do not include PPE related objectives.
- **Standard PPE** (this can be shared across multiple courses)
  - Photo collage
  - Listing of the PPE using bullets

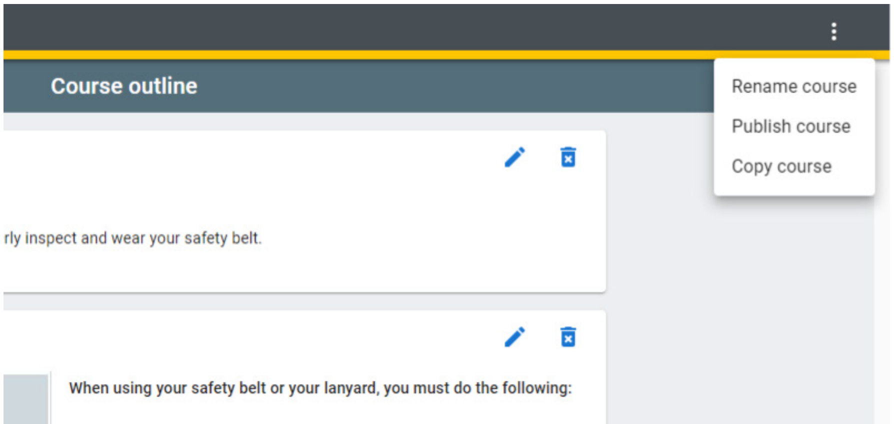
- **Job-specific PPE**
  - Photo collage
  - Listing of the PPE using bullets
- **Standard GMPs**
  - Photo collage
  - Listing of the GMPs using bullets
- **Identified Physical Hazards**
  - List using bullets
- **Identified Chemical Hazards**
  - List using bullets
- **Step by Step Instructions**
  - Photos should be required for each step
  - Consecutive steps should be numbered
  - Lists should be bulleted
  - Be sure and consult your SME if you have any questions or for final verification
- **Add a Question after each Critical Step**
  - Use a combination of true/false and multiple-choice questions
  - Remember to choose the correct answer
  - Best Practice – Maximum of 5 questions per course depending on the length and complexity of the task
  - There is no option for remediation loop withing Playbook courses
- **PDF can be uploaded — if absolutely necessary**
  - Do not insert documents that are updated frequently
  - Do not insert the SOP itself
  - Uploading documents is not recommended except in very specific instances, as they will typically become outdated without being noticed
- **Verification Question**
  - This training prepared me to do (restate purpose statement).
  - Yes / No
  - This should be included in every course
- **Optional Language Question**
  - A translator in my preferred language was provided for this training
  - Yes / No / Not Applicable
- **Optional Final Statement(s)**
  - Restating of the course purpose
  - Company safety slogan

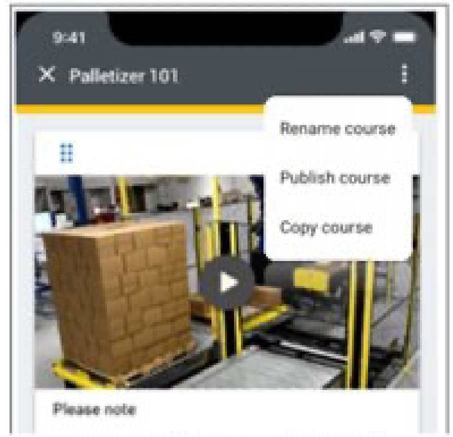
Considerations for Sharing/Copying Content

There is likely to be content that can be shared across jobs or locations, so the ability to copy a course is critical. However, it is important that this be done correctly to prevent a course from being edited instead of copied.

Draft — when the course is a draft, (not yet published), it can be accessed by ALL users who have Playbook admin access — even those from other worksites. This is a huge benefit to allow collaboration among the team who is creating training and also for sites who may have the same or similar process. Something to be careful of, is that this functionality allows others to copy the course if needed, but if not done correctly, they can rename or alter the course.

To keep that from happening, please note the different options available in the Playbook app or in Alchemy Manager. The available options are in the upper right corner of the draft in both Manager and in Playbook:





Rename Course

- Changes the title of the current draft course
- DOES NOT copy the draft course
- ONLY use this when you need to correct the name of a course that YOU have created for YOUR site
- DO NOT rename courses created by other users or locations

Copy Course

- Copying an existing draft will create a new copy while leaving the initial course draft intact
  - Saves the original draft course and a new, duplicate draft course
- Allows the user to rename and edit the new draft

Considerations for Publishing Content

When a course is published, it is then available to be utilized for the specific worksites selected. Therefore, it is important to only publish when you are ready to launch the course or associate it with a qualification. It is also advised to create custom categories for organizing and grouping your content.

Publish Course

- Publishes the course to Alchemy Manager (including setting a worksite and category) to make it available for training users
- Removes the course from drafts and moves it into the course listing

- Published courses can be edited in Playbook or Manager
- Editing a published course creates a version number
- Edits are tracked according to Major/Minor/Patch and who is making edits

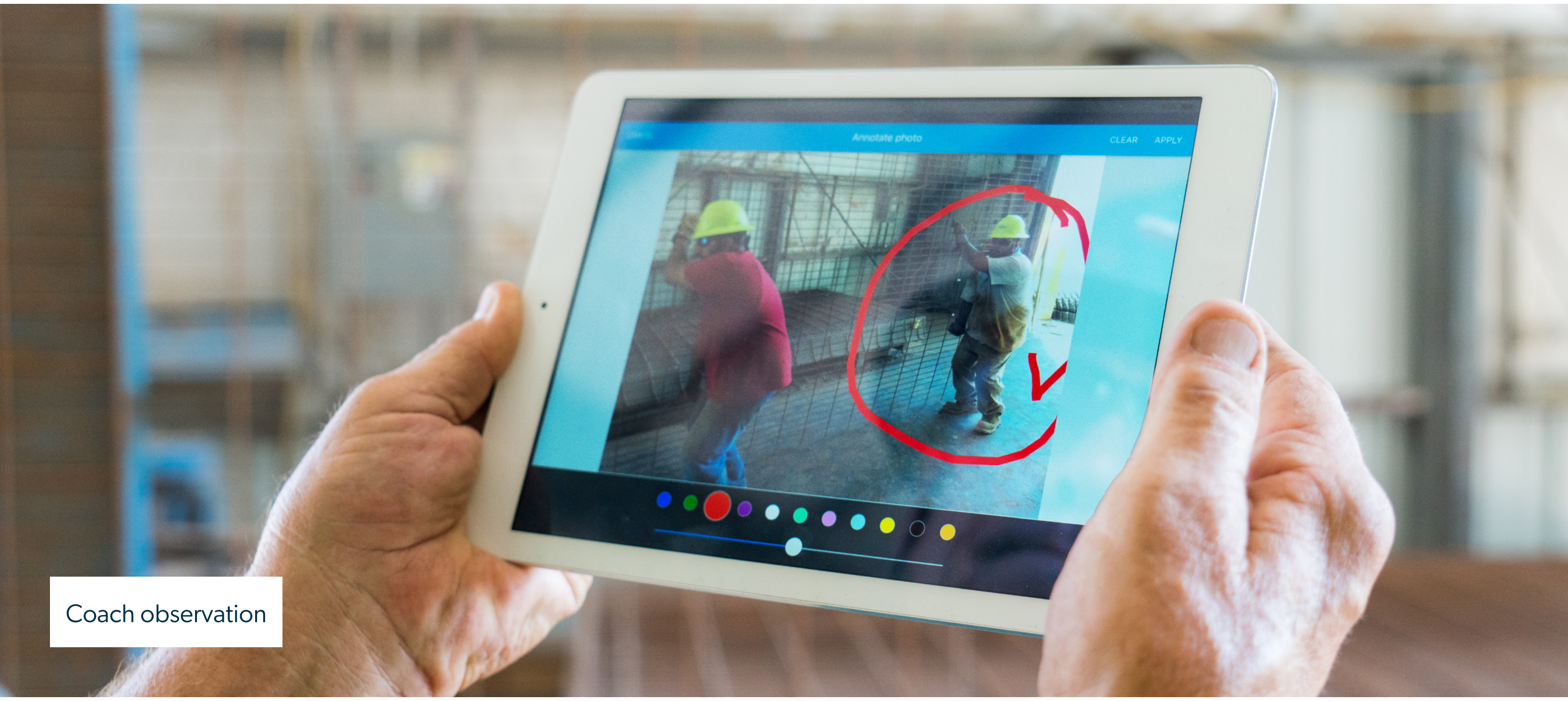
Do not publish a course until it has been reviewed and approved. It's easy to overlook mistakes or inaccuracies when you are in the weeds building a course, so having someone verify your work for accuracy and spelling errors before you publish is always a good idea.

Do not work on someone else's draft without their permission.

Published courses can be copied as well, but ONLY if you have access to the worksites associated with the course and even then, you must be careful and ensure that you are copying the course and not editing the existing course.

CHAPTER 3

Creating Coach Observations



Coach observation

Alchemy Coach is a separate app, used to track validations of correct on-the-floor behaviors. Coach ties in closely with Playbook, regardless of whether or not you plan to use the Job Qualifications portion of Playbook or not. The Playbook courses allow you to train a user on a task, and Coach allows you to verify that they can actually perform the task and demonstrate proficiency, and both can be associated with Job Qualifications and Learning Plans.

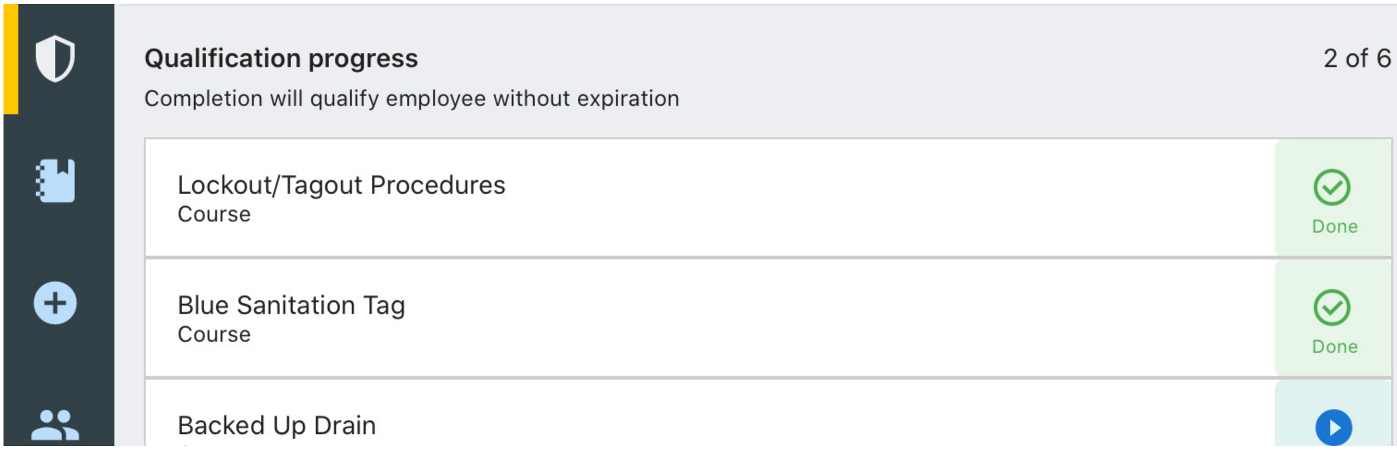
As with Playbook courses, it is highly recommended that you develop a standardized naming convention and template for Coach Observations as well. Please see Addendum 3 for a sample template with step-by-step instructions, but here are some recommended best practices:

- **Course Name** — Come up with a predetermined naming convention and have it align with the corresponding Playbook training course(s). It might be helpful to put "Qualification" in the name.
  - At a minimum include plant name, but also add division if applicable
  - Plant_Department_Area_job name_version
  - Example: AUS Poultry. Harvest Area One Puller
- **Observation Instructions** — Give clear instructions to the coach regarding what they will be doing. Example:
  - Introduce yourself
  - Ask the employee if they have a preferred language and what it is
  - Summon a translator if needed
  - Let the employee know what to expect (e.g., observing from a distance, observing near their workstation, asking questions, giving and receiving feedback)
  - Let the employee know how long the observation will take; we recommend them to be about 10 minutes, and no longer than 20 minutes to maintain employee engagement
  - Let the employee know this is a job qualification observation to determine proficiency (or show progress depending on the purpose of the observation)
- **Passing Percentage** — Recommendation is to always have this at 100% and do not allow for Manual Grade.
- **Signatures** — Allow for supervisor/coach and associate/trainee signatures
- **Observation Limit** — If the Coach Observation is part of the job qualification, you should set the limit of number of employees that can be observed at a time to one (1)
- **Corrective Action**
  - Allow for Corrective Actions and provide specific instructions for what that should be:
  - If the employee is not proficient at their tasks, follow these steps:
    - Step 1, Step 2, Step 3
  - Select "No" for Coach Completes Corrective Action
- **Questions**
  - Recommended question type for most roles is Yes/No
  - Safety and Food Safety choices may be Yes/No, Safe/At Risk and Compliant
  - If you need an N/A option, the Yes/No question type does not offer N/A
  - Helpful hint: Phase questions like this: "Ask Associate…"
  - In the notes, include "Listen for…" and list the important words or phrases the observer should hear from the employee in order for them to be marked as Yes.
  - It is highly recommended that the observation questions align with the task steps and flow of the corresponding Playbook Training.

Any task that is deemed "Critical" must be covered in the Observation both through observation and Q&A with the employee.

CHAPTER 4

Creating a Job Qualification



Creating a Job Qualification is done through Alchemy Manager, and can include courses created in Playbook, Creator courses, Alchemy courses, Observations, and Checkpoints. ILTs and eLearning course display in the Playbook app but can only be created/completed via Alchemy Manager.

Include Everything — A Job Qualification should include all of the training activities that an employee needs to be trained on, in order to perform the specific job. This training can be done via Player, eLearning, Instructor Led Training (ILT), or Playbook. For example, all employees need basic PPE and GMP training. These courses don't need to be created as Playbook courses, because they are already available through Player or eLearning. Those courses can be added to the Job Qualification and the employee will get credit for having taken them via their orientation or annual training. So always add them to the Job Qualification.

Observations — Always include a final observation that allows the supervisor to watch the employee perform each of the tasks involved in the job.

Checkpoints — These can be added in cases where a specific level of supervisor or manager needs to sign off on a specific task. It might also be utilized if a Job Qualification covers several phases of training, as a way to sign off that the first phase has been completed and that the employee is ready to start the second phase.

Expiration Date — Depending on your training process, you may require employees to requalify for a Job Qualification after a specified period of time. If that is the case, you can set an expiration date for the Job Qualification and have the employees re-qualify either by completing the same requirements as the initial qualification or completing different requirements, such as a simple refresher course.

Requirements —When an employee is assigned a Job Qualification, if there is a training course included that they have already completed (regardless of when it was completed), that training will meet this requirement of the Job Qualification. If an expiration date is set up for the Job Qualification, at that point it will only look for training taken moving forward.

CHAPTER 5

Important Considerations

Coach Observations — Determine if you need a N/A option before you develop your observation statements/questions.

Payment Impacts — If your Job Qualification process impacts employee salaries, you may want to have the final Checkpoint be Human Resources, so they are aware the employee is qualified and can process the appropriate paperwork for the pay change.

Revocation — It is essential to understand the ramifications of revoking a Job Qualification. That action should never be completed without involving the appropriate people. Human Resources should be involved, as well as Plant Management.

Provisional Qualification — A Provisional Qualification is when you automatically qualify an employee for a task without them going through the Job Qualification steps. (Use case is an employee has been doing this job already and you just created the Job Qualification.) If you choose to do this, be sure you have clearly defined criteria for provisional qualification of employees. If you decide to provisionally qualify employees, determine your criteria and apply it consistently.

CHAPTER 6

Final Thoughts

If you think you need more than what this document provides, please don't hesitate to reach out to your Account Manager to learn more about purchasing Training Strategy Consulting services. The Alchemy consulting team has a consulting package specifically aimed at assisting customers in setting up and implementing Alchemy Playbook.

ADDENDUM 1

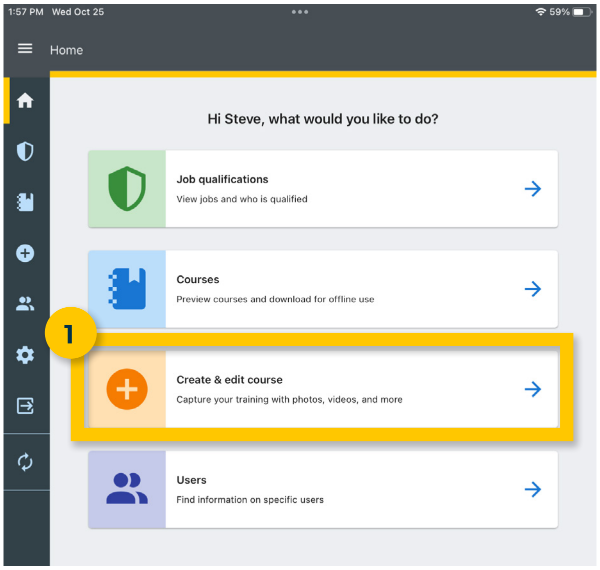
Playbook Course Outline

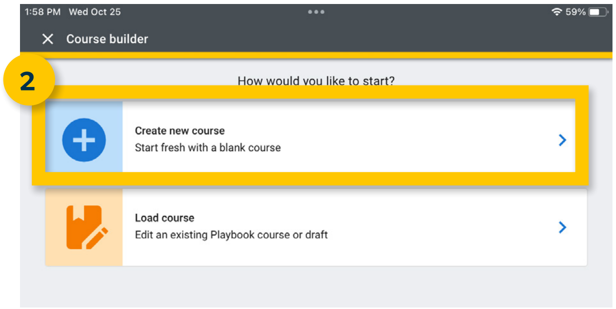
Playbook courses can be created via the Playbook app or in Manager. Additionally, you can start a Playbook course or copy a draft in Manager, then edit it in Playbook to add pictures and/or video.

The following instructions outline how to create a course via the Playbook app.

Create a new course

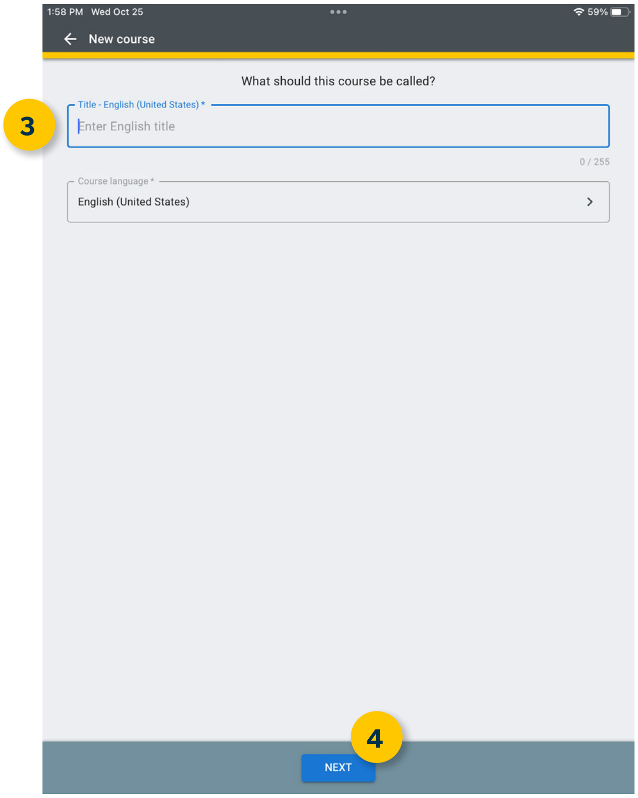
1. On the Home tab, select "Create & edit course"
2. Select "Create new course"





Playbook Course Title

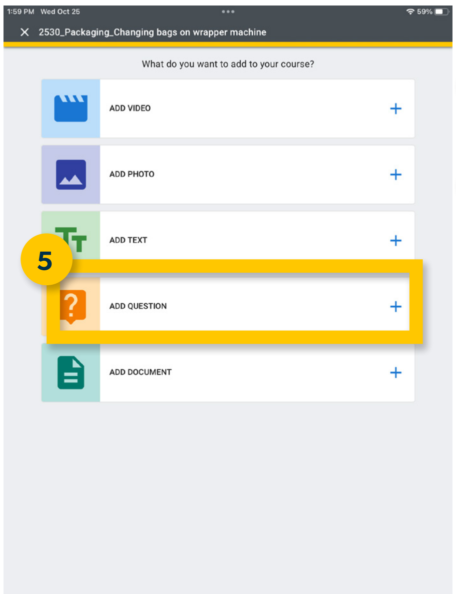
3. Name the course
   — Follow predetermined naming convention for Playbook courses: AUS_Area_Job task
   — For Example: AUS_Packaging_Changing bags on wrapper machine
4. Select "Next"

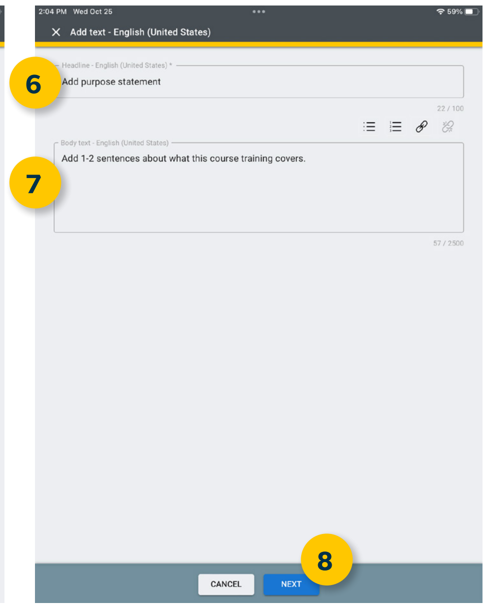


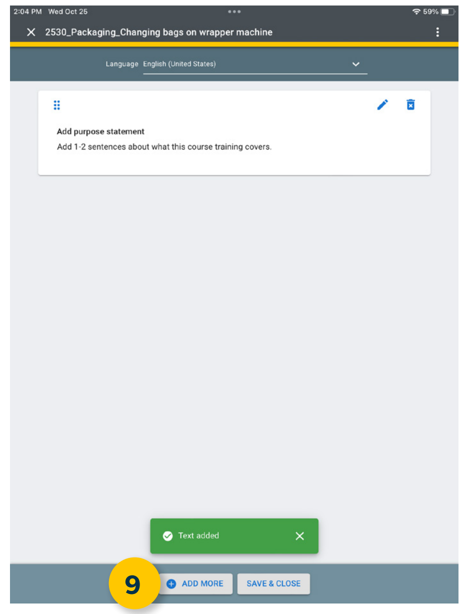
Add purpose statement

Best practice: Start every course with a purpose statement (mini learning objective)

5. Select "ADD TEXT"
6. Add purpose statement headline
7. Add purpose statement brief description
   - Copy and paste purpose statement from SOP. This should be 1-2 sentences and only cover what is trained on in the course.
8. Select "Next"



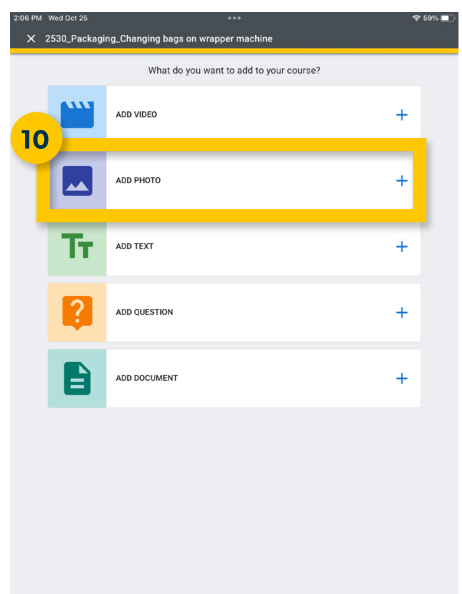




Add PPE info

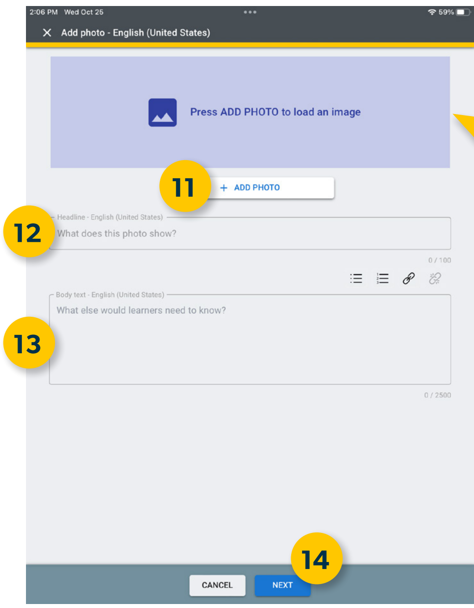
Best practice: Insert a photo collage of required PPE for the job. This may vary from job to job, so be specific and accurately depict the PPE required to do the job.

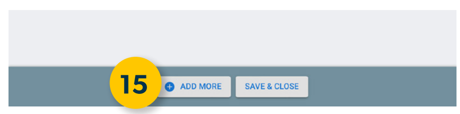
9. Select "ADD MORE"
10. Select "ADD PHOTO"



11. Add photo collage of PPE
12. Add headline (required PPE)
13. OPTIONAL: List PPE in body text
14. Select “NEXT”
15. Select “ADD MORE”

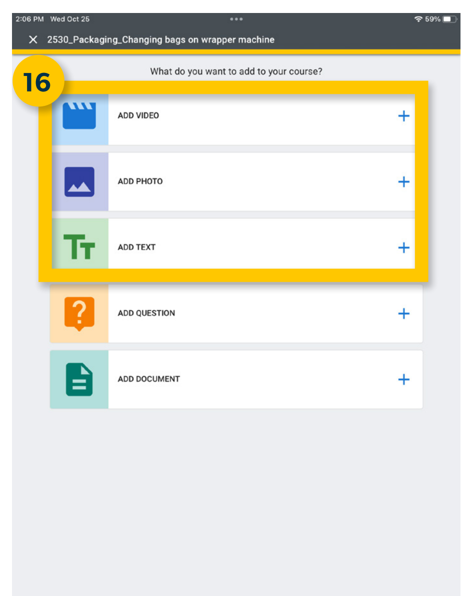
THIS IS ONLY AN EXAMPLE PHOTO. You will need to create photo collages of required PPE for your jobs. The easiest way to create the photo collage is to put the photos into PowerPoint, create the photo collage and save it in the shared drive.





Add step-by-step instructions

16. Add step-by-step instructions to complete the task. Include photos or videos for each step.
    - Consult with SME if photo or video would be more effective
    - Videos should be brief and depict the process or task step
17. Add as many steps as needed. Remember to select “NEXT” then “ADD MORE” to add more content.



Add task-related questions

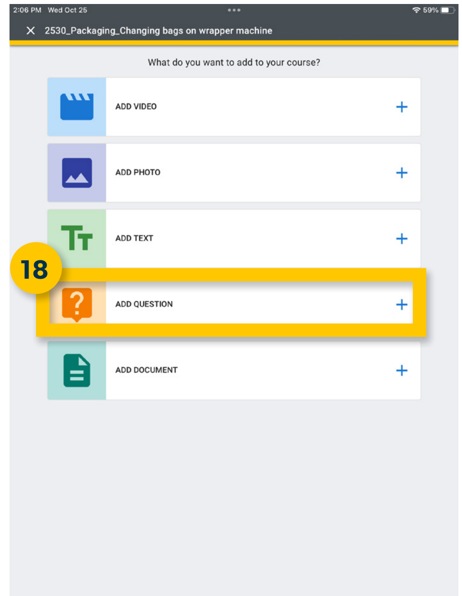
Best practice #1: Sprinkle questions throughout the course. Insert task-related questions near where the process step or task was explained.

Best practice #2: Minimum 2 questions; maximum 6 questions per course depending on length and complexity.

18. Select "ADD QUESTION"

- Use combination of True/False and multiple choice questions
- Remember to choose the correct answer
- Consult with SME on which tasks require reinforcement with a question (critical tasks — if they do that step incorrectly, the error could impact personal or product safety/quality, cost money or cause downtime)

19. Add as many questions as needed. Remember to select "NEXT" then "ADD MORE" to add more questions.

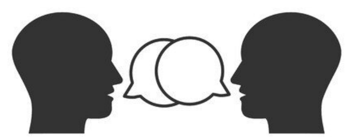


Add graphic of two talking heads

To be included in EVERY COURSE

20. Add graphic of two talking heads

21. Add headline: If you have any questions, ask your supervisor or lead.



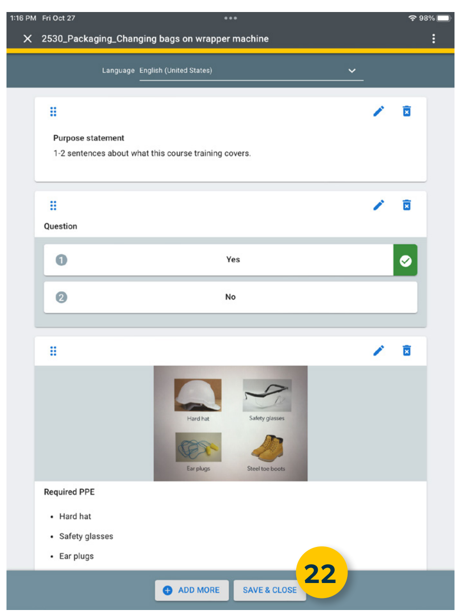
Save course

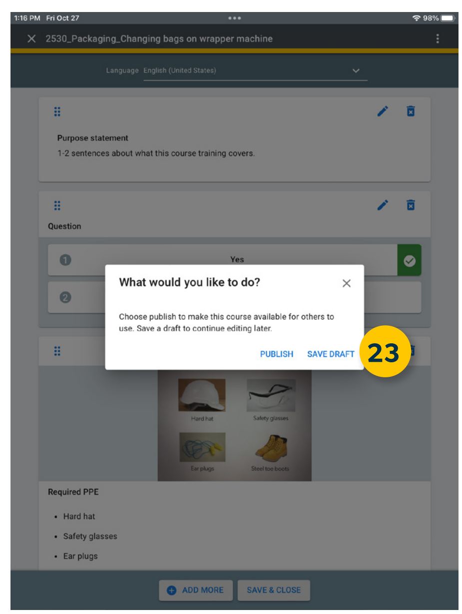
22. Select "SAVE & CLOSE"

- Pop up box will appear asking "What would you like to do?"

23. Select either "PUBLISH" or "SAVE DRAFT"

- ONLY PUBLISH A COURSE IF YOU HAVE APPROVAL TO DO SO.





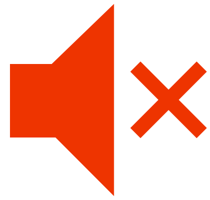
ADDENDUM 2

Photo & Video Best Practices

1 When recording video, keep the phone turned HORIZONTALLY.

2 Don’t use the zoom pinch on your phone; instead, physically move your camera closer to the object you want to zoom in on. Pinch zooming often reduces the resolution of the image and can cause blurriness.

3 Mute background noise while recording your videos. Most users don't mind low quality video, but if the audio is bad, it's difficult to keep watching.



4 Pay attention to GMP/safety rules. Do not include GMP or safety violations in your pictures or videos. Examples:

- If bump caps are required in the area, make sure they are being worn correctly
- Make sure all hearing protection cords are intact
- Beard and hairnets worn properly
- No hoses on the floor

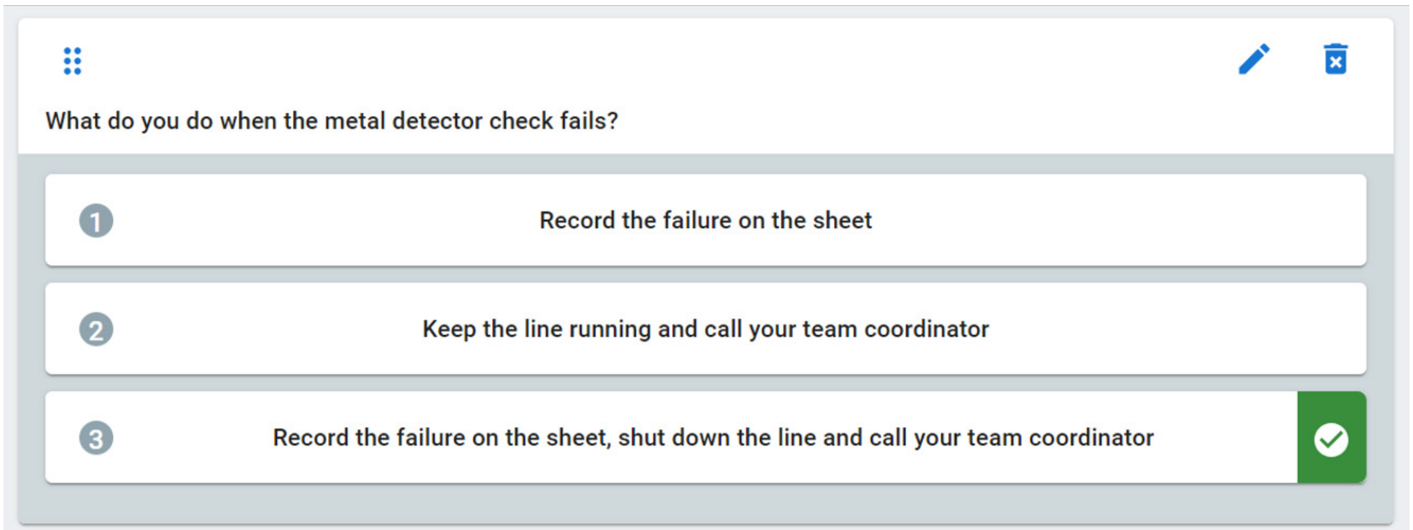
5 Avoid using employee faces (when possible). Try to position yourself to focus on the process; not the people. If you do capture faces in your pictures…

- Crop
- Blur
- Cover up

6 Use knowledge checks throughout. Use them to highlight:

- Safety callouts
- Difficult parts of the process
- Can be used to gauge behavior retention

Do NOT put them all together at the end.



7 Editing software:

Free options!

- Photo/Video — Clipchamp (Microsoft)
- Audio — Audacity

Design Team Recommendation:

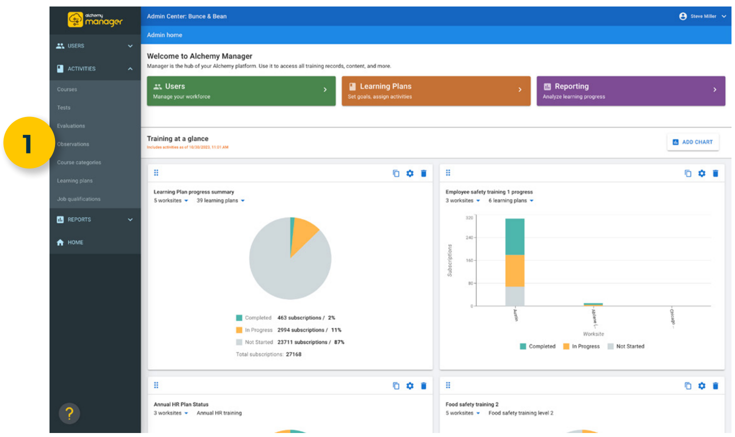
- Adobe Suite (not free)

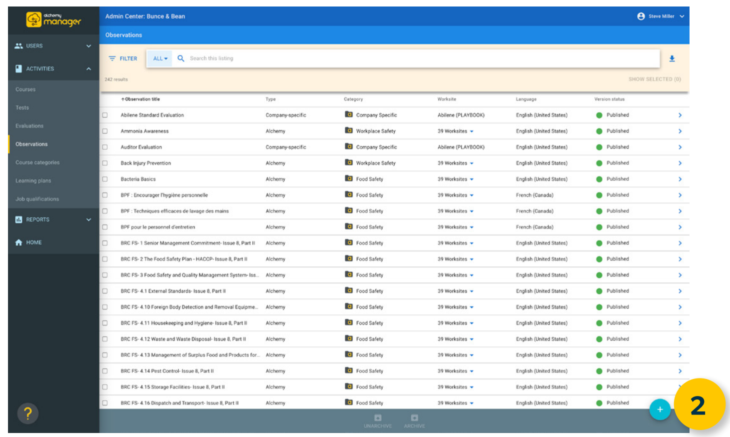
ADDENDUM 3

Coach Observation

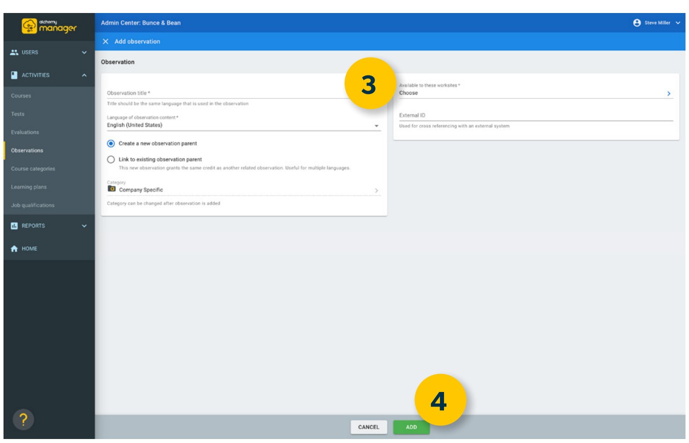
Initial setup

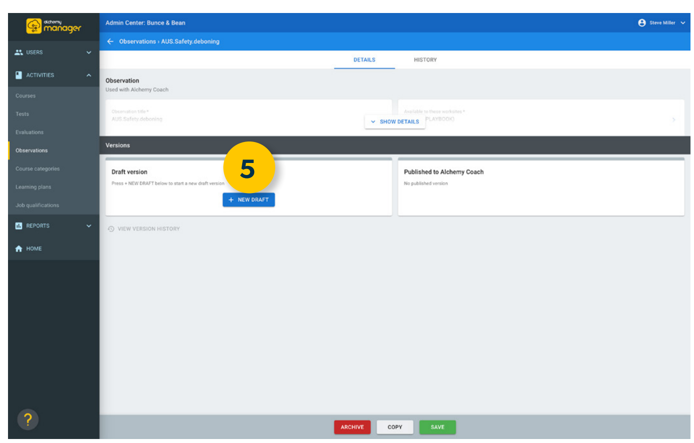
1. In Manager, in the ACTIVITIES tab, select "Observations"
2. Select the + button to add a new observation





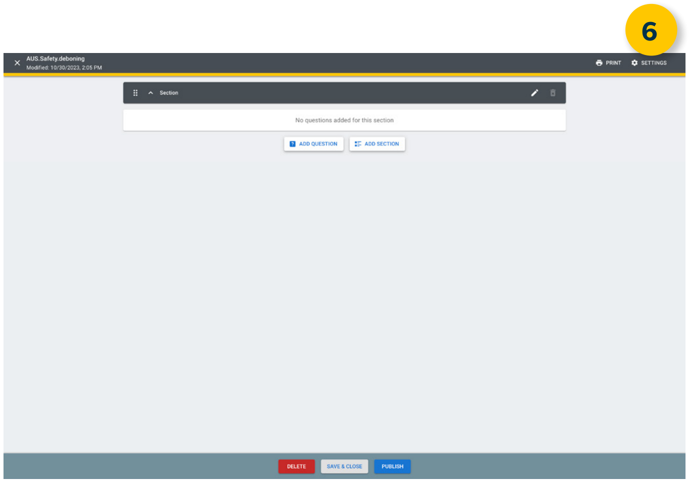
3. Add a title and adjust other settings
   — Use predetermined naming convention for Coach Observations — Should align with the corresponding Playbook training course
4. Select "ADD"
5. Select the "+ NEW DRAFT" button

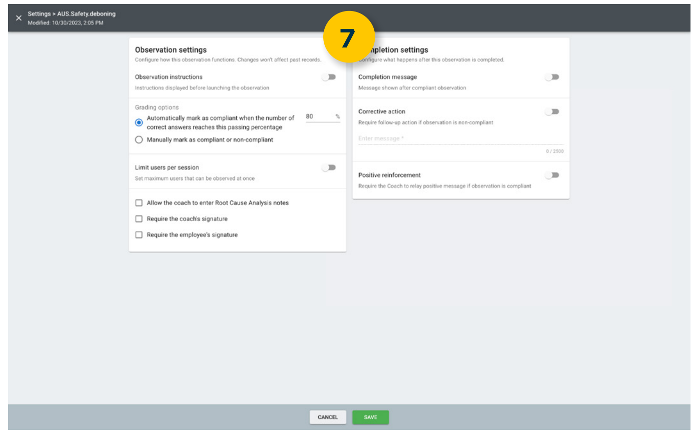




6. Select “⚙ SETTINGS”

7. This is where you configure how this observation functions. Changes won’t affect past records.

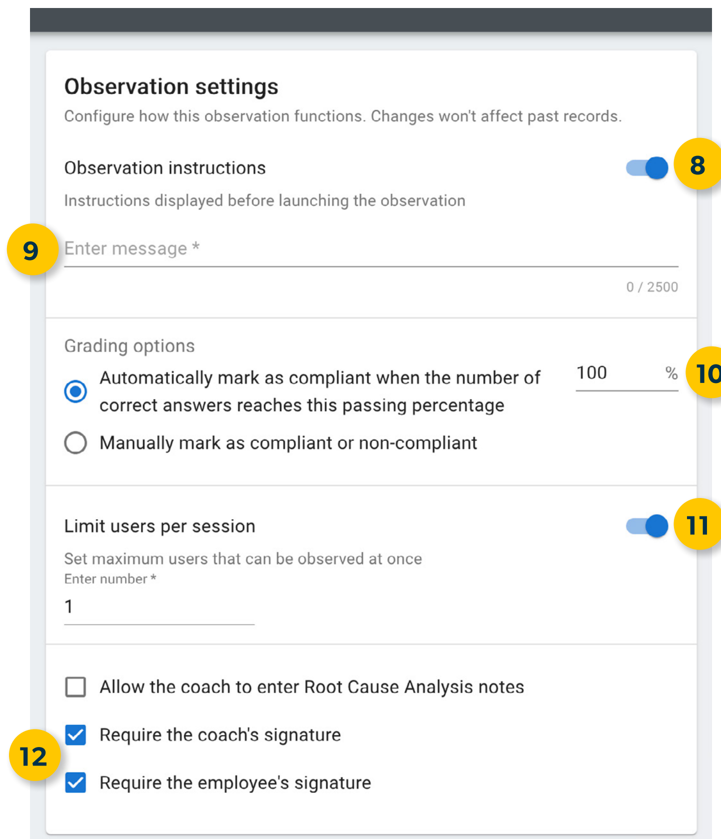




8. Toggle observation instructions to ON

9. Add a message. Example/best practices:
   - Introduce yourself
   - Let employee know what to expect (e.g., observing from a distance, observing near their workstation, asking questions, giving and receiving feedback)
   - Let employee know how long the observation will take
   - Let employee know this is a follow up to their job-specific training to ensure they have all the training they need to complete their tasks safely and effectively
   - If you have a time limit for observations, list it here

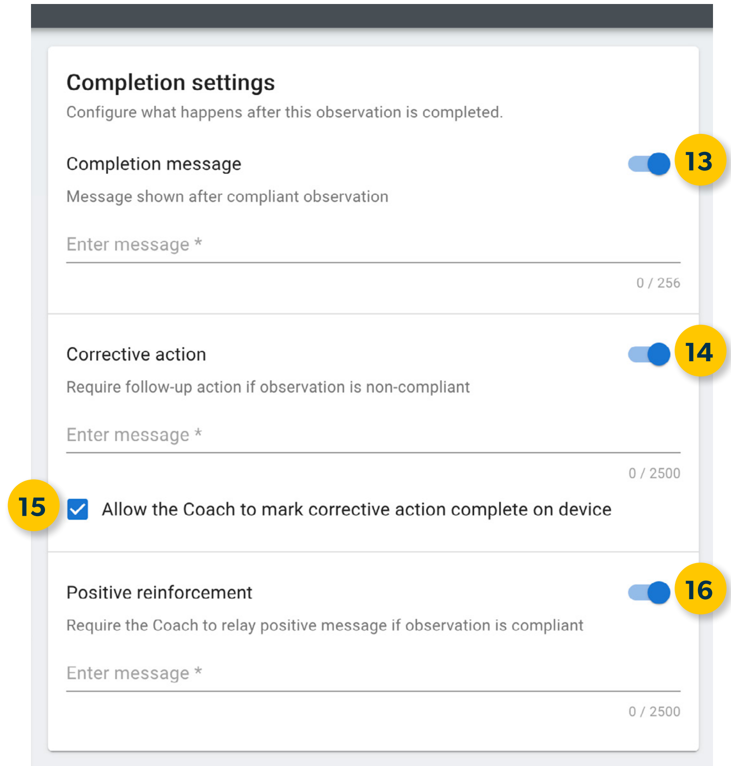
10. Set grading options to automatically mark as compliant at 100%



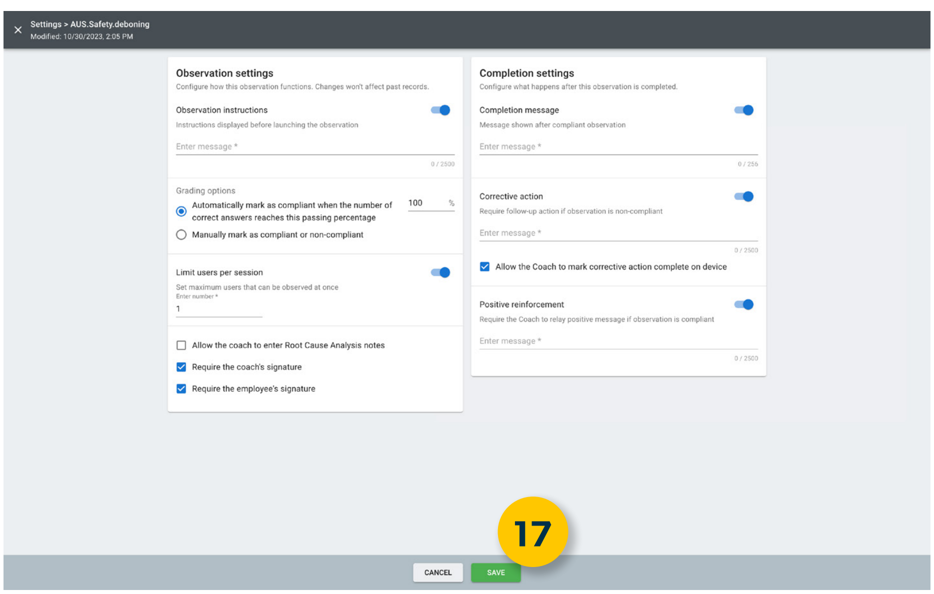
11. Toggle limit users per session to ON
   - This sets the maximum number of users that can be observed at once. For observations that are part of a job qualification, set the limit to 1.

12. Check the boxes to require coach and employee signatures

13. Toggle completion message to ON
14. Toggle corrective action to ON.
    - Example: Ask for feedback on training the employee received
    - For corrective actions that require additional follow up, follow these steps:
        1. Discuss with the employee the proper way to complete the job task.
        2. Ask the employee to demonstrate the job tasks again.
        3. If the employee continues to struggle with the job task, recommend they retake the job task training. Document this in the corrective actions and in the notes.
    - Remain positive and encouraging



15. Check the box to allow the Coach to complete the corrective action
16. Toggle positive reinforcement to ON
    - Add a message. Example: Thank you for your commitment to Bunce & Bean!
17. Select "SAVE"

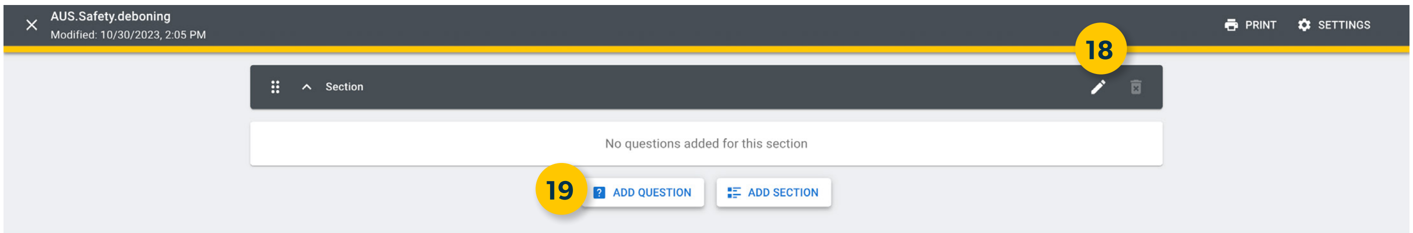


Creating the observation

Best practice: First section should always be PPE

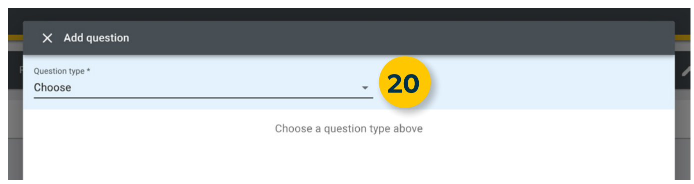
18. Select the pencil icon to edit the section name

- The flow of the observation should match the flow of the corresponding Playbook course(s)
- General section should include observations statements on:
    1. PPE
    2. Safety concerns in work area (pinch points, conveyor safety, slippery conditions, etc.)



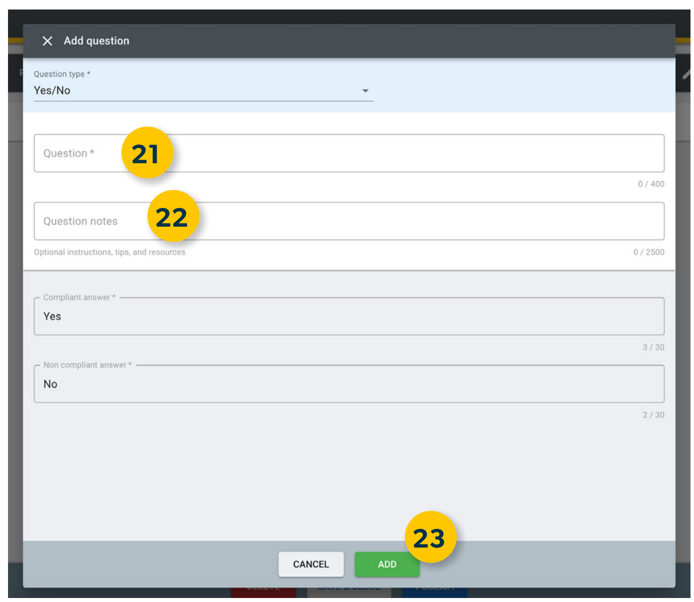
19. Select the "ADD QUESTION" button

20. Choose statement/question type:



- Yes/No
- Safe/At Risk
- Scaled Score
- Partial Compliance
- Compliance

Best practice: Recommended question type for most roles are Yes/No; For Safety and Food Safety choices may be Yes/No, Safe/At Risk and Compliant



21. Add the question

- Helpful hint: Phase questions like this: "Ask employee…"
- Statements/questions should align with training content in Playbook course(s). Be sure to emphasize the importance of critical tasks identified in training by asking employees to demonstrate the tasks and ask them why it's important

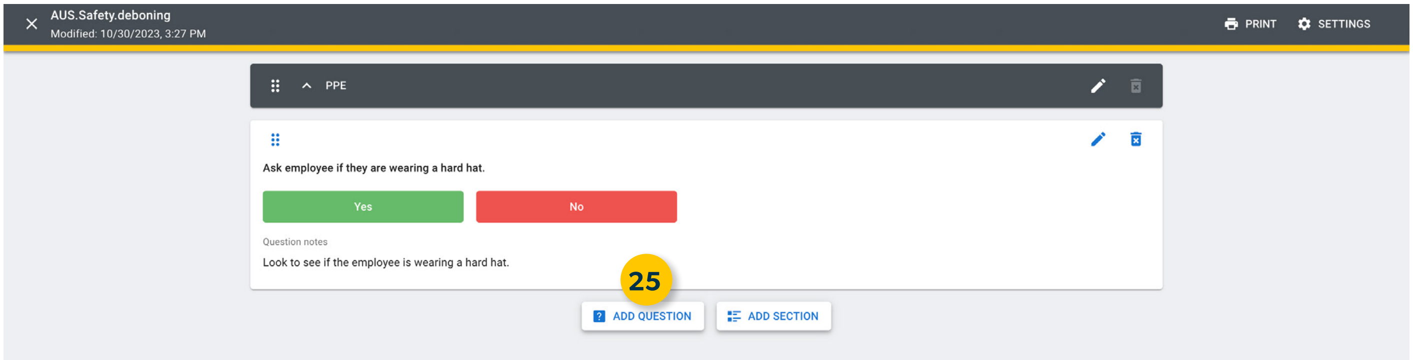
22. In the notes, include "Listen for…" and list the important words or phrases the observer should hear from the employee in order for them to be marked as Yes.

23. Select "ADD" — This adds the statement/question to the observation

24. Repeat as needed for each statement/question

25. Select the "ADD SECTION" button

— Section 2 should start the observation on job-specific task

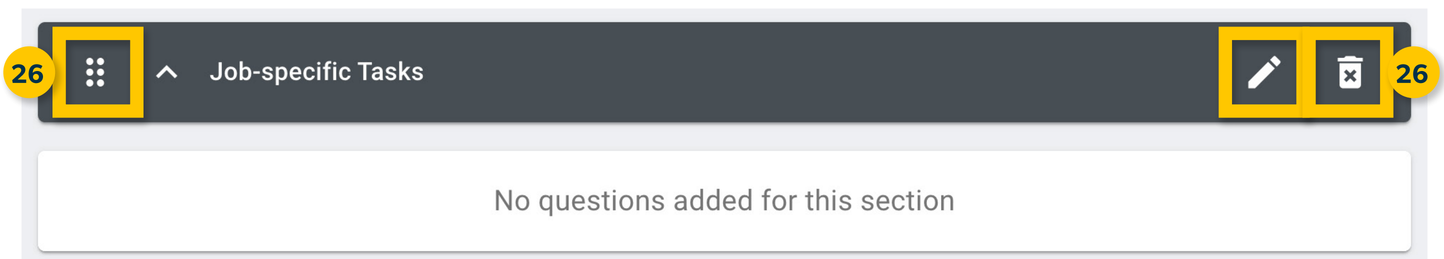


26. Edit the sections and questions

— Select the pencil icon to edit question text or question type.

— Select the garbage can/X icon to delete sections or questions.

— Use the 6 dots in the upper left to move sections or questions around within the observation.



27. Select "SAVE & CLOSE," "PUBLISH." or "DELETE"

— To save the observation for review by a SME or continue working on it, choose Save & Close. The observation will remain a draft. If you are done and ready to publish, choose Publish. If you don't need the observation, choose delete.

— ONLY PUBLISH IF YOU HAVE PERMISSION TO DO SO.