



Foundational Course Checklist

Follow these five principles for creating foundational courses that help prepare employees to handle any procedure on their own. Use this checklist to make sure you include important information and leave out unnecessary details.

Set up context

- Provide a big-picture overview
- Teach broad concepts leaving out unnecessary details
- Use analogies and examples

Show them “around the neighborhood”

- Introduce them to the software applications they will use
- Explain who they will interact with internally
- Explain what types of businesses and/or individuals they will interact with externally

Let the digital guides do their work

- Don't require memorization
- Don't teach information that will be found in the digital guides

Introduce digital guides

- Introduce what they are and where to find them — not how to perform specific procedures
- Provide links to digital guides

Limit the time

- Have the foundational course last about 20 minutes or less (30 minutes max)