

FWCA Instructional Design Group Intake Process

November 13, 2024

Challenges to Overcome



Analyze Requests

Gather enough content and context to evaluate and understand the request and set the intent at the start.



Plan/Staff Requests

Determine the best way to staff and plan for development or execution.

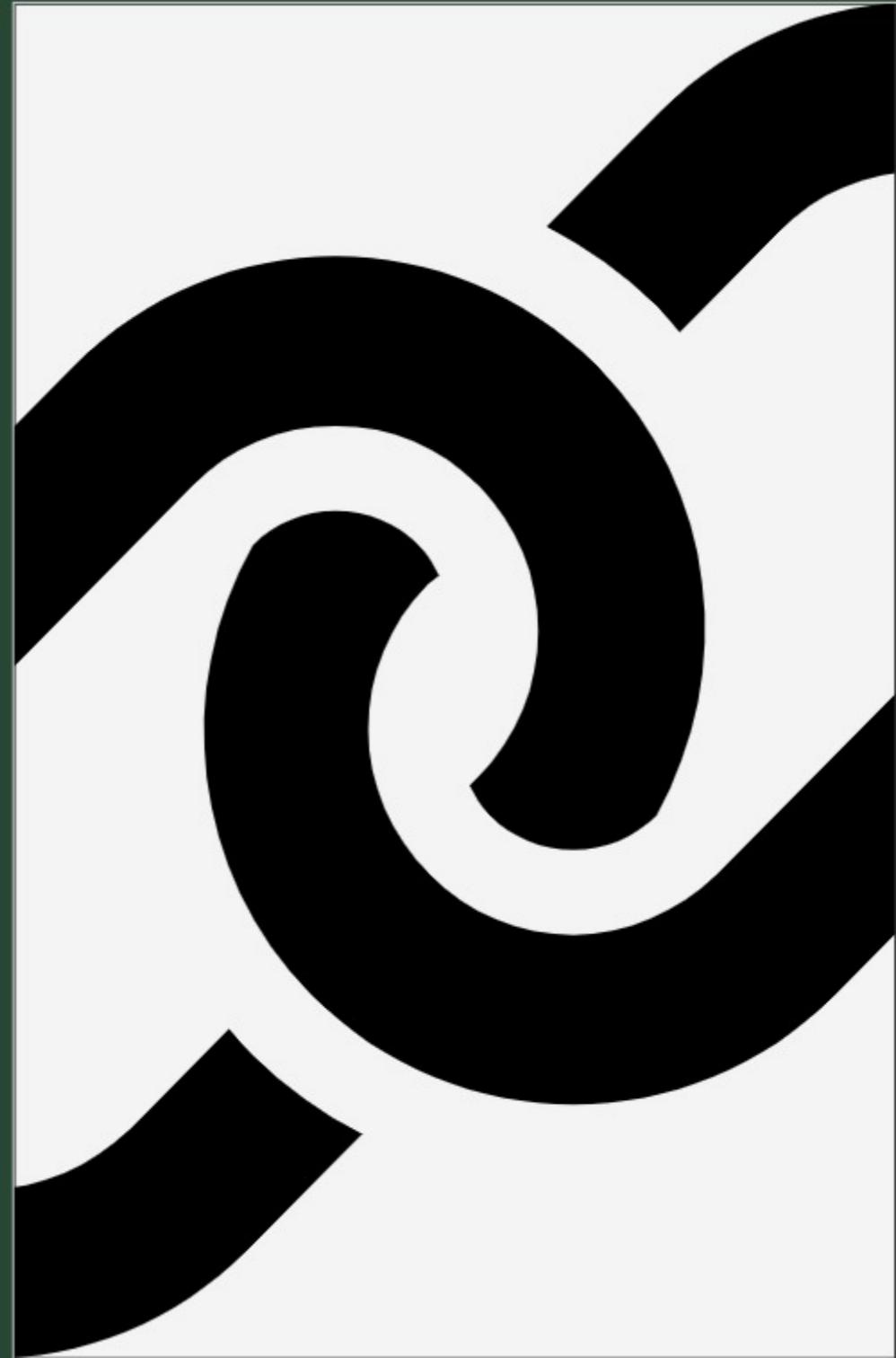


Track Requests

Enable follow-through even as additional requests come in, prioritize and balance workloads to complete.

Solution: *Partner from the Start*

Through more structured Intake, the ID Group can partner with stakeholders (you) to assign and apply expertise and determine timely, "right-sized" solutions.



Intake Flow



Request Form Submitted

Provide *basic information specific to your request type.*



Notifications Sent

On submit, the team receives an email and a task with info is added to the Team Planner.



Trigger Evaluation

Manager will fully evaluate the tasked request and consider staffing. Team member will contact POC within 3 business days.



Request Validation

Depending on the request, assigned team members may gather additional details, conduct front-end analysis, determine kickoff meeting needs, etc.

Intended Results

- Determine support levels / engagement
- Create right-size solutions.
- Manage and track workloads
- Track data for requests by type, work area, delivery, fiscal years, etc.



Process Walk-Through

MS Forms > MS Planner > Outlook >
Humans in the Loop > new SOPs =

**Transparent process and
actionable data about FWCA
projects!**

The image displays two overlapping screenshots of the 'FWCA Project Management' application. The background screenshot shows a 'NEW Requests' section with a task card for 'TEST Project Title' highlighted by a red arrow. The foreground screenshot shows a detailed view of the 'TEST Project Title 2' task card. The card includes the following information:

- Task Name:** TEST Project Title 2
- Created by:** McCormick, Mollie R
- Tags:** Adobe Campaign, Q1, FY25
- Bucket:** NDW Requests
- Progress:** Not started
- Priority:** Medium
- Start date:** 12/15/2024
- Due date:** 12/19/2024
- Repeat:** Does not repeat
- Notes:** Request to evaluate: Date of submission: 2024-12-16T15:19:41.7686428Z, Brief Project Title: TEST Project Title, Requestor Name: TEST: Training Announcement, Training Area of Request: Heavy Equipment Training, Requested date to COMPLETE this project: 2024-12-20, Type of Request: Training Announcement (Adobe Campaign Request), Funding Source: WSS, Brief description of request: [GATHER FROM FORM]
- Checklist:** Evaluate submission (determine if task should be accepted), Assign correct labels to request, Assign task to team member (or yourself), Move task to correct bucket in the planner

Help Us Help YOU

Access the **Support Request Form** to ensure your request is logged, evaluated, and tracked to its best outcome.

Thank You!



<https://forms.office.com/g/1KR03qLBLW>

[FWCA ID Group Intake Process HANDOUT.docx](#)

Help us test the process, post comments to the tracker:
<https://doimsp.sharepoint.com/:x/s/NPS-HPTC-FWCA-ISD/EYXZbP9w8GNMI0UkWxWcingBkkMFMbe-nSQQHBrfnTy5ZQ?e=0UaTob>