Case Study: Enterprise BI Training Curriculum Redesign

How I transformed 11 modules of raw SME content into a learner-centered enterprise training curriculum.

Instructional Design | Content Architecture | Technical Writing | Portfolio Sample | 2019

The Situation

A business intelligence vendor maintained a library of customer and internal training materials built from raw subject matter expert (SME) contributions. The content covered a complex, multi-product analytics suite spanning data integration, metadata modeling, reporting, and dashboard tooling. Eleven modules in total.

The existing materials were an inconsistent, unstructured collection of raw SME notes. Concepts and procedures were tangled together. Steps were buried in dense paragraphs. Terminology went undefined. Typos were common. There were no learning objectives, no consistent structure, and no separation between beginner tasks and advanced configuration. In at least one module, the original document ended with a homework assignment and the author's name in the footer: material that was being handed directly to customers.

Structural clarity was non-negotiable. The audience ranged from new support engineers to external enterprise customers, and delivery spanned both instructor-led and self-paced formats.

The Work

Working independently and with full ownership of all content and instructional design decisions, I rebuilt the complete training library from scratch across all 11 modules in approximately two months. The final deliverable was 212 pages of structured, branded, screenshot-supported training content. All of it built entirely from source materials in the condition described above.

Structure. I reorganized raw content into a consistent Lesson/Step hierarchy. Each module opened with a stated objective, a Terms You Should Know section, and a roadmap of lessons. I numbered all procedures and separated them from conceptual content.

Audience architecture. I pulled advanced configuration content out of the main procedural flow and placed it in clearly marked Advanced Extras sections, so beginners could complete core tasks without hitting content not relevant to their level.

Callout system. I introduced warning, note, and tip callouts and applied them consistently throughout. I surfaced critical information that had been buried in prose and formatted it for scanability.

Glossary and reference appendices. I added a full glossary of terms and an acronym reference, covering the platform's extensive technical vocabulary. Neither existed in the source materials.

Language and accuracy. I corrected typos, grammatical errors, and inconsistent terminology throughout. I then validated technical accuracy against the product.

Visual documentation. I added screenshots with numbered callouts to support every major procedural sequence.

The redesigned curriculum covered 11 modules spanning beginner through advanced content. It was adopted for long-term use in both new employee onboarding and customer training. Stakeholders and new support engineers reported the materials were significantly easier to follow than the originals.

Before and After

The transformation was most visible at the structural level. The original module opened with this:

Before (raw SME content):

"When you have 1000 of tables [sic] in the underlying database, trying to scan through all the tables to understand the business needs can be a very tedious task... PME solves this complexity."

(PME: Pentaho Metadata Editor)

After (redesigned):

- **Module Objective**: By the end of this module, you should be able to create a simple logical metadata model using the Pentaho Metadata Editor, as well as understand more complex metadata modeling techniques.
- **Terms You Should Know** [defined vocabulary block]
- **Lesson 1: Introduction to Pentaho Metadata Domains**
- **Lesson 2: Building a Metadata Model** [Step 1 through Step 5, each numbered and named]

The redesigned module also incorporated a second module (Interactive Reporting) into a single cohesive document, expanding scope while tightening content density.

Skills Applied

Instructional design / Curriculum architecture / Content separation by task type / Technical writing / Screenshot documentation / Glossary development / Brand formatting / SME content translation