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# Objective

Educate staff about the upcoming launch of “project” to ensure proper use of the tool/system and compliance with new policies.

# Methodology

This section describes the overall training methodology followed by the “project”:

* Design
	+ Conduct needs analysis
		- What is changing?
		- What skills do users need to gain because of training?
	+ Define content to be covered in each module (Curriculum Plan)
	+ Key decisions
		- Timeline
		- Where will the modules be hosted?
		- Will we be tracking completion?
		- Can we re-use vendor training or do we need specific examples?
		- Do we need a cheat sheet/quick reference card?
		- Timing expectations? (I.e. length, frequency of next buttons, and animation)
* Develop
	+ Build storyboards
	+ Define roles
		- Content outline
		- Record
		- Voiceovers
		- Review
		- Edit
	+ Review storyboards with SME before recording begins
	+ Frequent communication with the developer
	+ Review the first module with SME upon completion to ensure the module is being developed as expected
	+ Working review sessions with key project team members
* Delivery
	+ Work with individuals to post modules to a pre-determined location
* Feedback (post-implementation)
	+ Conduct focus group survey/feedback call to see how the tool is working, identify issues, and ideas for future enhancement

# Training Audiences

1. TBD

NOTE: [Section 6 Curriculum Plan](#_Curriculum_Plan) describes the training each audience will receive.

# Audience Analysis

| **Audience group** | **# of people** | **Who manages audience group?** | **Importance of audience’s buy-in?** | **What will they gain / lose?** | **Training Required** |
| --- | --- | --- | --- | --- | --- |
| Advocates (early adopters) | 2-3 per geography | Richard  | High |  |  |
| Steering Committee |  |  | High |  |  |
| Infrastructure Committee |  |  | High |  |  |
| Practice & Geographic Leadership |  |  | High |  |  |
| Super Users |  |  | High |  |  |
| General Users (Level 4+ / SVP and above) |  |  | High |  |  |
| Opportunity Knowledge Managers |  |  | High |  |  |
| Business Managers |  |  | High |  |  |
| All PR Staff |  |  | Medium |  |  |

# Module Outline

|  |  | DURATION | DELIVERY | INSTRUCTOR |
| --- | --- | --- | --- | --- |
|   |   |   |   |   |
| **Module 1 -**  |  min | ILT | TBD |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|   |   |   |   |  |
| **Module 2 -**  | min | Web | TBD |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|   |   |   |   |   |
| **Module 3 -**  | min | Web | TBD |
|  |   |   |   |
|  |  |  |  |
| **Module 4 -**  | min | ILT | TBD |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|  |   |   |   |
|  |  |  |  |
|  |   |   |   |
|  |  |  |  |
| **Module 5 -**  | min | ILT | TBD |
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|  |  |  |  |

# Curriculum Plan

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Advocates | Steering Committee | Infrastructure Committee | Practice and Geo Leaders | Super Users | General Users | Opportunity Knowledge Managers | Business Managers | All PR Staff | Admin MIS |
| Module 1 -  |  | X | X | X |  |  |  |  |  |  |
| Module 2 -  | X | X | X | X | X | X | X | X | X |  |
| Module 3 -  |  |  |  | X | X | X | X |  |  |  |
| Module 4 -  |  |  |  |  | X | X | X |  |  |  |
| Module 5 -  |  |  |  |  | X |  |  |  |  |  |

# Train the Trainer Approach



# Preliminary Timeline



NOTE: Need to update.

# Appendix

## Audience

|  |  |  |
| --- | --- | --- |
| ROLE | NAME | LOCATION |
| Super Users |  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
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|  |  |
|  |  |
|  |  |

## Next Steps

Notes for the project team

* Review module learning outcomes outlined in the high-level module descriptions.
* Define content to be covered in each module.
* Define business scenarios, demonstrations, and practice exercises required.
* Define and document materials that will need to be developed to support the training.
* Develop training and user support materials, adhering to training development standards*.*
* Prepare an evaluation sheet for each module to gauge the overall reaction to and effectiveness of the training.
* Confirm training environment approach, requirements, procedures, and responsibilities.
* Enter data into the training environment, test, and replicate (Training team)
* Test each training demonstration and practice exercise to ensure that the data functions properly, all data requirements are met and that the training is written correctly.
* Conduct Pilot?
	+ Produce pilot testing templates.
	+ Determine and organize pilot testing logistics, including dates, location, trainers, participants, system set-up, resource/material requirements, etc.
	+ Prepare pilot testing materials (participant and trainer materials and any additional training resources). Ensure that data relevant to the module has been entered and tested within the training environment and that user ids have been set-up.
	+ Prepare a pilot testing environment, which should resemble the actual training environment as closely as possible.

## Estimated development time per hour of delivery

* 1-hour module = 60 hours development

# Keys to Success

* Initial kickoff meeting and pre-development meeting with the project sponsor to ensure:
	1. Curriculum plan covers all necessary modules/categories
	2. Training timeline is set
	3. Clear understanding of the training goals and what end users are expected to gain upon completing the training.
	4. Ensure the storyboard contains all relevant information. Sample information is accurate and relevant to a current scenario at .
	5. Frequent communications between the development team and project team
	6. Method for launching training to end-users is determined
* Review upon completion of part one with the project sponsor. This ensures the training is being developed as expected and gives us time to make any changes before a total duplication of effort occurs.
* Review with sponsors and other project team members to ensure training is accurate, thorough, and no mistakes.