How to “Do” Training

Venture City Manufacturing – Operations *10/18/2022*

VCM Training Strategy

Support the vision and business objectives of Venture City Manufacturing by providing training solutions for Operations that build the capability for current and future excellence.

We will do this by developing and delivering learning programs that improve performance, enhance employee capabilities, and foster a Spirit of Excellence.

General Training Principles

Training will be:

- **Learner-centered**
  - Engaging; designed to stimulate curiosity, fun, and real learning
  - Focused on learning by doing; information presentation kept to a minimum
  - Relevant; practical and application-oriented
  - Convenient; available when, where, and how it is needed
  - Clear; easy to use, work with, or navigate
  - Flexible; delivers just what is needed while allowing deeper exploration
- **Performance-based**
  - Addresses a clearly defined business need
  - Designed for real-world transfer; built with the end in mind
  - Actively supported by learners' leaders
- **Efficient, effective, and impactful**
  - Leverages appropriate technology
  - Efficient; uses time and resources of designer, trainer/coach, and learner well
  - Globally consistent and scalable
  - Easy to track and measure through the LMS; metrics at each level of measurement
  - Makes a measurable difference in performance

Training Standards

- Specific performance objectives drive the design of all training programs
- All training is designed and delivered in accordance with our General Training Principles
- Training requests are documented
- Programs are designed with the requirement to consider and plan for localization
- Learning methods are selected to make wise use of electronic and face-to-face delivery
- Training packages are assembled so that a trainer can pick up the package, prepare efficiently, and be ready to train individuals or groups with less than a week of notice
- All learning programs go through our quality assurance process
- All training with a performance impact is recorded and entered into the LMS
- We verify and document that all learners who complete a course are able to perform the course objectives
- We achieve a 50% or greater evaluation response rate with an outcome of 50% Net Promoter Score ratings for all courses
- Programs with an investment of more than $10,000 or 20 person-days of training are evaluated with the Success Case Method
- Leaders understand and provide individualized support for learning according to our standards
- Training staff apply diverse personal style and experience to achieve consistent outcomes with consistent inputs

High Level Training Process

We follow a consistent training process within Operations. This process helps us:

- Adhere to our principles and standards
- Ensure that our business talent needs are addressed, and
- Operate efficiently and effectively

Training Process

Most steps in this process have supporting tools. These tools are shown in bold, italic text.

1. Identify and document the need for training. (Use the ***Training Request*** to do this.)
2. Offer potential solutions to the business need.
3. Describe and document the desired performance. (Use the ***Learning Impact Map***, ***Training Package Template***, and existing process documentation for this. If the process is not documented, do it as part of this step.)
    a. Task
    b. Conditions
    c. Performance Standards
4. Design high-level solution and get agreement from stakeholders. (May include a proposal, prototype, or storyboards, depending on the situation. Resource the project appropriately.)
5. Develop detailed training or learning solution. (Use the ***Training Package Template*** to do this.)
6. Do QA on the training. (Use the ***Training QA Form*** and process to do this.)
7. Prepare logistics for training. (Schedule facilities, instructors, learners, material production, LMS details, etc.; see the ***Training Preparation Checklist***)
8. Implement or deliver the training.
9. Document participation and feedback. (Turn in attendance for entry into the LMS. Collect ***Training Reaction Evaluation*** data.)
10. Evaluate results and revise solution, as needed. (Make revision notes to the request and document with sponsor. Do ***Success Case Evaluation***, if over $10,000 or 20 person-days.)

Training Requests

First, figure out what the specific learning need is. Then, check the VCM learning management system (LMS) for training that meets that need. If nothing already exists, make a training request through your supervisor or manager, as appropriate. If there is something that isn't in the LMS, but that already exists to meet the need, our leaders can approve and/or provide it without further escalation.

If we need to find or create a new training or learning solution for the need, please provide this information to the Operations Training Manager (Steve Semler). This can be in an email:

- **Background/Context:** What is going on that suggests a need for training or learning? Give us a picture of the situation and the need.
- **Target Audience:** Who is this for? What do they already know?
- **Subject/Topic:** What things should the training cover? What outcomes do you want to achieve?
- **Time and Date Requirements:** If this training is needed by or on specific dates, or if there are specific requirements for how long it has to be, describe that here.
- **Requestor/Contact Info:** Who should we contact to follow up?

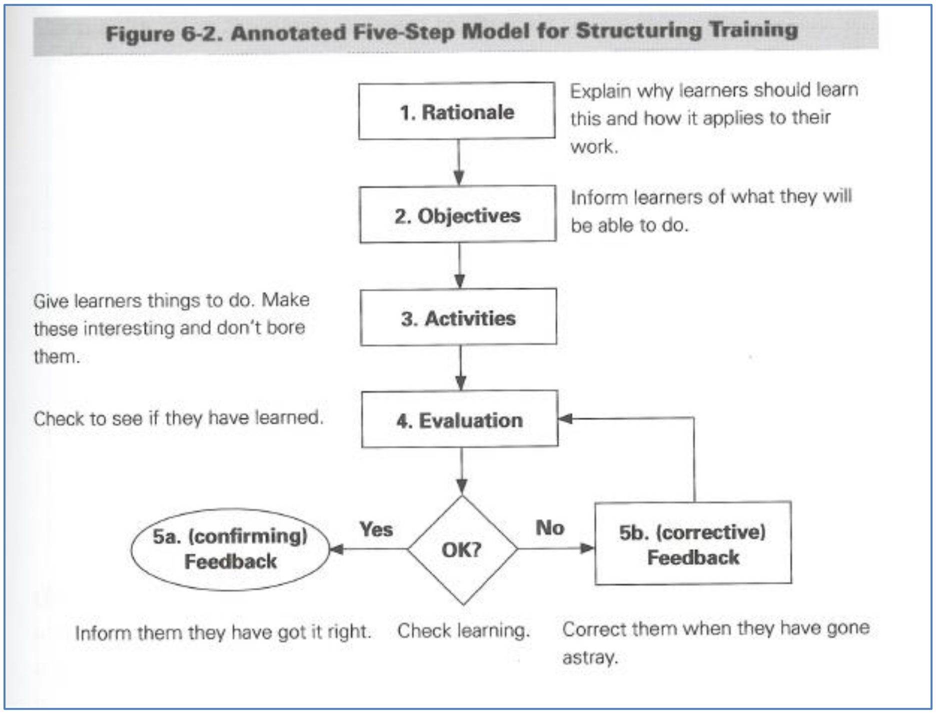
Sample Training Request: A Ticket to the Fair

- **Background/Context:** Once a year, the state holds a large-scale fair. For one week, hundreds of thousands of paying visitors flock to it. Each year, the State Fair Commission hires temporary workers for various jobs. This training is for 45 ticket sellers. They have to be accurate and fast because lines can get long and paying visitors get impatient. Accuracy and speed are the two key success criteria. The system is totally manual. All of the potential ticket sellers are novices, have gone through background checks, and are bonded.
- **Target Audience:** Part-time ticket sellers with education levels ranging from grade 10 to somecollege. All are over 18; some are as old as 70. About two-thirds are women. None have dexterity problems or significant hearing or vision impairments.
- **Subject/Topic:** Calculating admission costs, taking money, issuing tickets, and giving correct change.
- **Time and Date Requirements:** Must be ready by two weeks before the State Fair opens. Training will take place the week before the Fair in three sessions of about 15 people. Each training session should be less than a half-day. (Previous sessions were 2.5 hours of classroom training.)
- **Requestor/Contact Info:** Ima Clownsworth, Admissions and Entertainment Coordinator, ima.clownsworth@statefair.org, 555-4FUN, ext. 4566.

The training team and relevant subject matter experts (SMEs) will follow up to determine the best response to the request. If new training is needed, they will design and organize delivery of whatever is needed to meet the request, subject to business priorities and available resources.

Training Design

We will design all training to meet the general training principles as closely as possible, given the time and resources available. Depending on priorities and resources, training that is "good enough" may be preferable to training that meets all standards and expectations. Regardless of the resources available, training should at a minimum follow the basic five-step model shown below).



From "Telling Ain't Training," Harold D. Stolovitch and Erica J. Keeps, ASTD, 2011.Used with permission.

This is a generic training design for any type of task or information training. There is a bit of science and art to this—the objectives and activities, especially—but just putting training into this process flow helps a lot.

1. **Rationale**: Explain why learners should learn this and how it applies to their work. (This lets them decide what they should pay attention to.)
2. **Objectives**: Inform learners of what they will be able to do. (Not what they will know, but what they will have to ***do*** with that knowledge.)
3. **Activities**: Give learners things to do. Make them interesting and don't bore them. (Better to have people learn by doing than by listening or reading, whenever possible.)
4. **Evaluation**: Check to see if they have learned. (Have them do the task in a safe situation, whenever possible. Simulate, quiz, or talk through hypothetical task situations, if doing the task isn't practical.)
5. **Feedback**: Let them know the results of the evaluation right away, without delay.
    a. **Confirming Feedback**: If they got it right, don't make them guess, let them know that was the way to do it.
    b. **Corrective Feedback**: If they missed something or went astray, correct them and let them know what the right answer was. (Then, send them back to try again.)

Building the Capability to "Do" Training

Over time, it is the responsibility of the Training Manager to build capability within Operations group to do these things, as appropriate to individuals' interests and job duties:

- **Make good decisions** about when, how, and why to use training as part of an effective solution to business problems, based on sound, research-backed adult learning principles. (And, know when training is ***not*** an appropriate solution to a problem.)
- **Continuously assess training and learning needs**, and gather complete information to write training/learning requests in business terms.
- **Design effective training** that is learner-centered, performance-based, and organizationally efficient, effective, and impactful.
- **Develop learning material** that is fun, engaging, and appropriate for the need and the audience.
- **Deliver training and learning activities** through instructor-led, computer-based, and other learning methods and technologies, as appropriate for the need and learning design.
- **Evaluate the effectiveness of training and learning activities** for the purpose of continuous improvement and for the purpose of determining business impact and making decisions about what programs and activities to start, stop, or continue.
- **Create and maintain training and learning processes, procedures, principles, and infrastructure**, to include: (1) individual, team, unit, and organizational assessments and evaluations of training and learning needs, (2) planning, resourcing, and scheduling of training, and (3) decision processes to upgrade, purchase, discontinue, or alter the training infrastructure as it applies to Operations.

We will build the capability by gradually involving Operations leaders and employees in more and more of these areas as time, resources, interest, and priorities permit. I also expect to build short training courses on "how to" do many of these things as we go along.

Operations Training – Build Plan

General timeline, sequence, and approach to building training capability.

Begin Month	Complete Month	Major Task Area	4/2014 Status
1	1	Understand the Organization	Completed
1	2	Identify Training Priorities	Completed
1	2	Establish Learning Principles	Completed
1	3	Understand the Business – High Level	Completed
1	3	Build Key Relationships	Completed
1	6	Tie Into Existing Training	Completed
2	3	Establish Training Strategy	Completed
2	3	Establish Training Standards	Completed
2	3	Define Training Package(s)	Completed
2	4	Establish Training Administration Processes (pre-LMS)	Completed
2	4	Develop Training Capability – CBT/Online Training	Completed
2	6	Address Early Training Needs	Completed
2	6	Build Out Curricula – High Priority, High Level (Quick Fixes)	Completed
3	4	Establish Level 1 Evaluations and Process	Completed
3	5	Establish Initial Metrics	Completed
3	6	Implement LMS	NA
3	6	Implement Processes in the LMS	Completed
4	6	Understand the Business – In More Depth	Completed
4	6	Establish Training Reporting Processes	Completed
4	6	Create Process to Collect Metrics	In Progress
4	6	Establish Leadership Training Report Cycle	Completed
4	9	Develop Training Capability – Trainers	In Progress
4	12	Establish Major Programs – Core Job Skills	In Progress
5	6	Set Up Employee Training Communications	Completed
5	6	Set Up Training Staff Communications	Completed
5	6	Set Up Leadership Communications	Completed
6	7	Set Up Department Training Meetings	Completed
6	7	Establish Level 2 Evaluations and Process	In Progress
6	7	Establish Level 3/4 Evaluations and Process	In Progress
6	8	Establish Full Metrics – Training Scorecard	In Progress
7	8	Set Up Organization/Unit Quarterly Training Reviews	In Progress
7	9	Integrate Training with Talent Processes	Planning
7	12	Build Out Curricula – First Tier, High Priority	Planning
7	12	Run with Processes – Monitor and Adjust	In Progress
7	12	Establish Major Programs – Leadership Development	In Progress
7	12	Establish Major Programs – Career Development	In Progress
9	12	Establish Major Programs – Employee Engagement	Planning
9	24	Build Out Curricula – Next Tier, Moderate Priority	Not Started
10	12	Show and Report Results	Not Started
13	24	Establish Major Programs – Succession/Talent Management	Not Started

Internal Trainer Certification

INTENT

Our intent in Operations is to do most of our training by relying on skilled, capable "part-time trainers" who work in the departments being trained. These are people who have a lot of knowledge about the job, and who can also use effective training principles and techniques to help other employees learn. Typically, these are supervisors, work directors, or expert employees who have an interest and skill in training. These people are usually also the ones who identify or serve as subject matter experts when we do design of new live or online training courses.

OBJECTIVE

Each department within Operations should have at least two internally-certified trainers. (Departments may have many more to get more training done and share the training workload, as it makes sense.)

PROCESS

Trainers should complete the internal train-the-trainer (TTT) program, called "Becoming a Trainer." This program has a blend of online, classroom, and self-study work. It requires the trainer to be evaluated and coached on his or her training delivery. When both the trainer and the program coach feel that the trainer has mastered the basic skills, the trainer receives certification.

See the "Becoming a Trainer" program description and details for more information. The ***Trainer Certification Checklist*** follows, on the next page.

Trainer Certification Checklist

Trainer Level 1 – Training as an Additional Duty

Topic/Skill	Practice 1 Rating *(U,P,T)*	Practice 2 Rating *(U,P,T)*	Completed *(Date and Initial)*
Instructions: For topics that require the learner to demonstrate a skill, the Instructor will assign a rating after each practice activity: "U" = Untrained, "P" = Practice Needed, or "T" = Trained. When the learner can perform the task at a "T" level, the Instructor will date and initial the task as completed. For other topics, the Instructor can initial when the topic is covered. **Standard:** Evaluation standard is for an entry-level trainer expected to deliver peer-to-peer training occasionally as a subject matter expert.			
Courses & Assignments			
"Becoming a Trainer" Introduction • Ref: Online Course	NA	NA	
"How to Do Training" • Ref: Online Course	NA	NA	
"Facilitation Techniques" Workshop • Ref: ILT Class	NA	NA	
"Prepare and Practice Training" Assignment • Ref: Assignment Instructions (learner marks complete)	NA	NA	
"Create a Class" Assignment • Ref: Assignment Instructions (post the assignment)			
Evaluation & Certification			
Uses all five parts of the 5 Step Training Model effectively when delivering training • Rationale is clear and meaningful • Objectives are relevant to learners • Activities support the learning objectives • Evaluation in included and related to objectives • Feedback is clear and helpful • Ref: "Telling Ain't Training" • Ref: "How to Do Training"			
Prepares for training • Assesses the audience characteristics and training needs • Customizes material and delivery to meet audience needs and objectives • Ref: Facilitator Competencies			
Creates an effective learning environment • Generates an environment that is physically, socially, and psychologically conducive to learning • Creates/maintains a professional atmosphere • Shows respect and consideration for individual and audience needs • Promotes continuous, collaborative learning • Ref: Facilitator Competencies			

Topic/Skill	Practice 1 Rating *(U,P,T)*	Practice 2 Rating *(U,P,T)*	Completed *(Date and Initial)*
Facilitates training effectively • Interacts and adjusts approach to audience appropriately • Uses visuals and supporting media effectively • Shows appreciation for contributions made by participants • Engages audience in constructive dialogue that supports new information and points of view • Manages unforeseen situations including conflict, the impact of sensitive materials, disturbances, embarrassments, unanswerable questions • Keeps training focused and on schedule • Provides clear instruction • Ref: Facilitator Competencies			
Enables learners to meet the objectives • Utilizes techniques that promote the transfer of learning to application on the job • Ref: Facilitator Competencies			
Completes training follow-up responsibilities • Turns in attendance roster(s) to training manager • Collects and turns in performance checklists to training manager • Collects and turns in evaluations to training manager • Ref: Operations Training procedure document			
Accurately assesses own training performance • Ref: This checklist			

Training Meetings

It is important to hold regular training meetings at each level of the business. This makes evaluation, assessment, and planning of training a normal part of the management of the business. Most meetings should be short and happen on a monthly cycle. It is usually better to schedule these after the Operations Review so that leaders have the attention to devote to this topic.

Meetings should not be cancelled, but may often be rescheduled within the same month. Cancelling a training meeting usually means that training has dropped in priority in leaders' minds. Long-term, this is damaging to the business and signifies that leaders are failing to uphold their responsibility to manage talent.

Monthly Training Meeting Agenda

PURPOSE: Monthly check-in on training activity, priorities, and plans

Time: Short and Quick = 30 minutes only!

Agenda Items:

1. Training Activity
    a. Training Report: Quick update on training during the past month; check for errors or corrections needed on report
    b. Training Evaluation Results: Updated results from evaluations, as applicable
    c. Other Training Completed: Anything done that wasn't reflected on the current report
    d. Upcoming Training: Planned training and upcoming opportunities
2. Training Priorities
    a. Next Month: What is happening that will affect training priorities? Impact on training—move up, move back, put on hold, accelerate, etc.?
    b. Next Quarter: Same, but farther out
3. Training Plans:
    a. Existing Requests: Status update on current requests and projects
    b. New Requests: Any new requests that we did not already capture earlier in the meeting; verify what we heard
    c. Coordination: Assign work, tasks, responsibilities as appropriate

Analyzing and Prioritizing Training Needs

With limited time and resources, we are always looking to get the highest impact from any training or learning activity. There are some tools to help us identify and prioritize training needs.

Learning Impact Map

The learning impact map is a table that shows what skills and capabilities are needed to achieve the business results we want. From left to right, it identifies the skills or capabilities employees need to have, the critical activities that they need to perform, the results they achieve through those critical activities, and then the department and company results achieved through the contributions of those individual results.

Important: The learning impact map shows how the actions of individual employees make a difference to the company. (And, usually, to customers.) This gives us very specific details to work with for training and learning design purposes. It also gives managers and employees a clear picture of why the training matters and where to focus attention.

Generic Learning Impact Map (example for Financial Risk PID processing)

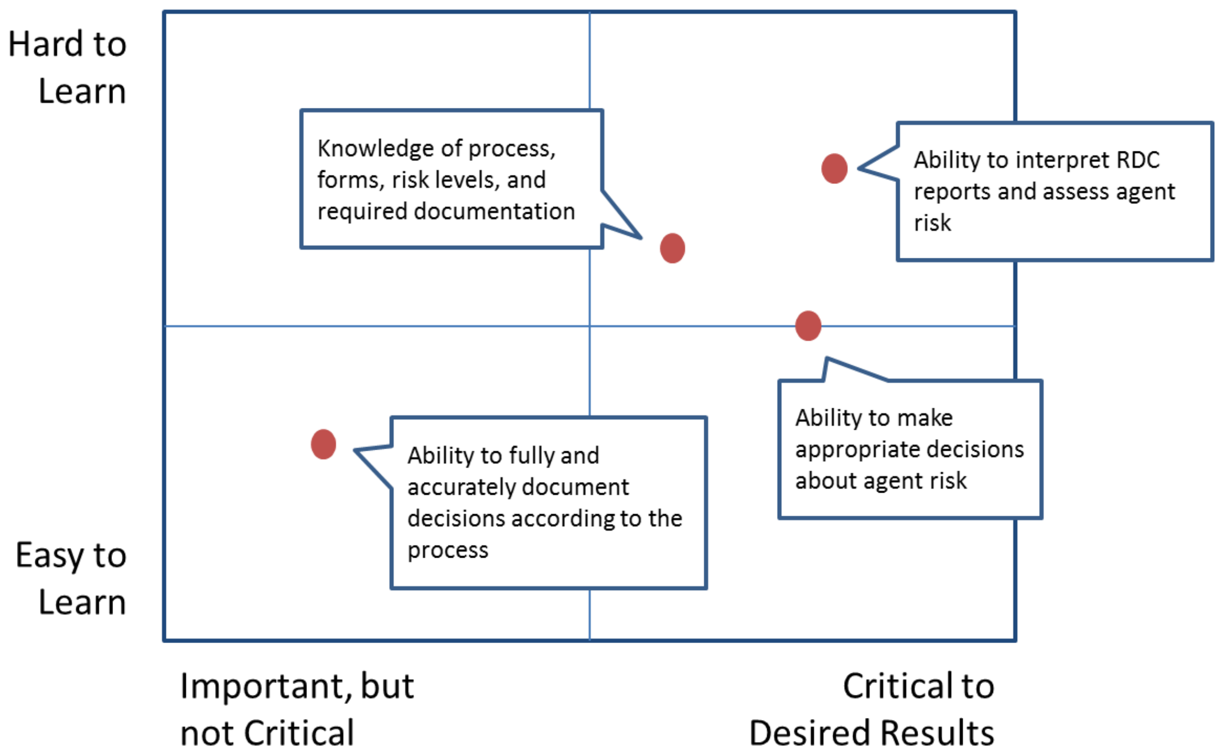
Key Skills	Critical Activities	Key Job Results	Operations Results	VCM Results
Knowledge of process, forms, risk levels, and required documentation Ability to interpret data on forms and determine whether a PID is complete Ability to interpret RDC reports and assess agent risk Ability to make appropriate decisions about agent risk Ability to recognize and take correct action when a PID requires more information, correction, escalation, or some other action Ability to fully and accurately document decisions according to the process	Make sure that the form contains all required information and that it is legible Submit the RDC report request on the entity and applicable individuals Obtain reports and assess risk to make a decision Pend PID and request more information or clarification when necessary Escalate for higher level decision with recommendation when necessary Document the decision	PIDs rapidly received and turned into reports All potential agent risks clearly and quickly identified Decisions rendered on PIDs as quickly as possible Process flow—including pends, escalations, etc.—kept moving as rapidly as possible Documentation for compliance clear, complete, efficient, and easy to access	High volume of PIDs handled within 5 business days end-to-end (from prospect's perspective) All risks identified and properly managed All activities, information, and decisions fully documented for compliance purposes	Growing stream of qualified agents Properly managed risk of new agents

Items in each column do not have to line up with items in other columns on a one-to-one basis.

For a generic template version of the learning impact map, check the Operations Training folder here, or use this embedded sample.

Learning Priority Grid

The second tool helps us identify high-leverage areas for training. A learning priority grid plots topics (or knowledge and skill areas, or critical activities) on a 2 x 2 matrix. On one side of the grid is how hard the topic or skill is to learn. On the other is how important the topic or skill is. Generally, the harder something is to learn and the more critical it is to performance, the more priority needs to be assigned to developing and delivering training for that thing.



Sample Learning Priority Grid

Rationale: Things that are easier to learn can be trained or learned more informally, with less effort and training expertise required. Things that are less important should be done after things that are most important. Focused effort and resources are usually needed for things in the upper right quadrant.

Training Preparation Worksheet

Suggested items to check and questions to consider

Session Logistics

- ☐ **Schedule:** Know the dates, start times, end times, places, rooms
- ☐ **Audience:** Who, how many, how they get to the location, what they need to bring with them, what they need to take away with them, cultural or organizational requirements
- ☐ **Materials:** Trainer prep of audience-specific material/data, site shipping contact, shipping address, special shipping instructions and timelines, how the material gets to the room and when, how to verify receipt and distribution
- ☐ **Location specifics:** Site contact person, parking, security (can you get in?), room locations, building and site safety procedures, restrooms, breaks, lunch/meals, cleanup, will the room be locked or cleaned overnight and when and how do you get access again the next day; AV support person
- ☐ **Room specifics:** Room layout (table and seating setup), electricity and power cords, audio-visual equipment, microphones and speakers, displays or projectors and screens, internet or network access and passwords, temperature and ventilation control, flip charts, easels, markers, pens, name tags or name tents, sticky notes, note pads (technology and connection for webinars)

Know the Content

- ☐ **Rationale:** Know why this training is being done for these learners
- ☐ **Objectives:** Know what the learners have to do as a result of training
- ☐ **Topic or Content List:** Know the current content
- ☐ **Updates:** Know recent events (if any) that affect the content or the way the learners will use it

Know the Activities and Flow

- ☐ **Agenda:** Know the logical flow and why this order is recommended or required
- ☐ **Activities:** How to facilitate, materials needed, how to make the learning point, how much learner control/independence is appropriate, how to do the evaluation and feedback, how to manage group activities, how to support individual activities, how to set up and prepare for computer-based activities
- ☐ **Priorities and Timing:** Know the time allotted to each activity, where you could expand, where you could cut, what activities are most important or helpful to these learners

Consider the Learner Experience

- ☐ **Initial Impressions:** What they will see on arrival, how they will react to the start or opening, what questions they might come in with, what they expect the training to be like
- ☐ **Pace:** How fast should it go, how much action vs. reflection
- ☐ **Outcomes:** What outcomes do they most want, what do they consider valuable, how to run the experience so they get what they want (while meeting the objectives)
- ☐ **Transfer/Application:** What will they take back to the job, how will they use it, what support do we have for back-home application, what will make transfer most effective

Organizational Transformation Toolkit

Whenever there is a major change in the business, go through this “rule of thumb” list of things to think about or plan for. For smaller changes, the same principles apply, but adjust the scope and scale downward, as appropriate.

Setting up the Change

- ☐ **Share the burning platform/case for change:** Be able to communicate the need for change in a way that addresses the individual, personal impact. Frequently address the “Why can’t we just keep doing what we’re doing?” “Why do I have to be affected?” and “What will happen next?” questions. *Rule of Thumb: If you can’t state the overall case for change in one visually-charged sentence, you will not overcome cynicism.*
- ☐ **Paint the big picture of the future state:** Be able to paint the picture of how the business will operate in the future. Which groups will be doing what? How will they do it? What will change? Why do it this way? What costs and benefits will be gained? How do we know these are realistic, given investor, management, and employee cynicism based on what they have seen or experienced before? *Rule of Thumb: Use no more than three bullet points to clearly define how the business will operate in its future state.*
- ☐ **Work out the future state details:** Determine what has to change, and when, to achieve the future state. Then, plan backward to determine how to make a transition from the current state to the future state. To the extent possible, involve people in planning how to make the transition. *Rule of Thumb: People will start off assuming that the change is bad unless they were involved in decision making. Provide individual-level details as early as possible to lay out the facts.*
- ☐ **Formally include change management in the project:** Staff the project team leading the transformation with change management expertise. *Rule of Thumb: Unless you are specially qualified in organizational change management, double your initial estimate of the resources required.*
- ☐ **Manage your messaging:** Consider the possible discrepancies between messages going to different audiences (i.e., investors, executives, groups affected, groups not affected, front line employees). Present a consistent set of messages, each displaying integrity and empathy for the different audiences. *Rule of Thumb: If you don’t have someone specifically assigned to actively manage messaging for all affected stakeholder groups, those stakeholders will do it for you, to your detriment.*

Managing the Transition

- ☐ **Expect the performance drop:** Talk with leaders, HR, and OD about how performance will decline due to uncertainty, employees leaving (and taking their expertise and knowledge with them), procedures changing, lag between onboarding and full productivity of new or contract employees, etc. *Rule of Thumb: You will experience at least a 10% drop in performance for the duration of the transition, starting after the announcement to employees. Account for and mitigate it, but expect it to cost.*
- ☐ **Leadership counts:** Meet frequently with leaders at all levels to help them understand the change, how they should talk about it, and what they need to do to lead employees through the transition. *Rule of Thumb: Time and money spent equipping leaders to communicate and*

manage through the transition is returned at 3:1 or greater in problems prevented or productivity retained.

- ☐ **Capture knowledge:** Identify and document process knowledge and expertise that needs to be retained. Do likewise for key relationships. *Rule of Thumb: The easier it is for employees to capture their knowledge, the easier it is to prevent business disruptions. (Recorded web meetings where experienced employees describe/show what they do are a good way to capture knowledge, if no other method has been planned. Documentation and training can be built from these sessions.)*
- ☐ **Plan formal handoffs:** Formally change responsibilities at specific dates. Celebrate these handoffs to give a strong sense of closure. *Rule of Thumb: Plan for overlap of responsibilities, but don't expect teams or employees who are being replaced to be engaged. Instead, expect a major portion of the outgoing team to "check out" physically or mentally early on in the transition.*
- ☐ **Over-communicate:** Send frequent (no less than weekly) updates about how people will be affected; even if decisions still have not been finalized. This should come from leaders who have personal relationships with those affected. (Higher level leaders and/or HR usually don't have the trust and credibility that leaders who are closer to the employees have developed.) *Rule of Thumb: If people don't hear anything for a week, then they will assume something bad is happening.*
- ☐ **Hire mercenaries:** Consider hiring contract staff to offset performance drops during the transition. Contractors have no loyalty to your organization, but they are also not likely to hold negative attitudes, either. *Rule of Thumb: For contractors, "it's just a job." If employees are being replaced, it's personal.*
- ☐ **Appeal to professional pride:** People are more loyal to their chosen professions than they are to employers. Recognize and show appreciation for individuals or groups upholding their professional standards through the transition. *Rule of Thumb: Leaders close to the employees can appeal to professional pride. Leaders more than two levels above the employee group do not have the relationship strength to make this work, and should not attempt this.*

Settling into the New Business as Usual

- ☐ **Train, study, adjust, and retrain:** Train employees on the changed processes and procedures shortly before they have to do it "the new way." Then, let them operate for a period of time while they also study what they are doing, looking for problems and improvements. Gather the lessons learned, update the training, and then train employees on the "tweaks and adjustments." After that, you can lock down the documentation and training. *Rule of Thumb: Let individual job processes run for a month and team or department processes for three months, in order to see how things work through 2-3 routine business cycles.*
- ☐ **Celebrate success:** Formally close out phases of the transition with mini-celebrations. Acknowledge what was lost, as well as what was gained, in order to make it "okay" for the people who stayed through the transition. *Rule of Thumb: Don't shy away from talking about feelings of loss with the people who came through a major change. Often they experience feelings of guilt if they retained their jobs (or found new ones internally), if other co-workers were terminated.*

Resource and File Locations

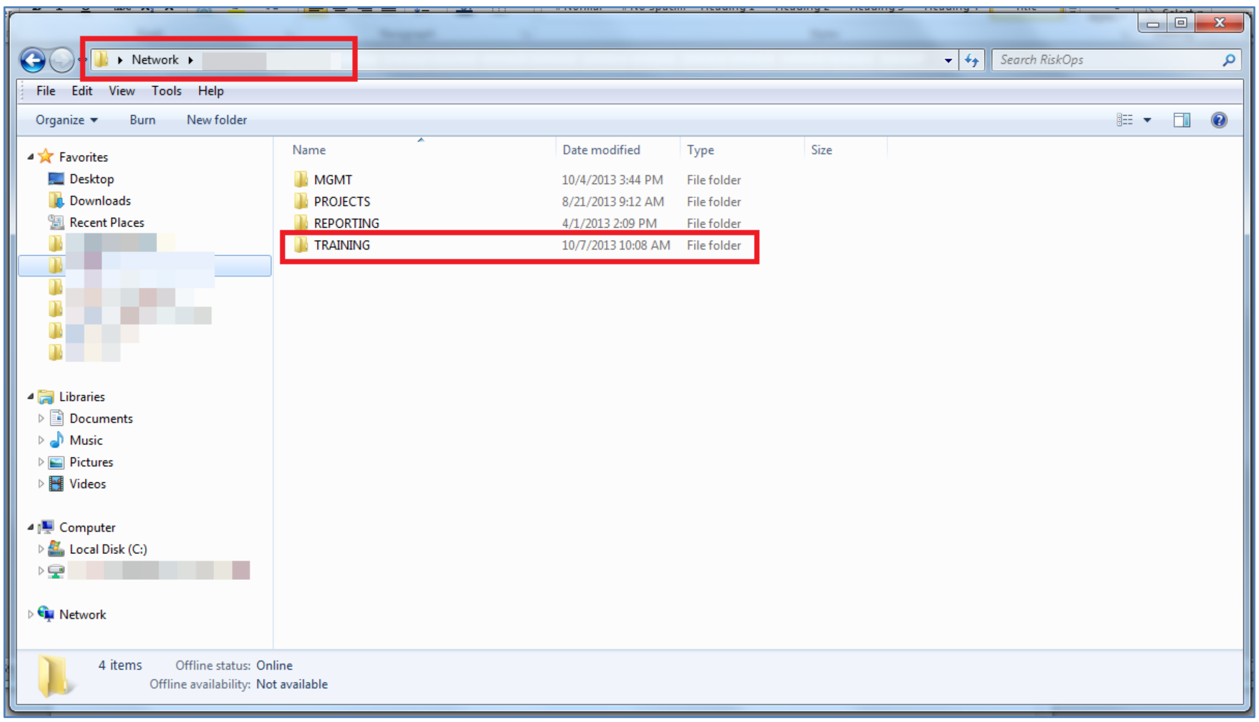
We will be keeping Operations training information in two places.

Where to look:

1. Look in the **Operations > Training folder** (link goes here) and its subfolders for files, documents, and resources.
2. Look in the **learning management system** (the Cornerstone OnDemand LMS) for finished CBT courses and employee training records (transcripts).

Folder Access:

People with training responsibilities will usually have read/write access to the Operations training folder. Other employees will usually have read only access.

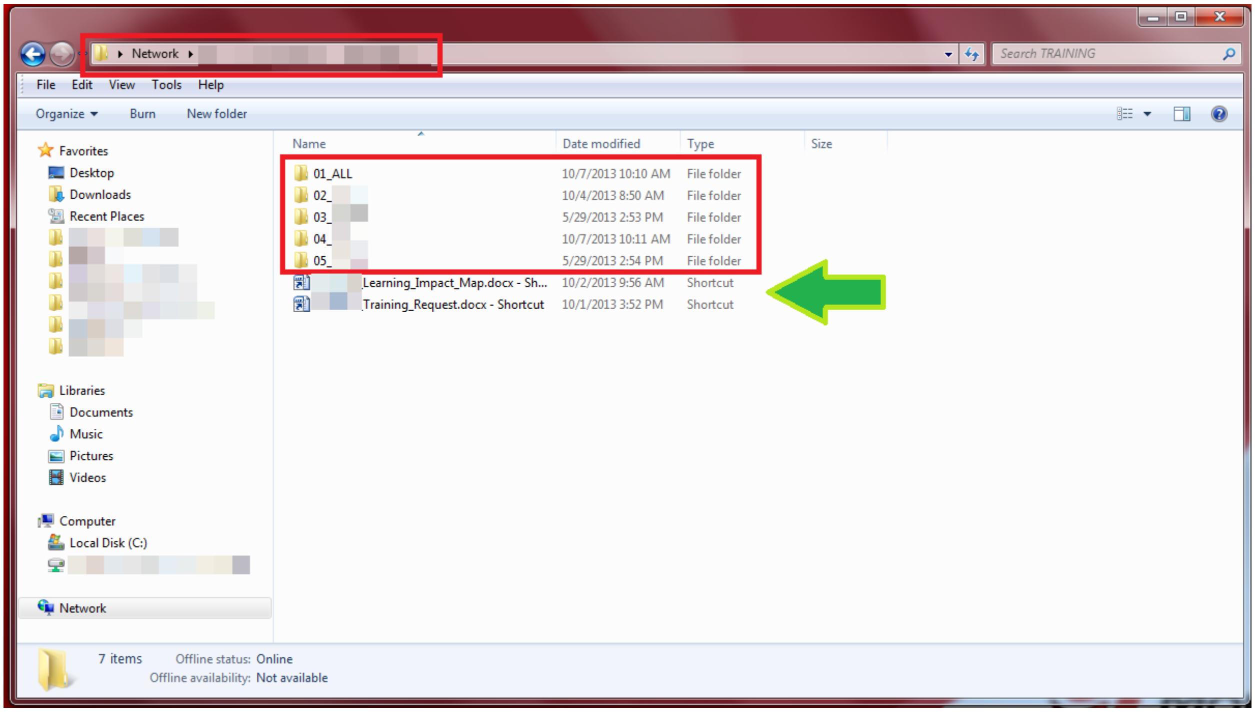


Folder Organization:

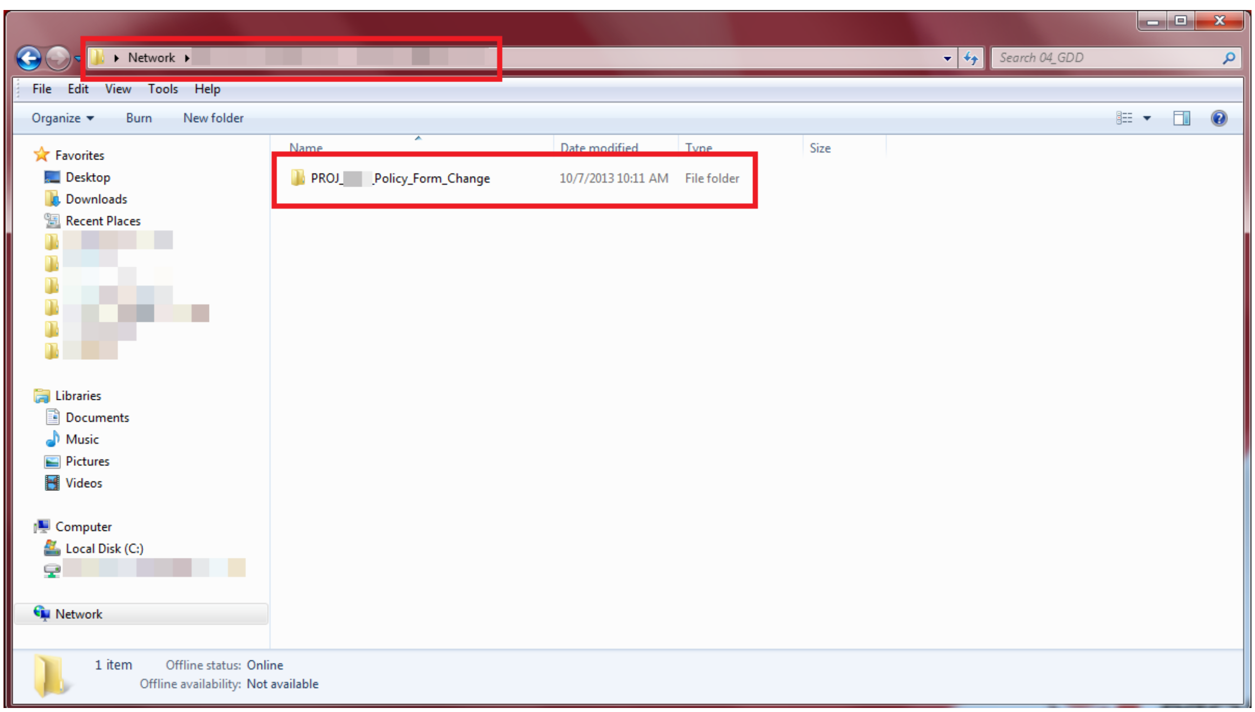
There is a folder for each of the groups within Operations. Training content and training projects have subfolders within those files. Training references or documents that are commonly used may have shortcuts at the top level of the TRAINING folder.

See the next two images for examples.

The folders are shown in the red box. The green arrow points to commonly used tool shortcuts.



Here is an example of a specific folder for the **GDD Policy and Forms training project** inside the GDD training folder. After the project is completed, the folder administrator will leave the training material and references in the folder and remove the PROJ portion of the folder name.



Training Reports

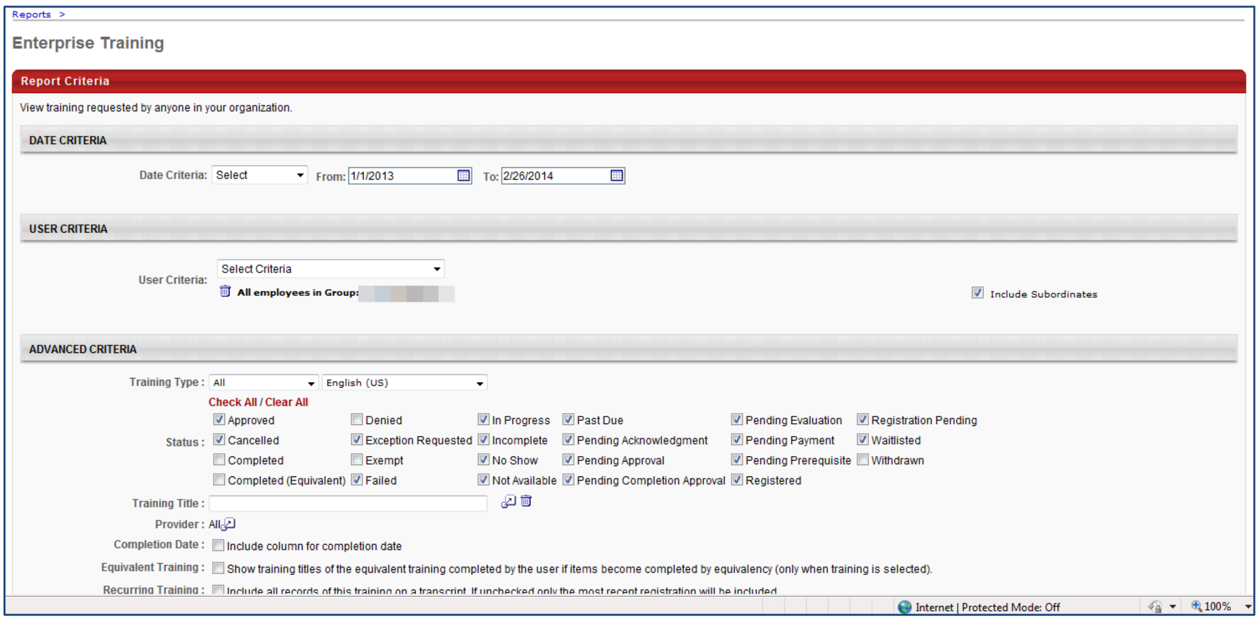
Training Assigned but Not Complete (Monthly)

Path in the LMS: Reports > Training > Enterprise Training

Report Name/Type: Enterprise Training (Standard)

Report Criteria: Adjust criteria, as desired. Standard reporting criteria are shown.

- **Date:** [Suggested] From 1/1 of previous year to today's date
- **User:** Group [Operations and each subordinate group, run separately as unique reports]
- **Advanced Criteria - Status:** Click on "Check All" and then deselect **Approved, Denied**, **Completed**, **Completed (Equivalent)**, **No Show**, **Exempt**, **Withdrawn**. We want to see just what people have been assigned and have not done.



Click **SEARCH** to run the report, then **Export to Excel**.

Edit the Report in Excel:

- **Save As** with the name **"Enterprise_Training_Incomplete_[Group]_YYYY_MM_DD"** as an .xls or .xlsx file.
- Enter the **[Group]** in A3 (Operations, COPS, AFAS, etc.) and bold it.
- Enter the **[Report Date]** in B3 and bold it.
- **Hide Columns** E-H (Version, Division-Position, Training Provider, Score).
- **Custom Sort** by User and Registered Date (Newest to Oldest).
- **Color the cell** I2 with yellow highlight and enter **">6 Months and/or Past Due – Action Needed."**
- **Color the cell** I3 with light blue and enter **"Attention Needed."**
- **Scan and color the rows** yellow or light blue, according to these criteria:
  - **Action Needed:** Past Due and/or >6 months since registration; especially if compliance.
  - **Attention Needed:** >2 months and/or anything that doesn't seem to make sense for the learner. (Phone training for Financial Analysts, for example.)

- **Save** the report with your edits. Make sure you use a consistent folder for reports.

Send to: Leaders down to supervisor in the appropriate group.

Training Status – Overall

Path in the LMS: Reports > Training > Enterprise Training

Report Name/Type: Enterprise Training (Standard)

Report Criteria: Adjust criteria, as desired.

- **Date:** From 1/1 of previous year to today's date or Last Year, or as needed.
- **User:** Group [Operations and each subordinate group, run separately as unique reports]
- **Advanced Criteria - Status:** Generally, click "Check All" unless you want to see something specific, like only completed courses or No Shows or Withdraws. (***Expect a very long report!***)

Click **SEARCH** to run the report, then **Export to Excel**.

Edit the Report in Excel:

- **Save As** with the name **"Enterprise_Training_Full_[Group]_YYYY_MM_DD"** as an .xls or .xlsx file.
- Enter the **[Group]** in A3 (Operations, COPS, AFAS, etc.) and bold it.
- Enter the **[Report Date]** in B3 and bold it.
- **Hide Columns** E-H (Version, Division-Position, Training Provider, Score), if desired.
- **Custom Sort** by User and Registered Date (Newest to Oldest).
- **Filter Rows** if desired or helpful.
- **Scan and color the rows** according to what you are looking for.
- **Save** the report with your edits. Make sure you use a consistent folder for reports.

Send to: Leaders who need the report.

Training Scorecard (Metrics)

The Training Scorecard shows our metrics in four categories of ascending relevance – Activity, Efficiency, Effectiveness, and Impact. It is possible to measure everything on this list, but it takes some work to get a measurement system up and running for all of that.

- **Activity:** Responsiveness and Training "stuff" done or delivered. I include the non-course activities delivered so that we have a good total count of learning activity beyond what we may have captured in course completions in the LMS. We have a goal to respond to 100% of requests we receive and arbitrarily to offer a solution or recommendation for 75% of requests. (Some requests will not be training/learning issues, or will not meet prioritization guidelines, or have to be deferred.) Solutions offered covers the initial "Here's what we could do…" and does not imply that a solution was delivered; although that could be the case.
    - Requests Received: **nn**, Requests Answered: **nn** (xx%), Solutions Offered: **nn** (xx%)
    - Learners: **nn**, Courses: **nn**, Hours: **nn** (duration), Other Learning Activities Completed/Delivered: **nn**
- **Efficiency:** Simply put, this tells us the cost per activity. "How are we using what we are investing?" Remember to include the cost of learners' time off their regular work, because this is a real operational cost. These figures are in tension with the effectiveness and impact figures, below, and it is important to keep this point in front of decision makers.
    - Cost/Learning Hour: **nn**, Hours/Activity: **nn**, Cost/Activity: **nn**, Activities/L&D Resource: **nn**
- **Effectiveness:** Volume of performance objectives met, and percentage of people who can report success using what they learned. Then, reported average ratings for usability, net promoter score, and manager ratings of change in learner performance. Also includes the employee engagement score (taken from a very short pulse survey to a random sample within the BU).
    - Objectives Met x Learners: **nn**, Success %: **nn**
    - Usability Ratings: **nn**, Net Promoter Scores: **nn**, Manager Ratings: **nn**
    - Employee Engagement Score: **nn** (% change: **nn**)
- **Impact:** How many successes did we have from learning? What was the verified value of those successes? (Caveat: Not all programs will get a full impact evaluation. (We're using the Success Case Evaluation from Robert Brinkerhoff.) The most important activities will get SCEs and these will go to show value, again referring to the previous slide.)
    - # of Successes: **nn**
    - Value of Successes: **nn**

Caution! These statistics can only capture a small portion of the learning activity that actually takes place. This is probably less than 20% of all of the learning that is actually happening in the business.	Generic_Training_Scorecard.pptx

How to do QA on a Training Program

We want to make sure that each program meets the needs of the learners, the standards of our training group, and the technical requirements of the delivery system we are using. This applies to computer-based training or online training (OLT), as well as to classroom and on-the-job training and instructor-led training (ILT).

General Procedure

1. **Review the training request, scope docs, impact maps, and other material that lays out the needs and requirements.** Make sure that you know what the program is supposed to do.
2. **Go through the program material in detailed sequence** (screen by screen for OLT; page by page and activity by activity for ILT). Look for these things: (not all will apply to all programs)
    a. Is the content accurate?
    b. Are all parts present and ready to put in front of learners?
    c. Does everything that learners can interact with do what it is supposed to do?
    d. Is there anything present that learners should NOT be able to interact with that is distracting or that is not functioning as intended?
    e. Does this adhere to our principles (learner-focused; performance-based; efficient, effective, and impactful)?
    f. Does the presentation of the content adhere to our branding guidelines, to the extent it makes sense?
    g. Are we complying with appropriate copyright law and other regulations, as applicable?
3. **Go through the program material at a high level**, looking across modules, sections, and so on. Look for these things:
    a. Is this a complete solution to the need?
    b. Is this program going to engage the intended audience?
    c. Is this program going to produce the impact we want?
    d. Is everything in the program needed, or are there parts we can make optional to save learner and trainer time and cost?
    e. Are the logistics of delivery going to work reliably?
4. **Test the program in its intended delivery mode.** (Usually, this is a test in the pilot instance of the LMS for OLT and a pilot session or detailed walkthrough delivered for ILT.) Work out any bugs.
5. **Add a document labeled "QA Notes" to the project folder** with comments, improvement suggestions, findings, test results, and other information. Include details that would be helpful to someone tasked with making the next upgrade to the program or auditing how the program was designed.

Training QA Form

Program/Project Name:		
Reviewer:		
Training Detail Review		
OK	**FIX**	**Item**
		1. Is the content accurate?
		2. Are all parts present and ready to put in front of learners?
		3. Does everything that learners can interact with do what it is supposed to do?
		4. Is there anything present that learners should NOT be able to interact with that is distracting or that is not functioning as intended?
		5. Does the presentation of the content adhere to our branding guidelines, to the extent it makes sense?
		6. Are we complying with appropriate copyright law and other regulations, as applicable?
Comments:		
Training High-Level Review		
OK	**FIX**	**Item**
		7. Is this a complete solution to the need?
		8. Does this adhere to our principles (learner-focused; performance-based; efficient, effective, and impactful)?
		9. Is this program going to engage the intended audience?
		10. Is this program going to produce the impact we want?
		11. Is everything in the program needed, or are there parts we can make optional to save learner and trainer time and cost?
		12. Are the logistics of delivery going to work reliably?
Comments:		
Technical/Pilot Testing		
OK/NA	**FIX**	**Item**
		13. Does the solution function in the authoring tool preview as expected?
		14. Does the solution function in the LMS preview as expected?
		15. Does the solution function for a test user as expected?
		16. Does the pilot work for all relevant stakeholder groups?
Comments:		

Training Reaction Evaluation

Course: [Course Name]

Lead Trainer: [Trainer Name]

1. What part of training stands out for you as the most interesting? Why?

2. What part of training stands out for you as the most useful? Why?

3. What part of training stands out for you as the most difficult or the most challenging? Why?

4. On a rough percentage basis (0-100%), how much of what you learned in training do you think you will be able to use?

5. On a scale of 1 (low) to 10 (high), how likely would you be to recommend this training to others, if they had a choice about training?

6. What one or two things could we do to make this training better? (Feel free to say more, if you have additional suggestions!)

The actual email message, with explanations and instructions follows. This example was originally written for new hire training.

Participant Feedback on Training

Hi folks,

Welcome to **[company, if applicable]** and the **[department or program]**! I met you in passing, but we probably haven't been introduced. My name is **[your name]** and I am **[title]**. Part of my job is to make sure that we're providing training and learning opportunities that help people be successful. **[explain purpose of program]** I would like to get your feedback on how the first two weeks of training has gone for you.

Please reply directly to me (DO NOT CLICK REPLY ALL!) with your answers to the questions, below. Your feedback is anonymous, and will be rolled up into a summary before any of the trainers or leadership team members sees it.

Course: [course name]

Lead Trainer: [trainer name]

1. What part of training stands out for you as the most interesting? Why?
2. What part of training stands out for you as the most useful? Why?
3. What part of training stands out for you as the most difficult or the most challenging? Why?
4. On a rough percentage basis (0-100%), how much of what you learned in training do you think you will be able to use?
5. On a scale of 1 (low) to 10 (high), how likely would you be to recommend this training to other new employees, if they had a choice about training?
6. What one or two things could we do to make this training better? (Feel free to say more, if you have additional suggestions!)

In about 4-6 weeks, I will send you a follow-up survey about this training. The intent of our follow-up is to see what people were able to use on the job. When you get that survey from me, please take the time to respond. It will help us to keep improving our training and learning activities within **[department or program]**. Contact me at any time if you have any questions or suggestions!

Thank you for your time,

--**[your name]**

