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| Jill Davidian5/5/2016 |
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**OpenText**

**Training Strategy and Plan**

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*Template last updated: 17 November 2014*

**Bold** denotes OCM Tool or Playbook section

# Training Strategy and Plan Guiding Principles

The overarching guiding principles provide direction for the design, development, delivery and evaluation of training. These should be tailored for each project to guide the planned approach for training. Common guiding principles include:

* Support effective training by incorporating adult learning theory principles:
	+ Treat trainees like adults or risk resistance to what you are training
	+ Document and frequently reference learning objectives for each training course
	+ Incorporate exercises and hands-on practice activities in training materials
	+ If people are not engaged, take a break or move to an exercise as the average person has a 15-20 minute attention span
	+ Engage the stakeholder whenever possible -- ask questions to get their participation and discuss rather than present whenever possible
	+ Make the environment ‘safe’ for learning where participants feel comfortable to always ask questions
* Proactively manage the tradeoff between budget and training effectiveness and utilize higher cost training delivery methods only when required by the training need
* Cater to different learning styles (e.g. visual, oral, hands-on, etc.)
* Ensure the training is easy to access, use, and understand
* Be relevant and at the appropriate level of detail for each audience group
* Allow for localization to different business groups, regions and roles (as needed)
* Support normal business activities and minimize time away from work
* Enable training delivery on a “just-in-time” basis (i.e. as close to actual use as possible)
* Involve business group representatives in the training activities where possible (consider the Change Champions if this has been established for the project)
* If classroom training is needed, identify and engage trainers early, then prepare and support them for the role

# Scope

Use this section to state what will be included in the project training and what it will not support. Include details as applicable such as stakeholder groups, business groups, systems, processes, and future releases.

* In-Scope
	+ - Law department
		- Matters and Insurance Certificates

# Assumptions

For any project, there are certain assumptions that are made regarding training development and delivery. Use this section to state project training assumptions. This should include training assumptions related to resources, technical needs, or the organization/ business groups. Examples of training assumptions include:

* There are two phases to this project. Phase 1 will complete in July and Phase 2 will complete through the end of the year.
	+ Phase 1 – Matters and Insurance Certificates
	+ Phase 2 – Full clean up (everything else)
* This project is part of a broader Information Management initiative for XXXX
* The core project team will drive training and communications to the business (with the support of IT OCM)

# Training Audience Identification and Analysis

* *Transaction corporate attorneys*

The Attorneys will use OpenText less often, as they often send documents to their administrative assistants to store and file. They also file documents where it is most convenient for them. The training for them will need to focus on the new process and encouraging them to trust the system, as well as how to use the system.

* *Law staff (non-attorneys) including Administrative Assistants*

The Administrative Assistants currently do the bulk of the tasks related to storing documents, and they will continue to do the bulk of it in the new system. For this group, the focus would need to be on how they will be using the new system in the future, and how it differs from what they are currently doing to store documents.

# Training Approach

The project should follow a five-step approach to analyze, design, develop, deliver, and evaluate training. Outcomes from each step should act as inputs for the next step.

## Analyze (Training Needs Analysis)

See separate Training Needs Analysis document.

## Design

**Training Outline**

* Dashboard
	+ Navigation
	+ Bread crumb trail
* Folder Structure
	+ New structure
	+ How to create new folders
* Moving Historical Documents to Open Text
	+ Drag and Drop feature
	+ Bulk upload
* Creating/Saving New Documents
	+ Creating and saving a document from within OpenText
	+ Creating and saving a document from outside of OpenText
	+ Integration with Outlook (Enterprise Connect)
	+ Integration with the rest of Office 2013
* Editing Documents
	+ Versioning
	+ Editing within OpenText vs. outside of OpenText
* Searching/Finding Documents
	+ Filtering
	+ Save a “view” as a virtual folder
* Viewing/Sending Documents
	+ Zip and download
	+ Zip and email
* ECM Everywhere (iPad and mobile)

**Training Methods Table**

| **Training Method** | **Description** |
| --- | --- |
| Instructor Led Training (ILT) | 2-2.5 hour face-to-face training sessions would be held for two separate groups – Attorneys and Administrative Assistants. These two sessions would be focused in different ways, but would use the same PPT deck. Training materials would be developed by OCM and delivered by Law.  |
| Quick Reference Guides (QRGs)/ Job Aids | 8 Quick Reference Guides would be provided in PDF and Word format with screenshots and step-by-step instructions.The Quick Reference Guides would be stored on the Law SharePoint site (TBD.) |

## Develop

 **Training Deliverables:**

* PowerPoint deck for Administrative Assistant training with notes
* PowerPoint deck for Attorney training with notes
* Quick Reference Guides

## Evaluate

Key Performance Indicators:

* Speed of migration
* Amount of content moved
* Usage of OpenText by Law organization within 30, 60 and 90 days
* Reduction of documents on shared drives within 30, 60 and 90 days

# Training Resources

| Role | Assigned Resource | Assumptions/Comments |
| --- | --- | --- |
| Training Manager | Cynthia Onstott |  |
| Training Lead | Jill Davidian / Tabitha Burns |  |
| Business Group SMBR | Nelda Martinez |  |
| Business Group SMBR | Dena Major |  |
| Business Group SMBR | Dianne Stevens |  |
| IT Development Resources | Doug Schultz |  |

# Training Governance

|  |  |  |  |
| --- | --- | --- | --- |
| Training Deliverable | Stakeholder | Reviewer & Approver | Timing |
| *Type of training deliverable – purpose and audience/ channel* | * *Training Recipient*
 | * *Team/ Individual responsible for reviewing the training prior to delivery*
 | * *Lead time needed based on audience and format*
 |
| ILT Training PPT deck – Administrative Assistants | * Administrative Assistants
 | * OCM Manager
* XXX
* XXX
* XXX
* XXX
 |  |
| ILT Training PPT deck - Attorneys | * Attorneys
 | * XXX
* XXX
* XXX
* XXX
* XXX
 |  |
| Quick Reference Guides | * Entire Law department
 | * OCM Manager
* XXX
* XXX
* XXX
 |  |

# Timeline

|  |  |  |
| --- | --- | --- |
| **Training Activity** | **“Complete By” Date** | **Who** |
| Complete ILT outline/agenda |  |  |
| Identify requirements for what will need to be loaded in the system to create training (documents to search for, etc.) |  |  |
| Training deep dive with Nelda, Dena, Dianne, and Doug:* Review ILT outline/agenda
* Discuss differences in training for Admins and Attorneys
* Discuss any dummy documents that need to be loaded into system to develop training material (to do a search, etc.)
* Introduce team to Tabitha
 |  |  |
| System design complete |  |  |
| Dummy documents loaded into OpenText, if needed |  |  |
| Complete PPT decks for ILT and send to team for round 1 review |  |  |
| Receive round 1 feedback from PPT decks from team |  |  |
| Complete Quick Reference Guides and send for round 1 review  |  |  |
| Receive round 1 Quick Reference Guide changes from team |  |  |
| Make round 1 changes to PPT decks and send to team for use in UAT |  |  |
| Complete round 1 changes to Quick Reference Guides (possibly to be used in UAT) |  |  |
| UAT Training |  |  |
| UAT Complete |  |  |
| Receive any changes to PPT decks and/or Quick Reference Guides from team after UAT |  |  |
| Make any changes to PPT decks after UAT; Final version of PPT deck complete  |  |  |
| Train-the-Trainer |  |  |
| Make any changes to Quick Reference Guides after UAT; Quick Reference Guides complete |  |  |
| End User Training  |  |  |
| Go-Live |  |  |

# Sustainability

The Law department will store Quick Reference Guides on their SharePoint site for future reference/training.