

Training Assessment Results

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(1)

Training Assessment Categories

- Business Case
 - Identify current Technology Solutions Customer Relation Management (CRM) training materials
 - Identify training deficiencies and gaps in current materials
- Training Materials
 - Evaluation of current materials
 - Identify training deficiencies with materials
- Organization and Structure
 - Location of training materials
 - Central Repository
- Recommendations & Options
 - Adoption of updates to include current implementation
 - Restructuring CRM Training
 - Timelines
- Summary
 - Next Steps - No more pain
 - Highlight of quick wins in key user value areas

Business Case

The purpose of this training assessment is to identify current CRM training materials and requirements needed by to bring existing and new users the skills and knowledge to perform their jobs in an efficient way. The below key items of the assessment are included but are not limited to:

- Results of past surveys indicate inadequate training materials
- Training materials require updating and/or replacing current content
- Recognized the “gap” between performance required and the current performance
- Provide options to close the gap between the users knowledge and expectations from
- Training materials out of date



Evaluation of Current Training Materials

- No “Day in the Life” examples in training material
- Error messages not explained i.e. What to do if you receive an error
- Reporting options not clearly displayed
- Quick Reference, Job Aids, and Work Instructions are non-existent
- Training not based on departmental functions



- CRM New employee training non-existent
- Location of help functions and support not supplied
- Professional training not given in a formal training environment
- No accountability of knowledge transfer from Trainer to Student
- Training schedule did not allow enough classroom time for exercises

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Organization & Structure

● The following observations were made concerning the location of the current training materials:

- Inconsistent structure and methodology based on current CRM Processes
- Training method not clearly identified by course (Self-Directed and/or Instructor Lead)
- Current course content not included in Learning Management System; Center for Learning (SumTotal)
- Online help links from CRM Application not directed to training content
- Courses are not prepared for dual training methods (Self-Directed and Instructor Lead)
- Lack of a training environment for training and development

Recommendations

Maximize End User Training

Consulting

- Align Business, Workflows, & Technology and ID any Gaps

Adoption

- Integrated Training Plan to maximize End-user Adoption
- Integrated Communication Plan to ensure users are kept up-to-date

Training Design and Development

- Presentation; Learning Objectives, Business Process, Standards & Definitions
- Training Environment
- Design Document
- Hands on Exercises
- Quick Reference Guides
- Instructor Guide
- Training Survey

Facilitation

- Scheduling and Logistics
- Classroom Training or via Webinar
- "Quick Hit" Early Value areas with Job-Aids, QRC, and Simulations
- Analyze cross-Department needs
- Provide "Train the Trainer" Training
- Develop Project Success Metrics

Post Training End User Support

- Support users on specific aspects aligned to their job, daily workflow and business processes
- Leverage existing resources for ongoing training via Remote Distance Learning Tools or CBT's
- Identify support phone numbers & links to materials

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Training Strategy

Option 1 – Total Training Solution

Services Provided	Description At a glance	Consultant Hours	Resource Hours	Total Hours
Training Plan	<ul style="list-style-type: none"> Develop Training Plan and Strategy to include: <ul style="list-style-type: none"> Curriculum Scheduling Logistics 	80	80	160 (4Weeks)
Communication Plan	<ul style="list-style-type: none"> Develop Communications Plan to include: <ul style="list-style-type: none"> Email Distribution Posters Newsletters ❖ Ongoing Communication 	60	60	120 (3 Weeks)
Training Design	<ul style="list-style-type: none"> Build Templates Content Structure Training Environment 	80	80	160 (4 Weeks)
Training Materials Development	<ul style="list-style-type: none"> Develop ILT & Simulations and CBT Training Materials CRM 7.0 Enhancements 	320	320	640 (4 Months)
Training Delivery	<ul style="list-style-type: none"> Train-the-Trainer Instructor Led Training CBT / Simulations 	100	100	200 (1 Month, 1 Week)

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Note: Total Hours will split ½ with additional resource(s)

Training Strategy

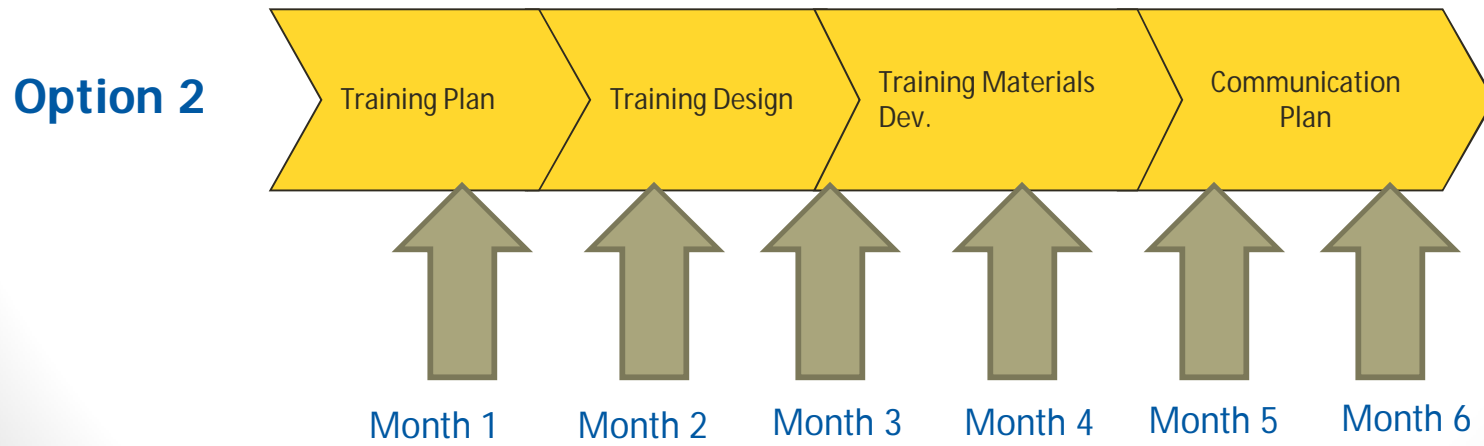
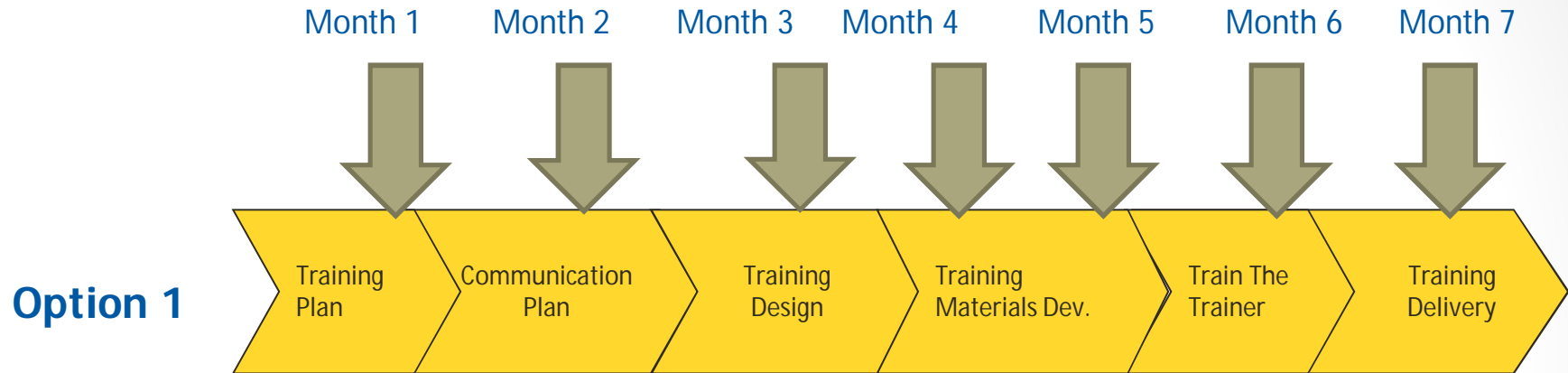
Option 2 – Enhance Current Training

Services Provided	Description At a glance	Consultant Hours	Resource Hours	Total Hours
Training Plan	<ul style="list-style-type: none"> Develop Training Plan and Strategy to include: <ul style="list-style-type: none"> Curriculum Training Delivery Plan Knowledge Transfer Accountability 	40	40	80 (2 Weeks)
Training Design	<ul style="list-style-type: none"> Build Templates Content Structure Training Environment 	80	80	160 (4 Weeks)
Training Materials Development	<ul style="list-style-type: none"> Update existing materials based on current processes Develop Job-Aids, QRC, and ILT Materials Include CRM 7.0 Enhancements Links to the Materials 	320	320	640 (4 Months)
Communication Plan	<ul style="list-style-type: none"> Develop Communications Plan to include: <ul style="list-style-type: none"> Electronic distribution of updated materials Training Newsletters with Tips & Tricks 	60	60	120 (3 Weeks)

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Training Strategy Timeline



Summary of Assessment

Priorities

Fill the training gaps with a sustainment program to update current skills and developing new behaviors for current and new employees.

Solution Adoption

If new training programs are not put in place, problems may continue throughout pertaining to individual performance and confidence which may affect departmental bottom lines.

Communication

Generating positive communications "We hear you and we understand" messages to the affected users. This will resonate loudly to gain support for a new training program.

Cost effective Results

Implement one of the proposed options. Assist with designs and development, using current resources you have in place.

Follow-up and Accountability

Once training options have been considered and implemented an additional survey will be conducted to measure the success of this training.

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