UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

MIGRATION PLANNING GUIDANCE TEMPLATES

TRAINING STRATEGY TEMPLATE

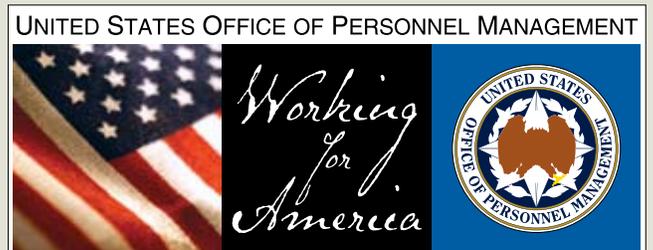UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

Working for America

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1. Training Strategy Overview

This document presents a template that Customer Agencies and Shared Service Centers (SSC) can use to document the training strategy for the migration of the agency to the SSC systems, processes, and procedures. Developing a training strategy will help a successful transfer of knowledge and implementation of the process and system procedures during and after migration.

1.1 Objectives

<State the primary objectives of the Training Strategy. Examples are provided below>

- To determine the approach for delivering training programs that are consistent with the users' needs and provide "just-in-time" training.

- To construct an approach that can be used by trainers to train all end-users while providing the flexibility to tailor the material to individual groups, business processes and end-user skill sets.

- To identify process areas and related training courses that serve as a basis for end-user training.

- To identify the primary audience for each training course.

- To develop course design framework principles that maximize value and minimize the elapsed time spent in training.

- To develop an approach that provides knowledge transfer and post-training reference to end-users.

- To identify areas where ideas and/or effort can be leveraged across organizations in an effort to streamline training development while providing each organization with the materials and support needed to successfully deliver training.

1.2 Approach

<State the approach for developing the training strategy>

Sample Text

For this document, the key areas of a training program were identified in order to understand the required components of the training strategy. The overall training strategy resulted primarily from an evaluation of information garnered from interviews with representatives from [CUSTOMER AGENCY].
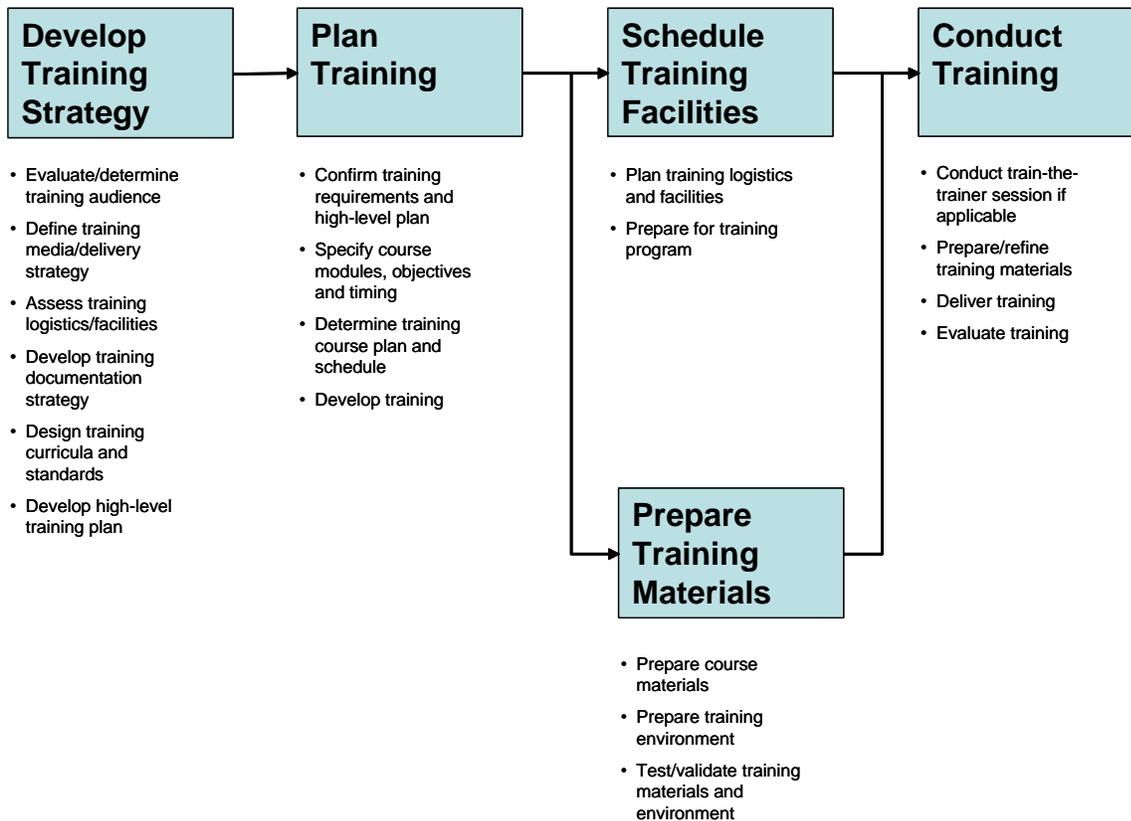
1.3 Assumptions

<State any assumptions for developing and implementing the training strategy>

Sample Text

- End-users will receive training on the skills and knowledge necessary to perform their role in the <XX > process and system, in addition to receiving an overview of the entire < XX > process and system.

- Training will be conducted using PCs or Macs as appropriate for the users of the system.

- Once course materials are further outlined, timing of courses will be modified if needed to allow adequate time for instruction.

1.4 Training Phases

The graphic below presents an overview of the training phases and key activities that should be performed within each phase.

TRAINING PHASES

Develop Training Strategy

- Evaluate/determine training audience
- Define training media/delivery strategy
- Assess training logistics/facilities
- Develop training documentation strategy
- Design training curricula and standards
- Develop high-level training plan

Plan Training

- Confirm training requirements and high-level plan
- Specify course modules, objectives and timing
- Determine training course plan and schedule
- Develop training

Schedule Training Facilities

- Plan training logistics and facilities
- Prepare for training program

Conduct Training

- Conduct train-the-trainer session if applicable
- Prepare/refine training materials
- Deliver training
- Evaluate training

Prepare Training Materials

- Prepare course materials
- Prepare training environment
- Test/validate training materials and environment

2. Training Strategy

Use this section of the Training Strategy to outline the components of training that is specific to the migration.

2.1 Course Design Framework

The course design framework serves as the basis for training material development and provides a reference for completeness and integration of training materials. The course design is structured to provide the following :

- Course outline
- Course approach and timing
- Primary course audience

<Describe each component of the course design below.>

2.1.1 Course Outline

The course outline identifies the training modules that will be part of the training course design. Training modules may be designed for different user groups. Examples are provided below.

2.1.1.1 Flash Demo

Sample Text
The Flash demo of [SYSTEM X] will provide basic information related to navigation as well as cover general topics that span the entire training audience. Topics covered will be:

- Basic navigation/usage including system access, print, save, etc.
- High level overview of the timing of data flow in [SYSTEM X]
- Overview of the process
- High level discussion of workflow including roles and implications

2.1.1.2 Course A – Analyst

Sample Text
The Analyst course will provide users with a hands-on model review of [SYSTEM X]. Topics covered will be:

- Basic Model Navigation
- Workflow
- Data Entry and Help

2.1.1.3 Course B – Managers

Sample Text
The [SAMPLE] course will provide managers department with the knowledge of [SYSTEM X] they will need to perform their functions. Topics covered will be:

- Timecard Approvals

- Manager Self-Service

2.1.2 Course Approach and Timing

<The course approach identifies the methodology and used to develop the courses and the time increment necessary to complete the instruction for the specific training area. Examples are provided below>

- Flash Demo – 10 minutes

- Course A – Four Hours

- Course B – Two Hours

2.1.3 Primary Course Audience

<The following Training Needs Assessment table lists the courses and primary audience identified for each course. The audience should be identified by functional group with the related departments listed underneath. A sample table is provided below.>

TRAINING NEEDS ASSESSMENT

Audience	Flash Demo	Course A Analyst
Analyst:		
• Workforce Planning & Analysis	✔	✔
• Human Resource Services	✔	✔

2.1.4 Trainer Responsibilities

<The following chart identifies the trainers and the courses they will be responsible for training.>

TRAINER RESPONSIBILITIES

Trainer	Course A	Course B	Course C	Course D	Course E
Name		✔			
Name	✔		✔		
Name	✔			✔	✔
Name					✔
Facilitators – Name	✔	✔	✔	✔	✔
Roamers	✔	✔	✔	✔	✔
Technical Resource	✔	✔	✔	✔	✔
Name (SME)	✔				

2.2 Cross-Organization Training Requirements

<This section of the Training Strategy document outlines the components of training that span across all organizations. This section may include the following topics :>

- Resource and Material Requirements

- Training Implementation Requirements

- Training Guidelines and Expectations

- Critical Success Factors

2.3 Resource and Material Requirements

<This section identifies the resources (i.e., logistics, facilities, documentation and technology) required for the courses to be most effective. Estimates are made based on the number of participants who will be attending the courses as well as the number of training hours required for the training to be effective. Examples are provided below.>

2.3.1 Logistics and Facilities Requirements

Sample Text
Training rooms will be configured incorporating the following requirements:

- Training will be conducted in conference rooms in various buildings on the Client campus.

- Off-site users will attend a training course on-site to the extent that scheduling permits it.

- One participant will be placed at each computer.

- Training rooms need to accommodate users of both Macs and PCs.

- The training rooms need to include the supplies used during training (e.g., projection equipment, white board or flip chart, etc.).

2.3.2 Documentation Requirements

<Multiple forms of documentation will be developed to support training and provide assistance post-training. Example of a documentation requirements table by organization within the agency is detailed below.>

DOCUMENTATION REQUIREMENTS BY ORGANIZATION

Type	Purpose	Organization 1
Flash Demo	Provide a brief introduction to and overview of [SYSTEM X]	✔
Training Guide	Explain detailed steps and incorporate targeted exercises to provide practical experience on new processes and procedures	✔
Quick Reference Guide	Highlight the basics of [SYSTEM X] (e.g., system access, print, save) for reference during and after training	✔
Procedures-at-a-Glance	Detail key processes for easy reference on the job (job aids)	✔
Sponsor Video	Highlight the reason for and importance of the training from an organization perspective	✔
Training Evaluation	Understand success of training and areas for improvement	✔

2.3.3 Technology Requirements

<This section details the technical requirements for the training provided. Examples are provided below.>

- A separate training environment will be created for training.

- Data will be copied from the current application(s) into the training environment prior to training.

- Each Contributor user must have his/her login and access set up prior to training.

- Analyst users can be set up with a group login and access or with individual user logins and access.

2.4 Training Implementation Requirements

<This section details any training implementation requirements necessary to successfully meet the objectives of all training courses. Examples are provided below.>

- Projection equipment will be set up in each training site so that live computer screens can be clearly seen by participants.

- One participant will be placed at each computer.

- All workstations will be configured the same way.

- Activities will be tailored to the user/groups being trained on [SYSTEM X].

2.5 Training Guidelines and Expectations

<This section details the training expectations outlined below and serve as a guide for ensuring successful delivery of all training courses. Examples are provided below.>

- Attendance is necessary for the success of the migration and therefore will be tracked by each group.

- Punctuality is important to individual learning and the learning of the class as a whole.

- Class participation and enthusiasm is required for learning.

- Leaving during a class session should be limited to emergencies.

- Mutual respect shared between instructors and participants is important to the learning environment.

- Instructors and/or facilitators will be responsible for resolving any "parking lot" issues identified during each course.

2.6 Critical Success Factors

< This section details the critical success factors needed to achieve the success of training. Examples are provided below.>

- **Dedicated resources** – Identification of a training coordinator and formation of a training team that represents all functions affected by the change.

- **Support and commitment** – Engagement of sponsors and subject-matter-experts in the training process.

- **Clear objectives and measures of success** – Establishment of clearly defined training objectives to guide training decisions.

- **Understanding the impact** – Understanding the changes at all levels of the organization and translating them into appropriate training courses.

- **Instructional methods** – Identification of the best course design framework that is consistent with the culture, taking into consideration past experiences, and building a network of technical support.

- **Training methods** – Identification of the target audience and the best methods of training delivery that are feasible, add value, and are aligned with the stated training objectives.

- **Training materials** – Development of materials that support training activities before, during, and after formal training classes.

- **Dedicated facilities** – Establishment of the facilities that will be used to conduct training.

- **Plan for on-going support** – Preparation for user support following formal training classes and defining ways to orient new hires, transfers, etc.

UNITED STATES
OFFICE OF PERSONNEL MANAGEMENT
1900 E Street, NW
Washington, DC 20415