

BAC System Implementation Training Plan

Overview

This document contains information about training scope, strategy, audiences and timelines to ensure training for the BAC system implementation meets performance and business objectives.

Learning Objectives

Terminal Objective

After completing training, job roles within each persona will be able to fulfill their business processes while using the new BAC system in the moment they need to.

Enabling Objectives

Enabling learning objectives for job roles within each persona will be determined after meeting with SMEs on the needs of the job roles within their discipline. The objectives will then be detailed in a design document.

Training Scope

In Scope

- Training on how job roles within personas conduct their business using the system
- Changes to processes (budgeting, annual plans, etc.) in conjunction with system functionality, processes, and procedures

Out of Scope

- In depth training on other systems learners may use in conjunction with the new system

Risks

- Business processes and procedures not provided to training team in time to create and deploy content by timeline

- Screens with procedure steps not provided in time for training deliverables/events
- Stage (practice environment) not ready/stable for learner practice sessions
- Tech build delays push out the go-live timeline, affecting training timelines

Roles and Responsibilities

Role	Assigned	Responsibility
System program sponsor	TBD	Approve training approach/strategy
System program manager	TBD	Approve training approach/strategy, provide guidance
System product manager	TBD	Design personas, help instructional designer create learning objectives, provide learning content (system processes, procedures), help design self-paced video example, approve content for subject matter accuracy
Lead instructional designer	TBD	Create learning strategy, document learning objectives, design structure and criteria for self-paced learning materials and teach-back learning materials, approve videos created by developers, create facilitator guide template for teach-back sessions, instruct trainers how to conduct teach-back sessions, survey learners, report results to program leaders
Instructional designer/help portal developer	TBD	Update help portal, support content creation
Software change manager	TBD	Provide input on training plan and materials
Communications lead	TBD	Send out software communications
Vendor trainer	TBD	Create system training guide and PPT slides, facilitate TTT, provide input on self-paced learning materials

Video developers	TBD	Create self-paced videos
Trainers	TBD	Schedule and facilitate teach-back sessions

Learning Strategies

The learning strategies for all future system modules will include the following elements. This approach ensures learners have a more active learning experience, enabling them to better retain and apply the new knowledge and skills to their job roles.

Self-Paced Learning

A few weeks before go-live, learners will be given access to learning materials they can complete at their own pace. These will consist of the following:

- **Short video clips** will explain process changes and demonstrate system procedures. These will be recorded by a narrator using a webcam with no other participants.
- **Quick guides** are text-based versions (with some screenshots) of the video clips.
- **Practice activities** allow learners to practice in the Stage environment based on video clips and a collection of quick guides. This is where most of the deep learning takes place, as the practice will reinforce the same tasks they will perform on the job.

Teach-back Sessions

Shortly before go-live, formal training sessions will be conducted with job roles within each persona. During these sessions, employees will teach each other what they learned during the previous few weeks from the self-paced training materials.

- The session trainer will have an agenda and facilitator guide to provide structure to the session.
- Rather than give employees a “content dump,” which is a passive learning experience, employees will do most of the demonstrating/instructing. When employees are given opportunities to teach each other what they’ve learned, their understanding deepens and they retain the knowledge better.

- Prior to the sessions, the trainers can choose to recruit a few learners to be prepared to deliver the teach-backs. During the sessions, they can also choose to call upon participants impromptu to share what they've learned.
- The trainers can fill in any gaps that participants may not have touched on.

Content Development

Development of the self-paced learning materials and facilitator guides will be a collaborative effort.

- Quick guides will be built in the help portal based on the content provided in user acceptance testing (UAT).
- Subject matter experts (SMEs) will create self-paced videos based on the quick guide content. The SMEs may be system project managers and others who are asked to be trainers of the teach-back sessions for their respective personas. Many of these will likely be taken from the list of people who assisted with UAT. The instructional designers will provide structure and guidance.
- The practice activities will be designed by these same product managers and SMEs.
- The facilitator (i.e., teach-back) guides will be developed by the SMEs who are recruited to facilitate the teach-back sessions. The instructional designer will provide a template they can use.

Formal Review and Approval Process

All learner facing materials must receive approval from the product owner and training team. The process follows this sequence:

1. The training team reviews SME produced materials.
2. The training team requests updates, as needed.
3. SMEs make requested edits.
4. The training team requests approval of materials from the product owner.
5. The training team conducts final QA of the materials.
6. The training team published the materials.

Feedback and Evaluation

Feedback and evaluation to track learning effectiveness include:

1. Knowledge checks/quizzes during self-paced learning and teach-back sessions
2. Surveys after:

- a. Vendor led train-the-trainer sessions
 - b. Company-led teach-back sessions
 - c. Go-live (15/30/60 days)
- 3. Outreach to leaders (30/60 days) on how their employees are completing system tasks and business processes
- 4. Feedback forms on the help portal and system implementation website
- 5. Other feedback channels:
 - a. Change influencers
 - b. Live office hours
 - c. Colleagues
 - d. Formal chat channels
 - e. Trainers
 - f. Managers

Timeline

Milestone	Start Date	End Date
Video developers/trainers identified for each job role within a persona	TBD	TBD
Learning objectives created for each for each job role within a persona	TBD	TBD
System procedures created for each for each job role within a persona	TBD	TBD
Stage environment made available	TBD	TBD
UAT conducted	TBD	TBD
Day 1 TTT led by vendor	TBD	TBD
Day 1 TTT led by vendor	TBD	TBD
Day 1 TTT led by vendor	TBD	TBD
Example videos and design standards created	TBD	TBD
Video developers taught how to create videos	TBD	TBD
Videos and practice activities developed	TBD	TBD
Self-paced learning activities published to help	TBD	TBD

portal		
Facilitator guide developed for teach-back sessions	TBD	TBD
Company-led TTT	TBD	TBD
Teach-back sessions conducted	TBD	TBD
Go-live	TBD	TBD

Deliverables

The training team will create the following:

- Learning objectives
- Design document with processes/procedures by job roles within personas
- Quick guides (on help portal)
- Practice activities (e.g., check your knowledge, scenarios)
- Facilitator guide template
- Sample video with instructions for SMEs

SMEs will create the following:

- Video demos
- Facilitator guides based on template