7 Steps to Success:
Building a Center Training Plan for SATERN

SATERN Change Management Workshop

February 15, 2006

Workshop Objectives

- Provide a forum for networking and information sharing
- Assist Centers/Disciplines in beginning to plan for SATERN training efforts

What is learning about?

Setting the Context

7 Steps to Success

- There are seven <u>key</u> steps to building a Center Training Plan for SATERN:

  - Defining the Scope
  - Identifying Participants and Resources
  - Deciding on the Training Approach
  - Creating a Master Schedule
  - Modifying Training Materials
  - Coordinating Marketing, Enrollment, and Logistics
  - Measuring Results

7 Steps to Success

- CAUTION! These seven steps are not linear, in fact, many may need to happen concurrently
- Each step informs another
- These are generic guidelines and will vary by Center/Discipline
- Each Center/Discipline needs to build a team of the right people to perform these tasks

Is it bigger than a breadbox?

Step 1: Defining the Scope

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- The training scope defines the extent and nature of the training. The tasks involved in this planning step include:
  - Identifying the impact of the training on your Center/Discipline
    - ✓ what is the timeframe that training needs to take place?
    - ✓ is there an overlap with other Agency rollouts?
  - Determining the span of influence - organizational or isolated
    - ✓ who is impacted and how many are there?
    - ✓ what organizations will have training needs?
  - Identifying the context and the current environment
    - ✓ what other Center initiatives could affect this implementation?

Step 1: Defining the Scope

- Environmental factors should also be considered:
  - Identifying the key influencers and their involvement
    - ✓ who needs to be involved in training decisions?
  - Identifying high level barriers to learning
    - ✓ what challenges in the learning environment must be considered?

Step 1: Defining the Scope

- Work to determine what is “inside the circle”
  - Gather Information
    - ✓ Review Agency Training Approach
    - ✓ Meet with Center Transition Representative and understand your Center’s schedule and scope (e.g. phasing)
    - ✓ Create a scope document that outlines your understanding

- Utilize CM tools to inform your work:
  - Stakeholder identification and analysis

Step 1: Defining the Scope
ACTIVITY

Who needs to be trained?

Step 2: Identifying Participants and Resources

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- This step is designed to identify and analyze your training audience and builds on the information gained in the scoping step. The tasks involved in this planning step include:
  - Audience Analysis
    - ✓ Determine who the learners are, and how many
    - ✓ Understand where learners are located in the organization
    - ✓ Identify special scheduling or learning needs
  - Role Mapping
    - ✓ Obtain Admin role information from the SDD and Center Implementation Plan
    - ✓ Identify which end-users are a mapped to which Administrative roles

Step 2: Identifying Participants and Resources

- This step also focuses on identifying facilities and other resources available for training. The tasks involved in this planning step include:
  - Facility Inventory
    - ✓ Identify what onsite training facilities exist
    - ✓ Understand functional capability (systems), capacity, AV and setup flexibility
    - ✓ Determine the typical load, lead time and process for reservations
    - ✓ Determine the capacity, capability and cost of offsite training facilities
  - Equipment Assessment
    - ✓ Identify the typical end-user system requirements
  - Personnel
    - ✓ Create a list of department training contacts / coordinators

How will they learn?

Step 3: Deciding on the Training Approach

Step 3: Deciding on the Training Approach

- A training approach defines how training will be delivered. The tasks involved in this planning step include:
  - Reviewing SATERN training approach
    - ✓ what courses and training materials will be provided to the Center?
    - ✓ what training approach is recommended by the project?
    - ✓ what support is available from the Agency?
  - Deciding on delivery methods to be used for each audience
    - ✓ Instructor-led
    - ✓ Self-paced
    - ✓ Communications
    - ✓ Blended

Training Approach: Administrators

Audience	Training	Agency Materials	Responsible
Level 1 Regional Admin	Hands-on classroom training; Train-the-trainer	Slides Participant Guides Job aids	Agency
Level 3: Training Office Admin Level 4: Org Training Coordinator Level 5: Manage Facilities Level 10: View Only Reports	Hands-on classroom training; using sandbox,		Center
Level 8 Discipline Domain Admin	Hands-on classroom training; Train-the-trainer	Slides Participant Guides Job aids	Agency
Level 9 Discipline Reporter	Hands-on classroom training; using sandbox,		Disciplines

Administrator Training for SATERN will be provided via a train-the-trainer approach

Training Approach: Learners

Audience	Training	Agency Materials	Responsible
Learners	Demonstrations in Auditorium, Open Houses, Self-paced Training	• WBT • Job Aids • Powerpoint Slides	Center
Supervisors	Instructor Led– 2 hrs Chat Sessions; Self-Paced Training	• WBT • Supervisor Guide • Job Aids • Powerpoint Slides	Center

Training for Learners and Supervisors should be in alignment with Center phasing plan

Step 3: Deciding on the Training Approach

- Identifying trainers and determining plan to prepare trainers. Some considerations are:
  - NASA Functional experts
    - ✓ Are there enough of them?
    - ✓ What is the time commitment?
    - ✓ Are they available/willing?
  - Contractors
    - ✓ Do we have the resources to hire external resources to train end-users?
  - Some combination of the above
    - ✓ Is a co-teach model feasible?

Step 3: Deciding on the Training Approach

Some additional considerations when identifying trainers:

- Knowledge requirements
  - ✓ Is it enough to just have technical expertise (i.e., know the software)?
  - ✓ Should trainers also be able to address questions related to policies and procedures?
- Training-the-Trainers
  - ✓ Do the trainers require content training?
  - ✓ Do the trainers require facilitation skills training?
- Facilitation skills
  - Do the trainers have some basic understanding of facilitation skills and managing group dynamics?
  - Do they have an understanding of adult learning principles?

Software expertise alone does not make an trainer effective

Step 3: Deciding on the Training Approach

- Determining how to use Web-Based Training
  Some considerations:
  - Will you use WBT as a pre-requisite, alternative, reinforcement or refresher for instructor-led learning?
  - Do any barriers to access exist?
    - ✓ Browser or system capability
    - ✓ Audience willingness

Have a clear strategy for the use of different learning delivery methods and tools

Step 3: Deciding on the Training Approach

- Determining the learning environment and required level of end-user support.
  - Help Desk
    - ✓ When speaking with a person really matters
  - Job Aids
    - ✓ For less frequent users or infrequent tasks
  - Reference Guides
    - ✓ Comprehensive resources, similar to training manuals
  - Frequently Asked Questions
    - ✓ Other people are asking the same questions - frequently!

The need for information does not end once the participant has left the classroom or finished the WBT course

When will the learning occur?

Step 4: Creating a Master Schedule

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- A master schedule is a capacity plan to deliver learning activities. It is created by compiling data gathered in the first three steps.
- It outlines where and when each learning event will be held and considers:
  - Curriculum of courses to be offered
  - Course duration and capacity
  - Size of each audience requiring classroom training
  - Availability of facilities and instructors
  - Timeline for training
  - Leadtime for dependent tasks (e.g. T3 and modifications)

The master schedule creates a bridge between planning and implementation

Step 4: Creating a Master Schedule

A lot of thought goes into creating a Master Schedule…

When is the system scheduled to go-live?

Have the training materials been revised?

Have the trainers been identified and trained?

Have we allowed enough lead-time for the training schedule to be advertised?

Is the training sandbox available?

Have the training facilities been identified and reserved?

Steps 2, 3, and 4: SCENARIO ACTIVITY

What will they learn?

Step 5: Modifying Training Materials`

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- This step defines how training materials will be tailored to the Center / Discipline. The tasks involved in this planning step include:
  - Reviewing materials provided by the Agency
    - ✓ Participant guides
    - ✓ Instructor Materials
    - ✓ Job Aids
    - ✓ Reference Guides (Process)
  - Identifying and completing revisions necessary to reflect Center-specific:
    - ✓ Processes
    - ✓ Terminology

Step 5: Modifying Training Materials

- Some tips for modifying training materials:
  - Embrace the Agency process to reduce the need for major material modification
  - Review all materials and outline and agree on modifications to be made before beginning any revision
  - Ensure alignment in the changes; one change may have a “domino effect” across several materials
  - Create a plan that estimates the work effort, resources and timeline

It is up to each Center /Discipline to identify and remedy gaps between the training materials provided and Center/Discipline-specific requirements.

Step 5: Modifying Training Materials

- A critical component of training is the *Training Sandbox.* Tips for training sandbox use:
  - Notify SATERN project team of Training Schedule
  - Walk through scenarios in the sandbox that will be used to support Center training requirements

How will we manage the Training Effort?

Step 6: Coordinating Enrollment, Marketing, and Logistics

Step 6: How will we manage the training effort?

- This step defines how the Center will coordinate the training administration tasks related to the SATERN implementation. The tasks involved in this planning step include:
  - Managing the enrollment process
    - ✓ Identify if the current process will effectively support SATERN
    - ✓ Determine process for confirmation and policy for cancellation
    - ✓ Publicize training schedules
  - Ongoing management and coordination of the scheduling process
    - ✓ Maintain master schedule
    - ✓ Schedule facilities and audio visual support
    - ✓ Contact facilitators and establish back up plan
    - ✓ Coordinate communications with instructors

Step 6: How will we manage the training effort?

- Coordinating Logistics
  - ✓ Arrange for copying and distribution of student and instructor materials
  - ✓ Assess and secure the necessary resources or investigate alternatives
  - ✓ Room setup and preparedness
  - ✓ Evaluation collection

- Ongoing management and coordination of the scheduling process
  - ✓ Schedule facilities
  - ✓ Contact facilitators and establish back up plan

Step 6: How will we manage the training effort?

- Some tips for managing the training effort:
  - Clearly define processes and accountabilities
  - Identify processes that can be consolidated, distributed or outsourced
    - ✓ fulfillment / copy centers
    - ✓ use department personnel to assist in enrollment
  - Use electronic distribution of materials where applicable
  - Confirm early to ensure attendance

Is it working?

Step 7: Measuring Results

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- Measuring learning results closes the loop on continuous improvement
- Tracking participant reactions to training immediately following training can provide valuable information to identify issues and gauge acceptance

Step 7: Measuring Results

- Centers will be responsible for capturing Level 1 data. This data provides:
  - Response to the program; participant feelings
  - A basic measure of customer satisfaction
  - Value to the Center and the Program
    - ✓ feedback for improvements
    - ✓ quantitative data to share with the organization
    - ✓ indication to trainees the importance of the training process
    - ✓ quantitative data that can be used to establish standards of performance

Step 7: Measuring Results

- As part of the training plan, identify someone who can:
  - Collect training evaluations
  - Aggregate the data
  - Analyze data and make recommendations for improvement

- Keys to success in Level 1 evaluations:
  - Decrease cycle time in getting data back to Transition Rep and instructors
  - Identify trends across areas (e.g. job role, departments)
  - Communicate key findings to program office

Wrap-Up

Defining the Next Steps

Wrap-up

- Next Steps
  - Complete the Action Planning worksheet
  - Continue the work begun in this session to begin creation of your Center /Discipline plans
  - Utilize Transition Representatives and the Project CM Team if you need support