



## Memorandum

**To:** Anne Teresa, SFA  
Vicki Wilson, SFA

**CC:** Linh Nguyen, Accenture

**From:** Howard Weitzner, Accenture

**Date:** July 15, 2001

**Subject:** Deliverable 29.3.1a Training Services Summary

### **Purpose**

This memo summarizes the results of Training Services provided to SFA University during the period June 16 – July 15, 2001. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

### **Initiatives this Period**

Specific initiatives addressed during this period included:

- SFA University planning meeting design, support and follow-up
- Training development and delivery methodology/process team support
- Evaluation and measurement strategy
- Manager development and performance support assistance
- Delivery cost assessment
- LMS support

### **Planned Initiatives**

During the period July 15 – August 15, the following initiatives may be addressed, but not limited to:

- SFA University planning meeting design and support
- Training development and delivery methodology/process team support
- Evaluation and measurement strategy
- Manager development and performance support assistance
- Delivery cost assessment
- LMS support

**Subject:** July 15 Training Services Summary Deliverable

**Description of Initiatives**

*SFA University planning meeting design and support*

On June 21, Accenture hosted a full-day planning meeting for SFA University. This planning meeting was for all SFA managers and the purpose was to review the current SFA University organization and begin planning for the next fiscal year to support SFA University's goal to be a strategic partner in support of SFA's performance plan. The action plan from the meeting included the following (responsibility in parentheses):

- Develop the Balanced Scorecard for SFA University (Anne)
- Clarify and reduce the list of brainstormed activities and present back to team (Lorraine, Howard, Anne)
- Further define the "learning circle" operational model (Stephen, Jeff, Howard, Lorraine)
- Clarify and confirm the SFA University shared vision (Stephen, Sarah, Laura)
- Share "SFA Moments" with all SFA University staff and revise to include external partners (Anne)
- Plan next SFA University manager meeting for 2 days in September to further define the FY02 performance plan and further develop the activities targeted for completion in FY02 (Howard, Lorraine, Anne)

*Training development and delivery methodology/Process team support*

The process team has evolved from a team designed to improve the process of APS Processing with the Schools channel to a team designed to create and implement a best practice for how SFA University develops and delivers training. This training development and delivery methodology will enable SFA University to provide "best-of-breed" training services to the organization.

The methodology (Plan It, Design It, Build It, Do It, Assess It) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate). Major tasks, deliverables and roles have been identified and will be refined prior to presenting to the "stakeholder" group during the week of July 23. Specific activities during this past work period include:

- Development of the "Gantt" chart detailing the timing and coordination of tasks
- Identification of milestones and reviewers
- Identification of roles
- Revisions to tasks and deliverables
- Planning for the stakeholder meeting and next phase of work (see below)

**Subject:** July 15 Training Services Summary Deliverable

Further stages of work will include the development of detailed steps, deliverable examples, job aids, templates, project plans, etc... The approach is to start small (step 1), provide some quick wins (step 2) and then expand as needed (steps 3). By completing a high-level methodology first, SFA University will approach the Schools channel, and others, with valuable information from which projects can get immediate value.

*Evaluation and measurement strategy*

A strategy and job-aid has been developed to assist SFA University to conduct surveys and measure the effectiveness of training. These tools will help SFA University to manage training from a performance perspective and validate the value of training. Effectiveness and cost management are key metrics in establishing a ROI for training. This survey and measurements strategy will be reviewed with SFA University. After revisions are made, the approach will be piloted and supported.

*Manager development and performance support assistance*

Ad-hoc support has been provided to assist SFA University's role as a strategic partner to the organization. Similar to activities which may be conducted by a learning consultant, assistance was provided to clarify development needs, review alternatives and recommend actions. Specifically, the following activities were supported:

- Project management training – review needs of CFO's office and how SFA University can support the development of project management training. Follow-up is pending.
- Manager development – identification of courses and activities that will provide low-cost, high-value impact to managers throughout SFA. Targeted skills include leadership development, coaching employees and project management training. eLearning courses were considered to be appropriate and will be reviewed prior to the presentation of recommendations.
- Performance support – development of presentation materials to introduce the concept of performance support and how SFA University may leverage performance support tools and concepts to complement the training experiences provided to SFA. This information will be reviewed with SFA University and refined to further reflect the needs of the organization.

**Subject:** July 15 Training Services Summary Deliverable

*Delivery cost assessment*

An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need identified to conduct a quick delivery cost assessment of which courses to target for cost reduction. In conjunction with SFA University, this quick assessment has started and will update the information based on training data from 2000 as well as fill the gaps in existing information. Low-cost solutions that are easy to implement ("quick hits") will be identified. Quick hits will include those courses with low content complexity, high volume of participants, frequent course sessions, low course fulfillment and the need for consistent content for all users.

*LMS support*

During this period, the effort to identify and secure funding for a Learning Management System (LMS) was supported. While the LMS requirements and selection effort was primarily driven through a separate work effort, the impact on SFA and SFA University were addressed through this work effort. Additional support will be provided in the future as activities require coordination between this work effort and the LMS work effort.

**Observations/Recommendations**

During the period June 16 – July 15, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- It would be beneficial to capture the services SFA University provides in a SFA University "blueprint" similar to the organization-wide blueprint. This will help SFA University communicate its role as a strategic partner within the organization as well as prioritize capability development projects.
- A strategy for knowledge management for SFA University will help share and integrate processes/information. The SFA University knowledge management strategy should be aligned with, but not subordinate to, an overall SFA knowledge management strategy. This knowledge management strategy should be coordinated with HR, CIO and Analysis.
- Additional opportunities to partner with the TDC should be pursued. The TDC has seen some early success with eLearning courses. This success should be understood to help position alternative low-cost delivery options for SFA University.

**Subject:** July 15 Training Services Summary Deliverable

- As the conducts of the Front 2 Back course are completed, there is still a need for new employee training and acculturation. An orientation course combining Front 2 Back, Traditions and PBO at the Front Lines may help fill this gap.

*Attachments:*

- Training diagram for training development and delivery methodology
- Gantt chart for training development and delivery methodology
- SFA evaluation capability for evaluation and measurement strategy
- Performance support presentation for manager development and performance support assistance
- Training needs matrix for delivery cost assessment