



## Memorandum

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

**CC:** Linh Nguyen, Accenture

**From:** Howard Weitzner, Accenture

**Date:** August 15, 2001

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

### **Purpose**

This memo summarizes the results of Training Services provided to SFA University during the period July 16 – August 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
- Project management support
- Delivery cost assessment
- LMS support

### **Planned Initiatives**

During the period August 16 – September 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
- Development of the Learning Consultant role and capabilities
- Manager development and performance support assistance
- Delivery cost assessment
- LMS support

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**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, most of which are long term initiatives currently in progress (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 were presented to the "stakeholder" group during the week of July 23. 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. Specific activities during this past work period include:

- Refinement of the "Gantt" chart detailing the timing and coordination of tasks

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- Revisions to tasks and deliverables
- Conduct of the stakeholder meeting
- Planning of the pilot phase of work

The next phases of work will include:

- Selection of a pilot training course through which detailed deliverables will be created
- Creation of an Overview to socialize the process with the stakeholders on training teams
- Development of team lead training to develop the skills required to be a project lead for a training development effort
- Development of the Role Map and other Plan It! Phase deliverables

*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. An overview presentation has recently been created during the last development period. The next component of work will be to transition this effort to a SFA University manager and support the rollout of the materials.

*Project Management Support*

Ad-hoc support has been provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage to be successful. During the next development period, this information will be included with the Training Process materials as well as the manager development efforts.

*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

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reviewed and the need was identified to conduct a quick delivery cost assessment of which courses to target for cost reduction. In conjunction with SFA University, this quick assessment will be updated based on FY 2000 training data as well as research into the existing gaps of current 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. Specific activities in the next development period will include:

- Analysis of the 2000 training data
- Detailed research of the costs of one course and identification of the related process and tools
- Gather baseline data for all other courses

*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 July 16 – August 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 currently 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.
- SFA University should explore its role as a service provider to the rest of the organization to provide a cohesive resource for the organization to improve its human

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performance potential. These human performance and transformational services may include performance assessments, systems analyses, cultural readiness for the PBO, collaborative work groups, and strategies to measure employee contribution to unit costs.

*Attachments:*

- Training diagram for training development and delivery methodology
- Gantt chart for training development and delivery methodology
- SFA evaluation capability overview presentation
- Project Management support overview
- Plan It! job aids and templates for the training development and delivery methodology (rough drafts)
  - Stakeholder Analysis template
  - Stakeholder Analysis job aid
  - Audience/User Analysis template
  - Audience Analysis job aid
  - Gap Analysis template
  - Gap Documentation job aid
  - Learning Objectives template
  - Learning Objectives job aid
  - SFA University Role Map