

## Lessons learned – Plan phase pilot

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The plan materials were originally tested with the Spring 'Tools' Training in October, revised based upon their recommendations, and piloted with the Pell training team in January.

The Pell training kick-off meeting was organized and facilitated by the Training Process Improvement team. During the 2-day workshop, the team completed all major deliverables of the Plan phase, utilizing the standard templates and job aids.

The compiled feedback included in this document incorporates the recommendations gathered from the Pell team, facilitators, and Training Process Improvement team. It is divided in five sections following the structure of the 2-day session. The process overview, plan overview, templates and job aids, highlights and points to consider.

### Process overview presentation

- Participants had difficulty following the process overview because they were to refer to another presentation. Would be beneficial to consolidate the workshop presentation and the process overview presentation
  - Presentation would benefit from speaker notes. Especially highlighting positive process feedback (Marie?)
- The process team should consider flushing out the rest of the process at a high-level- so the other phases can be presented with certainty
- *Wish list item- Specific, process-only training*

### Plan phase overview

- The plan phase slides should be more structured in the kick-off presentation. Presently, slides have been dropped in from the process overview presentation as a placeholder. The new slides should focus on:
  - The three major deliverables
  - Relationship between the deliverables
  - Importance of planning – quote from Marie “Because our planning was so thorough- we did not forget the things that would have fallen through the cracks”
- Update and incorporate the plan overview. This document supplies the “why” and demonstrates how all of the plan deliverables fit together

### Templates & job aids

#### **Audience analysis**

- Clarify in the job aid that audience groups are not who currently attends training, but who should be *targeted* to attend training
- Explain the important of identifying comparable audience groups. Should a person only appear in one audience group? Need to ask Howard and/or Jeff
- *Wish list item – provide audience data to support the team – or – identify these data resources and encourage the team to bring all relevant audience information to kick-off meeting*

#### **Learning objectives**

- Incorporate some type of brainstorming – categories? Main topics? into the job aid - Need to ask Howard and/or Jeff about the learning objective process
- Inefficient as a large group activity, might work well if team divided into small groups
- Allot more time

### **Content scope**

- The Pell team's skills made this section more fluid.
- It is important to identify the SME and utilize them as main resource and/or facilitator
- Make sure the content scope is at a high-level. The Pell team might have gotten too specific – for example, instead of using “changes to software” as a key concept, the team listed out the changes to the software. This was confusing- because some team member's learning objectives were quite detailed- and this provided the detailed content? How detailed is too detailed? And aren't detailed learning objectives appropriate? Discuss with Howard and/or Jeff
- Allot more time
- *Wish list item - Provide supporting content documentation – or – encourage the team to bring relevant content documentation*

### **Delivery strategy**

- Template works well with facilitation – especially saying “Based on what we have learned thus far... etc. Based on the audience and the learning objectives...”
- Important to point out instructions on job aid

### **Logistics strategy**

- Important to meet with logistics liaison before meeting so there are no surprises
- Liaison should attend meetings in each phase during logistics discussions to provide expertise and convey what high-level logistics content is needed
- Should have a formal logistics liaison to create open communication with the process team. For example, Scarlotte Brock referred to a checklist the logistics team is creating. It would be beneficial to incorporate this/have knowledge of to include in the process

### **Role Map**

- This could to be moved up on the agenda and done at the beginning of the day (or even before the session)
  - Perhaps team lead should fill out role map and go over individually or as a team
  - *Wish list item – Complete individual role profiles*
- Time commitment of being on the team needs to be relayed up front
  - To keep and accurate measure of time commitment to relay to future teams, it is imperative that team members keep track of their hours doing Pell related work

### **Stakeholder**

- Important to document the communications process to understand variable and necessary inputs and outputs to incorporate with the training process
- Should have a formal communications liaison to open the exchange of knowledge with the process team. For example, Anita referred to a checklist, specific dates for material reviews, different people that will need hard copies of materials, etc. It would be beneficial to incorporate this/have knowledge of to include in the process.

### **Workplan**

- Adjust so user-friendlier. Work backwards?
- Clean up – everything on the workplan may not need to be there
- Hard to fit appropriate information in the confined space

**Highlights – Things to add to process**

- Meet with team lead prior- was great – Make sure to meet with logistics and communications as well

**Points to reconsider/adjust**

- Need another ½ a day
- More supplies/extra temps- stakeholder, and pencils
- Midge/Pennie might consider speaking to kick off the meeting
- Update the glossary?
- Instructional design plan- term used inconsistently. Need to make sure everyone is clear- NCS uses term, however, theirs include different deliverables. Was confusing when completing the workplan with NCS
- Include a formal plan phase evaluation.

**Pre- Plan**

- Pell team requested information before session
  - Letter?
  - Process overview presentation? Does it require facilitation to be understood?
  - Conference call?
- Team lead should send out the information – Potentially role map and adjust Linda's letter to be job aid for the role map?
- Meet with team lead early!

## Plan Phase Modifications

To Do	Priority	Responsible	Date
Kick-off presentation and process overview presentation consolidation			
Add speaker notes to presentation where applicable			
Create more specific slides for detailed plan overview			
Update plan overview document			
Clarify audience analysis job aid to reflect "target" audience. Discuss audience group selection with HW and/or JK			
Discuss potential revisions to learning objective process with HW and/or JK. Incorporate group work into the agenda			
Clarify depth of content scope with HW and/or JK			
Contact logistics to discuss liaison thoughts. Conduct "SME" interview with liaison to understand their process. Review checklist			
Contact communication to discuss liaison thoughts. Conduct "SME" interview with liaison to understand their process.			
Determine appropriate time for role map discussion. Make sure to include in job aid the importance of keeping track of hours spent on the respective training project			
Revise workplan			
<b>Wish list items</b>			
Determine pre-plan strategy			

Provide process-specific training			
Provide audience analysis data			
Provide content scope data			
Provide detailed role descriptions			
Update glossary			