



regoUniversity 2019

SAN DIEGO

Ongoing Training/Mentoring |
Best Practices

Your Guides: Sara Garvey and Grant Zemont

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Agenda

- Prepare for Success
 - Understand impacts and tie into Change Management
 - Methods and Learning Styles
 - The Learning Plan
- Continue to Support
 - Open Discussion
 - Measuring Success
 - Continual Improvement Post Go-Live
- Appendix
 - Training Methods
 - Learning Styles

Part I: Prepare for Success

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Training Is A Component of Change Management

Phase 1 – Prepare for Change

- Develop Training Plans
- Change Impact Analysis

Why? To develop a customized and scaled approach with the necessary sponsorship and team structures

Phase 2 – Managing Change

- Deliver training and elicit feedback

Why? To create and implement plans that will move everyone through change

Phase 3 – Reinforcing Change

- Collect and analyze feedback – measure success
- Diagnose gaps and address resistance with additional classes and mentoring

Why? To ensure that the change is adopted and sustained

¹ Adapted from The Standard for Change Management®, Association of Change Management Professionals (ACMP)

² PROSCI Best Practices in Change Management, 2014

Complete a Change Impact Analysis (1)

- Understand the possible implications to each **role**. Change often produces a large ripple effect if trying to stuff too much information into one training class. This can reduce the ability to retain and use the information.
- Identify all the documentation that might have to be modified or created to support the training.
- For each impacted role, identify the detailed steps required to implement the change and ensure the training supports these tasks. In other words, show how the process and tool work together.

Complete a Change Impact Analysis (2)

- Stakeholder Analysis
 - Provide a framework for the types of training content required
 - Identify specific learning needs of each stakeholder group
 - How their needs may differ from others within the organization
- Questions to ask
 - How many people need to be trained, where are they located?
 - How do their needs differ from others within the organization?
 - Why are they being trained?
 - Has the process changed?
 - Has the tool changed?
 - What specific procedures need 'Just In Time' support training materials?
 - Where/ how will learners 'consume' support training materials



Support the Learner – Org needs to ‘Buy In’

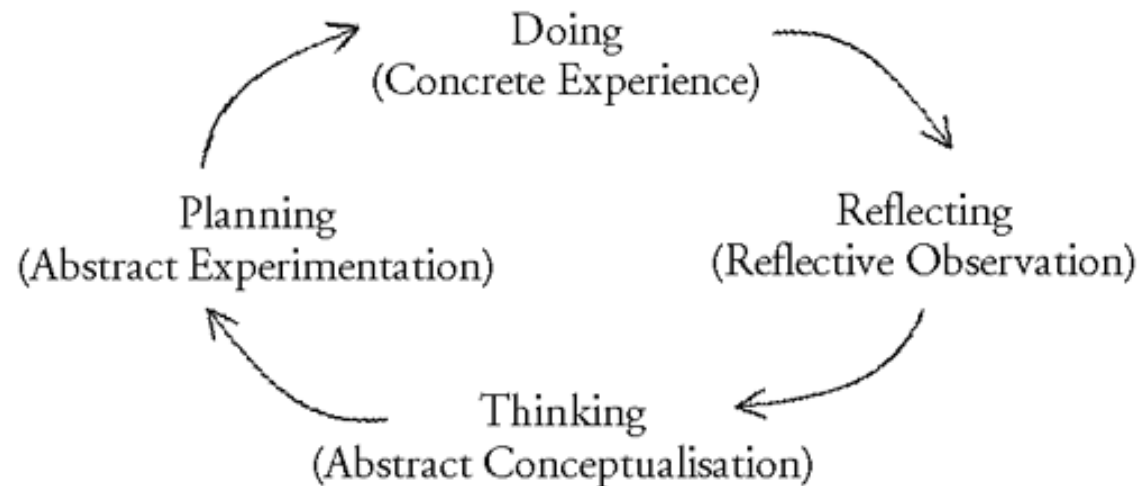
- Executive Support – Senior Leaders set examples by participating in training
- Link training to organization’s overall strategy:
 - What is our learning roadmap?
 - Are we making training a priority?
 - Do we allow time to learn?
 - Do we ‘acknowledge’ learning growth?
- Technology Support:
 - LMS
 - SharePoint or other access method

Meet End Users Where They Are

- Teaching features/functions is fine, but helping end users understand **how and why** to use the tool in their specific context is even more powerful and will yield better results and higher adoption rates
- Provide hands-on reinforcement of what is being taught
- Setup Training classes according to users needs:
 - Persona based
 - Topic Based

Account for Diverse Learning Types

- Using several methods for each training course helps employees learn and retain information
- Ensure all training geared to meet performance goals of the learner

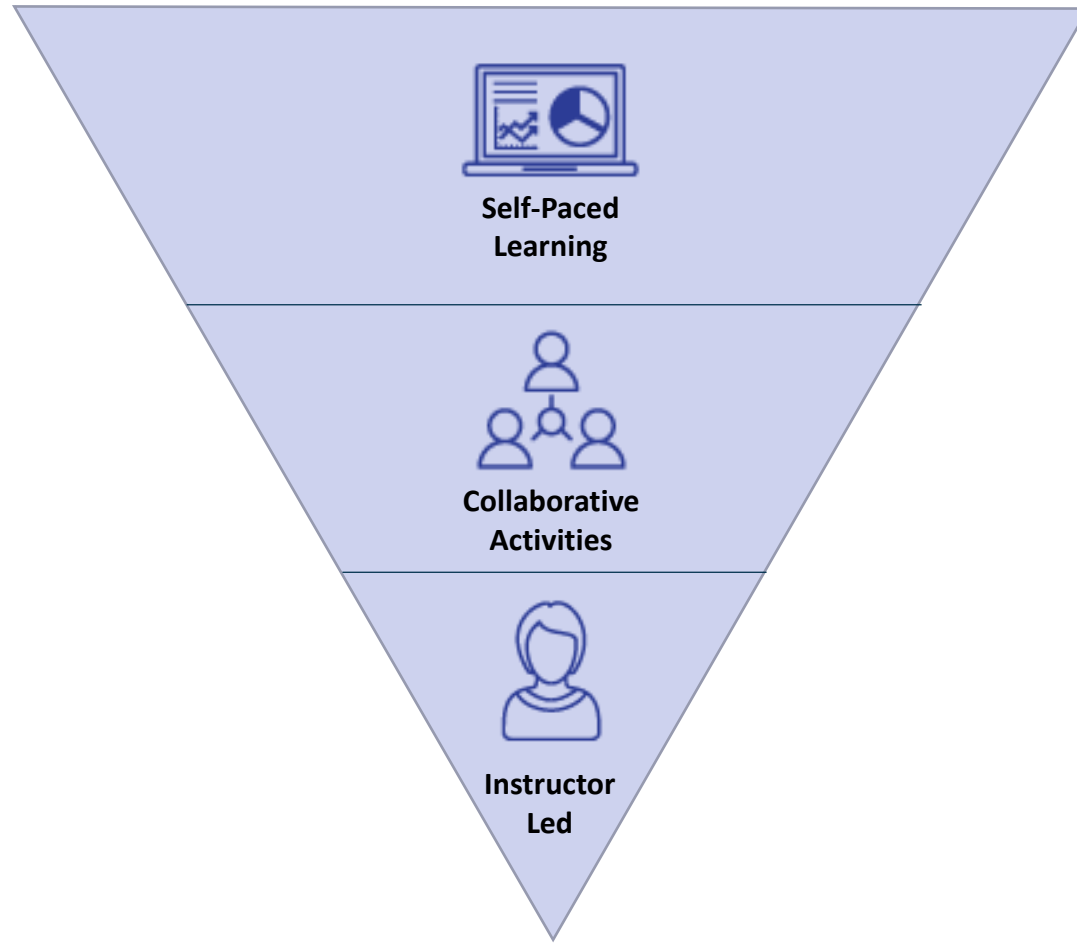


- Quick Reference
 - Word/PowerPoint
 - Visio
- Just in Time
 - E-Learning
 - Camtasia/Captivate/Storyline
- Instructor Led
 - In Person Training
 - Virtual Training

Learning Shift

“From *Courses* to *Resources*”

- Shift from providing courses and detailed training to providing end users with what they need to learn at their own pace.
- Online and printable documentation/resources for end users.
- Provide support, not hours of training.



The Learning Plan

- Deliverable: A customized, role-based training plan and approach
 - Type(s) of Training/Learning
 - If applicable, number and length of courses and number of time to be delivered
 - Number of times each ILT course will be delivered
 - Alternative delivery mechanisms
 - Materials to be created



Part II: Continue to Support

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Open Discussion



How do you know training is working?

What type of feedback do you hear from participants?

Supporting the Instructor

- Have an assistant instructor or co-instructor
 - So the primary instructor can stay focused on the training
 - To help with logistical things like troubleshooting technical issues in the training room
 - To help with answering questions and troubles with the exercises
- Come prepared with print outs for the instructor
 - Have a printed course outline to help the instructor ensure that everything is covered and for pacing of the course
 - Have a printed Instructor Guide with basic steps for demonstrations to ensure all steps are shown

Identify Champions To Help Mentor Others

There will be those who feel they get a lot of value from CA Clarity . Identify them. Ask them to be a part of the movement and support the cause. Reward them.



Measure Training Effectiveness

1. **Collect** feedback and compliance/ **adoption metric** information
2. **Analyze** the data; look for patterns and themes
3. **Prepare** summaries of key findings
4. **Organize** findings so that they can be quickly and easily understood
5. **Evaluate** the overall effectiveness of the training and support program and identify any weaknesses

Establish an OCM Approach

1. Establish Change Team that represents all functional areas being trained
2. Develop plans to address resistance based on feedback
3. Identify ways to provide support and continual learning based on specific needs of each area (e.g. formal training vs. a steady flow of informal QRGs)
4. Reward and communicate success stories from areas that now get value from CA Clarity – *perception is reality*

Training Does Not Stop At Go Live

- Create a culture of continual learning and improvement:
 - Always strive to be better
 - Barrier to adoption should never be lack of information
 - Adjust rigor based on feature rollout and success measurements
- Tactics:
 - Lunch ‘n’ Learns: formal or ad hoc
 - Office hours: lead by a trainer, PMO rep, or a champion
 - Re-trainings: either formal full classes, or bite-sized smaller classes that just cover 1 topic
 - Reinforce existing training & refresh collateral to keep it current
 - Constantly refer to existing training material: PPTs, QRGs, videos
 - Desk “drive-by” sessions

Questions?



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Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



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Appendix

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Training Methods

Delivery Method	Overview
Classroom Instruction with Instructor	<ul style="list-style-type: none"> Participants attend training where an instructor presents material and there is an opportunity for interaction and hands-on learning or practice Classroom training with instructor is most often chosen over any other method as most effective for learning
E-Learning with Instructor	<ul style="list-style-type: none"> Instruction delivered electronically with an instructor or facilitator who sets the pace and/or offers interaction (e.g., webcasts or scheduled Internet instruction)
E-Learning Self-Paced	<ul style="list-style-type: none"> Training delivered electronically via the internet in which learner sets own learning pace.
Blended Learning	<ul style="list-style-type: none"> Combines e-learning with instructor-led classroom training or one-on-one instruction. Being able to go at one's own pace, as well as not being slowed down or pressured to keep up was seen as positive in blended learning, e-learning, self-paced, and one-on-one methods
Interactive	<ul style="list-style-type: none"> Role Play Case Studies
One On One Instruction	<ul style="list-style-type: none"> Instructor provides individual instruction to one learner one-on-one tutorial appears to be the second most effective for respondents when they can only choose one method. When asked to rate methods individually for effectiveness, one-on-one tutorial was ranked highest. "It's hands-on, personal, generally quick as it addresses my individual need."
Lecture/ Demonstration	<ul style="list-style-type: none"> In-person lecture/ demonstration on a particular topic with limited interaction and practice

Learning Styles

Type	Explanation
Auditory	<ul style="list-style-type: none">• Prefer a verbal presentation with discussions, yet face paced and good joke or story
Visual	<ul style="list-style-type: none">• Prefer colorful, graphical and easy to view documentation
Kinesthetic	<ul style="list-style-type: none">• Prefer movement of both instructor and themselves• Learners may rock back and forth, shake a leg• Instructor should move about the front of the room and use hands gestures.• Try using role play, giving breaks and regular opportunities to perform tasks (Just doing it versus talking about it).