ABT Program

Training Strategy Plan

June, 2008

Revision History

Version	Prepared by	Date	Reviewed by	Approved by	Note
Original v.1	Cindy C-Wilson, Mary Myhre-Ciber	May 9, 2008	Duane Hill	Manny Ovena	
v.2	Cindy C-Wilson	June 17, 2008	ABT Team	Manny Ovena, Keith Pace-Ciber	OCM comments & minor Budget update

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1.0 Introduction

The ABT Program is responsible for implementing best business practices for financial, human resources (HR), payroll, benefits, budget and time capture as appropriate. These processes will be supported by Oracle E-Business Suite (EBS) for financials, PeopleSoft Human Capital Management (HCM) for HR, payroll, and benefits and a budget system and time capture system yet to be determined. Training planning, development and delivery is critical to the overall success of the initiative. Training will ensure easy and effective system use and will enhance user understanding and acceptance of the new systems and business processes. The ABT Organizational Change and Training Team is responsible for analyzing, developing, conducting and measuring the effectiveness of business process change and application/system training. End user training will focus on changes to business processes and supporting systems.

The training strategy will address the needs of all major groups that will be impacted by the new systems including:

- End users, which includes employees currently using either Oracle or PeopleSoft applications, employees new to the systems, vendors and special districts
- Production support staff
- ABT Program team members

Distinct approaches and delivery methods will be developed for each of the identified training tracks. The focus of all training delivery methods will be on participants gaining the necessary competencies and skill-sets to perform their day-to-day activities in the new environment.

This strategy document will be the baseline for a more detailed Training Plan. The detailed Training Plan will be built upon the final implementation phasing schedule and include specific courses, schedules, resources and measurements.

2.0 Goals and Objectives

Realizing that adult learners have multiple ways of assimilating information; efforts to use as many different methodologies as economically and administratively feasible is one of the goals. A variety of training experiences will include:

- Attending instructor- led classroom sessions
- Reading training and desktop procedure manuals
- Having hands-on experience with the applications
- Using online or Web-based training at their own desk
- Gaining support when needed from production assistance
- Taking advantage of one-on-one support as needed

The variety of methods and media will help reinforce the end users understanding of the new business processes, new systems and how performing their tasks will changes.

Additional goals are to reduce the learning curve and minimize the time it will take employees to become skilled in doing their job with the new applications/systems. Understanding that users will go through a learning curve, the ABT Readiness Program, as part of the Organizational Change Management Plan, includes ongoing support by ABT support staff, functional analysts and department power users where appropriate. Training will be done prior to but as close to going live with the new applications/systems as possible. The actual dates for this training are subject to the final implementation date established by the ABT Program.

The objectives of PeopleSoft/Oracle training are to:

1) Present the new version of the software to end users currently using the system
2) Introduce the applications to those who will be migrating from MSA/ARMS
3) Provide an understanding of how new business processes are performed supported by the new systems.

Training planned for end users includes but is not limited to those entering new hires, processing time, running payroll, administering leaves and terminations, and processing financial data i.e. Accounts Payable/Receivable, Procurement, and General Ledger.

Time Capture and budget system training will follow a similar approach and is dependent on the timing of the systems selected.

3.0 Training Scope

The systems included in scope for this ABT Training Strategy and subsequent detailed Training Plan includes the following application training:

- Oracle E-Business Suite (EBS) (R12)

- PeopleSoft Human Capital Management (HCM) 9.0

- Budget (TBD)

- Time Capture (TBD)

Additional Training Strategy scope and subsequent detailed Training Plan include:

- Pre-implementation training of project team members, both technical and functional

- Consultant knowledge transfer

- End user training for testing assistance

- Business processes, to the extent they influence the use of the supporting systems

The focus of end user training is on the applications and the processes contained within those applications. Training for project and support staff includes the ability to design, configure, test and support the applications.

4.0 Out of Scope

Employees are expected to have a basic understanding of computers, which includes the ability to launch Internet/Intranet sessions. Training that is out of scope for ABT training:

- Windows
- Excel
- Word
- Access
- Department/Division side systems that feed or extract information from the core systems.

Departments/divisions are responsible for training their employees to the basic level of computer understanding and usage.

5.0 Approach and Methodology

Training materials will be based on the "to be" business processes. Training will be comprehensive in the number and type of exercises it will employ to provide hands-on activities relevant to the end user community. The material will be process-oriented and promote user understanding by following a step-by-step progression. Specific curriculum plans will be developed by the Training Leads. The plan will provide an overview of each course and any required prerequisites for each identified training track.

Training will be delivered using as many methods as possible respecting the multiple ways adults learn. Methods will include:

- Classroom
- User Productivity Kit (UPK)
- Presentations
- Handouts and posters
- One-on-one meetings
- Group meetings
- Focus groups
- Gotomeeting conferences
- Train the trainer courses
- Post 'go live' hands-on assistance

5.1 Classroom

Instructor-led classroom sessions using available training rooms throughout King County will be offered. Classes are most successful with 10-12 participants and two instructors. Department 'power users' may be called upon to assist the lead instructor during these

sessions. Classrooms are currently available in the Chinook Building and the King Street Center. These training rooms will be reserved as a priority once the implementation date has been published and the course schedule is created.

5.2 User Productivity Kit (UPK

The online UPK software offers multiple modes of learning (see table.)

Modes	
See It	Allows the user to watch the system as it goes through standard business process steps, explaining each step as it moves forward.
Try It	Allows the user to follow the directions by clicking through standard business process steps at the direction of the program.
Know It	Allows the user to assess how well they know the system. The user performs the business processes and the system prompts them when they take a wrong step but does not tell the user the correct step to take. At the conclusion of the exercise the system provides the user with a test score. may be used to measure proficiency with the business process and application prior to granting access to the production system
Do It	This mode is available when the user is working in a live environment and they want additional help with a process that they are not comfortable with. The system provides coaching as they perform their real work.

The UPK will be used to design training materials and train and test basic navigation training pre-requisites. This software can be used for both PeopleSoft and Oracle, but is not available for the budget and Time Capture systems. Online PowerPoint presentations and Flash presentations may be used for these two systems in lieu of UPK.

5.3 Presentations/Intranet

An overview of beginning to end processing can be provided through presentations and via the Intranet. Presentations to discuss business process changes and introduce the new applications will be given at workshops, department/division meetings, small groups and focus groups. Training will need an Intranet presence and could be part of the current Employee Web site and/or the ABT Program's Intranet Web site. Discussions about where to house the training information and links to Quick Reference Cards and other training materials need to be held prior to implementation. Communication around where to find this information will be critical.

5.4 Handouts and Posters

Handouts and flyers will be created to announce training sessions being offered. Information will be provided listing class schedules, pre-requisites and other pertinent information. The distribution of this media is dependent upon the implementation schedule. Posters can also be created and tailored to these sessions once the training sessions are scheduled. .

5.5 One-on-One Meetings

One-on-one training includes hands-on production assistance scheduled by appointment or set up as an 'open lab' time. These sessions will be staffed by trainers and functional analysts as necessary. Department/division power users may be called upon to assist with implementation questions.

5.6 Group Meetings

The ABT Training staff will use as many currently established scheduled department/division and/or section meetings as possible to distribute communications regarding the ABT Program. The MSA, PeopleSoft and ABT Forums will also be used to facilitate communication. It will be important to communicate a unified message and status information to employees through these channels. The ABT Training staff will coordinate with group meeting coordinators to be a part of these meetings once implementation scheduling is confirmed.

5.7 Focus Groups

Discussions on business process changes and the impacts of those decisions may need to be held in focus groups. Employees doing 'similar' work may need to gather together to discuss their specific issue(s) and obtain input and feedback from others. These groups may be used for requirements gathering, end user training for testing and possible training material feedback.

5.8 GotoMeeting Conferences

GotoMeeting is an online Web conferencing tool that enables individuals to join a presentation, demonstration, collaboration or training session. This online, real time resource offers end users the option of attending training sessions without traveling to a physical classroom. The trainer can walk multiple end users, who may not need a hands-on classroom session, through a process or processes at the same time.

5.9 Train the Trainer

'Train the Trainer' sessions will be the method to distribute education materials for Time Capture due to the potential high number of employees to be trained and the department/division specific time entry needs. Trainers will be identified and will include timekeepers and/or payroll staff. Training staff and functional analysts will support these 'trainers'. The "Train the Trainer" sessions will cover basic skills of training as well as Time Capture specifics.

5.10 Knowledge Transfer

A key success factor for the ABT initiative is effective Knowledge Transfer. One of CIBER's primary goals is to proactively prepare ABT Program team members with a collaborative knowledge transfer process that will translate to new skill sets and most importantly the ability to maintain and support the system once the CIBER consultants leave the project. This approach focuses not simply on Knowledge Transfer, but on capability transfer. The CIBER Leads will periodically conduct an interactive Knowledge Transfer Assessment to ensure that core functional users and technical staff are able to independently manage and enhance the new systems. The Knowledge Transfer process will provide the following outcomes:

- Core project team members will gain the necessary knowledge and skills to enable the business transformation
- Core project team members will have the ability to undergo subsequent change efforts faster and more effectively
- The CIBER Team Leads will provide recognition and documentation for individual achievement of Knowledge Transfer goals through the evaluation and Knowledge Transfer process
- Core project team members will have the ability to draw on the experience and network of CIBER team members
- There will be reduced and /or mitigated project risk through joint ownership and accountability; and
- The process supports Knowledge Transfer by having a joint team of ABT and CIBER resources performing both functional and technical activities.

Ensuring that new members of the Core project team have the appropriate level of knowledge is part of this knowledge transfer. An assessment of knowledge and the analysis of what is needed to fill in any gaps will be done while the team is being formed. Once the requisite knowledge base is determined, CIBER will develop classes and deliver the curriculum to build the competency base needed for the team to effectively conduct and analyze fit/gap sessions, design and configure the systems, facilitate testing and potentially assist and support ongoing operations and maintenance.

6.0 Assumptions

The activities in this strategy plan are based on the following assumptions:

- Employees view the training as a high priority and are available to attend training
- Department/division sponsors support training attendance
- The county will purchase the Oracle User Productivity Kit (UPK) and have the required resources available to produce training scripts and materials
- Training and documentation developers will be identified, assigned and allowed sufficient time to customize the training and documentation materials and to conduct the training sessions.
- The county will provide proper training facilities, and provide appropriate equipment with required software for conducting training sessions (i.e., overhead projector, on-line PC's and printers will be connected and available, software for displaying necessary applications and documentation will be installed).
- Adequate training instances will be available and include all the appropriate modules
- Technical resources from the project team will be assigned to support the training sessions including any necessary conversions/migrations, batch program processing and problem resolution.
- A training environment will be created to support the defined training schedules included within this document.
- Database support will be available for supporting the needs of the training program

- Functional analysts are available on an ongoing basis to provide training and support of new users

- The project team will complete required system modifications, unit testing, and system or user acceptance testing prior to the scheduled training date.

- Security access will be defined, established and tested prior to commencement of the training sessions.

- The training audiences know and understand how to use a personal computer, especially how to navigate using a Web Browser; training for basic PC skills are not included in this plan.

- Training audiences will have completed prerequisite courses.

7.0 Training Requirements Analysis

7.1 End User Analysis

A Stakeholder Inventory is being conducted and will be completed in June 2008. This analysis identifies the system users in each department, division and some sections that perform business processes related to financial and HR functions. Budget information will be gathered at a later time.

The analysis from this inventory will provide a baseline for the number of users needing to be trained in each functional area and by process. The assumption will be that they will each need to attend at least one in-class session. Training rooms, schedules and amount of material will be scoped from this analysis.

Once the new 'to be' solution is determined, additional input from the department/division Subject Matter Experts (SMEs) may be needed to identify those impacted and needing training for the new processes/systems. ABT Program staff, SMEs and Department HR Service Delivery Managers (HRSDMs) will work together to identify updated skill sets needed for the 'to be' solution. Department HRSDMs will work within their department to determine the appropriate users to attend training as it applies to their body of work.

The Cost Benefit Comparison Study conducted by the Hackett Group in April 2008 will be used as a source of validation for the Stakeholder Inventory. The survey asks slightly different questions, but it has been determined that some of these can be used as verification of what was returned by the SMEs on the inventory.

Where possible, current system access/user lists will be compiled. This gives an additional perspective on system use including who has access to what functions compared to what was reported will help identify any missing pieces. An attempt will be made to validate that those currently with system access will continue to need that access in the future. If they do not, they will not be included in the training plan.

All training schedules, classes, resources, and material are dependent on the implementation strategy. Once the recommended strategy is in place, additional details can be put together with more clarity.

7.2 Environmental Requirements

A number of data requirements must be met to create the required environment to support each training session; these requirements include: security, customized PeopleSoft and Oracle application components, customized training database, a stable training environment, training facilities and scheduled technical support.

- o Security access must be defined and established to provide the users access to the appropriate PeopleSoft and Oracle pages.
- o PeopleSoft and Oracle foundation tables must be established in the training database to support the functions of the PeopleSoft HCM and Oracle EBS. Budget and Time Capture databases may also be required in order to perform the training activities.
- o PeopleSoft and Oracle training databases will mirror production and be refreshed periodically to reflect the most current development and testing results in order to incorporate the customizations into the training guides, online documentation and conduct training. Additionally, changes to business processes that affect end-users should be incorporated.
- o Workstations and printers must be configured per the technical requirements.
- o Training facilities and technical support need to be scheduled.

8.0 Training Materials:

The end-user training materials include concepts and procedures, PeopleSoft/Oracle pages and activities. The materials are organized so that topics are grouped to reflect the natural progression a user would use to approach each application function. High-level process diagrams are provided to give the users an overview of a specific process or steps and where it fits in the overall process. Activities and exercises are used to provide an opportunity for the user to perform the functions they will use in their day to day work.

Training materials will be developed with the use of the UPK tool. Materials include but are not limited to:

- Desktop procedures as the training manual

- Quick reference guides

- Business process maps

- Basic system information (PeopleSoft, Oracle, and budget system glossary).

Additional materials specific to department/division needs will be developed and tested prior to providing training. Input from department/division end users will be key and will be identified by involving end users in the system testing cycles and to test the training materials.

9.0 Training Courses:

This list of training courses is not a full complement of courses, but presented as examples of some of the curriculum that will need to be developed:

- Financials:
    - General Ledger
    - Procurement
    - Accounts Payable
    - Accounts Receivable
    - Inventory Management
    - Order Management
    - Cash Management
    - Project Costing
    - Grants
    - Project Billing
    - Asset Management
    - Financial Reporting

- Human Resources:
    - Recruit
    - Hire
    - Maintain employee data
    - Position Management
    - Leave Administration
    - Training and Development
    - Performance Management
    - Reporting

- Time Capture:
    - Time Entry/Reporting
    - Time Processing
    - Time Approvals

- Benefits:
    - Enter employee enrollment options
    - Benefits Reporting

- Payroll:
    - Set up employee payroll data
    - Process payroll
    - Reporting

- Budget:
    - Budget forecasting
    - Budget development
    - Budget management
    - Budget reporting

10.0 Training Schedule:

The final training schedule is dependent on the implementation timeline for functionality and departments/divisions.

The following information will be taken into account in determining the training schedules:

- o Course list
- o End user numbers from Stakeholder Inventory
- o Business processes included within application training
- o Application system access
- o Preparation time for trainers and materials
- o Preparation for post-production support staff.

Depending on the specific implementation date, training will begin to be conducted four to six weeks prior to the go-live date. The number of courses and end users will determine the final number of training sites and trainers required to cover the material. Employees do best with 'just in time training' and the ABT training staff will attempt to accommodate that requirement within this structure.

Influences on training for additional phases may be dependent on the post go-live support necessary to ensure success and any follow-up training that may be needed from the initial phase. Review training and training of new employees would be identified and provided between phases or in addition to the next phase, depending on the timing of the need. A similar timeline will be put in place for the next implementation date. Four to six weeks prior to the next implementation date, the training structure mentioned above will be used. Lessons learned from the first phase of implementation will be applied in subsequent roll-outs.

11.0 Training Resource Plan:

Training resource requirements are dependent on the phasing of the functionality and departments/divisions selected to go live with each implementation phase. Depending on the number of end users impacted, the following considerations will be made:

- o Number of Courses/Sessions for each application
- o Hours/Days required to deliver each course
- o Number of training developers to develop material
- o Number of trainers to deliver training
- o Number of classrooms/training rooms
- o Hardware/software required
- o Projectors
- o Desktop configuration requirements
- o Quantity of materials (training manuals and desktop procedures)
- o Quick Reference Cards – what processes and how many copies
- o UPK software - developer licenses (6) and # users (2,500)
- o GotoMeeting licenses

The following organizational chart for training addresses the Go Live implementation of PeopleSoft HCMS and the subsequent Go Live implementation of Oracle EBS.
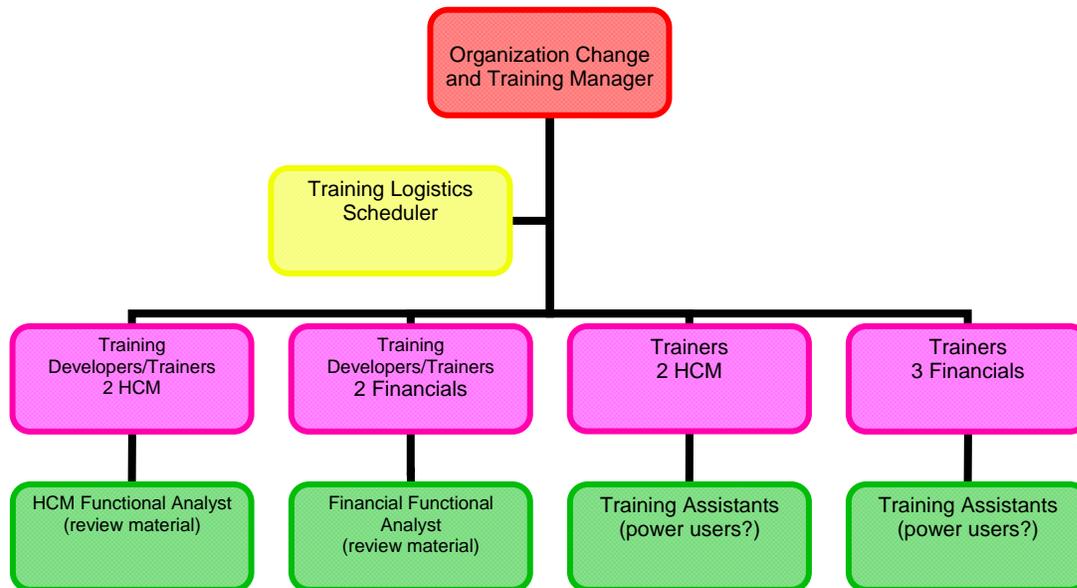
12.0 Tracking and Reporting:

Measuring the effectiveness of the training effort is a critical component to assessing the readiness of the department/division to 'go live'. Once the groups of employees that need training have been identified, skill surveys will be created and distributed as necessary. The purpose of the survey results is to give the trainers a baseline understanding of the end user's skills. This will allow the departments an opportunity to develop their employees and to address any identified deficiencies.

End users will be scheduled for classroom sessions as required. An online pre-requisite for basic navigation will be offered through the UPK tool. The employee will be required to 'test' their knowledge in the classroom after the training through the 'Know It' mode of UPK. Once this is complete, trainees will be asked to fill out a feedback form so the training staff can monitor the class materials, delivery and any other comments that will help the training staff and county employees be successful.

Security access to the appropriate processes, functions and application(s) will be provided upon successful completion of training. New security forms will be available at each training session and forwarded to the appropriate system security administrator.