



ERICSA

1963 - 2023

A GEM 60 YEARS
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SAVANNAH

60TH ANNUAL TRAINING CONFERENCE & EXPOSITION

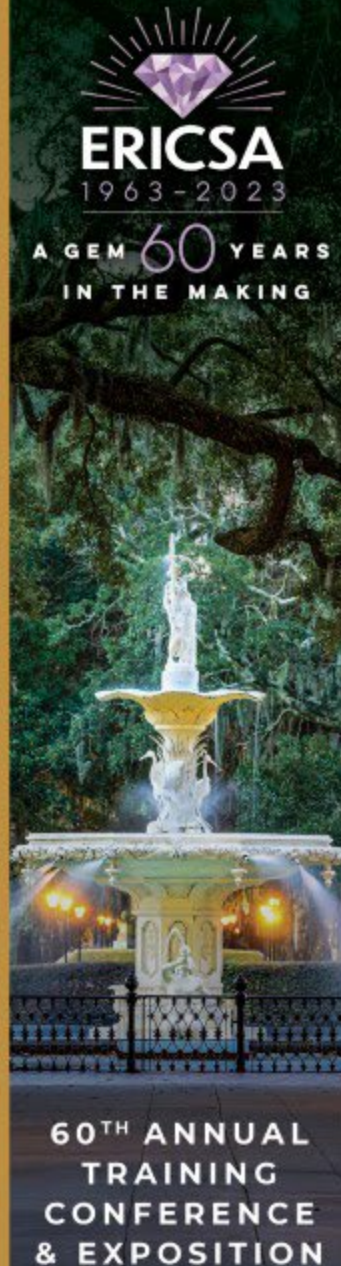
MONDAY, MAY 22 - FRIDAY, MAY 26, 2023

Training and Site Support Planning: *Lessons in Flexibility*

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Indiana Dept. of Child Services

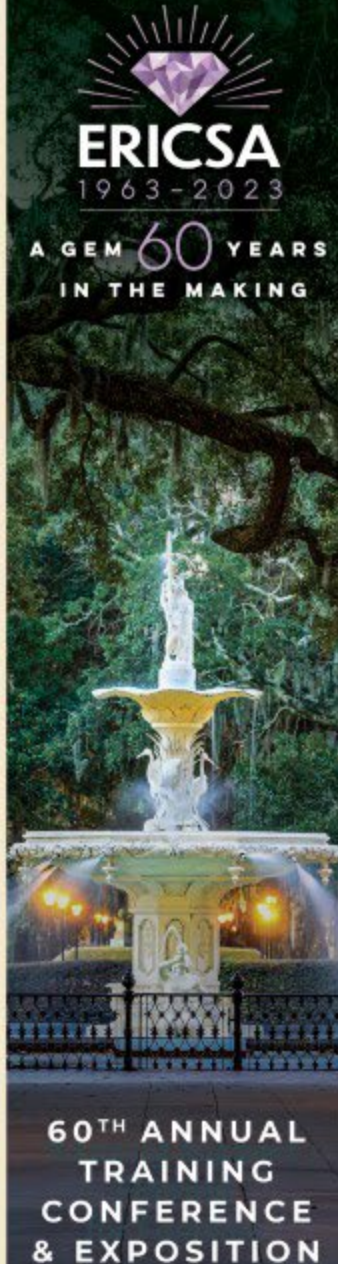


Planning for major training initiatives can be as time consuming and daunting as the training initiative implementation itself. Indiana launched their legacy system replacement project in mid-2020, with an implementation date of January 2023. Many plans were made for the project, from creating formal training and on-site support plan deliverables, designing templates, and hiring & training new staff, but was each piece worth the effort? We'll explore lessons learned and, most importantly, why flexibility is key to successful planning, training delivery, and project implementation.



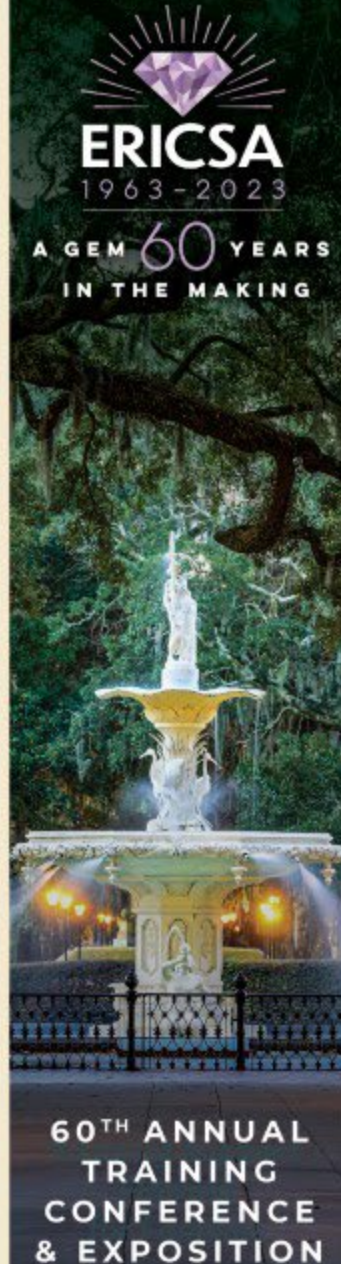
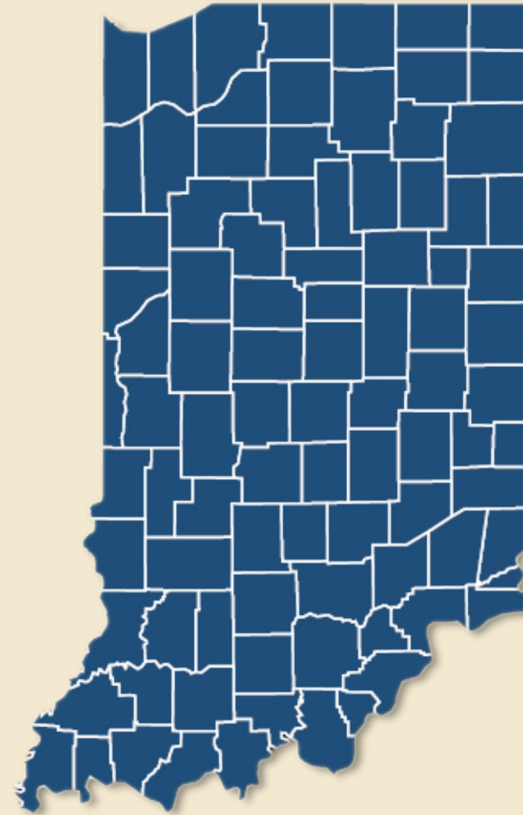
Topics

- Level set – What is Indiana like?
- Best Laid Plans for:
 - Change Management
 - Communication
 - Training
 - On-Site Support
- Summary – Lessons Learned and What We Might Do Differently



Level Set – What is Indiana like?

- Centrally administered
- Locally implemented
- 92 counties
- Cooperative agreements with each Elected Prosecutor and Clerk Offices



Change Management Planning



- **What we did:**
 - Utilized ADKAR methodology
 - Ongoing workgroup of volunteers from each office called 'Change Champions'
 - Early Webinars on Change Management
 - Early & Repeated Risk Assessments of Offices (mostly self-reported)
- **What we learned:**
 - It's hard to measure our future feelings:
 - underestimation of need,
 - overestimation of confidence,
 - and general lack of participation.
 - Just In Time Change Management efforts are just as important as System Training!
 - Need for more 'hands-on' experience and realistic scenarios, such as from other states or offices already rolled out

Communication Planning

Impact

Influence

Involvement

Strategy

Mechanisms

- Change Champion Meeting
- Stakeholder Meetings
- On Site Support visits
- INvest Monthly Newsletter
- Child Support Weekly article
- Child Support Resource website

Challenges

- Unique stakeholder management
- Lack of participation/use
- Redesigning based on feedback
- Timing
- Information overload



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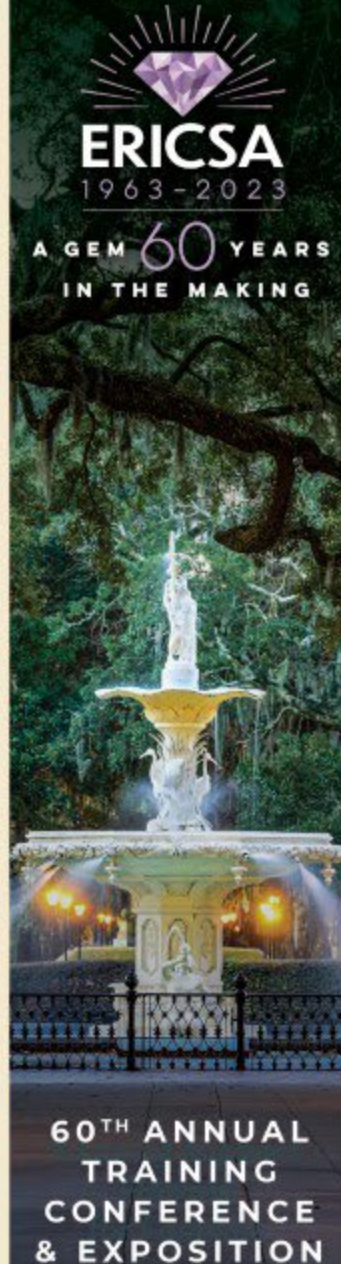


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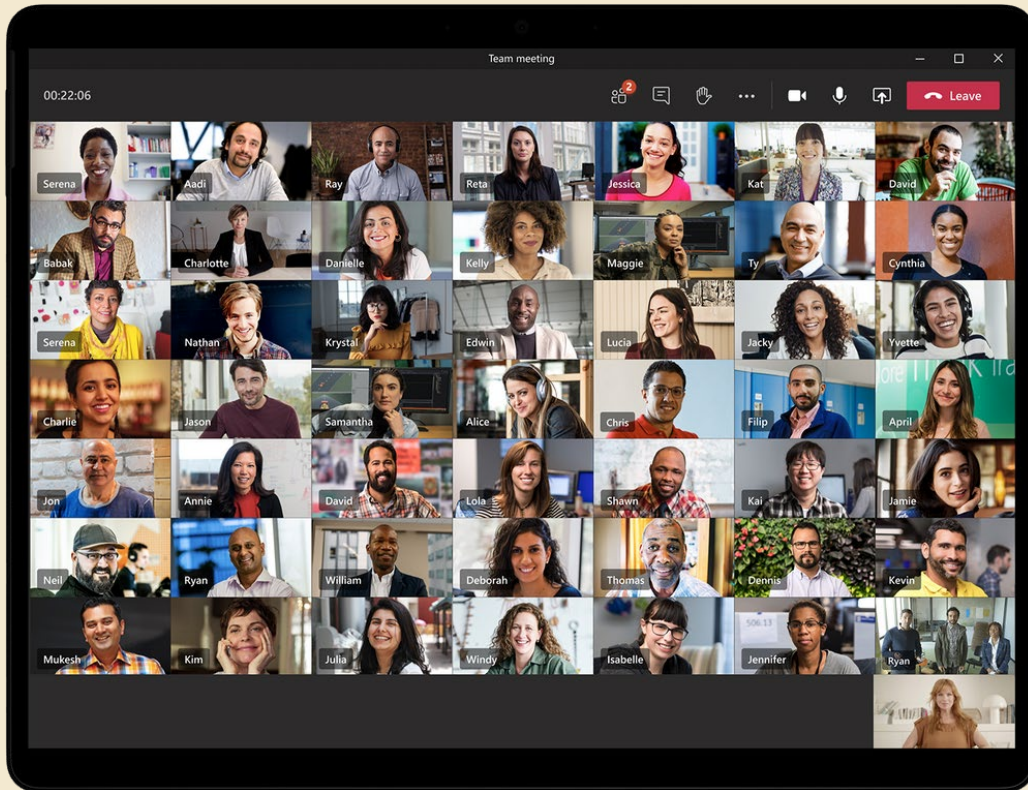
Training Planning

- **How it was planned:**

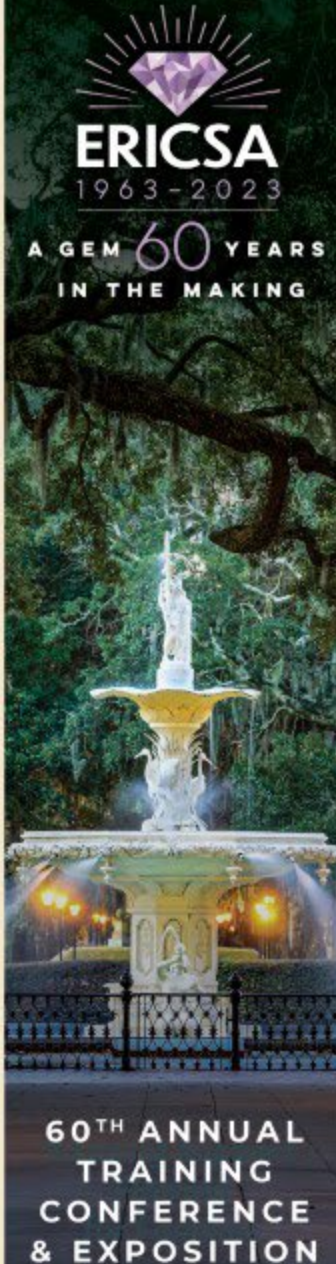
- 3 in-person training regions (North, Central, South)
- 1:15 Instructor to Student across 2 cohorts the month prior to office rollout date
- Requiring 6 Instructional Leads and 6 assistants (regional sets of each clerk and prosecutor trainers)
- One off 'super user' training prior to other trainings for testers, pilot, and key stakeholders
- Physical Binders of all training manuals and activities



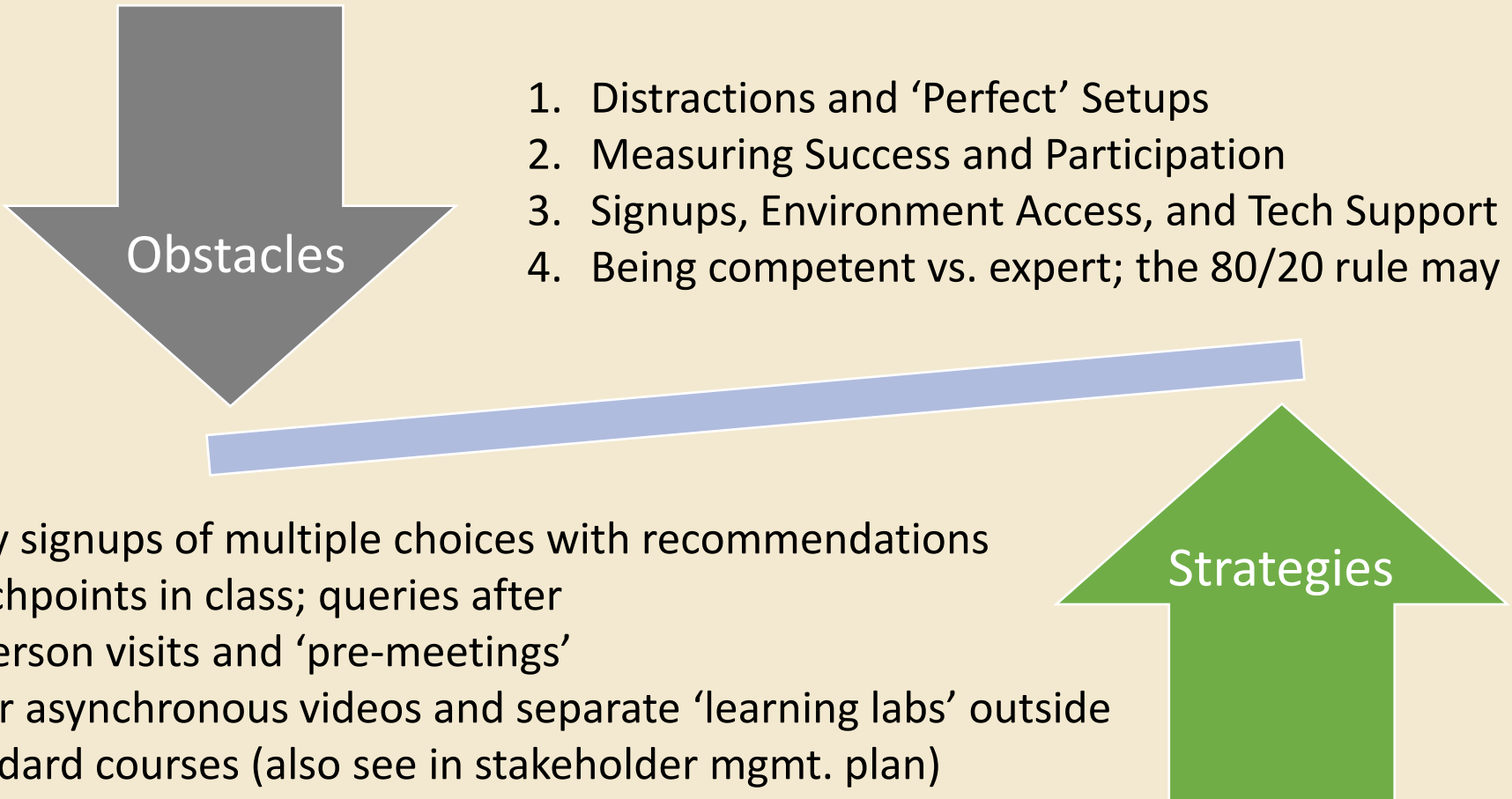
Training Planning



- **How it went after COVID:**
 - 2 online Microsoft Teams cohorts each month for each audience
 - ~150 students per session with 1 instructor and 1-3 moderators
 - 4 instructors, 2 moderators – plus assistance from others
 - At Your Own Pace Online Course developed for review and absences
 - ‘Pilot’ Training then a ‘Refresher’ later, for a total of 6 days for prosecutors and 2-3 days for clerks
 - Online material shared on our Learning Management System and SharePoint Document Library



Training Planning – Unique Obstacles to Online Learning



Obstacles

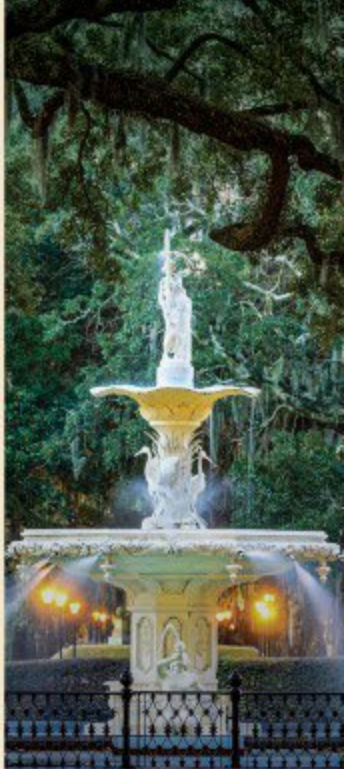
1. Distractions and 'Perfect' Setups
2. Measuring Success and Participation
3. Signups, Environment Access, and Tech Support
4. Being competent vs. expert; the 80/20 rule may not apply

Strategies

1. Early signups of multiple choices with recommendations
2. Touchpoints in class; queries after
3. In person visits and 'pre-meetings'
4. Offer asynchronous videos and separate 'learning labs' outside standard courses (also see in stakeholder mgmt. plan)



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Training Planning – Unique Obstacles to AGILE Instructional Design



LLAMA - Lot Like Agile
Management Approach™

1. Rapid Review Cycles

- Training materials need to be regularly compared/updated to planned sprints and defects (with little notice);
- Updates communicated to stakeholders

2. Internal Customer Service & Process

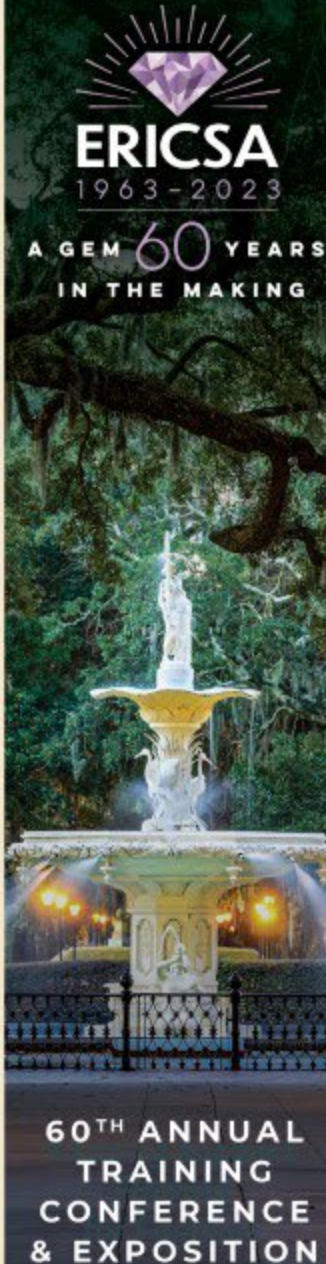
- Regular communication between training, implementation, and design teams is critical
- Documentation/governance is a lifeline
- Who trains the trainers/writers/SMEs?

3. Training and Sandbox Environments

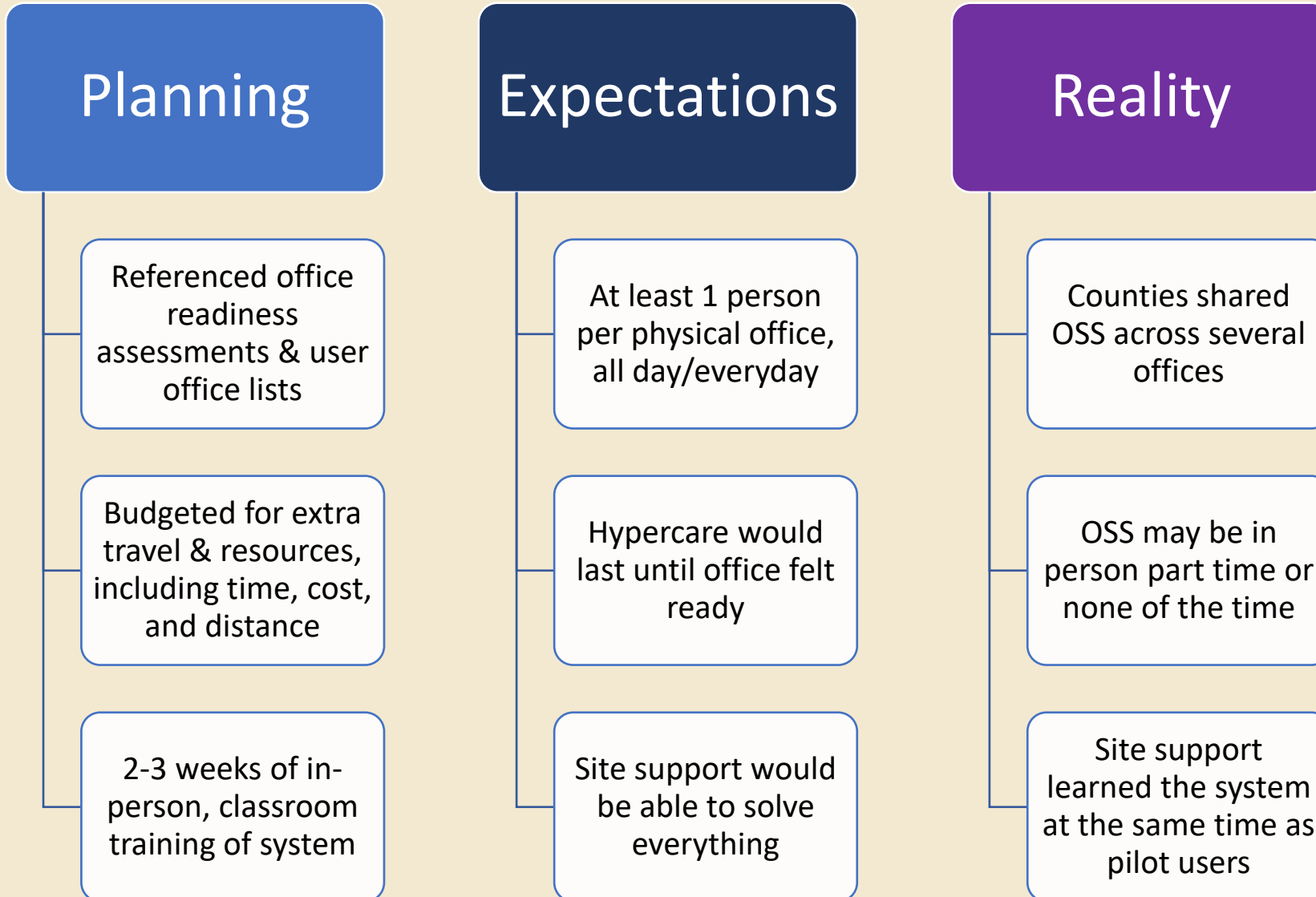
- Require regular updates and bug tests
- May lead to unexpected disruptions to training activities

4. Human Resource Allocation

- More time & pressure is put on reviewers and technical writers;
- Trainers cannot rely on scripts, must be flexible and SMEs



On Site Support Planning



Summary – Lessons Learned & What We Might Do Differently

Change Mgmt.

- Highly recommend Change Champions program
- Just In Time training
- Emphasize skills criticality for all
- Use quantitative measurements
- Share experiences from others

Communications

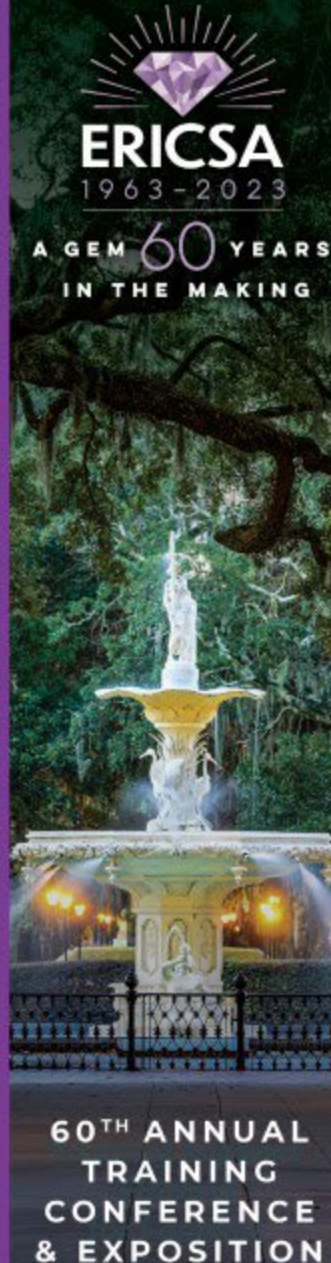
- Engage and involve users at every stage
- Invite users to participate, even if they don't
- Communicate more often than you believe is necessary
- Document SLAs in advance

Training

- List existing business process documentation and compare
- Design workflows that incorporate training staff
- Designated material review schedule & system testing
- Replicate Live as much as possible

OSS

- Build relationships with users
- Technical vs business experience
- One size doesn't fit all
- Plan staffing for different rollout approaches
- Focus on risk analysis



Summary – Lessons Learned & What We Might Do Differently

Staffing Needs

- Skilled writers
- Instructional designers
- Trainers who are comfortable via multiple platforms
- LMS administrator & content creator
- Project managers for OCM components

Resource Turnover

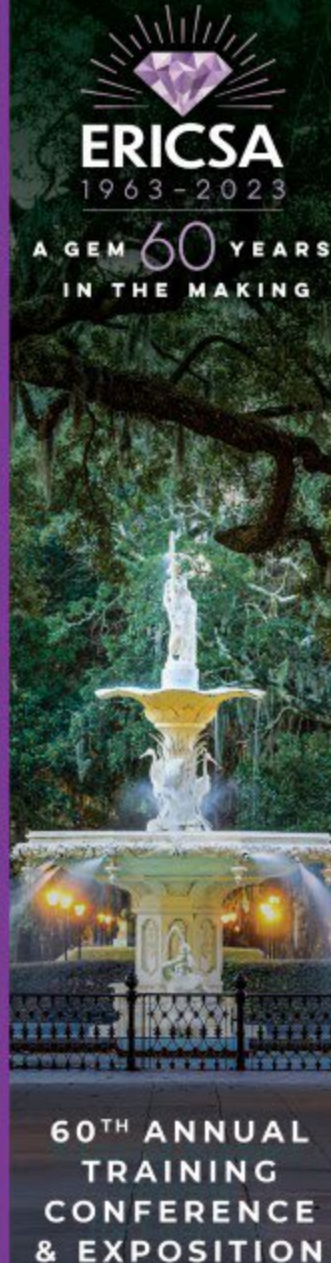
- Expect key team members to leave
- Avoid knowledge silos
- Cross-train heavily
- Hire to replace rather than adding duties to others
- Document decisions, contracts, etc.

Project Deadlines

- Build in extra time for document review and technical challenges
- Speed and responsiveness is vital
- The project waits for no one!
- Plan for schedule changes and delays

Staffing Expectations

- Hours of availability
- Policy for flex time, OT, comp time
- Cutover weekends – business
- Hire more help than you think you need



Summary – Lessons Learned & What We Might Do Differently

Be Agile!

- Plan will change multiple times
- Make Plans A, B, and C
- Pivoting approach is essential
- Lean on team's skillsets
- Hold regular lessons learned sessions

