



TenStep Supplemental Paper

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Learn When and How to Implement End User Training

It should normally be clear that training will be provided just as the project solution is about to be deployed. However, what typically happens is that the work associated with training is also all pushed toward the end of the project. The result is that you may feel rushed to create the training material, and the training might not seem as effective as you wanted.

The key to effective training, as it is with other aspects of the project life cycle is to start the planning process early. If you wait to consider training needs until the end of the project, you will not have enough time to do it the way you would like.

Start with the strategy (maybe)

The first possible deliverable to consider is a Training Strategy. You would want to consider this level of planning if your project is complex and there is a large training component. For instance, if you are involved in a project to implement a new Customer Relationship Management (CRM) application, this type of application obviously has a dramatic impact on the Sales and Marketing users. You may want to create a Training Strategy first to make sure you have agreement with the client on the overall direction and approach to take.

All strategy documents on a project are typically done in the Analysis Phase. So, early on, as you are getting your business requirements, you also get requirements on the training required. These requirements are used to create an overall strategy, which should then be approved by the client.

As you probably know from experience, most projects do not have such a complex training situation, and so the Training Strategy document is not needed for most projects.

Create an overall Training Plan (for sure)

The Training Plan is created during the Design Phase. If you have a Training Strategy, the Training Plan simply contains the additional details required to make the strategy real. If you do not have a strategy, then the Training Plan typically has some initial aspects of the strategy, and then quickly gets into the details as well. The Training Plan would include a description of the audience you are trying to reach (this could include clients and IT staff), what their training needs are and how you will satisfy the needs. You also need to define how the training will be developed and executed, as well as the timing of when the training will be deployed. Remember that training does not only imply stand-up, internal classes. You may consider bringing in outside trainers, using vendor classes, coaching sessions, webinars, how-to instructions, frequently asked questions, computer-based training, etc.

Develop the training content needed

If you complete the planning documents ahead of time, you will find yourself in the unusual position of actually being ready to develop the training content at the same time



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that you are developing the rest of the solution. Isn't that a novel concept? The Training Plan, of course, is not the same as a workplan. So, you also need to drill down from the Training Plan, and actually add the remaining development and deployment activities to your workplan. However, at this point, you are basically in a position where the confusion has been lifted and it should be clear as to what has to happen in the training arena.

Test the training content, if necessary

In most instances, the first time you deploy training is actually in a live environment with real users. However, sometimes the training is offered first to an internal group, or even the project team. This serves as a test of the material to make sure that it flows well. It also helps prepare the instructors so that they will be more comfortable delivering the training to the end users. If you are going to give webinars, or any other type of distance learning, you can test the technology and the delivery at this time.

Implementation

It was mentioned earlier that you typically want to train your users right before the actual solution is implemented. However, this is a generalization. Actually, the training deployment is based on the timing specified in your project Training Plan. However, what you should notice is that this approach reduces the chance that your actual training will be rushed, or that your training will somehow miss the mark. Assuming you followed the prior steps, at this point in the project, you should have developed (and perhaps even tested) your training content, and you should be ready to go regardless of when the actual training is needed.

Summary

What you see in this approach is that the training delivery also follows a life cycle. Just as you don't want to jump straight into your project Construction Phase, you also don't want to wait to the last moment and then quickly jump into building the training content. Some up-front planning is the key, as well as making sure that you do any construction of training content at the same time that you are constructing your solution. Just as you ensure that the implementation of your final solution will go smoothly, you can also ensure you will have a smooth training deployment by using this structured approach.