

Training Proposal for ProcessUnity

Created by Dan Brunelle Dec 2, 2018

Summary:

I met with members of the ProcessUnity team on Friday, Nov. 30th to discuss the need for training and instructional resources. It's apparent that the company is at a pivotal moment in its history. The market is paying attention to ProcessUnity's solutions and the organization must scale accordingly. To do this ProcessUnity needs to streamline processes as it brings on new customers and adds functionality. The design, development, and deployment of eLearning resources is the right strategy to accomplish this. An eLearning curriculum will benefit ProcessUnity by gaining efficiencies from repeatable online training. At the same time, customers will benefit from on demand training during and beyond first moments of their license.

This will be a phased project that initially produces a series of assets used to onboard and orient new customers. At later stages, content will be available that focuses on more specialized use and mastery of ProcessUnity products.

Need:

The existing training program is reliant on in-person delivery. This is a costly and time consuming effort because the same training exercise is replicated in-person every time it is given. The solution is to transform the curriculum to an eLearning where specific assets are created once and delivered multiple times to customers. This eLearning will be on demand and available for the customer when and where they need it.

Anticipated results:

The customer will benefit from...	ProcessUnity will benefit from..
A turn-key process of setting up their instance of ProcessUnity services.	Reallocation of assets from the delivery of "how to" training to more valuable customer engagements.
Training on their schedule available as soon as they are a customer.	Reduction of dependencies on customer support for basic customer queries.
Access to material for all employees. Not just those who attend instructor led training.	Improved customer engagement with ProcessUnity services.

On demand content for new features and products.	Improved customer satisfaction scores.
Measurable progress for specific users or teams as they advance through the curriculum.	Actionable metrics that gauge customer progress through the curriculum.
A record of employee training for compliance and certification.	Timely deployment of training for new features/functionality.

Recommended Steps:

This will be a phased approach.

Phase 1: Fundamentals

Produce assets that all or most customers need: onboarding, orientation, set up, and first use. Enough is known about the creation of the fundamental or “basic” content to frame out a set of steps. Phase 2 and 3 steps will be similar but need more investigation and discovery before outlining concrete tasks.

Task	Dependencies
Identify current baseline of ProcessUnity’s training offering and customer needs.	Input from customer success, implementation, product, and support teams.
Inventory of existing assets.	Access to all existing collateral: Knowledge Base, white papers etc. Exposure to existing customer instructor-led training. (ILT)
Identification and planning of first eLearning courses.	Input and validation from customer success, implementation, product, and support teams. Ensure that planned curriculum maps to Services 2.0 vision.
Writing and production of training.	<ul style="list-style-type: none"> - Content from help center, and other assets. - Availability of eLearning courseware (Camtasia, Captivate, Adobe CS etc.) - Review and validation of content from stakeholders.
Publication of training.	<ul style="list-style-type: none"> - Pilot group for initial offering. - Hosting capabilities (Akamai/ AWS etc.) - Learning page or portal for customers.
Measure success and iterate.	<ul style="list-style-type: none"> - Customer and internal feedback. - Basic metrics on usage / viewership.

Phase 2: Best Use

- Produce assets for training aligned with customer's specific needs and use cases.
- Implement learning management system. (LMS)

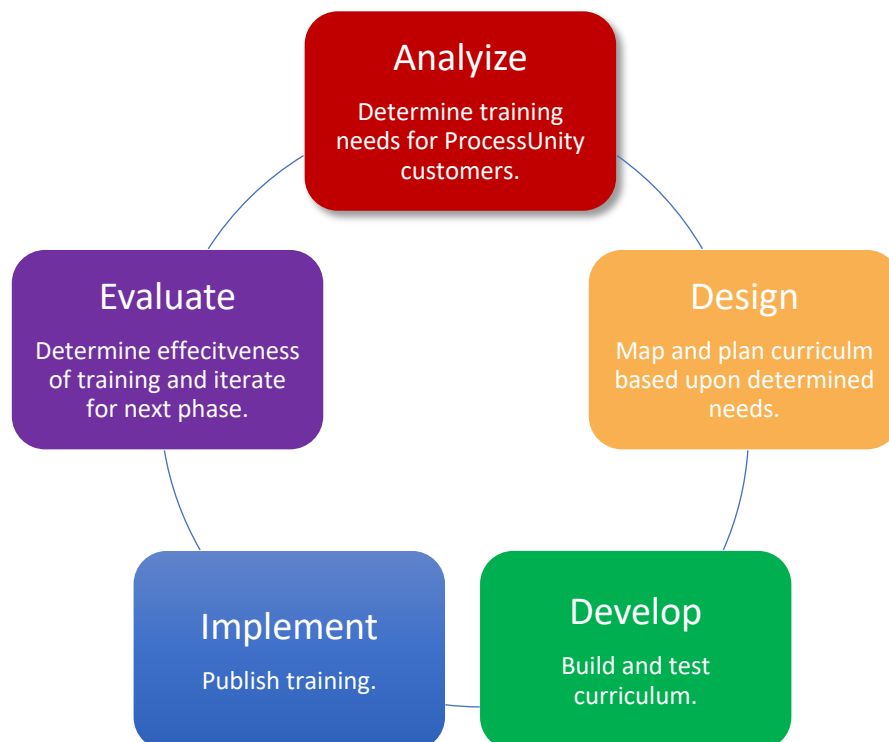
Phase 3: Mastery

- Produce specific materials that are integrated with customer sandbox, as well as supplementary eLearning assets.
- Create partner and customer certification program.

Methodology:

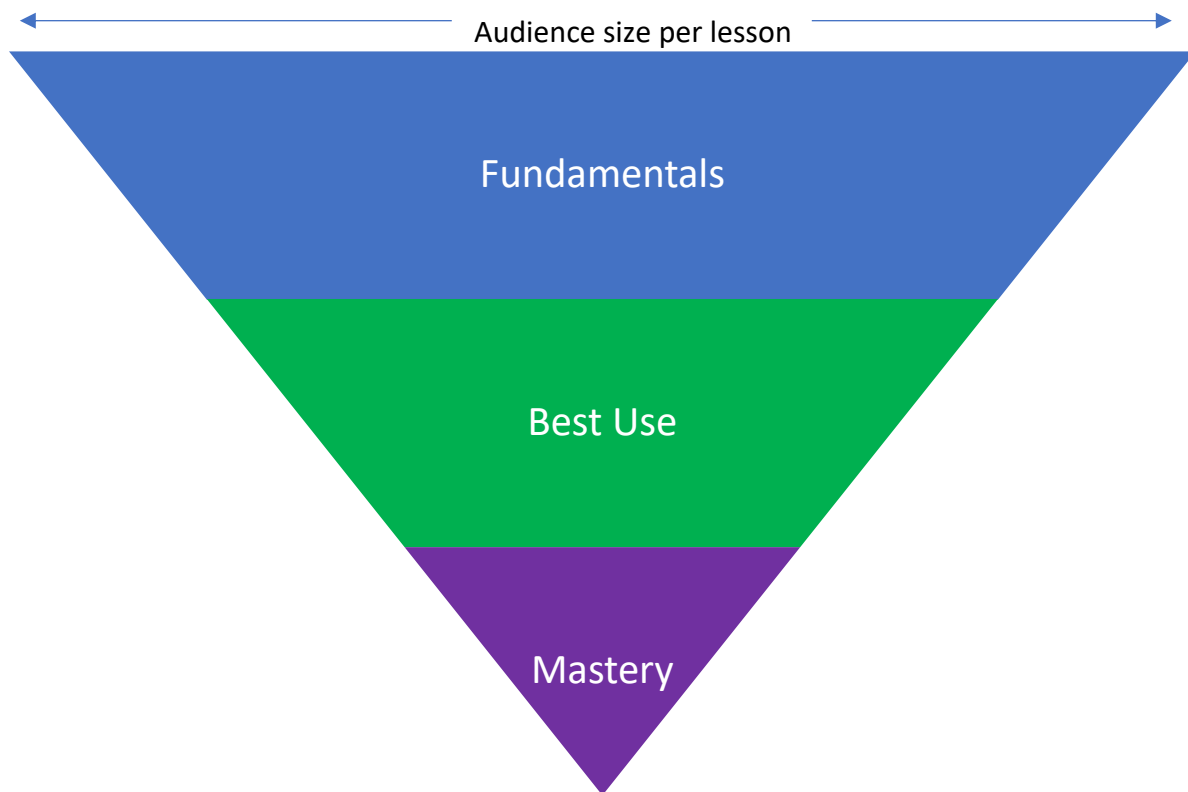
The creation of the curriculum and materials will be an iterative process consisting of:

- Analysis
- Design
- Development
- Implementation
- Evaluation



Some variation of this process will be used for each of the three phases. This is an iterative process with “lessons learned” from each phase applied and factored into the next one.

A phased approach to a training rollout is recommended because all customers will need the same initial training. This means that the first set of eLearning will produce the greatest yield across the customer base. Additionally, this initial training will provide ProcessUnity with a solid “sample size” of what training is working and what is not. A healthy pause between phase one and phase two will allow for a time to iterate before eLearning is created for narrower audiences. It is anticipated that resources may need to be added to sustain the output of meaningful content to the customer base in a timely fashion.



Thank you for reviewing this proposal. I’m appreciative of the opportunity to meet members of the team and to discover the great story that ProcessUnity has to tell as well as it’s training needs. I’d like to help! Please don’t hesitate to reach out with any questions that you may have. I look forward to meeting with you again.

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