The L&D Team
…in a nutshell

What We Do	Who We Help	Get Our Help
3 things…	All **Revenue Roles** * in the Company	Submit an [Asana ticket]()

• Design Training
• Deliver Training
• Knowledge Management
  ○ Knowledge base
  ○ Reference docs
  ○ Playbooks
	• Inside & Outside Sales
	• Relationship Management
	• Operations Teams
	  ○ Client Experience
	  ○ Technical Support
	  ○ Retention
	*We can sometimes accommodate requests outside these areas, but **Revenue Roles are our focus & priority.**
		• We'll assign your ticket to the right team member
		• We'll contact you within 2 business days of submission to get started
		• We collaborate with you to define timelines, deliverables, & more.

REMEMBER:
Your team members are the Subject Matter Experts!

L&D helps capture **your** team's expertise, but only if you **share it with us.**

If you need L&D help for:	Be sure to tell us the info below in your request:	
A Product:	• capabilities/limitations • features,advantages/benefits • images/videos	• transactions flows • set up & troubleshooting process • stakeholders/timelines/goals
A process:	• process flow (and correlating steps) • scripting	• sales deck • stakeholders/timelines/goals
Employee development:	• what portion of the curriculum (if pertaining to onboarding) • what is the performance gap	• behaviors that need to change • affiliated support materials
Regulation compliance:	• documentation of changes/updates • impacted organizations	• scope of impact • communication plan

L&D Operating Process

This document outlines what you can expect from the Company X L&D Team. It defines the type of work that we complete; our process for receiving requests, completing analysis, designing curriculum & content, and delivering training; and our expectations of our requesters and business partners

L&D Organization Scope

The Learning and Development (L&D) Organization is in place to provide foundational knowledge for all revenue roles in the company through two main vehicles: training programs and knowledge base development.

Revenue Roles include: Inside Sales, Outside Sales, Relationship Management, Client Experience, Retention, and Technical Support.

If you are outside of these organizations, you may submit a training or knowledge management request, however, they may be prioritized after Revenue roles depending upon impact.

Activities within each functional area:

Training programs:	• New hire onboarding • Ongoing development • Product & process training • Skill development • Role and career development • Management & leadership development
Knowledge Management:	• Knowledge base • Sales Playbook • Product/Process Reference documents

Functional Roles:

Instructional Design	• Analyze current state to identify learning gaps, clarify metrics, & outline objectives • Design overarching curricula in alignment with objectives • Tie key learning activities to application OTJ • Develop content including presentations, activities & supporting materials • Evaluate training results against success metrics established
Training:	• Prepare (virtual) classroom and correlating technology for facilitation • Practice content in preparation for facilitation • Design 'just-in-time' content for e-distribution • Deliver learner-centered, performance-based training to support organizations • Gather feedback and success metrics utilized to evaluate training • Provide scorecards to key stakeholders for participant evaluation
Knowledge Management:	• Analyze need/focus of knowledge content based on SME-provided information • Identify and outline recommendation for implementation format • Design & develop content for distribution to end-users • Input content into previously discussed/approved format • Provide train-the-trainer to Trainer or requestor to distribute to impacted teams

Expectations of Requestor & Partner Organizations

The core focus of the Learning & Development team is to analyze, create, facilitate, and evaluate the learning of our supported organizations. Our expertise lies in the following:

- Finding and analyzing skill/knowledge gap
- Designing/developing training materials and educational content (based on a specific set of objectives)
- Consulting and observing partner organizations to obtain information related to functional expectations
- Determining best method of implementation (knowledge/skills transfer, experiential relation, on-the-job application,etc)
- Facilitating training lessons, workshops, and full courses to ensure 'learning sticks'
- Evaluating the effectiveness of implemented training

We recognize that our partner organizations and supported organizations are, likewise, experts in their respective fields. Therefore, for both new requests or update of existing program/content, we will need for requesters to provide the following information (if applicable to the request), in order for us to design and deliver effective training and educational content:

Product:	Overview, capabilities/limitations, features, advantages/benefits, images/videos, transaction flows, set up process, troubleshooting process, stakeholder timelines/goals
Process:	Process flow (and correlating steps), scripting, sales deck, stakeholder timelines/goals
Employee Development:	Portion of the curriculum (if pertaining to onboarding), any observable performance gap(s), behaviors that need to change, affiliated support materials
Regulatory:	Documentation of changes/updates, impacted organizations, scope of impact, and communication plan

The L&D Team typically follows the information gathering process below. Since the L&D team's expertise is in adult learning, they rely on project managers, SME's, and other stakeholders to communicate the information needed for training and key project timelines. These three phases can be completed over the course of a project as decisions continue to be made. However, it is important to make sure there is adequate time for L&D to gather required information and develop/test training in order to have training completed by the desired launch date.

L&D Information Gathering Process:

1. Overview of the project-
    - What is the tool/process/change being implemented and why?
    - What is the general timeline for this project?
    - What are the perceived training needs (it is okay if they still need to be defined)
2. Project impact-
    - How is this tool/process/change impacting our company specifically?
    - Which teams are being impacted by this change? Do all of these teams need training?
    - How is this project going to develop/expand over time?
3. Training needs-
    - What is the role of L&D in creating and implementing training for this project?
    - Are there already training materials for this project and will they be incorporated into new training?
    - What are the additional training impacts from this project?
    - Who are the key SME's (Subject Matter Experts) to work with for content development?

L&D Organization Request Process

To balance and prioritize workload and convey transparency of status, please complete the following process to request training or knowledge base documentation.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Submit Training & Knowledge Management Request via Asana. Be sure to include the following information:
<table>
<tr><td>Name:</td><td>Input your name</td></tr>
<tr><td>Department & Role:</td><td>Input the team that this request impacts and your role within or affiliation with this team.</td></tr>
<tr><td>Summary of Request:</td><td>Please include a description (or title) of your request here.</td></tr>
<tr><td>Request Type:</td><td>Please select ALL that apply based on your ask:
Knowledge / Enablement Content Creation
Training Design & Facilitation
Results & Reports
If this is related to existing knowledge base content or training, you will be asked to provide the affiliated article number or name of the training.</td></tr>
<tr><td>Priority:</td><td>Select ‘Low’, ‘Medium’, or ‘High’ based on direct impact to ability for the team to function effectively, impact to clients, and alignment with company goals.</td></tr>
<tr><td>Description:</td><td>Outline a detailed description of your request and impacted team(s).</td></tr>
<tr><td>Subject Matter Expert:</td><td>Listed any known experts that can provide additional insight/information on this initiative.</td></tr>
<tr><td>Ideal due date:</td><td>Enter your desired completion date of this request. Completion date will be based upon the situation and priority of request but we would like to establish your expectations.</td></tr>
<tr><td>Attachments:</td><td>If there are attachments that you wish to share, provide these here.</td></tr>
</table></td></tr>
<tr><td>2</td><td>Once the request form is complete, it can be submitted. Submitted Requests are routed to the L&D Project Board, where it is monitored by the L&D Leader. Tickets will be assigned on a daily basis, at least once per day.</td></tr>
<tr><td>3</td><td>Team members will check at least one time per day to see if new tickets have been assigned to them, and perform analysis and scoping of the request within 2 business days after the submission date. This MAY include coordination with the team director or other team members.</td></tr>
<tr><td>4</td><td>Team members will be responsible to contact the requester of any ticket assigned to them no later than 2</td></tr>
</table>

	business days from the ticket submission date to confirm the following:
	● Have received request and supporting materials
	● Questions related to supporting materials or content in the ticket form
	● Confirm the scope:
	    ○ Deliverables
	    ○ Stakeholders
	    ○ Subject Matter Expert(s)
	    ○ Mutually agreed upon cadence for status update (once a week, every 2 days, once every two weeks, etc.)
	    ○ Approximate time frame/prioritization (reiterate that changes in other elements of scope will impact time frame and prioritization)
	    ○ Identify success metrics
	        ■ Who is responsible for tracking metrics?
	● Schedule a time for next follow up meeting (L&D team member should book time on requestor’s calendar and modify if needed)

5	Stakeholder review: ticket requester and/or other stakeholders (as designated) are shown a draft of deliverable in final stages, given opportunity to submit feedback (demo of curriculum, final draft of knowledge article(s), final draft of curriculum content, etc.)
6	Implementation of stakeholder feedback (as needed).
7	Completion of deliverable (article is published, curriculum is being used by facilitator, etc.) and notification to stakeholders.
8	If applicable– evaluation completed and results provided to stakeholders
9.	Ticket is closed, marked ‘Done’.

Training Industry Standards & Best Practices

The intent of the remainder of this document is to provide industry-standard guidelines for development and execution of effective training.

The Learning and Development team follows an agile iteration of A.D.D.I.E. for its' design strategy. A.D.D.I.E. is the most prevalent method of training design & implementation following the steps of **A**nalysis, **D**esign, **D**evelopment, **I**mplementation, and **E**valuation. To meet quick turnaround times and allow for frequent stakeholder feedback, the L&D team incorporates multiple iterations into the A.D.D.I.E. process, where stakeholders review outlines, drafts, and other content at various stages throughout the design and development process.

Below is a description of each of the A.D.D.I.E. phases.

Analysis

The Analysis phase of A.D.D.I.E. is a critical component to the effective outcome of training. During the analysis, the consultant or ID (instructional designer) will meet with SME's and key stakeholders to obtain information around the following:

- Who is the primary target audience for the course?
- What are the learning goals you aim to achieve?
- What are the physical and organizational constraints?
- What are the technical requirements of the course?
- What are the structural characteristics of the course?
- How accessible are the requisite knowledge sources?
- What criteria will be used for assessment?

Time Allocation

Though 'industry standards' have not been established with specific time allocation for Analysis, it is important to note that this phase can be very time intensive, as the rest of the ADDIE model requires the initial thought and assessment-based research during the Analysis phase. You should plan for **ample amounts of time to conduct evaluations or consider previous evaluations** of your audience population.

https://elearningindustry.com/getting-know-addie-analysis
http://www.mass-service.org/sites/default/files/A11%20ADDIE%20Presentation%20Materials.pdf

Design & Development

During the Design phase of A.D.D.I.E., the ID and collaborators identify the overarching goals for a training curriculum, formulate the key learning objectives, outline the flow & feels for the training and create a formal structure.

Development is the phase, in which resources, facilitators, and presenters are designated based on your design plan and content is developed, in alignment with the learning objectives, for the intended audience.

Time Allocation

Industry-wide accepted averages for development, are demonstrated below: *(results are methodology agnostic and based on comprehensive survey completed by ATD)*

Type of Training	Design time (in hours) for every one (1) hour of training
Traditional, In-person, Classroom	**38**
Virtual Instructor Led Training	**28**
E-Learning (Segmented by Level of Learner Interaction)	
Level 1: Passive	**42**
Level 2: Limited	**71**
Level 3: Complex	**130**
Level 4: Real-Time	**143**

https://www.td.org/insights/how-long-does-it-take-to-develop-one-hour-of-training-updated-for-2017

Implementation

During Implementation, the Facilitator will determine details of when and where the training will occur, send invitations, prepare the classroom (or virtual classroom), practice the facilitation, and facilitate to the participants. Post-implementation factors, such as follow up sessions, handouts, and post-facilitation assignments, should be considered during preparation.

Time Allocation

While the actual facilitation time frames will depend upon the curriculum built, preparation and post-implementation tasks should be allocated at **2 hours per hour of training.**

Evaluation

The Evaluation of a training can take many forms. There are four standard levels of evaluation in Adult Learning Theory as outlined below.

Level 4: Results To what degree targeted outcomes occur, as a result of the learning event(s) and subsequent reinforcement.

Example: # of contracts signed, accounts activated, revenue generated

Level 3: Behavior To what degree participants apply what they learned during training when they are back on the job.

Example: # of sets, helds, etc

Level 2: Learning To what degree participants acquire the intended knowledge, skills, and attitudes based on their participation in the learning event.

Example: Sales pitch certifications where learners must complete all aspects of a pitch rubric.

Level 1: Reaction To what degree participants react favorably to the learning event.

Example: A post-program survey where learners give feedback on what they liked and didn't like about the program.

Levels 1 & 2 are, traditionally, executed through survey and assessment, while level 3 is observed and quantified, and Level 4 is driven by organization metrics. Levels 1 & 2 are typically the easiest to measure as they are within the control of the L&D team and are low cost to execute. However, Levels 3 & 4 are the most important for determining the success of the learning program. It is key that program goals are tied to trackable metrics to ensure that it truly solves a business need and adds measurable value to the organization. For this reason, the L&D team identifies evaluation metrics as early as possible in the development process.

Time Allocation

Below is an outline of approximate time allocation for each level of Evaluation, based upon traditional execution:

Type of Evaluation	Design time (in hours) for every one (1) hour of training
Level 1: Survey	**1**
Level 2: Assessment	**2.5**
Level 3: Observation & Assessment	**5**
Level 4: Sales Results	**Varies by scope & scale**

http://www.chapmanalliance.com/howlong/

Below is some research on the top barriers to faster learning design and development. This L&D process will help mitigate these barriers and define expectations for all stakeholders.

Figure 1: Top Barriers to Faster Learning Design and Development?

What are the top three barriers to your team creating learning products faster? (Select up to three.)

https://www.td.org/insights/how-long-does-it-take-to-develop-one-hour-of-training-updated-for-2017