Learning at Launch:

The value of engaging learning services early and throughout the life of your projects.

Kelly Parker, FIS Divisional Client Engagement Manager

Agenda – Thursday, August 20, 2015

- **Intro and Welcome**
- **Bio**
- **Learning Services Industry**
- **FIS Success Story**
- **Introducing Learning Services into your Project Plans**
- **Communications and Timing**
- **What is in it for me?**
- **Q&A**
- **Adjourn**

FIS

The State of Education in Technology

- **There is power in learning – corporate America has taken a fresh focus on the importance of educating clients.**
  - Client loyalty
  - Industry edge, the value add that 'wins the deal'
  - Coaching/consulting
- **Learning has an enterprise role**
- **Learning links to performance**
- **Investments are being made**
- **New Innovations in Learning**
  - Gamification
  - Role Play
  - Avatar's

Training Methodology
Instructional Design Theory

Learning Services is a complex and fascinating field combining social sciences, technology, products and services.

- To develop appropriate artifacts, a company must ask what are the learning needs and goals?
- What development of instructional materials and activities is needed?
- What delivery channel will be most effective?

Kirkpatrick's four-level model is what is currently used by FIS Learning Services team and is considered an industry standard across the HR and training communities. The four levels of Kirkpatrick's evaluation model essentially measure:

- REACTIONS-What they thought and felt about the training
- LEARNING-The resulting increase in knowledge or capability
- TRANSFER-Extent of behavior and capability improvement and implementation/application
- RESULTS-The effects on the business or environment resulting from the trainee's performance

Source: http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm

Education Resources

COP's in Learning Services

The Association for Talent Development (ATD), formerly ASTD, is the world's largest association dedicated to those who develop talent in organizations.

The Digital Payments Learning Services Story

The FIS Case Study

- **Background Story**
  - Where we were in 2011
  - Our Goal: Better educate our clients on the products and administrative tools so they are knowledgeable regarding what to expect, call Support less and are satisfied with the partnership.
  - Building a Learning Services strategy
  - Executing the plan
  - Not getting lost in the shuffle - Evangelizing your program and services across the business and division
  - Intro Meeting, mid-year, annual review

- **The State of the Program Today**
  - How we define success
    - Client Surveys
    - Reduced call volume
    - Leadership support
    - Unforeseen affects –
      - More continuity between business units and teams
      - More exposure across groups regarding new updates and changes
      - Asked to participate in product launch
    - Next phases

Year Over Year Registration Volumes

Registration, Surveys and Management Sponsorship
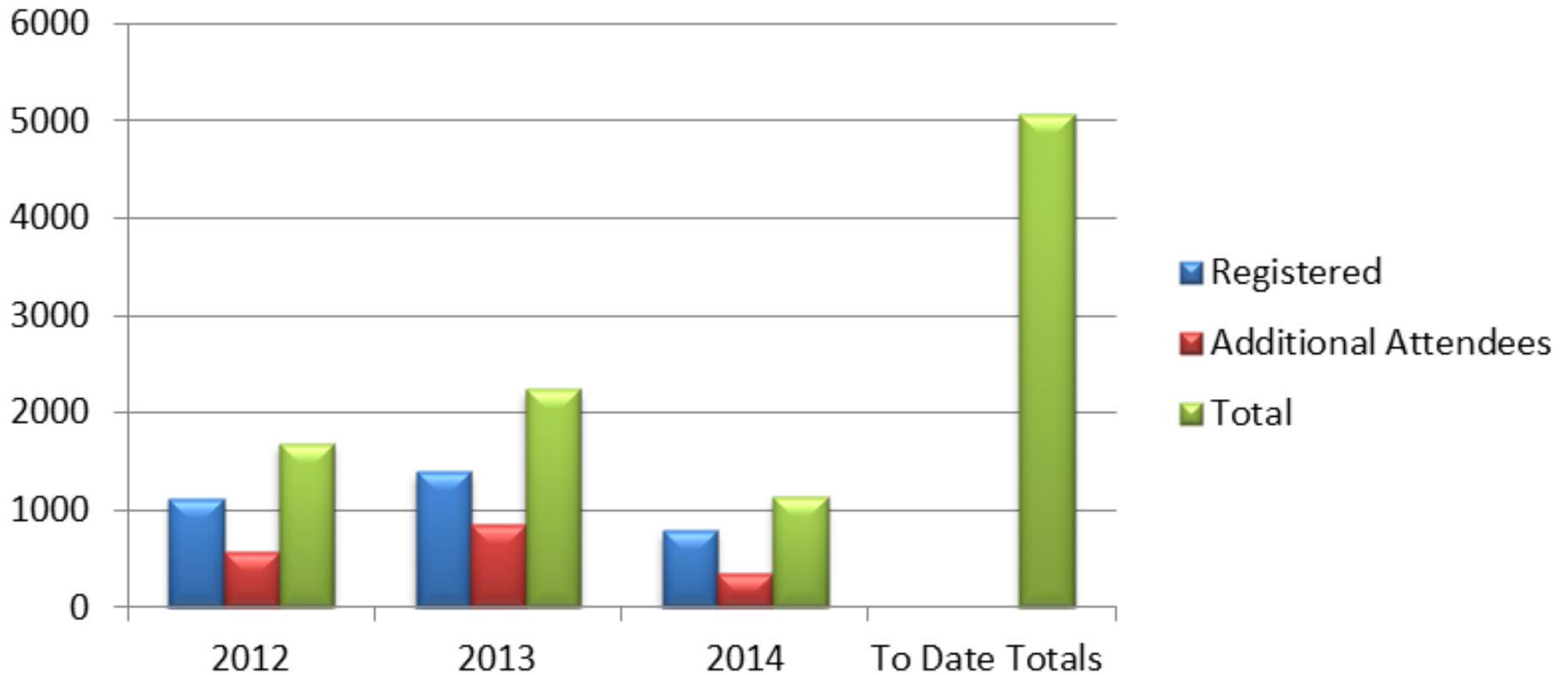
Registration Numbers
Registration, Surveys and Management Sponsorship

2012 Clinics												
Month	January	February	March	April	May	June	July	August	September	October	November	December	Total
Registrations	42	223	182	112	83	47	148	106	106	22	23	26	1120
Additional Attendees	1	119	76	74	62	30	89	84	0	10	15	9	569
2013 Clinics												
Month	January	February ry	March	April	May	June	July	August	September	October	November	December	Total
Registrations	22	69	109	126	157	161	53	73	83	90	293	162	1398
Additional Attendees	14	44	95	63	99	120	46	57	60	55	91	103	847
2014 Clinics												
Month	January	February	March	April	May	June	July	August	September	October	November	December	Total
Registrations	27	136	76	192	84	142	131						
Additional Attendees	31	32	51	36	53	64	85						

Survey Responses

Registration, Surveys and Management Sponsorship

- **How useful did you find the clinic's?**
  - Very Satisfied
  - Satisfied
  - Other

43.1% Very Satisfied

42.8% Satisfied

14.1% Neutral, Not satisfied

Notables

The more that you read, the more things you will know. The more that you learn, the more places you'll go.

~Dr. Seuss

All problems can be resolved with education… well, realistically education can proactively advise clients regarding what could be perceived later as project threat.

~Kelly Parker

Introducing Learning Services into Your Project Plans

Communications

Internal Communications

- Interaction with SAM's and Sales Teams
- User Groups (Executive Sponsorship)

External Communications

- Release Notes
- Email blast
- Direct Mail to LFI's and Resellers

Collaborations with peer groups

- Conversions
- Product
- Support
- Solution Assurance
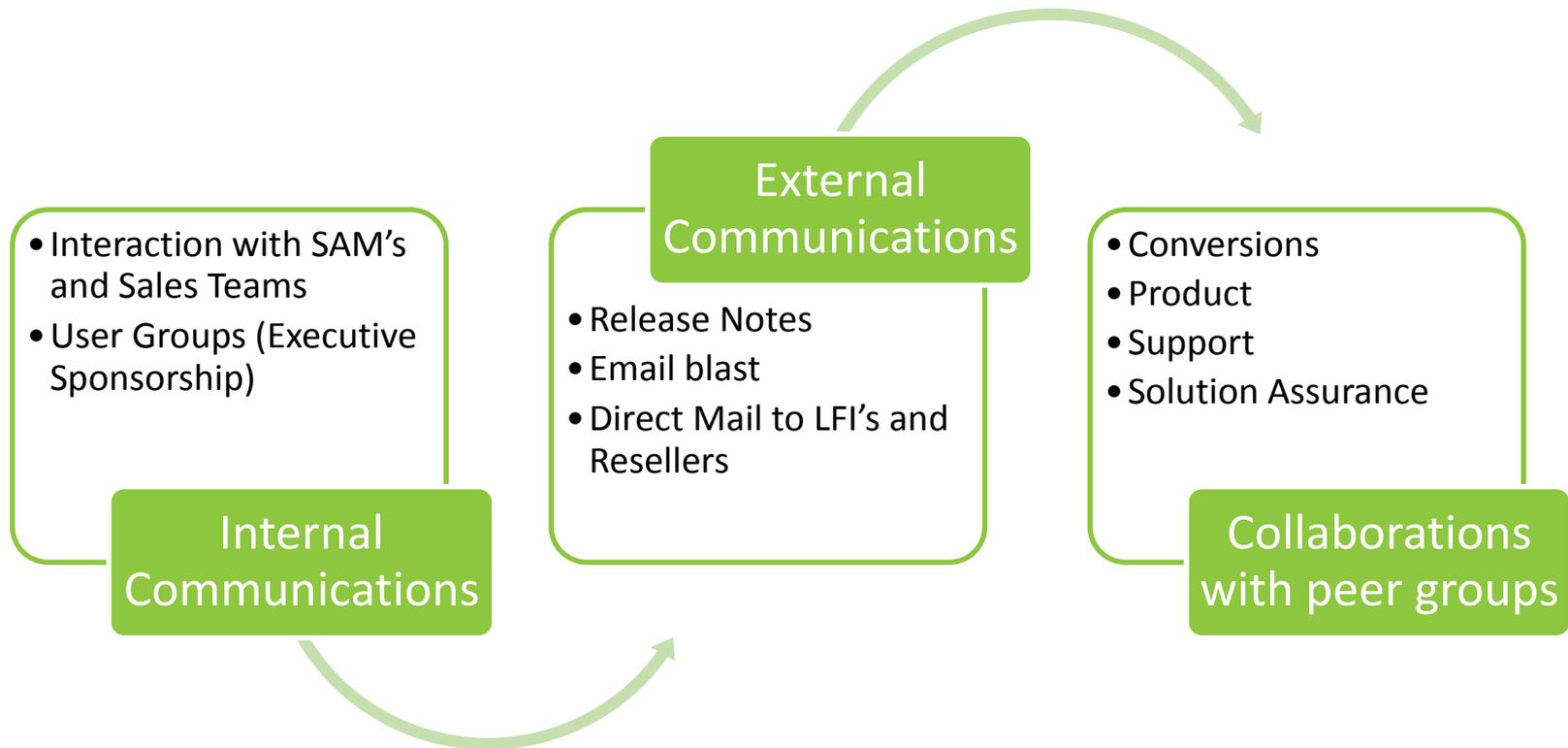
Communication plans

Pre Release	
Significant end user impact	8-12 weeks
Communication options and samples	6-8 weeks
Some end user impact	4-6 weeks
Bank impact only	4-6 weeks
Defects and system upgrades	2-4 weeks
Maintenance changes	2-4 weeks
Final Bulletin published	2 weeks
Post Release	
User guide update	1 week
Demo availability	3-4 weeks

Our Focus

Pre Conversion Training

Optimal Timing Prior to Go Live

Offer a 'hands on' classroom approach to make it 'real life'

Allow the Conversion Team to focus on conversion tasks

Blended approach

Configuration workshops

Post Conversion Training

Feedback from Digital Ops and Support Teams

Focused training on client needs – after experience with the product

Constant assessment and refinement of training effectiveness

Many access points - PC, Tablet, Mobile Device

Custom Approach with full consultation and onsite training and evaluation of product efficiencies
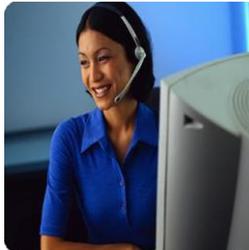
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Determining Training Delivery Method

Instructor Led-Classroom

- 2-4 days
- Hands on application
- scenario based activities

WebEx

- Shorter content
- Interaction with instructor
- Maximum 2-3 hours

eLearnings

- 30 minutes or less
- Module Based
- Excellent for huge volume

- Consider the complexity of the content
- Consider volume of clients to be trained
- Use a blended training approach
- Whenever possible develop reusable training content
- Frequent review and assessment – revise and adjust as needed

Training Options
Instructional Design Theory

- Live Webinars (WebEx, Centra, Adobe Connect, etc)

- Recorded Webinars (WebEx, Centra, Adobe Connect, etc)

- CBT Modules (TrainerSoft, Captivate, Lectora)

- Instructor Led Training at headquarters or remote locations (Instructional Design)

- Client Location – Instructor Led Training (we require one instructor per 12 students) plus we bill back actual travel related expenses to the client after the engagement concludes. (Instructional Design)

- Clients like to have options, provide them an array and then let them choose.

- You will need to also be prepared to provide a recommendation because ' they don't know what they don't know'.

Education – Client Lifecycle

- **Introduce to the Education Stakeholders Immediately**
- **Timing**
  - When to engage Client and Education resources
    - 6 weeks prior
    - 60 days Checkpoint
    - Annual checkpoint
    - .On Demand (Account Management and Support)

Education – Client Lifecycle (continued)

Categorical Break down of your content and why it is important

- What your client needs at Implementation is going to be different than what they want three years in, make certain they are continually learning what additional value your products and services can bring to their business.

- 100, 200, 300 series classes
  - Create an introductory through expert learning path for your clients, this way they never feel like you are being complacent when it comes to product development and client loyalty.

- When you launch a new product, feature, enhancement or fix, it does no one any good if they are not aware or understand how they work or the benefit that they will offer your business.
  - Release Webinar
    - `Internal
    - Client focused
  - Updates to artifacts
    - Product Overview
    - Product Manual
    - Learning curriculums
    - Demos

What's in it for me?

Why and when do we engage Learning Services

- **How can Learning Services help your project?**
  - When development is behind on documentation
  - When Product and Marketing don't have collateral
  - When sales is asking for client facing documentation
  - When a demo is needed

- Resources in the Learning Services field are typically very well educated and work with clients continuously, they are comfortable and used to jumping in as needed.

- Education industry recommends certifications and is proactively involved with peers that focus on education initiatives across multiple industries.

- These same resources are often fighting for recognition within their own organizations, give them a bit of exposure and they can be your #1 ally.

Questions??

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