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Training Plan

Last Revision Date: 5/2/2025

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**Executive Summary**

The purpose of this training plan is to enhance the skills and knowledge base of our internal users through structured and comprehensive learning paths. By focusing on key areas such as video content, custom content creation, and virtual classroom training, we aim to provide a versatile and engaging learning experience that meets the diverse needs of our users.

Our strategy includes detailed scheduling, varied session types, and accessible training recordings to ensure that all users can participate and benefit from the training program. We emphasize the importance of continuous feedback and adaptability to keep our content relevant and impactful. The learning paths have been carefully curated to address specific skill gaps and promote ongoing professional development.

Training Project Team

To align our communications, we are requesting the creation of a Training team that will work together on a weekly basis (or as needed) to review training content, communications that are being shared with our internal users, open training requests, classroom training schedules, and proposed Champions activities. This group is necessary to ensure:

1. Most accurate information about available training resources and the engagement level of users.
2. Promoting the most important messages and features from leadership

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Organization | email |
|  | Primary Learning Strategist |  |  |
|  |  |  |  |
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Goals & Objectives

The following goals have been outlined for the training program.

Reporting Period: Sep 2022 – Dec 2022

These goals will be measured with the following data points:

* Number of Champions Engaged with Champions Program
* Number of Users attending Online Training Events
* Number of Users Accessing the Training Portal
* Number of New Portal Registrations
* Hours of Trainings Viewed
* Number of Campaigns Sent to Various Key Contacts
  + Key Contact is defined as a designated contact that is identified as a person who will be responsible for distributing the training to a larger group of users.

Training Plan Layout

The rest of this document provides the actionable Training Plan to follow. The document is as a “living document” with the expectation that updates are continually being made, based on the effectiveness of the trainings and communications being implemented. Updates can occur as needed and can be as frequently as daily or as infrequently as quarterly, depending on the section. The table below lists out the most common sections with proposed update timelines to provide an idea of how often reviews should be occurring in each of the sections of the training plan.

|  |  |
| --- | --- |
| Training Plan Section | Proposed Update Schedule |
| Executive Summary | As Needed; Yearly |
| Training Project Team | As Needed; Yearly |
| Summary of Workshops | As Needed; Yearly |
| Initial Data Gathering Workshops | As Needed; Yearly |
| Goals & Objectives | As Needed; Quarterly |
| Training Plan Layout | As Needed; Monthly |
| Communications | As Needed; Quarterly |
| Personas | As Needed; Quarterly |
| Distribution Channels | As Needed; Monthly |
| Communication Types | As Needed; Monthly |
| Learning Campaigns | As Needed; Monthly |
| Reporting and Analytics | As Needed; Monthly |
| Strategy Syncs | As Needed; Monthly |
| Adoption and Usage Metrics | As Needed; Monthly |
| Champions Program | As Needed; Monthly |
| Online Training Platform | As Needed; Monthly |
| Custom Content | As Needed; Monthly |

Communications

Provided below is an overview of the strategic components required for effective communications around Training for Office 365. The types of communications will be defined, as well as the overall approach to communication distributions and approvals.

Personas

Within customer, 4 unique personas have been named. While there are always exceptions to the rule, following these personas will allow us to craft generalized communications that can be re-used across customer that are focused to specific users and areas of concern that are highly relevant to their concerns and issues.

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|  |  |

By reviewing the author and recipient audiences of each of the communications we will be able to ensure that we are crafting the Talking Points to meet the Goal of the communication. This will help us to ensure that we are generating communications that drive the actions from the users that we are looking for. Examples may include:

* Having Managers share links to the training site with their users.
* Having users attend upcoming training webinars.
* Having Champions complete a requested survey and provide feedback on a set of new features.

An example of audience and recipient communications, goals and talking points is provided below that highlights common themes identified within this project.

|  |  |  |  |
| --- | --- | --- | --- |
| To | From | Goal of Communication | High Level Talking Points |
| Leadership | Executive Sponsors | Importance of Training  We are Listening  Let us Know What You Need | * Customer is Committed to Empowering Users * Our Success Depends on Them * We need their Leadership – We are Here to Support Them |
| Managers | Executive Sponsors | Importance of Training | * Customer is Committed to Training * It is Key that THEY communicate Training Resources to Users * They should be and have permission to attend and use training * Customer has all the resources they need to communicate with their users |
| Champions | Customer | Available Training We are Listening  Let us Know What You Need | * Upcoming Training Schedule * Resources to Help You Help Others * Link to Training |
| End Users | Customer | Available Training | * Upcoming Training Schedule * Link to Training |

Distribution Channels & Communications

The following recommendations outline the channels for communication distributions. Within each channel, it is recommended that the communications described below are created for each channel. Based on each channel, the type of communication may vary, based on what method is found to be most effective, but overall, the goal and objective of the communication will remain the same across the channels.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Acquisition | Logistics | Health | Education | Sales | Contracting |
| Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept |
| Accounting | Personnel & Readiness | Retail | Information Technology | Support Elements | Research & Innovation |
| Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept | Dept  Dept  Dept |

The following are the proposed starter communications that should be developed and included in the Customer “Communication Pack”. The idea would be that these could then be used to communicate with each silo above. This approach allows Customer to approach communication to users in small groups vs being focused on organization wide communications.

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Description / Purpose | From | Audience |
| Overview Presentation (PowerPoint) | Will be used for the listening tour, an event where stakeholders can provide a high-level overview on the efforts to date and then gather feedback from users. | Project Sponsors | Leadership  Managers  Champions  End Users |
| Introduction Email | Will be sent to let Leaders know about:   * Latest Updates * Training Opportunities * What we need from Them | Project Sponsors | Leadership |
| Introduction Email | Will be sent to let Leaders know about:   * Latest Updates * Training Opportunities | Project Sponsors | End Users |
| Introduction Email | Will be created as a template that can be shared with Leadership so that they could send to their users if they wanted. They could customize as needed, but it would include:   * Latest Updates * Training Opportunities * Encouragement to Attend Training | Leadership | End Users |
| Introduction Email | Will be created as a template that can be shared with Leadership so that they could send to their managers if they wanted. They could customize as needed, but it would include:   * Latest Updates * Training Opportunities * Encouragement to Reinforce the Importance of Training with their direct reports * Encouragement to Lead by Example and Attend Training | Leadership | Managers |
| Introduction Email | Will be sent to let Managers know about:   * Latest Updates * Training Opportunities * What we need from Them | Project Sponsors | Managers |
| Introduction Email | Will be sent to let Champions know about:   * Latest Updates * Training Opportunities * What we need from Them | Project Sponsors | Champions |
| Introduction Email | Will be created as a template that can be shared with Leadership so that they could send to their Managers if they wanted. They could customize as needed, but it would include:   * Training Opportunities * Information on How to Reach Out to Their Champion | Champions | Users |
| Learning Campaigns | General purpose customized email campaigns to promote awareness and learning around a specific topic or feature in Office 365. | Champions  Customer | End Users |

Communication Types

Below are several of the proposed communication types described in additional detail.

### Learning Campaigns

Learning campaigns are customized training communications tailored to specific audiences. Campaigns promote the usage of Office 365 by building awareness of applications and features available to users. True technology adoption happens when users are able to improve their day-to-day processes by learning what the tools have to offer.

*Example Learning Campaign:*

Graphical user interface, application, website

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### Weekly Teams Postings

The Learning Strategist will send out weekly emails containing a headline, subject and body introducing users to a highlighted feature to be posted in a Team. Posts will include training links. The posts are intended to be forwarded out to users, or copied into a Teams post. It’s recommended to have a consistent header image for Teams posts to offer a visual cue that it is related to training.

*Example Teams Post Header:*



### Weekly Training Reminders

Consistent reminders about live training help us drive awareness and increase attendance. The Learning Strategist will send out weekly training reminders with links to the upcoming sessions to users and Lead Champions. Reminders will include where and how users can attend the training, as well dates, times, and topics for each session.

*Example Live Training Reminders:*

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Reporting and Analytics

Analytics play a critical role in assessing the effectiveness of training programs and ensuring that they meet the needs of the users. By analyzing usage data, completion rates, and engagement metrics, organizations can identify areas for improvement and make data-driven decisions to enhance their training strategies.

### Key Metrics to Include

* Usage Data: Track how often users access training materials and participate in sessions. This helps identify popular topics and areas where users may need additional support.
* Completion Rates: Measure the percentage of users who complete training modules or courses. High completion rates indicate that the content is engaging and relevant.
* Engagement Metrics: Analyze user interactions, such as questions asked during training sessions, participation in discussions, and feedback provided. Engagement metrics reveal how actively users are involved in the training process.
* Performance Improvements: Assess the impact of training on user performance by comparing pre-training and post-training metrics. Improved performance indicates the training is effective.
* Survey Results: Collect user feedback through surveys to gauge satisfaction and gather insights on the training experience. Surveys can help identify strengths and areas for enhancement.

Champions Program

Champions drive engagement to assist with business transformation. The ideal Champions are personnel who can combine their technical acumen with empathetic skills to assist others with adopting modern technology.

Champions Activities

Below are the recommended regular Champion activities.

|  |  |  |
| --- | --- | --- |
| Activity | Owner | Active Participants |
| Creation of Internal User Group of Champions |  |  |
| Champions Summit (monthly) |  |  |
| Champions Call (monthly) |  |  |
| Teams Learning Posts or Email Learning Campaign (weekly) |  |  |

|  |  |
| --- | --- |
| Activity | Description |
| Champions Summits | A monthly meeting for Champions where leadership can share information about the current goals of the organization, new changes coming, and any updates Champions should know about. This is a great time for Champions to be able to ask questions of leadership directly and for leadership to hear and see some of the solutions that Champions have been working on. |
| Train the Trainer / Learning Webinar | Train the Trainer sessions are group of Champions receive compact training that focuses both on specific training content and on how to teach this training content to others. The sessions include everything they need to deliver the training to their users, including:   * + Training Invitations & Announcements   + Training Presentation Deck with Teacher Notes   + Demo Scripts with all Document Samples   + Follow-up Emails and Post Training Survey for Students   Learning Webinars are 45 – 60 minutes sessions designed to train the users on basic Office 365 features. They can range on topic based on interest and can be completed for any end user topic within Microsoft 365. They are typically 45 minutes of instruction with 15 minutes of open Q&A.  If requested, the Learning Webinar can be conducted as an “Open Office Hours” session where no content is prepared and instead Champion come into an open forum and present questions to the Learning Strategist. |
| Teams Learning Posts or Email Learning Campaign | A concise email with a summary of features or solutions with links to helpful training and resources. They can be utilized by Champions and shared by Champions to their core user groups. |
| Champions Meetings | A meeting with Champions to review status, provide updates and discuss any issues or concerns. This is different than a Champions Summit as it is not a leadership to Champions push of information but instead a share of information between Champions directed by the Learning Strategist. |

Champion Management

At least two members from each Division to join and actively participate in the Champions Program. If one member should drop out of the program, a replacement from the same Division.

Champions will communicate using three primary methods – a Champions Team, Monthly Training and a Monthly Champions Meeting. The Champions Team will be open to anyone and quarterly the team will host a New Champions webinar, providing an overview of what it means to be a Champion.

### Champions Team

In the General channel, a Teams Post will be pinned that includes a link to training with information and resources for all new Champions. The following channels should be added to the Team to organize communications and files.

Champions Team:

* **General** – Share leadership messages and other announcements with the Champions
* **Ask a Question** – Champions can ask questions they have or questions from users.
* **End User Feedback** – Champions will share user feedback about the technology so we can address pain points or issues.
* **Sandbox** – Champions will use this channel to test features and add-ins so they can assist users with them.
* **Training Resources** – The Learning Strategist will share training resources with the Champions. Topics will be focused on new features, common questions, and tips and tricks.