



The Learning Process: A Phased Approach

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EXECUTIVE SUMMARY

A partnership between EPC Group and Axceler formed in 2010 to provide training on Axceler's ControlPoint product. Afterwards, a pharmaceutical company already familiar with the SharePoint administrative software desired to participate in training from this joint partnership in order to understand the full scope. The range of questions and areas of unfamiliarity with the functions and controls were the reason that the client decided to form this training. As a result, EPC Group employed a learning process, a designed framework that acts as methodology for integrating all the types of different automated knowledge and learning management modules, to train the users within the company. The learning process contains distinct phases: Analysis, Diagnosis, Design, Implementation, Evaluation and Continuation. Each phase is outlined, explained, and accompanied with narrative about how the pharmaceutical company's training was implemented according to the learning process. This case study reveals how EPC Group's phased learning process allowed the pharmaceutical company to take advantage of ControlPoint's functionalities for the purpose of aligning the technological capabilities of the product with their business needs.

BACKGROUND

In early 2010, Axceler, a company which specializes in software for SharePoint administration, formed a partnership with EPC Group to deliver training for ControlPoint, a product which serves a multitude of functions for governing SharePoint sites. The three main areas of functionalities include configuration and deployment operations, providing analyses and reports, and managing permissions. As a result, some of the benefits of ControlPoint include time savings resulting from the ease of managing multiple SharePoint sites with a few clicks, cost effectiveness from the opportunity for site owners to work on other projects, the ability to enforce governance policies by receiving alerts if permissions are broken, and the maintenance of an up-to-date system by determining negligible users or objects. A number of organizations and corporations approached Axceler to receive training on the software.

PROBLEM

One large pharmaceutical company desired especially to take advantage of the training offerings by the joint partnership between Axceler and EPC group. They purchased ControlPoint for the means of having greater control over the numerous SharePoint sites and subsites within their various divisions and the positive consequences aforementioned. Prior to reaching out for assistance, they had a strong familiarity with the software already from having utilized the product. Despite their experience with the product though, they wanted to take full advantage of the product's offerings and had further questions on the controls.

The questions the users from the organization had varied greatly:

- How could they generate analysis reports for certain users without giving them direct access to the ControlPoint interface?
- What was necessary to "promote" a site to become a site collection?
- Why are some the objects viewable but are not able to be expanded to see sub-items?

Additionally, the main SharePoint System Administrator and point of contact wanted to ensure that certain groups could not access certain advanced functions, so they customized the menus for ControlPoint to exclude these functions. Even though they may not have had access, the users in these regulated groups still had questions

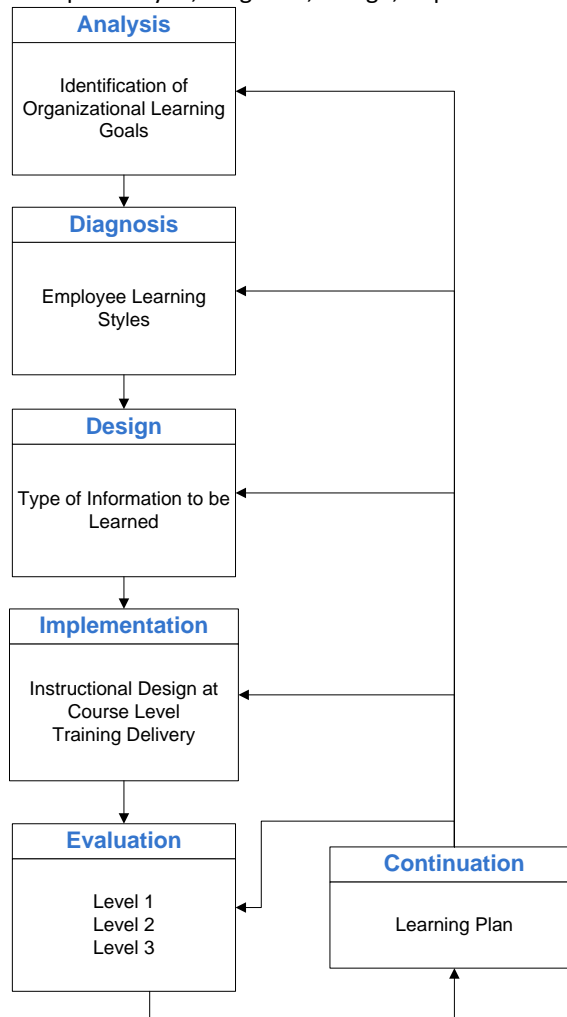
involving these functions. With the range of questions and particular issues that the client had, it became pertinent to follow a systematic approach to training that would suit the needs of the client and resolve the issues being faced.

TRAINING APPROACH

A multitude of methods exist to automate the learning process, which all of the managed knowledge, learning objects, and performance support can be integrated. The below model is a designed framework by EPC Group that acts as common ground for integrating all the types of different automated knowledge and learning management modules. While attending to the needs of the client, the learning process outlined was utilized to allow optimum productivity with the given features of the ControlPoint technology.

1.1 THE LEARNING PLANNING MODEL

The below model consists of six steps: Analysis, Diagnosis, Design, Implementation, Evaluation and Continuation.



1.1.1 ANALYSIS

The first step is a careful analysis and development of strategic learning objectives based upon the objectives of the organization. Once the business needs driving the organization are established, the process of defining the learning objectives (broad areas of competencies that the organization must improve or develop) begins with a meeting of representation from the major functional groups.

In the case of the pharmaceutical company, the analysis phase occurred when the organization's decision-makers decided to purchase the ControlPoint product. The business needs of the divisions within the company were evaluated, and the scenario which best met these needs was with the acquisition of the product. Once the purchase was made, the major functional groups determined that training would be a necessity to reach the best performance standards from the ControlPoint software and contacted Axceler and EPC Group to take advantage of its training offerings.

1.1.2 DIAGNOSIS

The diagnosis step involves determining which skills and competencies already exist and what needs to be implemented for the success of the learning system. The purpose of this step is to identify existing skills as well as needed skills. During the diagnosis process, it is important to identify individual learning styles and, based upon that, create the learning material.

Axceler, EPC Group, and the client organized discovery calls to determine the environment that the organization was working in, the type of SharePoint users that would be taking part in the training and any specificities the organization wanted. The number of farms, web applications, site collections, and sites were noted. The users were to be split between System Administrators and Business Users. As a final point, the main system administrator expressed detailed topics that he desired to be covered, such as the main difference between and capabilities of each ControlPoint permissions group. Additional calls and communication were made to tailor the learning materials to the needs of the client.

1.1.3 DESIGN

The next step in the process is the design of the learning system. This process involves determining the best method of delivering the information in terms of sequence, presentation format, and distribution to the employees; then developing a series of training classes, online tutorials, interactive courses, and other learning events and aides. Each training class should utilize a combination of different teaching strategies and tactics, which could range from a simple list of information to a full classroom experience with hands-on exercises. Additional learning materials could include a list of references, "chatrooms" or "Discussion boards" to connect individuals within a company spread across geographical region, creating a database of problems and resolutions, and even having an events reminder in the learning system which presents the opportunity to improve soft skills, communication, and team building.

After the initial discovery calls with the client, it was determined that the users were to be split-up into two different groups with different learning agendas: Business Users and System Administrators. Each would have a similarly formatted curriculum; however, they would consist of different modules for the different levels of users. As was mentioned before, the main System Administrator who was aiding the vendors in tailoring the curriculums did not want the Business Users to have knowledge of the actions and functions of ControlPoint that they would

not have access to or that might confuse them owing to the fact that they might not have a thorough understanding of certain concepts as System Administrators.

Furthermore, a training guide was created that served as a walk through guide that followed the curriculum so that trainees could reference it during the training session. An electronic copy was sent beforehand for review and physical copies were to be available as physical hand-outs during the classroom time. The training session was decided to be in a traditional classroom environment with an online webinar available for individuals who could not physically attend the training. The training session was an interactive one in which anyone could ask the instructor questions about their own specific environment. As the class would progress, each person would have his/her own ControlPoint interface to practice the lessons being addressed along with time to discuss freely amongst the other users their specific environments.

1.1.4 IMPLEMENTATION

Once the training is properly designed and sequenced for delivery, the next step is implementation. This step involves utilizing the designed objects to effectively integrate learning into the organization. A learning coordinator needs to ensure that the learning needs of the organization are congruent with the goals of the organization. At this stage, close monitoring of training practices, position training and establishment of a process for evaluating the training that occurs during implementation is imperative. It is a poor practice to conduct training within an organization and not have any measurable results of the effectiveness of the training.

At on-site training, a facilitator from EPC Group led training for three different training sessions over the course of three days with a technical resource from Axceler on stand-by to answer any questions the facilitator or address any technical issues. The main System Administrator and main point of contact joined in on all three days of the training session in order to serve as the lead and liaison for the organization and continually reiterate the needs of organization.

Since the electronic copies of the curriculum and training guide were sent beforehand, physical copies were passed out prior to training. A webinar was created and trainees outside of the classroom setting logged-on or called-in to partake in the session. The webinar was also recorded for future references to be made. A certain amount of time was established during the design phase for each learning module to allow for flexibility within the actual training class so that more or less time could be spent depending on the comfort of the students with the learning materials. Sometimes, some modules progressed into Socratic method-type sessions where the students learned from questioning the instructor with specific questions about their environments. As was evident with each session, they were dynamic in nature, as each training session should be. Evaluation of the learning process becomes pertinent to ensure that future sessions meet the standards of quality of previous ones or to improve sessions that might not have met certain standards.

1.1.5 EVALUATION

Learning management functions cannot occur without a continual evaluation of the learning. In this phase of the model, four levels of evaluation exist:

- Level 1: Conduct surveys and questionnaires at the end of the learning events.
- Level 2: Evaluate tests that measure participant's learning, which includes measurable feedback indicating what was learned and what was not learned.
- Level 3: Check to see if the skills taught in the training are actually being used on the job. Observing the employee and asking an employee's supervisor or customers to see if they noticed a difference. (Evaluation check list)

- Level 4: Measure the bottom line result of the training. Did the training positively impact the organization? What aspects of the learning system (course) were more effective than the others?

These four levels of evaluation ensure that the learning process is effective and yielding the desired results.

1.1.6 CONTINUATION

Training courses and initiatives are not one-time events. The process should be undertaken continually to ensure the maximum effectiveness. The learning process modeled is evolving constantly. The needs of an organization are changing as frequently as the technologies being implemented.

After the training at the pharmaceutical company, future questions and troubleshooting problems in which they still approach Axceler and EPC Group serve as an illustration of continuation. Moreover, they might have a large future turnover in employees, new employees being promoted to larger roles (i.e., Business Administrator to System Administrator), or a new version of the ControlPoint product might force the company to seek training again. Next time around, the needs would be different, so the training would have to be altered to suit the new business purposes.

Finally, the training vendor also has to be continually altering its learning approach. The evaluation phase gives insight into how and what the vendor might need to change to allow for more effective training sessions in the future. Constant improvement is a fundamental goal for any organization or vendor utilizing the learning process.

CONCLUSION

In brief, the learning process is an approach manipulated by EPC Group to manage the instruction process in a systematic fashion in order to assist organizations in benefiting from new technologies or techniques. As with the case of the pharmaceutical company, ControlPoint served as a tool that could alleviate the time constraints and other administrative strains that are sometimes symptomatic of large SharePoint environments. However, the users did not understand properly all of the functionalities and might have caused severe problems if they did not learn the product correctly. For this reason, the organization approached Axceler and EPC Group to receive training to discover the operations, architecture, and nuances of ControlPoint. The learning process modeled was the approach used to assist them in learning the new software. From the initial discovery calls, EPC Group was able to understand the needs of the client, design training sessions specific to those needs, and carry out it out in a classroom environment accompanied by the environmental help. The users not only learned what ControlPoint could do, but also conjured up new ways to utilize the product for their groups. Many times the training sessions transformed into discussion sessions where the trainees brainstormed ideas on how to take advantage of the newly learned functionalities, and the questions they had prior to the session were answered.

Q. How could they generate analysis reports for certain users without giving them direct access to the ControlPoint interface?

A. Scheduling reports and having the reports emailed or sent to a SharePoint library for later access.

Q. What was necessary to “promote” a site to become a site collection?

A. Set the destination of the copied or moved site as the web application.

Q. Why are some objects viewable but are not able to be expanded?

A. Depending on permission settings, a user may be able to see the object but not have access to it for security reasons.