PROCEDURE OVERVIEW

The **TRAINING AND DOCUMENTATION** procedure is defined as the identification, analysis and preparation of documentation and training materials, in order to effectively deploy service enhancements and products to functional units and end-users. The documentation summarized in this procedure is limited to training related materials and product release documentation as outlined in the **Scope of Work** (**SOW**) document. This procedure also encompasses the training roles and responsibilities to effectively perform the knowledge transfer that must occur with any product/service deployment.

Although internal training for new releases is provided by ***technical support***, new hire training is outside of the scope of this procedure.

Procedure Owner: QA Manager

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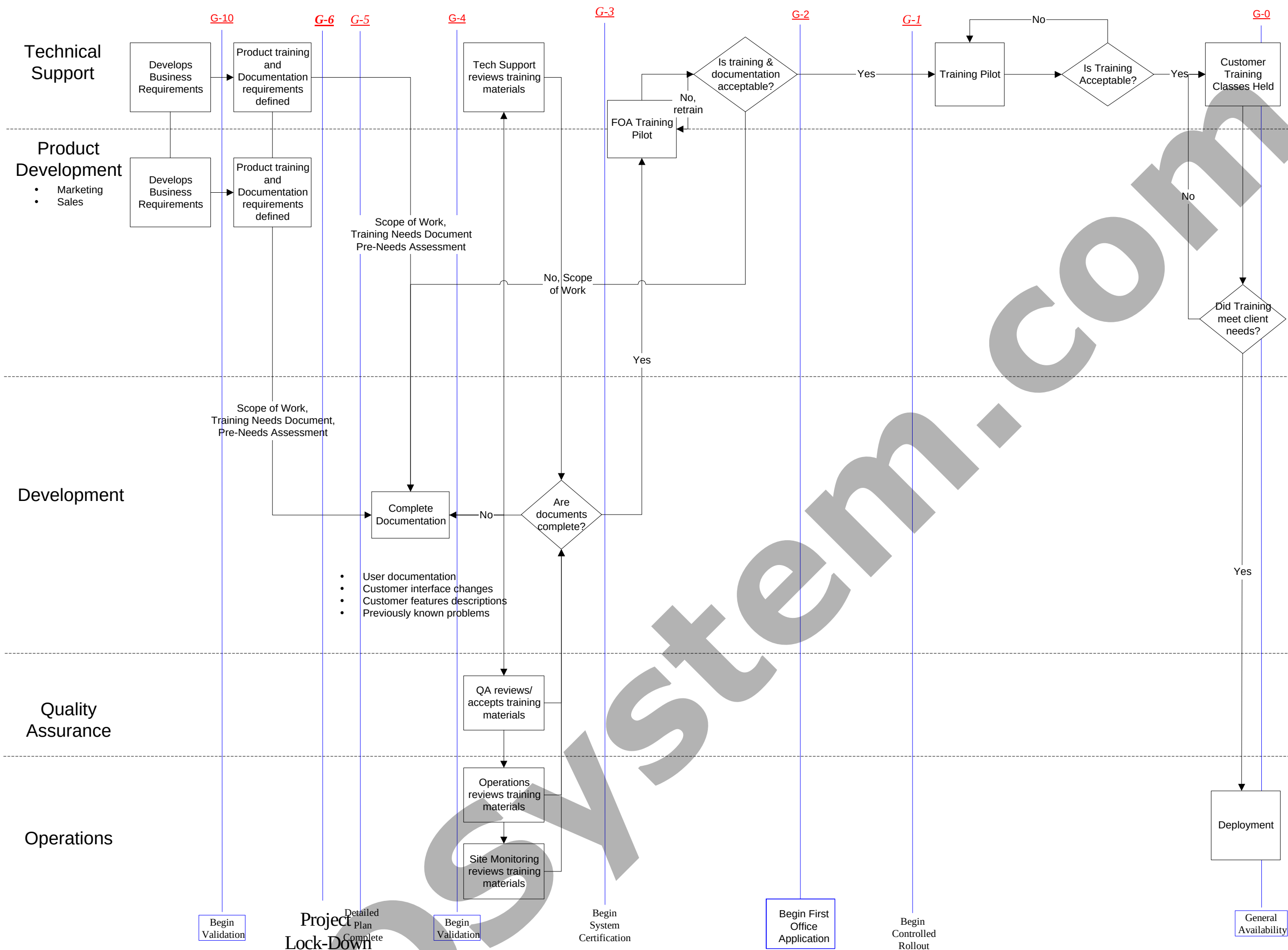
REVISION HISTORY

Version	Date	Author	Description

DISTRIBUTION LIST

Technical Support Manager, Technical Support
Project Manager, Technical Support
QA Manager, Engineering
Program Manager, Engineering
Director of Programming-Content, Product
Director of Advanced Product Development, Product
Director of Development, Engineering
Director, Technical Support
Manager of Operations, Operations

PROCEDURE DIAGRAM



ROLES AND RESPONSIBILITIES

Trainer/Training Group

Trainers are the people who will be responsible for training either the internal organization or the external client based on predetermined training needs. Depending on the technical capabilities of the individual being trained, the trainer will need to have different technical abilities. It is the responsibility of ***Technical Support*** to train users and the responsibility of ***engineering*** to train Engineering personnel. It is also the responsibility of ***Technical Support*** to act as the ***Tools Trainer***. This individual is one that knows the tools and can train the ***Content Group*** of any changes made to the toolset. In instances where ***Technical Support*** is not knowledgeable on new functionality, individuals will be pulled from ***Product, Operations*** and ***Development*** in order to "train the ***Trainer***".

Technical Support

The ***Technical Support*** group within SDLC.com is responsible for defining the initial training and documentation requirements, reviewing the documentation that is produced by the ***Development Group*** and providing training to the users. It is ultimately the responsibility of ***Technical Support*** to ensure that training and documentation are clear and concise. This group is also responsible for training the ***Content Group*** on toolset additions.

Development Group

The ***Development Group*** must compile documentation for training purposes. This documentation must coincide with internal and external needs that are defined in the **Scope of Work (SOW)** documentation and the **Training Needs Form**. The ***Development Group*** is held accountable for the thoroughness and accuracy of the documentation and will be required to modify the documentation if it is not accepted by ***Quality Assurance.*** Lastly, this group is required to train external engineers.

Product Group

It is the responsibility of the ***Project Manager within the Product Group*** to work with ***Technical Support*** to define the training needs of the release. Jointly, these two groups will be required to complete the **Training Needs Form** and the **SOW**.

Quality Assurance

Quality Assurance is ultimately responsible for accepting or rejecting the documentation produced by the ***Development Group***. ***Quality Assurance*** must review the documentation created and provide necessary feedback. Once the documentation is complete, ***Quality Assurance*** accepts the documentation by signing off on the documents. It is ultimately the responsibility of ***Quality Assurance*** to ensure the accuracy and thoroughness of the training documentation.

METRICS

Training Evaluation Form

This form will be used to identify the client's perception of the effectiveness of both the training and the materials created to support the training. This form will be given to the trainees upon completion of the training in order to measure the trainees' perception of the ***trainer***, training and the materials.

Requested Documentation Tracking Metric

This metric will measure the cycle time of creating accurate and complete training documentation materials. This will record the number of times, if any, the documentation was returned to development in order to be reworked. (who is responsible for tracking this metric? Also, did they say they would use this in practice?)

Training Effectiveness Metric

This metric is designed to support the reduction of cycle time related to training customers while increasing the quality of training. With more effective training classes, cycle time will be reduced because of the decrease in need to retrain people. This metric will record the length of the training classes as well as whether or not training had to be redone because of ineffectiveness. (who is responsible for tracking this metric? Also, did they say they would use this in practice?)

Number of Technical Support Calls Received after the Release

The number of ***Technical Support*** calls will be monitored for a month after a release to identify any trends. This will identify whether or not there were any areas that may not have been covered appropriately in the training. (is Technical Services responsible for this?)

Number of ISP Bump-outs

The number of ISP bump-outs is the number of times ISP technical support must call SDLC ***Technical Support*** for support. ISP bump-outs will be monitored for trends to identify whether or not there were any areas that may not have been covered appropriately in the training.

Post-Implementation Review

The Post-Implementation Review, performed by ***Quality Assurance***, will identify any shortcomings of both the training and documentation that were uncovered during the release. These shortcomings will be used to better enhance the procedure for future releases. (this is a good activity to do, but is isn't a metric; can it fit somewhere else?)

PROCEDURE ACTIVITIES

Defining Product Training and Documentation Requirements

Preliminary product training and documentation requirements are defined in the **RELEASE PLANNING PROCEDURE** within the **Scope of Work (SOW)** documentation. Both the ***Technical Support*** and the ***Product Group*** are required to work together in order to define these requirements. These groups then complete the **SOW**, which will document the training requirements, who will need training, and who will be providing the training. The training may vary depending on the classification of the customer/user, or whether the training is for internal or external use.

Prior to the beginning of Gate 6 (Project Lock Down) of the SDLC Business Gates, ***Technical Support*** and the ***Product Group*** must again work together to better define the training and documentation materials that will be necessary for the release. This is necessary to achieve Project Lock-Down at Gate 6. During this activity, both groups will update the **SOW** to reflect any modifications made in the System Requirements Specifications during the **REQUIREMENTS DEFINITION PROCEDURE.** This will ensure that complete and accurate documentation is produced from the ***Development Group***. ***Development*** will produce documentation as outlined in the **SOW.** Additionally, ***Quality Assurance*** will provide acceptance criteria within the **SOW** to identify what will be acceptable documentation for ***Development*** to produce.

Creation of the Training Needs Document for the Release

Technical Support and the ***Product Group*** will review all **SOW's** and create one summarized **Training Needs Document.** This document will outline all of the functionality that will require training within the release, who will provide training, who needs to receive training and whether or not there will be an FOA rollout training and controlled rollout training.

Completion of the Pre-Needs Assessment Form

Based on the updated **SOW,** the **Training Needs Document** and, if applicable, any customer contract, ***Technical Support*** and the ***Product Group*** must complete a **Pre-Needs Assessment Form** for each client that will be receiving training. This form contains all the training requirements defined in the **SOW.** This form is then sent to the client for training expectation acceptance and sign-off.

Completion and Review of the Documentation

Once the Detailed Plan is Complete (Gate 5), the ***Development Group*** must complete the training and documentation materials that were identified in the **SOW** during the **REQUIREMENTS DEFINITION PHASE** of the release. This documentation must contain, at a minimum:

- User documentation, including training materials
- Customer interface changes (if applicable)
- Customer feature descriptions
- Previously known system problems (if applicable)

It is vital that this documentation is complete and accurate. The following groups are responsible for reviewing the documentation for accuracy and completeness, and it is the sole responsibility of ***Quality Assurance*** to accept or reject the documentation:

- ***Technical Support***
- ***Product Group***
- ***Quality Assurance***
- ***Operations***

Should this documentation not meet the needs and requirements of these groups and the requirements set forth in the **SOW**, it will be sent back to ***Development*** for rework. This process will continue until the documentation is satisfactory. The acceptance criteria for this documentation is based on pre-determined criteria contained in the **SOW**, developed by ***Quality Assurance*** and agreed upon by ***Development.***

First Office Application (FOA) Training Pilot

Not all releases will necessitate an FOA. For those that do, once the documentation passes the review of the required groups, this will be the first application of the training and documentation materials that were developed. The FOA Training Pilot may be either a shared responsibility of the ***Product*** and ***Technical Support Groups*** or it may be the responsibility of only one of these two groups. The **Training Needs Document** will indicate the need for FOA training as well as the responsibilities for conducting it. This training will take place in the staging environment.

If this training is found to be ineffective due to the documented materials, the ***Development Group***, based on an updated **Requested Documentation Form**, will create new documentation materials. If the training is found to be ineffective because of the training ability (I think I know what you mean here, but “training ability” doesn’t seem to flow well), an additional training session will be held. The client-accepted **Pre-Needs Assessment Form** will be the measure used to evaluate the effectiveness of the training and the documentation**.**

Training Pilot

It is the responsibility of ***Technical Support*** to deliver the training pilot to the end-users (non-technical) and of the ***Development Group*** to deliver the technical training. The training pilot should be carried out and based on the needs identified during the **DEFINITION PHASE** of the project and included in the **Training Needs Document**. This training is available prior to the general release of the product and should be considered as a learning tool in advance of the general release. Based on the **Pre-Needs Assessment Form**, the training and documentation will be evaluated for the effectiveness and completeness. If one is found to be incomplete, the training will need to be performed again based on the requirements presented in the **Pre-Needs Assessment Form**.

Customer Training Classes

Upon acceptance of the training pilot, prior to deployment, ***Technical Support*** will provide customer-training classes for the controlled rollout and general availability (Gate 0). This training will occur in the staging environment and will be based on lessons learned during both the FOA pilot and the training pilot, as well as the requirements defined on the **Training Needs Document**.

Once this training is complete, it is the responsibility of ***Technical Support*** to issue the **Training Evaluation Form** to the customer. (See Appendix)

If the training does not meet the customer needs that were identified in the **Pre-Needs Assessment Form**, it must be redone.

Four weeks after the production deployment occurs, the **Training Evaluation Form** should be sent to customers again. This will help more effectively evaluate the training courses once the end-users have had the opportunity to practice what they were taught.

FORMS

- Pre-Needs Assessment Form
- Training Evaluation Form
- Training Needs Document

EXCEPTIONS

- None identified at this time

AFFECTED/RELATED PROCEDURES

- Release Planning
- Definition Phase

TOOLS/SOFTWARE/TECHNOLOGY USED

- None identified at this time

APPENDIX

- Training Evaluation Form

Appendix

Course Presentation Evaluation

Course Title: Instructor: Date:

INSTRUCTIONS: Please rate each of the following items on a scale or “1” to “10” from “NEEDS WORK” to “OUTSTANDING”. Circle the number which most closely represents your opinion. If the item in not applicable, circle “n/a”.

COURSE EVALUATION: I would rate the following course items:

	NEEDS WORK									OUTSTANDING	
1. The participant manual	1	2	3	4	5	6	7	8	9	10	n/a
2. The quality of video tapes	1	2	3	4	5	6	7	8	9	10	n/a
3. The preparation of overheads	1	2	3	4	5	6	7	8	9	10	n/a
4. The participant activities	1	2	3	4	5	6	7	8	9	10	n/a
5. The participant discussion	1	2	3	4	5	6	7	8	9	10	n/a
6. The classroom environment	1	2	3	4	5	6	7	8	9	10	n/a
7. The seating arrangement	1	2	3	4	5	6	7	8	9	10	n/a

INSTRUCTOR EVALUATION: I would rate the instructor as follows:

	NEEDS WORK									OUTSTANDING	
8. Making material clear	1	2	3	4	5	6	7	8	9	10	n/a
9. Confidence as an instructor	1	2	3	4	5	6	7	8	9	10	n/a
10. Answering questions	1	2	3	4	5	6	7	8	9	10	n/a
11. Use of audio visuals	1	2	3	4	5	6	7	8	9	10	n/a
12. Enthusiasm for subject	1	2	3	4	5	6	7	8	9	10	n/a
13. Use of classroom time	1	2	3	4	5	6	7	8	9	10	n/a

PERSONAL VALUE: I would rate this experience as follows:

	LOW									HIGH	
14. Value to me	1	2	3	4	5	6	7	8	9	10	n/a
15. Value for my job	1	2	3	4	5	6	7	8	9	10	n/a

16. Was the material in this course:

______ Too Theoretical
______ At My Level
______ Too Simple

COMMENTS:

COURSE DATA:

Please answer the following questions about the content of the course. Any suggestions you can offer would be greatly appreciated in helping us make sure that this course meets your needs.

17. What items or areas of information would you like to see added to this course which might assist you in the responsibilities of your current job?

(Font above and below are different)

18. What items or areas of information would you like to see removed from this course, and why?

19. What needs do you feel for other training?

20. Any other comments?