7 tips for managing training projects to support business transformation (Apr 13)

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Tips for managing your training project successfully during the Initiation stage

More companies and organisations are going through transformational change to achieve and maintain success in their field. There are many examples across a wide spectrum, including:

- BBC's 'Delivering Quality First' change programme launched in 2011

- 2012 John Lewis Partnership programme integrating business and technology for its three sales channels (in store, web and mobile)

- Current NHS transformation focusing on new clinical commissioning processes and patient pathway redesign

With so much change on the agenda, it is critical that employees receive the best possible learning experience, so they can perform efficiently following the change and, in doing so, realise the key project benefits.

It is essential for those managing large change projects to successfully and effectively manage the training from the outset. However, speaking from personal experience of managing transformation projects, the Initiation stage can often feel both uncomfortable and challenging.

As you dip your toe in the water you become aware of a number of things.

Whilst there is a fixed 'go live' date, there is constant change, an unclear training scope and low visibility of the project solution. You have a lot of stakeholders to engage, many of whom are apprehensive about the change. They question what the learning will look like, how it will be managed and what it will deliver. Ultimately, they want to know whether their people will be ready and confident for 'go live'.

As project manager, however, you want to wait for more certainty before you develop your plans.

There is often a period of inactivity that can feel as though the 'pause button' has been pushed whilst people wait to 'get all the facts'. This period is risky as valuable project time can be lost.
Does any of this sound familiar to you?

The good news is that there is a lot you can do to manage your project with confidence from the outset.

The certainty you are looking for will arrive much later in the project and so, it's really important to create initial plans and find a flexible learning solution early, to stay ahead of the game.

Central to this are 7 key 'change management' principles

1. A high degree of 'project' change is typical of Transformation projects
- This may seem obvious but once you accept that the scope of the project is likely to shift, you will be able to focus upon working flexibly to manage the change, rather than getting frustrated that just as you produce your next set of plans, everything has changed, again!

2. Take a 'helicopter view' and learn to operate at both high and low level detail

- Regularly review whether you are keeping a wide enough 'big picture' view on all areas of your training project including the delivery plan and scheduling.
- Low-level detail will enable you to develop plans with accuracy and high-level detail will allow you to communicate project progress to your programme board.
- Your training team resource will need to reflect these different levels.

3. Select a flexible learning solution which fits the needs of the transformation using learning technology to help you achieve this

The Towards Maturity's 2012-13 Benchmark Study identified that:
"92% of organisations seek to use learning technologies to respond faster to business change... and the average company was able to roll out new products, services and IT systems over 20% faster through the use of learning technologies."

- Large scale change brings new ways of working often enabled by a new IT infrastructure. There is much value in selecting a learning solution using cutting edge learning technology to match this.
- Develop ways of working with your e-learning solutions provider, including prototyping the design and technical solution, so you're ready to hit the ground running as soon as source content becomes available.
- E-learning gives great flexibility during design and build. It may be appropriate to use a 'rapid' approach to significantly reduce build time and reduce risks around late source content delivery. For instance, on system-led change, a rapid approach allows development to take place at the last possible moment and enable changes to be efficiently implemented. Traditional solution design based on using a 'dummy' systems training environment often has to wait until very late Test stages, which is risky.
- E-learning can also be used in a variety of delivery settings, again reflecting the project complexity, from facilitated sessions to individual learning at the desk. It also enables your learners to refresh and consolidate their knowledge between training and implementation.

4. Become comfortable at 'working in the grey'
- You can create a high level training plan early on, even when you don't have all the facts. A well-structured plan, even when based upon a large number of assumptions, will engage your stakeholders giving them confidence that you are in control and prepared.

5. Risks and issues need to have a seat at the top of the project table
- Treat risks and issues with respect, as they provide great opportunities for you to develop a clear and objective perspective of all your training activity.
- Understand your stakeholders' appetite for risk, as this will significantly influence how you manage your project.

6. Your key stakeholders are one of your most precious commodities
- Create a strategy to build your stakeholder relationships and revisit it regularly. Some stakeholders will become key allies for training and they will support you in managing challenges and influencing other key players.
- Define how you will communicate project progress to different stakeholder groups and then put this into action.

7. Build confidence in the learning solution and the training as early as you can
- It is very useful to include e-learning in your engagement communications to the business. This might be the first time your learners have used e-learning and it will build confidence levels and reduce any anxiety about using this learning medium, prior to their training, once they see how easy it is to use.

It's clear that managing change projects can be far from plain-sailing. However, if the training element is managed effectively it can deliver powerful results within the business.

So, if the project is complete and the training has been successful, what does good transformation look like?

Your people will be both fully trained and empowered to carry out their daily roles, post 'go live'. Most importantly, they will be confident and engaged in the changes to their job.

It will also mean a seamless transition from old to new for your customers with them experiencing all of the benefits of the transformational change, such as an improvement in customer service or increased product knowledge from employees.