



PROM BIT TRAINING PLAN

Business Integration Testing August 2010

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1.0 Introduction

This document is a Training Strategy SoW for PROM Business Transformation Project Phase BIT.

As ALU enters the first phase of its Global Business Transformation project, a large scale initiative that involves the migration of ISIS to the Blue Planet Systems and corresponding changes in several processes, procedures, people functions, it is highly critical to train people to keep doing their jobs without too much disruption and frustration.

This is a limited user training phase. There will be more users in the next phase, UAT and then the whole all 1426 users in ANZ for the Go-Live training.

The user groups participating in BIT Training are Finance, Supply Chain and Procurement local teams, and AASSC (Shanghai).

Blue Planet Overview, Standard Process Flow and detailed transactions for Finance

Alliance overview, standard process flow and detailed transactions for Order Management

Business Warehouse navigation and detailed transactions for Supply Chain

2.0 Goals of ALU wide Global Business Transformation

ALU-wide Migration from ISIS to Blue Planet Systems as part of Company's large 2010 Business transformation and Reorganization initiative

- Train users to use new Blue Planet Business systems
- Use methods appropriate to train large groups of users in Go-live
- Improve user training time period in BP compared to current training time in ISIS
- Improve performance of users on BP systems as compared to ISIS
- Establish support levels for Help
- Complete training of all users in ALU Transformation time period for ANZ between May 2010 and September 2010

3.0 Scope

In Scope

Business Integration Test (BIT)

- Migration from ISIS to Blue Planet System
- As of 5/5/10, decision made to include Alliance 2.2/2.3 into Integration testing
- Training only for current users of ISIS in AU, NZ, and some regional Service Centers within the functional areas of
 - ☐ Finance
 - ☐ Supply Chain
 - ☐ Procurement

Out of Scope

- No training on any of the partner systems (eg. SRM, Lawson) other than Alliance (2.2/2.3 for BIT but 3.0/3.1 for final go-live)
- No training for Line Managers, Project Managers, Department Managers in BIT (should be included in UAT) although LC identified these workgroups via the spreadsheets provided by IT.

4.0 Objectives of Training Plan

- To present the first version of learning strategy and a training plan for work groups in the areas of
 - ☐ Finance
 - ☐ Procurement
 - ☐ Supply Chain (in initial stages)
- To present next steps after BIT training
- Identifying roles and responsibilities

This training plan will cover the following:

Who

- ☐ are the target audiences to be trained? How many?
- ☐ are going to be the trainers?
- ☐ Roles and responsibilities from ALU side for training development, implementation and evaluation

What

- ☐ systems are going to be used? The new BP system

- ☐ training curriculum, courses and mode of delivery will be?

Why

- ☐ In order to get targeted users ready on time for BIT

When

- ☐ are the dates of training and testing?

Where

- ☐ will training take place and other logistics?

How

- ☐ Will we get feedback post the training?

5.0 Roles and Responsibilities

ALU University

Name	Role	Responsibilities/Accountabilities
Victor Agnillini	VP Transformation ANZ	PROM Governance
Harry Haliday	Director AL University	PROM Governance
Jyothi Shankar	Learning Consultant and Training Program Manager, ANZ	Responsible for successful training deployment and all LC functions from Needs to Implementation to Evaluation.
Katie Todeschini	Instructional Designer	Development of courses in consultation with SMEs, Recording of Live Meeting sessions
Janine Sagner	Training Coordinator	Course uploads on LMS including recordings, Scheduling, facilities and sending out communications

PROM Global Governance Stakeholders

Peter Mollo	VP IT and Business Transformation, ALU, NJ USA	Lead NAR Transformation
Stuart Curley	Director CEO Office , ALU France	Transformation Head Office, Governance
Diane Levi	Learning Consultant , USA	Responsible for successful training deployment and all LC functions in the North American Region

6.0 Related Documents

1. PROM Impact Analysis.doc by Florence Mazars Change Management and Jyothi Shankar LC ANZ Training Lead
2. PROM Training Needs Analysis by Jyothi Shankar
3. BIT Delivery Schedule.xls Jyothi Shankar LC ANZ Training Lead
4. Communications Plan
5. ID Milestones.xls
6. Training Feedback and L1 Evaluation Summary L1
7. Training Evaluations L3 for a course, Leading with Integrity
8. Course Development Status and ProM checklist to Delivery
9. PROM Integration Training Presentation Jyothi Shankar

7.0 Training Audiences by Functional Area

The following sections are based on the Needs Analysis in-depth interviews that the LC has conducted in April 2010 with stakeholders in each functional area. Also, an overall impact analysis was conducted prior to this to assess impacts in several dimensions. This Needs Analysis determines what they know and what they need to learn and create a roadmap.

7.1 FINANCE

Objectives of Change on Finance Users

Change from ISIS to Blue Planet and ALU reorg together will cause an impact such as

Train for changed roles and functions (for some personnel)

Needing to learn how to navigate around the new BP system for the tasks they do (for all personnel)

Example 1: Currently forecasting on projects is done by Project Managers but after BP comes in, it will be done by a Finance person in BP.

Example 2: Project reporting is not done in ANZ and so they are not used to project structures. Now they have to learn reporting

Workgroups	How many?	What do they need to learn?
Accounting	12 AU 7 NZ	☐ Project Financial Management ☐ Management Reporting ☐ Balance sheet/HFM reporting ☐ Financial Systems Management/Reporting ☐ Month-end/HFM reporting/Statutory Accounts ☐ BD/BU Management Reporting
Controlling	12 AU	☐ Project Financial Management ☐ Management Reporting ☐ Balance sheet/HFM reporting

	7 NZ	☐ Financial Systems Management/Reporting ☐ Month-end/HFM reporting/Statutory Accounts ☐ BD/BU Management Reporting
Projects	12 AU 7 NZ	☐ Project Financial Management ☐ Management Reporting ☐ Financial Systems Management/Reporting ☐ Project Forecasting
AASSC Shanghai	6 Shanghai	☐ Bank Accounting and Accounts Receivable ☐ Accounts Payable ☐ Assets ☐ General Ledger and Costing ☐ Employee Expenses ☐ Manager of SSC

Finance Key Users= 45 in AU and 26 in NZ

7.2 PROCUREMENT

Objectives of Change on Procurement Users

- Data Maintenance will be huge as data will need to be pushed from ASR to BP
- Vendor Information Record Maintenance may not be really impacted much.
- Business Warehouse for local and PSSC will be impacted eventually as Business Warehouses will undergo a change once Blue Planet is implemented and users will need to master navigation and ways of delivering ordered items from the warehouse.

Workgroups	How many?	What do they need to learn?
PSSC, Shanghai	3 Shanghai	☐ Master Data Maintenance (push data from ASR to BP) ☐ Vendor Information Record Maintenance (still under discussion. Only regional may need some training. Local will not because they only send some input to regional). ☐ Business Warehouse for local and PSSC only if PDW is going to be replaced by BW in BIT

For Procurement, the main training is going to be on SRM which is not in the scope of BIT

7.3 ORDER MANAGEMENT

Objectives of Change on Order Management Users

- Change of process from Manual form filling and feeding into the ISIS system to an automated process from start to finish using Blue Planet
- Once on BP, ensure training increases 'number of orders processed per hour' to the desired rate in a span of 3 weeks

Current vs Desired State

- Each order takes 2 to 3 days for E2E processing due to manual entry, flow to different points and needing to be printed, signed and scanned. Each day on an average 5 to 10 orders may be initiated.
- With Alliance and Blue Planet, the order entry is electronic and seamlessly flows from one point to another, needing no printouts or scans, and accepting electronic signatures. Printed at the end. E2E on a single order will take 3 to 4 hours.

Workgroups	How many?	What do they need to learn?
Order Managers using Alliance 2.2 and 2.3	4 AU 2 NZ	☐ OV (Order View) and ☐ OE (Order Entry - how different orders such as Wireline, Wireless and Optics orders, are prepared and handled ☐ How does the order flow into BP (SAP). ☐ Simple and Complex Order categories ☐ BP functions (Financial validation changing status from s10 to s40, Tech& Exec Box) ☐ How does the order flow out of SAP BP ☐ Treating POs (Purchase Orders) ☐ Treating IPOs (Interhouse Purchase Order) ☐ GR/GI (Goods receipt and Goods Issue) ☐ Invoices ☐ BW reporting covering SD (sales order), LE (logistics execution) and OE (order entry)

7.4 Partnering systems

The Learning Consultant is responsible for the end to end training plan. The training plan from the partnering systems is an integral part of the plan and will be consolidated.

AASSC involvement

AASSC training will be managed and delivered by WiPro but we will be getting access to their training plan and track and ensure they are on schedule and ready for UAT.

Based on the LC interviews with the key experts in each of the functional areas, the following curriculum has been planned.

8.0 Curriculum and Courses

Assumptions of Prior Knowledge

All the key users (trainees) will be assumed to have

- A thorough knowledge of their functional areas such as Finance, OM or Procurement
- A very good knowledge of using ISIS
- No knowledge on the use of Blue Planet

The curriculum will be comprised of some online courses and VLT and ILT that the participants will take in each of the functional areas as recommended below for BIT. For the UAT and GoLive phases this curriculum will be expanded.

WBT/Online Courses

TBU54041W	Alliance Overview (Recommended for those attending Alliance Introduction course on 17 th Aug)	WBT	Recommended prior to 19 th Aug
PRM1000W	ProM Overview	WBT	
PRM2000W	ProM Projects and Roadmaps	WBT	
CMP0100W	BP Navigation	WBT	

ISIS to BP Instructor Led Courses First set of ILT and VLT courses

End Users	Curriculum	Description
Finance ANZ AASSC	MEC Harmonization	Step by step procedures of MEC Transactions for reporting at month end as will be performed using the Blue Plant tool.
	HFM reporting Tool	How to extract HFM reports from BP to load to HFM tool (not about use of HFM tool which is being used already).
	Internal Orders	What are int orders used for, setting them up with relevant settlement rules.
	Project Financial Controlling	Planning and result analysis - WBS creation, planning on WBS, RA keys, RA process for WBS and simple orders.
ANZ OM and COM	BW Supply Chain Queries	How are queries treated in BP, how is communication established with PSSC in Shanghai, difference between ISIS and BP in order processing

	Supply Chain E2E Overview	E2E Overview for CDR (CAT), OP/CREQ (LOM), OP/OS (COM) Alliance non B2B and Logistics
	Order Processing and Management on BP	Order receive, entry into forms, processing in Alliance, creating receipts and sending to procurement
ANZ Procurement and PSSC	Purchasing (BP module MM)	Vendor Master Data setup Vendor Info-record creation OM Process overview (PSSC related)
Project Managers	PrOM/BP changes	Inter unit cost transfer policy Change in labour rates from fully loaded labour rate to direct labour rate only Coding of all costs where possible to project instead of cost centre eg. training, relocation, recruitment etc. Cost elements that can be coded to a project. No longer a limited subset.
Project Managers	Excel PPFU, aka Project Financial Reporting/Forecasting	Why are we changing from SAP ISIS to BP Roadmap for future project reporting for ALU Benefits of new model Step by step walkthrough of Excel PPFU
Project Financial Controllers	Excel PPFU	Setting up a PPFU Download of data from SAP into EXCEL Upload of data from EXCEL into SAP
All BIT key users	Introduction to Lawson demo	What is Lawson, How is it used, Time reporting, RM, WM (all high level) demo
All BIT key users	Resource Manager and Work Manager demo	Connection between Lawson and BP, More Resource Manager and Work Manager
All BIT key users	Resource Manager and Work Manager and TTT perspectives	More of Train-the-Trainer, in-depth Resource and Work Manager Training with the key users being to play with the test system

9.0 Key Drivers for Recommendations by the LC

- Bridging knowledge Gaps
 - Created content in partnership with SME and Managers
- Reducing Training Time and Cost
 - Changed mode of training from purely CRT to a mode where the trainer does not always have to travel to conduct classes around the globe. Also, created reusable WBTs where the fundamental concepts don't change much and can be used long term and so for new users. Functional vs Fancy e-learning is completely accepted by the client and users.
- Increasing effectiveness of Training
 - Company Specific tasks recreated in training,
 - Increasing the context for Learning thereby making it relevant and engaging
 - Provide readily available phone or in-person support during training period when users are trying out the system to learn order processing
- Complete training of all users in ALU Transformation time period for ANZ between May 2010 and September 2010

10.0 Milestones and Deliverables

Deliverables are Training Material for the WBT and ILT/VLT training. Many courses exist from rollout of NAR and Mexico. However, ANZ systems and processes are different for which courses need will be developed from scratch. All courses being developed will meet the timelines for delivery one week before its release or published date. A separate Excel is being maintained for the ID tasks. See Section 6.0 for document.

The Project Manager for PROM maintains the Gantt Chart Project Plan after getting input from the LC on the state of each project.

The LC maintains a Excel spreadsheet for the project plan for course development. Course delivery plan is in Section 10.3.

10.1 Trainers

Possible Sources for trainers

- Using the European trainers who were involved in Saudi deployment
- Using trainers from USA (D. Levi's group)
- Using SMEs like Martha with expertise on BP and Finance subject areas
- Also use the trainers who were part of BIT

10.2 Scheduling and Communications

Scheduling – Program Management

Finance workgroup prefers the course to be no more than 3 hours at a time.

They would like upfront training followed by practical hands-on training for the team to work examples.

Delivery recommendations by ALU LC

While people may individually dial in to the virtual class, it would be beneficial for the participants in a location to meet in one room for more engagement, energy and interaction.

Also, recommend 30 minutes at the end for discussion, Q&A after every class.

Communications

A detailed Communications Plan is created which outlines what types of communication and how frequently will participants receive notifications for the course, its registration details and reminders. Refer to document from Section 6.0.

Course legend

Courses to be deployed are identified and scheduled as in Section 8.2 below.

ILT = Instructor Led Classroom Training

VLT = Virtual Instructor led Training

WBT = Web based Training

The following courses have been identified for the **AU and NZ teams. Some workgroups in Shanghai and Bangkok will need to take relevant courses.**

10.3 Deployment for FINANCE, OM and PROCUREMENT Teams

Course Number	Course Name	Delivery Format	Proposed Dates in AUGUST 2010	Duration	Start Time (AEST)	Trainer	SME	Audience AU, NZ, Other How may?	Training Resources
TBU57028	Intro to Lawson	VLT	10 Tue	1.5 hrs	3 pm	Marcel	Walter	Lawson – 2, 8	No room
TBU57024	Intro to Alliance	VLT	17 Tue	2 hrs	3 pm	Otto	Otto	OM – 6, Others? Global – 2	Fix rm, B6S
As above	Intro to Alliance(cotd)	VLT	18 Wed	2 hrs	3 pm	As above	As above	As above	As above
PRM-MEC6000 V	HFM Reporting	VLT	19 Thu	3 hrs	3 pm H or 9 am M	Hannes/ Martha	Martha	Finance – 7,6	Fix rm, B6I?
TBU57029	Resource Manager and Work Manager	VLT	19 Thu	2 hrs	3 pm	Marcel/ Walter	Walter	Lawson – 4, 8	No room
	----Free day ---		20 Fri						
PRM-ANZ2100V	Internal Orders	VLT	23 Mon	3 hrs	9 am	Susan Pye	Martha	Finance – 14,12	Fix rm, B6I
PRM-ANZ3100	Project Financial Controlling	CLT	24 Tue	3 hrs	9 am	Martha	Martha	Finance – 15,9 Global - 3	Fix rm, B6I
As above	Project Financial Controlling (cotd)	CLT	25 Wed	3 hrs	9 am	As above	As above	As above	Fix rm, B6I
TBU57029	Resource Manager and Work Manager	VLT	26 Thu	2 hrs	3 pm	Marcel/Walter	Walter	Lawson – maybe 11 or less	No room
PRM-MEC1100 V	FI Monthly Closing (aka MEC Harmonization)	VLT	26 Thu	3 hrs	3 pm	Hannes	Hannes	Finance – 19,12 Global - 1	Fix rm, B6I?
TBU57025	OM E2E User	CLT	27 Fri	6 hrs	9 am	Roberto	Roberto	OM – 9 Global - 2	Fix rm, B6I
PRM-ANZ4000V	PrOM/BP changes	CLT	27 Fri	1 hr	9 am	Kim Cook	Graeme/Kim	PMs – 4, 2 Finance - PFCs - 22	Shannon
PRM-ANZ4100V	Excel PPFU for PM's (aka Project Reporting)	CLT	27 Fri	2 hr	10 am	Kim Cook	Graeme/Kim		Shannon
PRM-ANZ4200V	Excel PPFU for PFC's	CLT	27 Fri	1 hr	1 pm	Kim Cook	Graeme/Kim	Finance - PFCs - 16	Shannon

(Refer to Section 6.0 for Original Schedule in Excel)

11.0 Risk Mitigation Strategy

For the purposes of the BIT phase and UAT phase, as the numbers are small, the PROM Team has identified owners for Risk Mitigation in different areas which will be distributed to teams around ALU.

#	Areas	Owner	Contact
1	All Areas Central POC	Harry Halliday	
2	SRM overlap	Jonathan White	
3	BW Finance	Jonathan White	
4	Finance EOM	Susan Pye	
5	WiPro offshore for Finance teams	Slav Ukrainec / Jason Gilmore	
6	Supply Chain	Fred / Marco	
7	Technical Support	Jason Gilmore	

For GoLive where **1426** users will be migrating, the following risk strategy plan will be put into place.

The Risk Mitigation will be handled as follows for the GO Live

Risk	Risk cause	Risk effect	Likelihood Expected to Rare	Consequences, (negligible, minor, moderate, major, or crucial)	Risk ranking (low, moderate, high, or very high)	Mitigation strategies Track, Monitor Solve	Owner of mitigation strategy
			Likely	Crucial	Very High		
			Almost certain	Moderate	High		
			Possible	Minor	Moderate		

12.0 Training Feedback and Evaluation Plan

Following is the plan to administer the Evaluations after the course.

- Level 1: Immediate feedback (Reaction to trainer and content)
- Level 2: Feedback about 3 to 4 week after training to measure Learning against the set objectives
- Level 3: 3-month Participant and Manager feedback

Type of Course	L1	L2	L3
Online/WBT	Online – collected via LMS	Within Course – not collected	Not done
Instructor Led Training	Handed out and collected in class	By instructor only	Feedback obtained 3 to 6 months after with participants and their managers
Virtual Training	Downloaded and filled online in class	By instructor only	Feedback obtained 3 to 6 months after with participants and their managers

Refer to related documents in Section 6.0 on feedback questions, collection and evaluation.

13.0 Costs

Development of Training \$0

Type of Course	Estimated Hours	Complexity Simple to Graphic Design and Animations	Cost Per Hour Developer	Cost per hour Other (voice over, graphic artist etc)	Total
Online/WBT					
Instructor Led Training					
Virtual Training					
Video/Podcast					

Typical costs: ILT and VLT \$50 to 80 /hr of development depending on complexity for WBT and Video; \$80 to 100/hr

Cost for Delivery of Training \$0

Type of Course	Estimated Hours	Trainer Costs/Hour	Trainer T&A	Facilities and Misc	Total
Instructor Led Training					
Virtual Training					

Typical ALU course costs

\$600 per participant for a course that is 2 days long (**7 teaching hours a day**)....ie. 300 per day per participant

For more specialized and Tech courses it \$1000 in ALU

14.0 Next Steps

Observe how users perform during the BIT, in addition to the feedback we collect. Use the observations and feedback to improve the next set of training that will be provided for the UAT next month.

Organize a meeting for Lessons Learned and Improvement with Business Stakeholder and Change Management team.

For any questions or comments on this training plan, please contact Jyothi Shankar at jshankar@alcatel-lucent.com

15.0 Sign Offs

Name	Role	Signature	Date	Contact
Harry Halliday				
Jyothi Shankar				

16.0 Distribution List

Name	Role	Date	Contact

END OF DOCUMENT