Training and Organization Development Design Document for:

Delivery Consulting Skills Development

Date November, 2008

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PROJECT OVERVIEW

Course or Project Overview

The Delivery Organization plays a key role in sales and implementation of client solutions. As the solutions Deluxe provides to clients continue to evolve into more and more customized offerings, the Delivery Consultants will need broader and deeper consulting skills. This training and organization development design will address the consulting-related knowledge and skill gaps of experienced Delivery team members.

This design references designs already created for training delivery team members on specific new solution products.

Training Design Overview

This document explains the design of the training, and includes the following sections:

- Project Overview
- Project Specifics
- Training Plan
- Course Map and Deliverables
- Approval and Review Checkpoints

Impact/Priority/ Key Business Initiatives

The impact of this project to the business includes:

- This development project will reduce the time required to implement solutions with clients (expedite revenue).
- The training delivered through this project will improve client satisfaction with solutions purchased (build brand).
- The training delivered through this project will enhance the Delivery Consultants' abilities to sell add-on solutions and coordinate sales leads with APOs (increase revenue).
- The training and organization development activities will improve communication between internal stakeholders (improve operating efficiencies).

Key Players

The following is a list of key players for this project:

Contact Name(s)	Role	Area(s) of Expertise	Phone Numbers
Vicki Greene	Project Sponsor	Leader in Delivery Org.	Phone numbers withheld
Vicki Greene, Jennifer Spear, Barry Larson, Beth Hunt, Alan Palazzo, Phil Moe	Key Stakeholder(s)	Leaders in Delivery Org.	
Judy Hogan	Design & Development	Training Design & Development	
Dawn Schifsky	Process Development	Sales Process	
Sue Holbert	Design & Development	Training Design & Development	
TBD	Design & Development	Training Design & Development	
Operations Planning/Phil Moe	Process Development	Lean Processes	
Gene Carlson	HR Contact	Competencies and Hiring Criteria	
SPIN Certified Sales Trainers	Delivery Trainer(s)	SPIN selling model adjusted for Delivery function	
Product Managers	Product SMEs	Selling product value	

Deluxe - Internal Use Only

PROJECT SPECIFICS

Learning Goals

The following are the high-level organization development and learning goals for this project. Specific learning objectives are called out later in this document within specific audience areas.

Process Improvements:

- Implementation processes for new solutions (Delivery and Marketing to address)
- Sales/Delivery transition process documentation and role clarification (Channel Strategy to address)

Curriculum *- Create curriculum to develop these competencies and build knowledge in these areas:*

- Key competencies:
  - Critical Thinking - Planning and Process Improvement
  - Strategic Thinking (if this, then that)
  - Influencing Others
  - Building Relationships
  - Communication – Written and Verbal
- Knowledge Areas:
  - Industry Knowledge
  - Client Business Process Knowledge
  - Product Knowledge

Project Size or Level of Effort

- All Delivery Team Members (approximately 68 people) will participate in some aspect of this training.
- Learning objectives will be focused on job performance at the Senior Delivery Consultant level.
- Multiple sites impacted as the Delivery Consultant team is a virtual team.
- Sales/Delivery transition process will require new behaviors and attitudes within APOs as well.

Timeframe and Key Delivery Dates

List known timeframe dates:

Task/Deliverable	Key Date(s)	Comments
SWOT Analysis by Delivery Management	November 2009	Designed to create common understanding of issues and common vision of future state. Information generated in this activity will form base for other activities.
Value Stream Mapping for Conversion Process (Completed by Channel Strategy)	November 2009	This analysis of the Conversion process should also supply insights into the overall Sales/Delivery handoff. May also identify elements of SPIN sales process for Delivery.
Competency Benchmarks	January 2009	Need to create a behavioral-based benchmarking tool to illustrate at, above and below the mark behaviors required for each key competency.

Considerations

The following is a list of known assumptions, considerations, etc.:

- Delivery is a virtual team with limited budget for travel.
    - Limited access to group training events.
    - Coaching is done at a distance.
- Delivery Team Members are typically long-time Deluxe employees who are accustomed to well-documented processes.
- Delivery Consultants are at varying levels of performance. It is anticipated that they will continue to perform at varying levels. Learning objectives will be focused on job performance at the Senior Delivery Consultant level.
- Managers and employees will both need/desire training and development experiences to help them transition to their new roles.
- Managers must understand their new role and accept the new behaviors they must embrace in order for Delivery to remain successful.
- Subject Matter Expert (SME) Delivery Consultant resources are limited.
- Delivery Consultants act as front-line partners with field sales to support the selling of solutions to the FI client.
- Value Stream Mapping session will provide information needed to outline Sales/Delivery handoff.
- New and existing solutions are in a constant state of flux and will remain so indefinitely.
- Existing learning materials, such as Sales Success Start curriculum, will be leveraged as much as possible.
- All Delivery employees will have access to The Learning Spot.

Audience

		SITES											
Bus. Area	**Function**	**AV**	**CS**	**VIC**		**FLAG**	**GRT**	**TF**		**GBO**	**PX**	**KC**		**Field**
Delivery	Delivery Consultants													x
	Client Relationship Leads													x
	Client Relationship Consultants													x
	Delivery Specialists													X
	IT Consultants													x
	Delivery Managers													x

Requirements

The following is a list of technical, workplace, and environmental requirements for this project (this list may change based on additional findings and needs).

Requirement	Dates Available (affect on training)	Comments
Sound card (ability to listen to recordings)		Without this ability part of the blended approach would need to be altered.
LMS Access	January 2009	Will be part of Field Sales rollout
Sales/Delivery Transition Process Outlined	January 2009	This needs to be done by Channel Strategy and Process Analysts
New Solutions Delivery Processes Outlined	Various	This needs to be done by Delivery Team, Marketing and Process Analysts

TRAINING PLAN

Training Plan Overview

This section of the plan will relate to only the training aspects of the project.

This training would provide all Delivery Team Members with the following skill and knowledge-development activities and tools.

Individual Assessment – Behavioral benchmarks to measure and communicate current and desired performance in each of the following competency areas. Have each delivery team member complete the self-assessment and review with manager.

Key competencies:

Critical Thinking - Planning and Process Improvement

Strategic Thinking (if this, then that)

Influencing Others

Building Relationships

Communication – Written and Verbal

Curriculum - Create curriculum that incorporates self-assessment, self-study, coaching, solution-specific huddle sessions and all-team development sessions to develop the competencies listed above and build knowledge in these areas:

Knowledge Areas:

Industry Knowledge

Client Business Process Knowledge

Product Knowledge

Learning Objectives

Upon completion of training activities, learners will be able to:

Senior Delivery Consultants need to be able to (from job description):

- Recommend and take action to direct the client towards solutions of complex problems.
- Direct marketing customer acquisition campaigns.
- Manage projects that are broad in nature, requiring originality and ingenuity.
- Test and implement complex products and services sold by working with FI leadership team.
- Interact and consult to inspire clients to take action.
- Develop and enhance high-quality client relationships by consistently exceeding client expectations.
- Demonstrate excellent presentation skills.

Deluxe - Internal Use Only

Course Map

The following table is a course map for this training. The course map provides details as to how the training will be delivered.

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
Behavior-Based Competency Assessment	Assessment completed by self, manager and one additional person (optional) identifying employee's current, typical performance behaviors related to key competency areas.	Assessment with tabulation pages. Possibly use Survey Monkey to complete and tabulate. Assessment should be available in PDF format so employees have it as ready reference tool.	Judy Hogan	Managers will need to be committed to development of this tool. The tool itself will provide instruction to employees about desired behaviors.
Individual Learning Activities	Self-Directed Learning Activities posted on The Learning Spot.	Industry Knowledge FS Market issues – WebEx recording with Tracy Daniels (Sales Success Start) KES – Attend regional workshops as offered Articles on industry knowledge or current issues in management (possibly something line Execubooks)	Judy Hogan	Much of this content can be leveraged from Sales Success Start
		Systems Knowledge: Systems Training currently available on Learning Portal	Judy Hogan	Most is already completed. Will need to source more advanced training for Excel and create activity to practice/test new knowledge/skill.

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
		Strategic Thinking – Self-study course or reading materials. Self-Study course on Project Management	Judy Hogan Judy Hogan to Research	ABA online Course – Creating Marketing Campaigns – is possible resource Will look for existing resources before developing.
		Communication – Written Self-study covering writing and grammar (include grammar test to focus learning as needed)	SC&T	Resources: Previously-developed Deluxe course Course being developed for UCL Books ABA Course
		Communication – Verbal Self-Directed learning giving tips on presentation skills		Resources: ABA Course Books Previously-developed Deluxe Course(s)
Solutions Training (Leveraged from New Hire Training)	See Individual Training Designs for each Solution	Prioritize solutions for training development	Delivery Managers/ Judy Hogan	Managers must be made to choose priorities and set realistic expectations.
		Review status of current training materials for each solution and document current materials/resources.	Judy Hogan Sue Holbert Marla Hostetler Kristen Barney	Will need to incorporate both formal training developed by SC&T and informal training currently provided by Delivery Team Members.

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
		Create plan for supplementing available training: Short term Long term	Delivery Managers/ Judy Hogan Sue Holbert Marla Hostetler Kristen Barney	Plan should leverage available resources for short-term use as well as outline milestones for future development. Ideally, the training would leverage product managers and experienced APOs/CLCs.
Group Learning	Team Meetings and Communities of Practice	Industry Knowledge • Monthly/Quarterly discussion groups – Top issues in FIs (leverage KQ publication and KES participation) • Speaker from Deluxe Marketing Group or FI leader (prereq is self study) • Team specialist presentations w/Q&A Client Business Process Knowledge • Innovations in FI Operating Practices Series • Invited specialists from FI clients	Outlined and agreed upon with Managers and Judy Hogan	Create topic calendar for 12 to 18 months. Assign one manager to research or find presenter for each session.

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
		• Team specialists		
	Case Study Activities	Critical Thinking/Product Knowledge • Case Study – Planning a Loyalty Campaign (prereq is self-study course) • Case Study – Dealing with the "Difficult" organization Building Relationships • Implementing an "Experience" case study	Judy Hogan and Sr Delivery Consultants	These case studies would be done quarterly or semi-annually and would involve prework, discussion sessions and post work. Will rely on Sr. Delivery Consultants to help develop and deliver the sessions. Incorporate presentation skills into case studies.
	Facilitated Virtual Classes	Influencing Others/Building Relationships • Interpersonal Style – SELF or DISC (advantage of DISC is ability to do group dynamic) - Facilitated • Relating at the C-Level – Facilitated or Discussion with Executive	Judy Hogan and Sr Delivery Consultants	SELF of DISC would need to be processed by experienced facilitator. Relating at the C-Level could feature Sr. Delivery consultants and/or an Executive. Incorporate presentation skills as appropriate.

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
		Building Relationships • Experience 101 • Creating an Experience – Group discussion		
	Short Activities at Team Meetings (i.e. Two truths and a lie)	Influencing Others/Building Relationships - Various activities similar to huddle sessions.	Judy Hogan	Create listing of activities and suggested schedule. Incorporate presentation skills.
Coaching/Mentoring	Coaching Tool	Coaching tool using behavioral benchmarks identified above.	Judy Hogan	Tool should tie to behavioral benchmarks.
Manager Training	**Individual Learning** • Managers should be active participants in each of the above learning activities. • Reading Activity – Book or series of articles on leading a consulting organization (TBD)	Manager discussions to prepare managers for training to be delivered to teams before training event and to help support manager's role in implementing new team behaviors resulting from training.	Judy Hogan Org Effectiveness Team	

Course Map	Delivery Tool/Method	Deliverable(s)	Created By (if needed)	Details and Comments
	Group Discussions: • Interpersonal Style – Individual Style • Team Culture	If possible, create a compilation of team member's style to represent "Team's Style." Discuss with manager group. Create activity where managers consider Delivery's future role and desired culture.	Judy Hogan	

Pilot or Testing Plan

This project will be piloted or tested in the following ways:

- Because this training will be offered once, there will be no piloting or testing. But, after the first one or two events, we will solicit detailed input from participants to determine needed changes.

Coaching Plan

The following are coaching recommendations for this project:

- Manager works with employee to complete the competency assessment.
- Manager and employee will work together to identify competencies to be developed and to set goals and timelines for developing these competencies.
- Managers will need to receive training on their role in this process.

Continuous Education Plan

The following are continuous education recommendations for this training:

- This plan is by its nature a continuing education plan.
- The plan should be re-visited semi-annually by Delivery managers and SC&T to plan for adjustments and additions.

Measurement and Evaluation Plan

(Calculation)

The following methods will be used to measure and evaluate the effectiveness of this training:

Level 1 – Learner and Client Reaction

An evaluation questionnaire will be used to capture the learners' reactions to the training curriculum. There will be a second survey to capture the client's, feedback. Both questionnaires will be distributed via Survey Monkey. The participants will rate such things as material content, organization of training materials, and overall learning. The questionnaire will also solicit input from learners on ways to improve the training. The Sales Competency & Training team will review the survey results and modify future training programs as needed.

Level 2 – Measurement of Learning/Knowledge Transfer

Knowledge Check exercises will be developed to assess the learning of the following topics:

- Deluxe Company Information
- FS Industry Trends and Issues
- Planning, Project Management and Strategy Skills
- Product Knowledge
- Verbal and Written Communication Skills
- Sales Skill

Level 3 – Behavioral Changes

To assess whether or not a change in behavior occurs, we will track the following:

- Improved communication between Delivery and its business partners
- Shortened project implementation times
- Other – Delivery will be creating measures and several of these should be related to this project.

Integration Needs and Plan	The training content needs to be incorporated into the following existing training: • This training should complement training provided to new Delivery employees. • This training should complement training provided to APOs.
Maintenance Needs and Plan	The materials for this training are located on The Learning Spot. The project training materials will be stored on the network on the E:\Projects\Sales Delivery-New Solutions Training\Delivery Consulting Skills Dev drive.

DESIGN PROCESS & CHECKPOINTS (CONNECTION)

	Components/Tasks	Date(s)	Responsibility (who)	Status/Comments
Assess	Conduct Needs Assessment	July – September 2008	Judy Hogan	Completed
	Review and Approve Design w/ manager	October 2008	Judy Hogan	Completed
	Review and Approve Design w/ client	Oct 24, 2008	Judy Hogan	Completed
Design	Design – Following 5 step process, collaborating w/ others (i.e. Delivery, SMEs, Manager or Peer)	By November 15, 2008	Judy Hogan	Completed
	Review and Approve Design w/ manager	November 13, 2008	Judy Hogan/Charlene Bozzi	Completed
	Review and Approve Design w/ client	November 2008	Judy Hogan/Vicki Greene/ Manager Team	Would like two mangers to serve on this team.
Develop	Develop content & materials (at 50%) Review w/ manager	January 5, 2009	Judy Hogan	Delayed due to reorganization of Client Services
	Develop content & materials (at 100%) Final review w/ manager	February 6, 2009	Judy Hogan	Delayed due to reorganization of Client Services
	Review and Approve w/ client	February 6, 2009	Judy Hogan	
Implement	Identify and Arrange Tentative Training Dates and Logistics	N/A	Delivery Trainer	
	Finalize and Confirm Training Dates logistics	N/A	Delivery Trainer	
	Delivery or implementation of training • Train the Trainer(s) • Leader Session • Post to sites or databases • Print center	February 2009	Judy Hogan Delivery Manager Team	Will need to develop as much as possible on The Learning Spot
Finalize integration into existing training as needed				
Evaluate	Implement your Measurement & Evaluation Plan	As new employees are hired	Judy Hogan/SC&T Delivery Managers	

Note: If your project includes e-learning and/or podcasting components, be sure to reference those guidelines.