Creating a Learning Technology Strategy

Presented by Dawn Hanley & Bastian Reinhart

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Powering forward. Together.
Objectives:

During this presentation, participants will learn how to:

1. Identify key components
2. Gather data from various stakeholders
3. Analyze Data and Gather More Information
4. Document recommendations for decision makers
Identify Scope of Project

As Is
• Define Current State of Learning Technology

To Be
• Define Future State of Learning Technology

The Plan
• Desired Outcome = Create Recommendations
Project Template

**Project Deliverable – (DATE HERE)**
A XXX-year learning technology strategy recommendation document delivered to (who) by (when).

**Example:**
A 3-year learning technology strategy recommendation delivered to the Learning Strategy Committee by June of 2012.

**Business Case**
Why are we doing this project? Drivers for this project include:

**Examples:**
- End-user feedback on survey for 2 years requesting just in time learning.
- 45% of our workforce eligible to retire in next 5 years (loss of tacit knowledge).
- Need to get content and information out more quickly.
Questions for Learning Professionals

This set of questions can be used for in-house and other-company learning professionals:

1. What technology do you currently use to design, develop, deliver, and measure learning in your business area?
2. Do you have learning technology SME’s in your group (i.e., super-users in tools like Captivate, Articulate, SharePoint)?
3. Do you have examples of learning assets you’ve created in these tools? If yes, would you be willing to share them?
4. Does your current learning technology meet the business needs? If not, what are the gaps you are experiencing in delivering learning?
5. What learning needs do you anticipate your audience having in the next 3-5 years?
6. What additional technology have you considered buying in the next few years to meet the business needs?

Learning Technology Inventory List

This is the list of technology related to learning.

<table>
<thead>
<tr>
<th>Current Tech</th>
<th>Future Desired Tech</th>
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Social & Mobile Strategies

List who you met with and the date as things change rapidly in this industry.

List the goals of your program:

Examples:

1. Strengthen relationships with SMUD customers, future customers, and other invested audiences by:
   a. Educating audiences about relevant energy issues and SMUD programs, making energy interesting and fun when possible
   b. Supplemening established channels for both standard and emergency communications.
2. Enhance our reputation and influence as an industry leader.

<table>
<thead>
<tr>
<th>Current Channels</th>
<th>Future Channels</th>
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EXAMPLES:

Facebook – we have 950 fans currently and publish out various content on our accomplishments, upcoming events, etc.; We do currently struggle with getting enough content to update the page frequently

Twitter – we currently post news and outages

Yammer – for internal (employee) social media; enterprise tool for making companies and organizations more productive through the exchange of short frequent answers to questions

Lithium – measures social media’s ROI
IT Strategy for Learning Asset Storage, Delivery & Tracking

- Which learning technologies (i.e. SharePoint, Captivate, LMS) do you currently support?
- Which learning technologies are on the books for purchase or development in 2012 and 2013?
- Where do you see learning technologies going in the next few years?
- What security concerns do you have regarding these technologies?

**Recommendations:** Create business rules for storing the following:

<table>
<thead>
<tr>
<th>File Type</th>
<th>Audience/ User</th>
<th>Recommended Storage Location</th>
<th>Benefits</th>
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**EXAMPLES:**
- Captivate (.cpt), Articulate, and other eLearning development files
  - Developers of eLearning content (L&D folks)
  - Recommended Storage Location: Shared drive: Training/ Business Unit Name / Course Name OR LCMS
  - Benefits: Allows us to share content and reuse objects

- Flash / dynamic content files (i.e., .swf, .fly, .htm, .psd)
  - Learners/ employees
  - Recommended Storage Location: SharePoint – need to determine location and hierarchy OR LMS?
  - Benefits: Provides central, searchable location for learners

Exception: PSO
End User Survey Data

• Which applications do you use to learn “how to” do something for work?

• What information has been difficult to find?

• How do you prefer to find “help” or “how to” information?

• What tools would you prefer to use for eLearning?
Best Practice Research

Company Name

- List who you met with and the date of the meeting.
- **What technology do you currently use to design, develop, deliver, and measure learning in your business area?**
- Do you have learning technology SME’s in your group (i.e., super-users in tools like Captivate, Articulate, SharePoint)?
- Do you have examples of learning assets you’ve created in these tools? If yes, would you be willing to share them with us?
- Does your current learning technology meet the business needs? If not, what are the gaps you are experiencing in delivering learning?
- What learning needs do you anticipate your audience having in the next 3-5 years?
- What additional technology have you considered buying in the next few years to meet the business needs?
Q2 What information has been difficult to find?

**How To**
- Detailed instructions (and up-to-date) for SAP. All functions.
- SAP How-To
- Operational tutorials - SAP (requisitions), EDM, Halogen
- Procedures & processes (company-wide, or external to my dept)
- Process & procedure (dept)
- Little used processes
- Process & procedures for training team across SMUD
- Deposit research
- Business rules
- "How to" for software (Word, Excel, PowerPoint)
- Specific VBA code for spreadsheets
- SAP training (스크린 캡츠 are outdated)

**Industry Info**
- WECC Standards
- Dunning research
- Comparative "benchmark" data for industry

**Functionality of Search**
- The way things are grouped doesn’t always make it easy to find what you need
- Too many search items are returned
- I sometimes get lost searching for certain items

**Other**
- District wide (not job specific) new info.
- Historical data prior to 2010
- Data - Plans from other parts of the enterprise
- Program specific/historical trends & data
- Customer data
- LLC/CP differences
- Useful/updated info. on SVVID components

In addition to more easily finding current, up-to-date “How To” information, employees also identified search functionality on our intranet sites as an area for improvement.

**Impact to our Learning Tech Strategy:** Updating, enhancing and organizing our existing online systems seems important to ensure that our training assets are easily found and accurate. This speaks to the need for an enterprise-wide strategy for evaluating and reviewing content (maintenance cycle) as well as ensuring the “architecture” of the systems (like SMUDINet) support the learners in easily finding their information.

**Recommendations:** Work with SharePoint support (IT / Marketing) to improve the search function, reorganize information by role, or co-create other appropriate solutions. Also, implement a company-wide process for identifying and maintaining existing
# Data Analysis

## Technical Capabilities Assessment Grid

<table>
<thead>
<tr>
<th>Capabilities</th>
<th>Score</th>
<th>Facilitated by</th>
<th>PSO</th>
<th>Grid</th>
<th>Block</th>
<th>Scar</th>
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<tr>
<td><strong>Basic AFT</strong></td>
<td>4</td>
<td>FRF A8 &amp; B8 rooms</td>
<td>4</td>
<td>FRF - PSO Training Room &amp; BOO Control Room</td>
<td>3</td>
<td>HEDGE - 3 rooms</td>
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<td><strong>In class recording ability</strong></td>
<td>4</td>
<td>Camera is available</td>
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<td>FRF A8 &amp; B8 rooms</td>
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<td>HEDGE - 3 rooms</td>
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<td><strong>Mobile Delivery</strong></td>
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From 40 to 5?
## Final Recommendations

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<tr>
<th>Task/ Project / Initiative</th>
<th>Benefits</th>
<th>Tech Assets Alignment (see Heat Map)</th>
<th>Level of Effort</th>
<th>Status</th>
<th>Approach and Implementation Plan for 2012-2013</th>
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</table>
| New LMS implemented        | Easier to find info  
Cost savings on course catalogue printing, vendor contracts, etc.  
Better and more accurate reporting (esp. mandatory training)  
Reuse of content across business units (save dev time)  
IDP alignment  
Social learning:  
Knowledge Capture  
Increased collaboration and learning  
Maximize resources  
Maximize existing tech | Scheduling/ Outlook Integration  
Content Sharing Repository or SharePoint Integration;  
Dev/ Test/ Train Environments  
L-1 Reporting thru L-4 Reporting  
Logistical Reporting  
HRIS Integration (SAP)  
Business Unit System Integration (i.e., CRM)  
Collaboration Space  
Communities of Practice  
Course or class based learning communities  
User generated content  
Social tagging and bookmarking  
Knowledge Capture | High | In Progress  
January 1, 2013 delivery date | 1. Requirements completed (biz & tech) = 90% complete  
2. Vendor Demos (for future requirements considerations) = 100% complete  
3. RFP drafted = 20% complete  
4. Test Cases for Proof of Concept Demos = 0% complete  
5. RFP reviewed/approved = 0% complete  
6. RFP posted = 0% complete  
7. Vendor Selected = 0% complete  
8. Contract Negotiated & Approved = 0% complete  
9. Product Integration with Internal Systems (SAP, EDM, other) = 0% complete  
10. New Process Flows & Data Flows documented = 0%  
11. Dawn/Sheila + Sandy  
12. Training (IT) = 0%  
13. Training Admin & Trainers = 0%  
14. Training/ Roll Ou