



# Change Management & Implementation Overview

# Overview

01

**Process Overview:** We'll look at the overall process once the request reaches Training.

02

## **Discovery, Prioritization & Training Plans**

- Discovery Call, Training Lists & 365 Project Plans
- Training Plan Review: Kirkpatrick Levels of Evaluation, Accountability & Support

03

## **Documentation & Material Development**

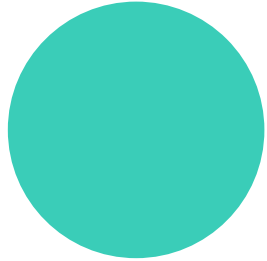
- It all starts with the SOP
- Training Updates & Consolidated Changes

04

## **Implementation, Evaluation & Post Training Updates (SOPs)**

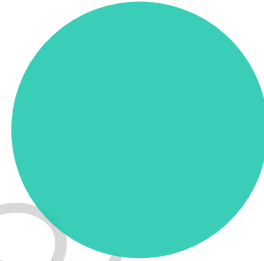
- Standard Training Implementation
- 30/60/90 Day Evaluations
- SOP & Material Updates

# Training Process Overview



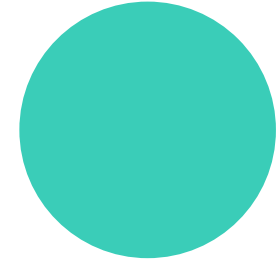
## Discovery, Prioritization & Training Plans

- Once a request is received, Training will schedule a quick call to discuss the initiative & training plan
- Meeting Minutes will be provided with Action Items
- Training Plan provided as well as access to Project Plan (if needed)



## Documentation & Material Development

- Training will create a document/SOP for each change & will require stakeholder approval (material starting point)
- PPT & E-learning built from SOP/document (if needed)



## Implementation, Evaluation & Post Training Updates (SOPs)

- Implementation of Training Plan (ILT Sessions, E-learning assignment, intranet resources, etc.)
- Meet with stakeholders to review implementation, accountability/support, schedule follow-up
- Update existing SOPs for Compliance & training material (i.e. presentations, e-learning, intranet pages, etc.)





# 1

## Discovery & Training Plans

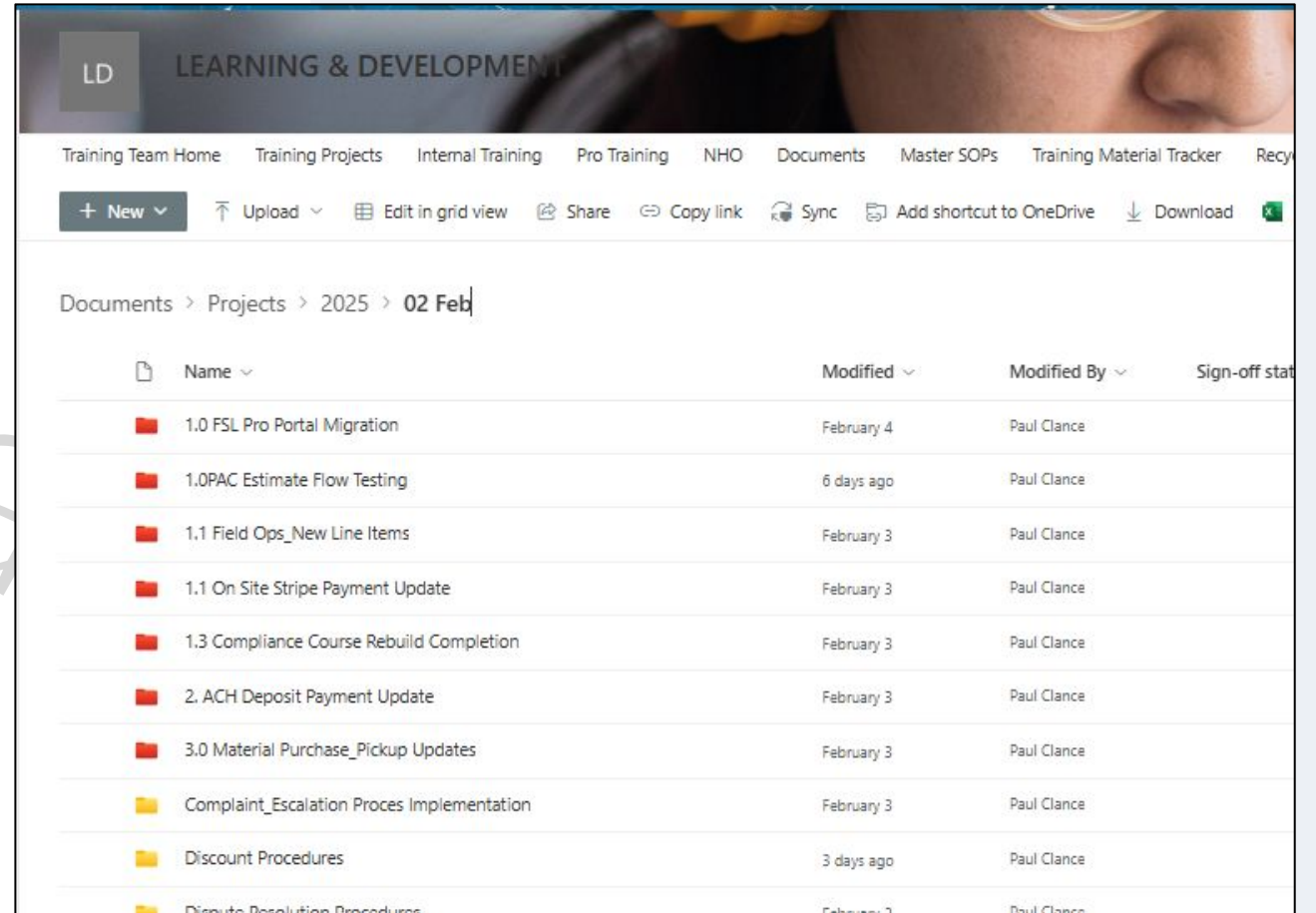
- Discovery Call, Training Lists & 365 Project Plans
- **Training Plan Review:** Kirkpatrick Levels of Evaluation, Accountability & Support

# Discovery Call

Once a request is received, Training will schedule a quick call to discuss the initiative & training plan

## Requests Notes:

- Make sure to include the change typed out
- If the change impacts other teams (i.e. Sales, Field, Product Managers, Accounting, etc.) , they'll be included in the call.
- Meeting Minutes will be provided after the call with Action Items
- Project folder created on L&D SP Site for all requests and are tracked



Name	Modified	Modified By	Sign-off status
1.0 FSL Pro Portal Migration	February 4	Paul Clance	
1.0PAC Estimate Flow Testing	6 days ago	Paul Clance	
1.1 Field Ops_New Line Items	February 3	Paul Clance	
1.1 On Site Stripe Payment Update	February 3	Paul Clance	
1.3 Compliance Course Rebuild Completion	February 3	Paul Clance	
2. ACH Deposit Payment Update	February 3	Paul Clance	
3.0 Material Purchase_Pickup Updates	February 3	Paul Clance	
Complaint_Escalation Proces Implementation	February 3	Paul Clance	
Discount Procedures	3 days ago	Paul Clance	
Dispute Resolution Procedures	February 3	Paul Clance	

# Training Motherboard List

- Training adds all requests to the **Training Motherboard 365 List**.
- BU, Priority and other details added for tracking
- “Current L&D Projects” contains all “In Progress” initiatives
- If the request requires a 365 Project, it will be created and the link will be placed here as well.

## Prioritization

- Training prioritizes and marks as either Urgent (red), Important (yellow) and Medium/Low (green)
- Training “**relentlessly triages**” all training requests to ensure proper & efficient resource/time allocation

The screenshot displays a software interface for 'The Training Motherboard 365 List'. The interface includes a header with the title and a star icon, a status filter set to 'In Progress/Develop...', and a toolbar with various filters and sorting options. The main content is a table of training requests, organized into three priority groups: Priority 1 (Urgent, red background), Priority 2 (Important, yellow background), and Priority 3 (Medium, green background). Each row contains details such as the request title, a project plan link, business unit, status, progress, priority, description, start and due dates, and assigned personnel.

Title	Project Plan Link	Busin...	Status	Progress	Priority	Description	Start dat...	Due date...	Complete...	Assigned ...
<b>Priority: 1. Urgent (9)</b>										
1.0 FSL Migration			In Progress/Dev...	In Progress	1. Urgent	This is the List for t...	2/3/2025	9/30/2025		
1.1 Field New Line Items (Permitting)	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>	F...	In Progress/Dev...	In Progress	1. Urgent	Dan needs new line...		2/14/2025		
1.1 On-site Stripe Customer Payment			In Progress/Dev...	In Progress	1. Urgent	Min wants to devel...	1/27/2025	2/14/2025		January 29
2.0 Material Purchase & Pickup Updates	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>		In Progress/Dev...	In Progress	1. Urgent	Update to how mat...	1/27/2025	2/14/2025		Paul Clance
2.1 SOP: Institutional E2E	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>	Field...	In Progress/Dev...	In Progress	1. Urgent	We need to docum...	1/15/2025	2/14/2025		
4.0 Vendor Training Program Update	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>	Pr...	In Progress/Dev...	In progress	1. Urgent	work with Tina to d...	10/4/2024	2/28/2025		Paul Clance
SOP: Estimating Team	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>	Estimating	In Progress/Dev...	In Progress	1. Urgent	Provided the latest ...	1/24/2025	2/7/2025		
SOP: Pro Dev and Pro Guide		Pr...	In Progress/Dev...	In Progress	1. Urgent	To track the approv...		2/14/2025		
SOP: Retail PC	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>		In Progress/Dev...	In Progress	1. Urgent	To track the approv...		2/14/2025		
<b>Priority: 2. Important (2)</b>										
LMS Compliance Push	<a href="https://project.microsoft.co...">https://project.microsoft.co...</a>	Enterprise	In Progress/Dev...	In Progress	2. Important		10/7/2024	2/28/2025		Paul Clance
SOP & Change Management Program		Enterprise	In Progress/Dev...	In Progress	2. Important		1/14/2025	2/28/2025		Paul Clance
<b>Priority: 3. Medium (2)</b>										
2025' General NHO LMS Course Rebuild		Enterprise	In Progress/Dev...	Not Started	3. Medium	Need to rebuild the...	1/13/2025	2/28/2025		
Add HomeBase, Pro Portal & Reno/Walk Trainin...		Enterprise	In Progress/Dev...		3. Medium	Eriko shared the vid...		3/28/2025		



# Training Plans

Training Plans based on Kirkpatrick 4 Levels of Evaluation.  
(Kirkpatrick's Four Levels of Training Evaluation)

We invert the Levels and begin with Results to create Training Plans.

- **Results:** We define the intended Results, including accountability & support packages.
- **Behavior (applied learning):** Critical behaviors that must be consistently performed will be measured. Reporting defined by accountability package.
- **Learning:** Evaluated with LMS course assessments and BU follow-ups.
- **Reaction:** Evaluated by feedback forms and on-call feedback.

Training Plans also include Learning Events (i.e. ILT sessions, Material Update Needs, etc.)

## 4

### Results

The degree to which targeted outcomes occur as a result of the training & the support and accountability package.

## 3

### Behavior

The degree to which participants apply what they learned during training when they are back on the job.

## 2

### Learning

The degree to which participants acquire the intended knowledge, skills, attitude, confidence and commitment based on their participation in Training.

## 1

### Reaction

The degree to which participants find the training favorable, engaging and relevant to their jobs.

# 365 Project Plans

- Most requests will have a Microsoft Project created to track the various tasks for implementation & evaluation.
- Results/Goals from Training Plan are added to Project Goals.
- All project tasks are managed from 365 Project plan.

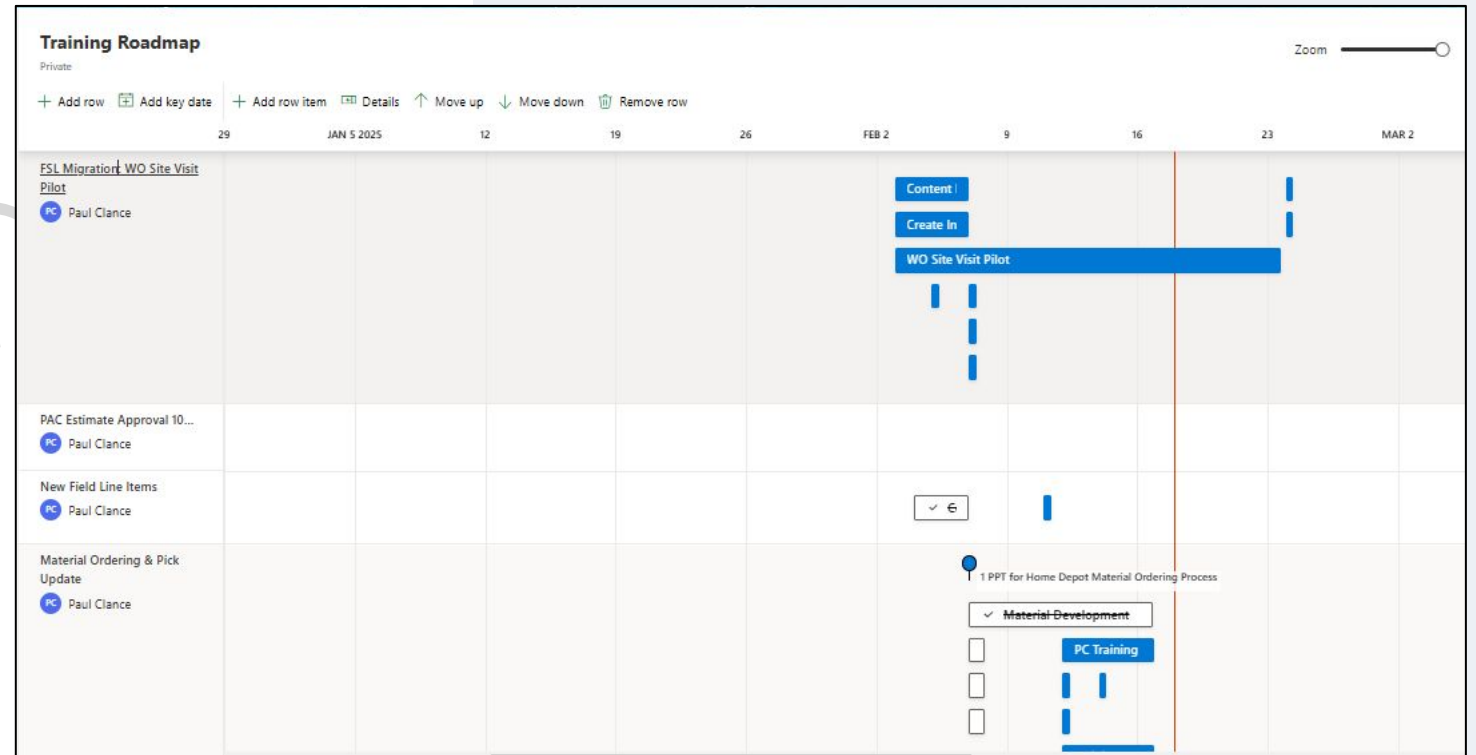
Task Name	Start	Finish	% complete	Effort
Add PPT & E-learning course registration link	1/28/2025	1/28/2025	100%	0.5 hours
PC SOP Update (Closeout)	1/28/2025	1/28/2025	100%	1 hour
Field Training	1/28/2025	2/7/2025	67%	0.5 hour
Field ILT Session 1	1/30/2025	1/30/2025	100%	0.5 hours
Assign Closeout E-Learning Course	1/28/2025	1/28/2025	100%	
Field SOP Updates (Closeout)	2/7/2025	2/7/2025	0%	
Pro Training/Comms	2/4/2025	2/14/2025	50%	
Comm to Pro Network about approval process updates	2/4/2025	2/4/2025	100%	
Pro Network Guide Updates & Republish	2/14/2025	2/14/2025	0%	
2-Week Follow-up	2/7/2025	2/14/2025	50%	
Review process feedback with stakeholders				
Identify any pain points or confusion				
30-day Follow-up				
30-day Follow-up Call				
Customer signature obtained (or not)				
The Field Team obtains customer signature				
The Pros will understand the payment				

Goal	Status	Options
Visible decrease in Pro payment request prior to customer approval.	Not started	End date, Connect tasks
PCs will submit a mechanical lien if the customer 100% if the customer refuses to sign the letter.	Not started	End date, Connect tasks
The Field Team obtains customer signature (or noted) for over \$5,000 for 90% of the time it is sent	Not started	End date, Connect tasks
Customer signature obtained (or noted) for 90% of all payments have signature obtained.	Not started	End date, Connect tasks



# Training Roadmap

- All Training Project Plans are added to the Training Roadmap.
- Added in two-week to monthly sprints
- Updated weekly on Fridays for planning



# 2

# Documentation & Material Development

- It all starts with the SOP
- Training Updates & Consolidated Changes



# It all starts with the SOP

## One

### Type out the Process or Change

Creates a document for all stakeholders to review & finalize. Framework for all other material.

## Two

### Stakeholder Approval

- Impacted BU Heads will approve SOP.
- All other material developed based on approved SOP (*no approvals required*)

## Three

### Scale Up

Based on approved document, can create PPT, videos, e-learning, quick reference guides, etc. based on training need.

## Four

### Add to Existing SOPs

Formatted process can be added to impacted SOPs or be stand-alone & placed on review cycle.

# Bi-Weekly/Monthly Training Updates

## Internal BU Communication

- .pdf with consolidated smaller changes/updates that impact the BU
- One for each BU (Field & PC & Sales) & is reviewed on BU team calls bi-weekly/monthly.
- Formatted to SOPs to easily update existing material.
- Includes process updates, reminders, and BU specific training needs.

## Training Update LMS Assignment

- A short LMS assignment that reviews the .pdf material and includes an assessment and/or acknowledgment
- Multimodal courses allow for additional & effective training in addition to ILT (blended)
- Acknowledgment for performance issues

## Minimum Training Plan

- At minimum, most changes require an SOP update and no training.
- If acknowledgment is required, it's best to add to a Training Update.
- Anything more than a Training update will have it's own material development plan.





# 3 Implementation, Evaluation & Post Training Updates (SOPs)

- Standard Training Implementation
- 30/60/90 Day Evaluations
- SOP & Material Updates



# Standard Training Implementation

01

**Webinars:** Normally 2 sessions for Field Teams & 1 for others. Attendance tracked & provided to stakeholders.

02

**LMS Course:** LMS courses assigned to complete that reviews the ILT info and an assessment to evaluate learning. Completion Report sent week after assignment.

03

**Material & Intranet Updates:** that Training material placed on team intranet sites for employee access & review. Available for BU heads to retrain teams.

04

**SOP & Material Updates:** Update existing SOPs & Material. Update any New Hire orientation material.

# Training Evaluations

1

## Initial Evaluation (1-2 Week of Implementation)

Review initial training (attendance, completions, questions, etc.), accountability & support from Training Plan & schedule 30-day follow-up.

2

## 30-Day Follow-up

Review data for success and determine if process changes or retraining required. Schedule 60- day follow-up (if needed)

3

## 60 & 90 Day Follow-up

Review data for success 60 day and determine if process changes or retraining required. Schedule 90- day follow-up (if needed)

# SOP & Material Updates

Update any  
published SOPs

- Update impacted Team SOPs using Training Update or draft document
- Update master SOPs on SOP SP Site
- New SOPs added to SOP SP Site and quarterly review date added and published to team SP site

Update existing  
Training Material

- Update master training material
- Place new material on Material Tracker



**Questions? Feedback?**