CRM 3.3
September 2007 Release

Training Plan

Date: 8/15/2007

Building a Better Connection!

Document Control

Change Record

Date	Author	Version	Change Reference
8-15-2007	Adriano Pianesi	1.0	3.3 CRM Training Plan

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1.0 INTRODUCTION

1.1 DOCUMENT DESCRIPTION

This document describes the CRM Training Plan for Release 3.3 of the PBGC CRM Rollout Project and includes: information on system training at PBGC, the goals of the CRM Training Plan, the strategy to accomplish these goals, the most appropriate approaches and content to train the target user groups and the scope of activities planned to ensure a successful user experience.

Evidence collected from various sources after the execution of the CRM 3.2 Training Plan indicated that the CRM training strategy reached its objectives. This plan will build on that successful experience by maintaining our customer-focus and collaboration with the PBGC user communities.

1.2 CRM AT PBGC

The CRM application replaced PBGC's 12 year old legacy application - Customer Communication Network (CCN), a legacy system the agency has been using for 13 years to manage participant records and communications. The CRM application software, featuring powerful Oracle technology, rolled out successfully to 25 different PBGC departments as part of a 2-year project implementation with the goals of increasing call resolution, and overall customer satisfaction.

In June 2003 CRM Release 1.4 was originally deployed to two field benefits Administration offices (FBA) handling the LTV and National Steel plans only. In Oct 2004 190 users started using CRM 1.4 including the Call Center, Trustee Processing Divisions (TPD) 2 and 5, and the Coraopolis FBA office. Based on the learning generated by those two successful rollouts a new version of CRM Release 2.0 was implemented in February 2005 to all TPDs and to 3 FBA plans. The CRM users group reached a total of 395 users.

By July/August 2005 CRM 2.0 was implemented for all PBGC user groups: 721 users in all TPD offices, FBA offices, Retiree Service Division (RSD), Management Control Unit (MCU), Appeals (PEAD) and PRO. The rollout of CRM Release 2.0 included the conversion of all remaining plans into CRM, the addition of non-pilot users, and the start of the phased decommissioning of CCN.

The CRM Release 3.0 took place in July 2006 as a component - together with IPS, Artis and MYPBA - of the agency-wide Unified Desktop initiative. With CRM 3.0 the DMC group was added to the number of users of CRM.

Two new upgrades took place in January 2007 with CRM 3.1 and another one in July 2007 with the release of CRM 3.2 to all CRM users groups

Under the current project schedule the CRM 3.3 application will rollout in September 2007. While system issues remain the primary focus, the CRM team is aware that even the best "system solution" will not be successful unless PBGC users have the necessary skills.

1.3 CRM TRAINING at PBGC

The customer focus was a key element of the CRM team work within PBGC.
An important element of customer focus in systems rollout is the quality of support/training services provided to the user community. As such for CRM 3.2 the CRM team has:

- Created 534 pages of documentation to document all system procedures;
- Trained 427 people who attended CRM sessions from all users groups;
- Held 2 two-day workshops for SSC in Quincy, MA;
- Held 27 Web Conferencing sessions using Webex;
- Held 12 Demos and Q&A classroom sessions for HQ staff
- Given a total of 91 hours of classroom instruction;
- Tested all trainees on their knowledge of the application with 82% correct as the impressive average across all classes.

Notably, the class with our new group of user - State Street Corporation – for our two 2-day "Introduction to CRM 3.2" workshop - based on SSC job-relevant tasks/documented procedures - have received very good evaluations and feedback. The same applies for our Demo and Clinic sessions as well as for our Webex sessions.

1.4 CRM TRAINING BEST PRACTICES

The training for CRM 3.3 will continue using the established process during the successful implementation of previous CRM Training Plans. The following best practices include:

- BUDGETING FOR TRAINING AND SUPPORT: The project will continue to provide professional training services based on modern learning theories, investing time and resources in the maintenance/building of CRM skills in the PBGC user community;

- “BLENDED” APPROACH TO SYSTEM TRAINING: using a variety of formats (print, classroom sessions, on-line tutorials and Web conferencing) that blends media for optimal learning results.

- NEEDS ANALYSIS: The team will continue to work closely with the business community to define the business context of the systems through the scheduling of Needs Analysis Meetings in preparation for CRM training interventions to collect needs based on real-work;

- USER INVOLVEMENT: The users’ community will continue to have an active role through the users’ cross-functional teams during the Design, Testing and Support phase;

1.5 DOCUMENT RELEVANT INITIATIVES AND STANDARDS

The CRM Training Plan supports critical training standards as well as corporate objectives, described in the following paragraphs:

PBGC Systems Life Cycle Methodology (SLCM). The document follows the standards set in the IT Systems Life Cycle Methodology (SLCM) Template. The template "training design guidelines" of the system life cycle methodology at PBGC is modeled after a CRM Training design artifact and make extensive use of the best practices of system training of the CRM Team.

Instructional System Design Methodology (ISD). This training plan is designed according to the Instructional System Design approach that defines processes and tasks to be followed to ensure the most effective delivery of instruction in the workplace.

Performance Improvement (PI) framework as defined by the International Society of Performance Improvement (ISPI): This plan is inspired by the methodology of Performance Improvement which considers skills & knowledge key performance drivers along with job expectations, organizational support, performance feedback, environment and tools, motivation and incentives.

Appreciative Inquiry (AI) Methodology. Many of the underlying assumptions of our training are based on the concepts of the Appreciative Inquiry methodology, an organizational development philosophy whose starting assumption is that groups in organizations evolve towards those areas they ask questions about.

2.0 CRM USER GROUPS

2.1 CRM USER GROUPS

The total number of current users for CRM 3.3 as of August 2nd, 2007 is estimated at **800**. No new users are anticipated for this release. The following is a breakdown of the offices of CRM present users:

- FBA office of Atlanta, GA;
- FBA office of Cedar Falls, IA;
- FBA office of Coraopolis, PA;
- FBA office of Miami, FL;
- FBA office of Milwaukee, WI;
- FBA office of Pueblo, CO;
- FBA office of Richmond Heights, OH;
- FBA office of Sarasota, FL;
- FBA office of Wilmington, DE;
- FBA office of Wheeling, WV;
- Retiree Services Division (RSD) in Washington, DC;
- TPD1office in Washington, DC;
- TPD2 office in Washington, DC;
- TPD3 office in Washington, DC;
- TPD4 office in Washington, DC;
- TPD5 office in Washington, DC;
- TPD6 office in Washington, DC;
- TPD7 office in Washington, DC;
- TPD8 office in Washington, DC;
- Customer Contact Center in Kingstowne, VA;
- Document Management Center (DMC) in Kingstowne, VA;
- Management Coordination Unit (MCU) in Washington, DC;
- Participant & Employer Appeals Department (PEAD) in Washington, DC;
- Strategic Planning Evaluation Division (SPED) in Washington, DC;
- Participant Resolution Office (PRO) office in Washington, DC;
- State Street Corporation (SSC) in Quincy, MA.

.

Table 1 - Breakdown of CRM Users

User Groups	CRM 3.2	CRM 3.3
Field Benefit Administration offices (FBA)	399	399
Retiree Service Division (RSD)	94	94
Trustee Processing Division (TPD)	115	115
Call Center	81	81
Other (MCU, PEAD, PRO, SPED)	46	46
DMC	25	25
Help Desk + LAN Administrators*	28	28
STATE STREET CORPORATION	10	10
* Help Desk staff + LAN Administrators were given an overview in previous CRM Training plans	800	800

2.2 CRM USER GROUPS NEEDS ANALYSIS

While it is clear that all PBGC end users want to be trained in CRM to perform their job functions, what is less evident – and critical for the success of this plan – is:

- Which parts of the system are most relevant to each user group;
- Which procedures are the most important for each user group;
- Which business procedures will be impacted by the new system.

The CRM Team will train only on the system procedures most relevant to each user group. The following is a list of the key six user groups segmented based on different use of the system:

1. FBA (399);
2. Call Center (81);
3. DMC, SSC (35);
4. *TPD (115);* MCU, PEAD, PRO, SPED (46);
5. RSD (94); State Street Corporation (10);
6. Help Desk, LAN Administrators (28).

In order to perform a correct matching of the system procedures for each PBGC user group needs analysis were performed. The specific needs and goals of each user group has influenced the development of learning objectives and the development of learning tasks to be used during the training initiative.

For CRM 3.3, this will be obtained with phone calls to a sample of the user groups.
The purpose of these conversations is to verify that PBGC staff before the actual training sessions:

- Are clear about their training goals*;
- Share project information about CRM 3.3.

The information collected in these sessions is normally turned into a Learning Objectives document to be approved by BAPD Management before the sessions.

- According to the Instructional System Design (ISD) "...goal analysis will turn abstract statements into concrete tasks that can be taught." (ASTD 1985)

Table 2 – Sample of CRM 3.3 user groups and their training needs.

User groups	Focus when using CRM	A new CRM user must learn… (sample procedures)
FBA (399 people in 10 FBA offices)	• **Understanding of every piece of information captured in the system;** • **Implications of each system information change;** • **CRM interaction with other PBGC applications;**	• **Overall System navigation;** • **Detailed understanding of main CRM procedures;** • **CRM Reports;** • **Managing IPS and MyPBA SR in CRM.**
Call Center (81 people)	• **Use the system with great speed and accuracy;** • **Need to reach CRM mastery.**	• **Contact Center** • **Changing payment addresses** • **Find overall Participant information**
RSD (94 people)	• **Understanding of non-ordinary customer processes (Missing P, Non-STCD plans, etc…)** • **CRM interaction with other PBGC applications;**	• **Changing payment addresses** • **Find overall Participant information** • **Detailed understanding of Change addresses CRM procedures;**
HELP DESK (18 people)	• **Basic Understanding of CRM for resolution of help desk tickets**	• **Overall System navigation;** • **The universal work queue;** • **General understanding of main CRM procedures;**
DMC (25 people) State Street bank (10 people)	• **Understanding of SR generation from IPS** • **Closing SR or transferring to FBA.**	• **Overall System navigation;** • **The universal work queue;** • **Detailed understanding of Change addresses CRM procedures;** • **New CRM Reports;** • **Managing IPS and MyPBA SR in CRM.**

3.0 SCOPE OF CRM TRAINING

3.1 SCOPE OF CRM 3.3 TRAINING

The CRM Training Plan identifies the following training tasks for CRM 3.3:

- **Training planning;**
- **Training materials development;**
- **Classroom sessions delivery;**
- **Online tutorials development/delivery;**
- **Webex sessions delivery;**
- **Evaluation/lessons learned.**

The total number of people who we will have to train for CRM 3.3: **800**.

	FY07 3rd Quarter	Training tasks
CRM 3.3	All FBAs, all TPDs, Call Center, RSD, PEAD, MCU, DMC, PRO, SPED, Help Desk State Street Corporation.	• **Training Planning;** • **Training Materials Development;** • **Classroom Sessions Delivery;** • **Online Tutorials Development/Delivery;** • **Webex Sessions Delivery;** • **Evaluation/Lessons Learned.**

Table 3 - CRM 3.3 training schedule dependencies.

DEPENDENCIES	MITIGATION STRATEGY
TRAINING MATERIALS DEVELOPMENT cannot start without CRM 3.3 design completed;	**Creation of templates based on CRM 3.2 materials**
TRAINING MATERIALS DEVELOPMENT cannot finish if CRM 3.3 design is not finished;	**Creation of templates based on CRM 3.2 materials**
ONLINE TUTORIALS DEVELOPMENT/DELIVERY; cannot start if CRM 3.3 Testing environment is not finished;	**Use of CRM 3.3 Development Environment**
CRM 3.3 WEBEX CLASSES cannot start if CRM 3.3 Training environment is not finished;	**Use of CRM 3.3 Development Environment**

Table 4 - CRM 3.3 training schedule.

• Training Planning;	Aug. 6 – Aug. 10
• Training Materials Development;	Aug. 13 – Aug. 24
• Online Tutorials Development/Delivery;	Sept. 10 – Sept. 14
• Classroom Sessions Delivery;	Sept. 12 – Sept. 13
• Webex Sessions Delivery;	Sept. 17 – Sept. 21
• Evaluation/Lessons Learned.	Sept. 25

4.0 CRM TRAINING DELIVERABLES

4.1 CRM TRAINING EVENTS/TRAINING MATERIALS

The CRM Training Plan "hard" deliverables are:

- **Training Events;**
  - Clinics (question-based, team sessions);
  - Webex sessions;
  - One-on-One sessions.

- **Training Materials/User Documentation**
  - Job Aids (printed, laminated);
  - Release Notes;
  - Training tutorials (on-line).

4.2 CRM TRAINING EVENTS

This plan assumes that the current CRM 3.2 skills can be improved with a targeted training intervention and that the new CRM 3.3 application can be learned:

- In not less than 2 hours;
- Within maximum 20 days of the system "going live" date;
- Making use of hands-on practice; group learning activities and Q&A;

4.2.1 Classroom Training (HQ and Kingstowne)

These eight sessions will be conducted at the Training Institute:

- Making use of Labs to provide hands-on practice;
- Making reference to CRM Users documentation;
- Preferably, not going over the optimal number of 15 participants per class;

The following is a suggested schedule of the classroom training sessions.

Total: 350 Time: starting on September 12th

SCHEDULE for 8 sessions

- September 12th
  9:00 -10:00 AM, 10:15 – 11:15 AM, 11:30 -12:30 PM, 1:30 -2:30 PM,
- September 13th
  9:00 -10:00 AM, 10:15 – 11:15 AM, 11:30 -12:30 PM, 1:30 -2:30 PM,

4.2.2 Webex User Training (Web conferencing sessions)

These fifteen sessions will be conducted using Webex with all FBA sites and other remote offices (SSC):

- Making use of Labs to provide hands-on practice;

- Making reference to CRM Users documentation;
- Preferably, not going over the optimal number of 25 participants per class;

The following is a suggested schedule of the user training sessions.

Total: 450 Time: starting on September 17

SCHEDULE for 15 sessions

- September 17th at 9:00 -10:00 AM, 11:00 -12:00 PM, 1:30 -2:30 PM,
- September 18th at 9:00 -10:00 AM, 11:00 -12:00 PM, 1:30 -2:30 PM
- September 20th at 9:00 -10:00 AM, 11:00 -12:00 PM, 1:30 -2:30 PM
- September 21st at 9:00 -10:00 AM, 11:00 -12:00 PM, 1:30 -2:30 PM
- September 22nd at 9:00 -10:00 AM, 11:00 -12:00 PM, 1:30 -2:30 PM

Table 5 – Schedule of training sessions for CRM 3.3

CRM 3.3 Scheduled Rollout Date

Training Tasks	Aug 2007				Sept 2007				Oct 2007			
Delivery of CRM 3.3 Webex Sessions												
FBA												
State Street Corporation												
Delivery of CRM 3.3 Classroom Sessions												
TPD, MCU												
Call Center												
DMC												
RSD												
PEAD, PRO, PCCG												

4.2.3 One-on-One

Reserved for the DC offices and the Call Center, the CRM Trainer will be available for one-on-one sessions subject to scheduling. On an "as needed" basis, sessions will take place one day of the week in a set time frame. To schedule a session users will call x5369.

These sessions will be held at the end-user's desk and will require no room set-up.

4.3 CRM TRAINING MATERIALS / USER DOCUMENTATION

The following is a list of training materials/user documentation artifacts to be produced for the deployment of CRM 3.3 training:

4.3.1 What has changed? CRM 3.3 Release Notes

The CRM 3.3 Release notes will describe the changes to the system and will be distributed through our CRM website.
Production schedule for the CRM 3.3 Release Notes: August 17th, 2007.

4.3.2 Quick info! CRM 3.3 Job Aids

Job aids (cheat sheets) are laminated pages with key information about a set of procedures, covering:

- CRM 3.3 What Changes;
- CRM 3.3 Locator and Death Match
- CRM 3.3 New Reports

The downloadable Job Aids will be available through our PBGC Intranet site.
Production schedule for the CRM 3.3 Job Aids: August 24th, 2007.

4.3.3 Movies of new procedures on-line: CRM 3.3 on-line tutorials

To complement our classroom user training and to start establishing a library of multimedia for CRM accessible by users after rollout, we will be authoring on-line training tutorials on 20 key systems procedures. These Flash files will be authored using MACROMEDIA CAPTIVATE multimedia software and will be made available on our INTRANET website.

Production schedule for the CRM 3.3 Training Tutorials: the downloadable training tutorials will be available through our PBGC Intranet site by September 12th, 2007.

Table 6 –Overview of training events of CRM 3.3 Training Plan

Training Events	Scheduled on…	CONTENT
CRM TEAM Clinics	**8 sessions - 4*60 min-session per day** • To start on September 12th • To end on September 13th	• Overview of **CRM 3.3;** • Q&A on **CRM 3.3** Address Tab • **CRM** Procedures (based on questions);
CRM TEAM Webex Training	**15 sessions – 3*60 min-session per day** • To start on September 17th • To end on September 21st	• Overview of **CRM 3.3;** • Q&A on **CRM 3.3** Address Tab • **CRM** Procedures (based on questions);

Table 7 – Overview of training materials/User Documentation of CRM 3.3

Training Materials / User Documentation	Done By
CRM 3.3 Release Notes	**August 17th, 2007**
CRM 3.3 Job Aid (based on Needs Analysis)	**August 23rd, 2007**
CRM 3.3 Training On-line tutorials (procedure-based)	**September 12th, 2007**

5.0 CRM TRAINING PLAN

The following details a proposed schedule for the CRM 3.3 training (days are working days).

5.1 TRAINING PLANNING

Task: the **training planning task (5 days)** includes all preliminary work in preparation of the training.

Deliverables: a Training Plan document with the definition of a detailed training strategy.

Currently scheduled for: August 2007.

Status: Completed.

Dependencies: CRM 3.3 Design Document.

Risk Mitigation Strategy: Not available.

5.2 TRAINING MATERIALS DEVELOPMENT

Task: The **training materials development task (10 days)** is the core of the training initiative. The constraint to this task is the availability of a “good enough” version of the system close to the final version that will go in production. This task often continues after its completion date with various iterations until the delivery phase sets in.

Deliverables: CRM 3.3 Job Aid and **CRM 3.3 Release Notes**

Currently scheduled for: Aug 2007

Status: Started.

Dependencies: Availability of CRM 3.3 environment

Risk Mitigation Strategy: Partial development of materials based on 3.2CRM release.

5.3 CLASSROOM SESSIONS DELIVERY

Task: In the **Classroom sessions delivery (2 days)** we provide classroom sessions to HQ CRM users.

Deliverables: Delivery of CRM user classes for people at PBGC HQ.

Currently scheduled for: September 12-13, 2007.

Status: Not started.

Dependencies: Scheduled completion of overall project tasks.

5.4 ON-LINE TUTORIALS DEVELOPMENT/DELIVERY (COMPUTER-BASED TRAINING)

Task: the **on-line tutorials development task (5 days)** is an important addition to our CRM 3.3 training initiative.

Deliverables: CRM 3.3 Online Tutorials.

Currently scheduled for: to be available from Sept. 12, 2007.

Status: Not started.

Dependencies: Availability of CRM 3.3.

Risk Mitigation Strategy: Scheduled completion of overall project tasks.

5.5 WEBEX SESSIONS DELIVERY

Task description: In the **delivery of WEBEX sessions (5 days)** the training events are held.

Deliverables: filled out evaluation forms, test results and exercises executed by the trainees during the sessions. Often this material is compiled in a final class report.

Currently scheduled for: from Sept 17 to Sept. 21.

Status: Not started.
Dependencies: Scheduled completion of overall project tasks.

5.6 EVALUATION/LESSONS LEARNED

Task: the **CRM training lessons learned task (5 days)** uses past experience to define a set of lessons learned for future rollout.

Currently scheduled for: Sept 24th 2007.
Dependencies: Scheduled completion of overall project tasks.

6.0 CRM TRAINING STRATEGY

6.1 PBGC GUIDELINES FOR CRM TRAINING STRATEGY

PBGC has significant experience with systems training. The PBGC community at large has a clear idea of what a successful training initiative should be. According to the information collected from different sources*, PBGC users:

- Value professional training approach to systems
- Consider good training as a critical success factor in system implementations;
- Want to be trained close to the rollout date;
- Desire on-site support during rollouts;
- Ask for training materials that can be used as system documentation;
- Enjoy interactive, team-based learning activities and Q&A sessions.

Based on this input, the following are the PBGC guidelines for CRM Training:

- Address the business processes of each office;
- Pay close attention to rollout timing;
- Provide multiple learning options to appeal to all learning styles;
- Produce good documentation;
- Be support-oriented.

6.2 CRM TRAINING APPROACH

The CRM training approach will be:

- Functional training;
- Modular instructional design;
- Multiple training materials based on real needs.

6.2.1 JOB-BASED (FUNCTIONAL APPROACH)

To maximize learning effectiveness, the CRM approach is job-based, functional training vs. generic training. Sessions' training content is defined <u>not</u> to generically teach CRM users but to allow end users to perform their job with the system.

6.2.2 MODULAR INSTRUCTIONAL DESIGN

The CRM instructional design will manage system complexity:

- "Chunking" the content to make it more digestible to different audiences;
- Adding hands-on practice;
- Reviewing what was learned and putting it all together.

* Sources for this information are: first-hand experience from CRM training sessions and on-site visits; meetings with the Call Center staff; comments from previous sessions; feedback from BAPD conferences; informal input from the PBGC training department.

6.3 CRM TRAINING MEDIA

Training for this initiative will be accomplished using classroom delivery, internet delivery and printed delivery. Best practices suggest that a variety of media delivery combined with repetition dramatically increases the probability of target group retention and application of learned skills.

Here are a few examples of content (i.e., the procedure to enter a service request) delivered in a variety of formats:

- **Job aid** (procedure printed on a plastic one-page job aid) i.e. printed document;
- **Webex Session**
- **On-line tutorial** (flash movie downloadable from web site) i.e. movie to see the procedure

6.4 CRM TRAINING CONTENT

The following is an outline of content of a 60-minute CRM 3.3 Training Session:

1. Intro to CRM 3.2;
2. CRM 3.2: Locator and Death match;
3. CRM New Reports;
4. CRM Email Center Q&A.

After assessing the needs and expectations of managers and participants of CRM 3.3 training, the training content will be selected focusing on procedures taken from a sample list similar to the one that follows.

Table 8 –Sample Partial List of CRM Procedures (New list not available at the time of the draft of this document)

NAVIGATOR FORM

1. ☐ How to visualize all options in the navigator
2. ☐ How to add items to a top ten list
3. ☐ How to open a contact center form
4. ☐ How to print the form you are in
5. ☐ How to switch responsibilities
6. ☐ How to exit the application
7. ☐ How to change your password

CUSTOMER SEARCH FORM

8. ☐ How to do a Basic Customer Search
9. ☐ How to do an Advanced Customer Search

CONTACT CENTER FORM

10. ☐ How to find a Participant by Name
11. ☐ How to find a Participant by SSN
12. ☐ How to clear a Participant information
13. ☐ How to find the Plan of a Participant
14. ☐ How to find Caller Information
15. ☐ How to create Caller Information
16. ☐ How to clear Caller Information

17. ☐ How to navigate/view details to a open/pending service request
18. ☐ How to navigate/view details to a Closed service request
19. ☐ How to navigate/view details to an E-Mail open/pending service request
20. ☐ How to navigate/view details to an E-Mail closed service request
21. ☐ How to navigate/view details to Team information
22. ☐ How to navigate/view details to Customer roles
23. ☐ How to navigate/view details to Appeal Information
24. ☐ How to navigate/view details to Appeal Referral
25. ☐ How to navigate/view details to Check History Information
26. ☐ How to find an address for a Participant/Caller
27. ☐ How to view addresses for a Participant/Caller
28. ☐ How to enter a new address for a Participant/Caller
29. ☐ How to edit an address for a Participant/Caller
30. ☐ How to delete (make inactive) an address for a Participant/Caller
31. ☐ How to visualize all inactive address on file

32. ☐ How to find a phone number/e-mail of a Participant
33. ☐ How to find a phone number/e-mail for a Caller
34. ☐ How to enter a new a phone number/e-mail for a Participant/Caller
35. ☐ How to make a phone number/e-mail the Primary Contact Point
36. ☐ How to edit a phone number/e-mail the Primary Contact Point
37. ☐ How to delete a Primary Contact phone number/e-mail
38. ☐ How to view interactions
39. ☐ How to view all interactions
40. ☐ How to wrap up a call (create an interaction)

41. ☐ How to view a service request info in the Contact Center Form
42. ☐ How to open a Service Request Form from the Contact Center Form
43. ☐ How to enter/submit a new service request from the Contact Center Form
44. ☐ How to edit a service request in the Contact Center Form

45. ☐ How to find a note in the Contact Center Form
46. ☐ How to edit a note in the Contact Center Form
47. ☐ How to add a note to the Contact Center Form
48. ☐ How to delete a note from the Contact Center Form

49. ☐ How to access the e-mail center

UNIVERSAL WORK QUEUE

50. ☐ How to use the Universal Work Queue
51. ☐ How to change view of the Universal Work Queue
52. ☐ How to resize the columns of the Universal Work Queue
53. ☐ How to move the columns of the Universal Work Queue
54. ☐ How to delete the columns of the Universal Work Queue
55. ☐ How to output a Universal Work Queue in Excel
56. ☐ How to save the customization of a Universal Work Queue

SERVICE REQUEST FORM

57. ☐ How to find a Service Request with the Navigator
58. ☐ How to find a Service Request by SSN
59. ☐ How to find a Service Request by SR#
60. ☐ How to enter a note to a Service Request
61. ☐ How to change the status of a Service Request to Pending
62. ☐ How to reassign a Service Request to another owner
63. ☐ How to link a service request to another

SUBMIT REQUEST FORM

64. ☐ How to view all past completed requests
65. ☐ How to find all Requests (report) in progress
66. ☐ How to find one Request (report) submitted
67. ☐ How to submit a new Request (report)
68. ☐ How to find a Request (report) already submitted
69. ☐ How to check the status of a Request (report) submitted
70. ☐ How to schedule to submit new Request (report) automatically
71. ☐ How to send a new Request output automatically
72. ☐ How to output a report in Excel

7.0 CRM TRAINING RESOURCES

Commitment of PBGC resources in the training effort is essential to achieve the knowledge and skills transfer required to meet the agency's CRM training goals. Their process expertise and job knowledge will ground CRM training in the context of current organizational processes.

7.1 CRM TEAM LEADS

The team leads group is made up of all CRM project Leads:

- Judy Mason, PBGC;
- Iris Smith, PBGC;
- Greg Swirdowich and Maya Rao.

The objective of the CRM trainer is to implement the CRM training strategy defined in this plan.

The tasks for the CRM Trainer will be to:

- Analyze the needs of CRM end users to ensure job-relevancy of training design;
- Design and develop training modules and materials;
- Deliver train-the-trainer sessions;
- Support users on-site;
- Report progress and issues to the CRM Team;
- Write training help files, user manuals, product guides as user documentation;
- Request resources from the management team, as required.

7.2 PBGC TRAINING INSTITUTE (DC)

The team is made up of the staff at the PBGC Training Institute. The objective of this team is to:

- Communicating PBGC "training" culture and expectations to the CRM Trainer;
- Ensure that all PBGC trained employees get the proper credit for the time spent learning CRM in classroom sessions;
- Provide training facilities for train-the-trainer sessions;
- Announce the training events in the enlarged PBGC community;
- Facilitate the registration of trainees as they sign-up for the course held in DC.

Table 9 - Roles and responsibilities of CRM training resources

Teams	Objective	Tasks
CRM Team LEADS	• Implement the CRM training strategy defined in this plan.	• Analyze needs of CRM end users to ensure job-relevancy of training design; • Design and develop training modules, and training materials; • Deliver train-the-trainer sessions; • Deliver CRM training to the users on-site; • Report progress and issues to the CRM Team; • Write training help files, user manuals and product guides as user documentation; • Support on-site rollouts; • Request resources from the Management Team, as required.
PBGC Training Institute Staff (DC)	• Ensure all PBGC trained employees get the proper credit for the time spent learning CRM in classroom sessions. • Provide training facilities for train-the-trainer sessions	• Manage the logistics of the training roll-out as far as registration, facilities, schedules, and arranging for room set up.

8.0 CRM TRAINING PLAN EVALUATION

8.1 LEVEL 1 EVALUATION

LEARNING/CHANGE MANAGEMENT DELIVERABLE

The level 1 learning measurement is important, especially when trying to obtain buy-in from the employees who will be using the system on a daily basis.
This evaluation will be conducted with:

- Questionnaires.

USER ACCEPTANCE DELIVERABLE

Metrics will be developed based on evaluation forms and assessment tests to document the results of the training initiative with the different PBGC audiences.
This evaluation will be conducted with:

- Training Incident Log.

It will be distributed to the CRM Team Leads at the end of each training session.

8.2 LEVEL 2 EVALUATION

LEARNING

The level 2 learning measurement is important to evaluate the effectiveness of the learning experience. This information is then used to help provide remediation to learners and to determine areas in which the training needs to be strengthened for future sessions.
This evaluation will be obtained through

- Tests Results

8.3 LEVEL 3 EVALUATION

LEARNING

The level 3 learning measurement checks to see if the skills taught in the training are actually being used on the job. Level 3 evaluates the transfer of learning from the learning experience to the job.

This evaluation will be obtained through:

- Post-rollout: Scheduled bi-weekly conference call meetings;
- Periodic phone calls to sites and office managers.

9.0 CONSTRAINTS AND ASSUMPTIONS

9.1 CONSTRAINTS

PBGC Senior Management has articulated the following primary constraints for this training plan:

1. Training Timing Constraints: the CRM Training Plan is constrained by the need to train around the scheduled time of the rollout, possibly within a one to three-week window around implementation of the CRM rollout strategy.

9.2 ASSUMPTIONS

The assumptions for this training plan are listed below (critical assumptions are in bold):

1. **Design Document will be available by middle of August 2007 to ensure proper planning of the training initiative;**

2. **The September release schedule will remain unchanged. Any change will impact the planning and implementation of training events;**

3. **The September release schedule will continue to use WEBEX and web conferencing training for FBA offices and remote CRM users;**

4. **A working version of CRM Release 3.3 will be available for the Training Team by Sept. 7th to start the development of Training Materials/User Documentation; a working version of the system – development environment will be available by August 7th;**

5. PBGC will provide access to FBA sites, TPDs, Call Center and other users for the CRM Training team for ongoing communications to ensure CRM training and support is properly implemented;

6. Training materials and system documentation will not be rewritten to address unchanged design from Release 3.2;

7. It is assumed that no more than 30 people will be trained per Webex session. Adding to this number will compromise the quality of the learning and possibly the ability of the trainees to ask questions during class;