



# Learning Services

## Training Requirements Assessment

Professional Consulting from Learning Services

### A Key Element in Accelerating User Adoption

OpenText's Training Requirements Assessment (TRA) evaluates the various aspects of your implementation, to both identify learning needs and criteria and to recommend the appropriate training path. The TRA is a crucial stage in the educational and adoption process.

### TRA Benefits

**Improve adoption.** Adoption is driven by providing executive sponsors, managers, end-users and administrators with the business context and benefits of the application (strategic), and clear learning paths to the business units beyond the initial setup and deployment (tactical). Improved adoption increases ROI and allows you to take full advantage of the process and business gains offered by our products.

**Reduce time (and costs) to train and to prepare training.** Acquiring specific and detailed learning objectives for each of the learning community groups reduces the time to develop and deliver training.

**Decrease reliance on help desk support staff.** With an improved level of knowledge in the day-to-day use of the tools, a reduction in technical support, while encouraging the accurate use of our software can be anticipated.

**Ensure a healthy, secure ECM environment.** Provide your knowledge managers, trainers and system administrators with the right training to use your new tools effectively.

**Enrich the quality and value of information.** Users that understand the value of the system (educated in both the benefits and the 'how to') will store and extend information that is valuable.

### TRA Approach

The OpenText approach to determine relevant and just-in-time learning includes the following analysis points and recommendations:

- **Business Need:** An overview of the change in practice related to the implementation is discussed to determine if instruction is required. The scope of the new functional technology to be deployed is reviewed along with the deployment objectives and roll out schedule.
- **Learning Community:** Based on the interviews conducted, the needs of the community by position and groups are assessed.
- **Gap Analysis and Learning Objectives by User Roles:** Following a gap analysis, a detailed list of learning objectives are defined and mapped to the various user roles to determine the training content analysis.



## TRA Development Process

**Training Delivery Methods:** Various instructional tools and training delivery methods are discussed and assessed based on your organization's culture, previous experience, learning objectives and audience experience.

**Training Plan:** Learning recommendations are prepared including recommended courses with descriptions, estimated duration, delivery method(s) and rollout schedule recommendations.

**Content Analysis and Customization Efforts:** Learning recommendations are mapped to existing Open Text materials. If course materials require customization, or new course material is needed the estimated level of effort to develop the material and deliver the course(s) is provided.

**Conclusion and Go Forward Plan:** Includes considerations for you to implement your organization's training plan.

As part of your training requirements assessment, we perform the necessary tasks in a four-stage process to ensure a high-value return on your time and investment.

### Stage I: Preliminary Tasks

- The OpenText Education team will review the business goals and objectives for this engagement and prepare a schedule of activities.

### Stage II: Data Gathering & Analysis

Next, a Learning Services Professional meets with your Project Implementation Team to gather and then analyze data and conduct a series of consultative interviews to:

- Determine lines of business and business processes influenced by new implementation.
- Review the scope of the functional technologies including custom applications intended for deployment with respect to training needs.
- Review existing learning tools and organization culture considerations.
- Discuss policies or behavioral changes to incorporate in training plan.
- Identify user groups and interview the user community to:
  - Categorize and validate the audience roles and responsibilities
  - Define the learning needs of the community by roles and groups and the audience experience/skill level; review the day-to-day responsibilities of groups.
  - Consider changes to existing practices and policies, and behavioral change management considerations
  - Discuss existing training methods and train-the-trainer possibilities; assess existing OpenText course structure and support materials for re-usability



### Stage III: Conclusions and Recommendations

- Develop a Training Plan with recommendations based on analysis.
- Compose an initial draft of our findings for discussion with all stakeholders.

### Stage IV: Reporting

- Review and revise the Training Requirements Assessment if required.
- Conduct a meeting with Customer to discuss details of the report and strategize on a go-forward plan that addresses your specific learning needs.

## Where to Begin?

If you would like more information on a Training Requirements Assessment or to discuss any service offered by OpenText Learning Services, contact:

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