2021-2023

NEW SOFTWARE TRAINING PLAN

Considerations for Planning:

- Software is intended to meet multiple needs, including to provide data to meet federal reporting requirements.

- Implementation is taking place with multiple clients, each with their own specific customizations to the software.

- Among the clients, training was needed for over 30,000 end users in approximately 2000 locations, some of which are quite remote.

- Available time is limited, and multiple training sessions would be needed – prior to use, after the implementation, and after multiple points of data have been collected.

- Consistent understanding of and purposeful use of the software is necessary to result in accurate data for the required reporting.

- A train-the-trainer model was offered, so materials created needed to be simple and easy to use to reduce inconsistencies in messaging while also being flexible enough to allow for some personalization to local needs.

- Another delivery option included live and recorded webinars, which also necessitated simple-to-understand materials that could stand on their own.

- Because the software is new, frequent updates are anticipated. Specific timing and content will be unknown until needs are identified. Therefore, training materials need to be easy to update and rerelease.

Training Plan:

- Create a series of 45-60 minute training sessions which can be used individually or combined together for use when more time is available
- For each session, a PowerPoint deck and a handout would be created. Notes to support the content were included within the slide deck to eliminate the need for a separate supporting guide.
- PowerPoint decks would be designed so they could be used for both in-person and virtual trainings.
- Handouts would include key definitions and links to resources to support users throughout implementation.

For Use Prior to Implementation:

Title:	Description:	Participants will leave the session with:
New Software Purpose and Value	Learn about key attributes of the new software and consider the ways stakeholders in different roles may benefit from each.	• An understanding of how New Software was designed and why • An understanding of the benefits of New Software based on role
How New Software Works	Develop understanding of the process for using New Software and confidence in knowing what to expect. Walk through the process of using the software and explore resources.	• An understanding of what the New Software process is like • Having identified parts of the process that most impact each role
Prepare for New Software for Users	Explore resources to prepare users, including information about timing, scheduling, functionality, and related tools.	• Resources to help users know what to expect with New Software • A plan for what they will share with users before implementation
Prepare for New Software for Leaders	Explore resources to determine the roles of leadership and users throughout the process. Develop a plan for sharing the decisions made with staff.	• Resources to help leaders know what to expect with New Software • A plan for what they will share with staff before implementation

For Use After Implementation:

Title:	Description:	Participants will leave the session with:
Introduction to New Software Reports	Explore the data and reports resulting from New Software. Consider how the data may inform regular work practices.	• A greater understanding of New Software data and reports • Strategies for using the resulting data
Sharing New Software Data with Users	Prepare to discuss the data with users. Identify key data points and determine common language to use. Consider what questions users are likely to ask and how they might respond.	• A stronger understanding of New Software and the resulting data • A plan for how to address questions about New Software from users
Goal Setting with New Software Data	Using the data resulting from New Software and other supporting data, create quarterly and yearly goals to support daily work practices.	• Understanding of the qualities of an effective goal • Quarterly and yearly goals for daily work, measurable by the New Software data

For Use After Multiple Data Points Have Been Collected

Title:	Description:	Participants will leave the session with:
New Software Data Over Time for Users	This data coaching session will focus on examining multiple points of data over time, identifying supporting data, looking for any trends and patterns, and asking and beginning to answer questions generated by the data.	• An increased understanding of the patterns and trends their data reveals. • Planned actions to take as a result of what the data indicates