**Savvy Summary Report for:**

**Logo, company name

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**Sustainability Academy**

By

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| --- | --- |
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# ADM Sustainability Academy

## Introduction

The ADM Sustainability team and Allen Interactions team met for two virtual Savvy Start meetings on November 30th and December 20th, 2022, to discuss the goals, objectives, and instructional activities for the Sustainability Academy courses. The first Savvy Start centered on a Basic level course and has been since tabled for development. This Savvy Summary Report (SSR) focuses on the 201-level courseware.

ADM Savvy attendees included these participants:

* Jennifer Alesia – Chief Learning Officer and primary point of contact
* Paul Scheetz - Dir. Climate Smart Agriculture
* Michelle French – Dir. of Global Sustainability
* Sam Minardi - VP Marketing

This report summarizes the discussions during the Savvy Start. The goal of this document is to reiterate ideas and decisions that were vocalized during our discussion. This document also identifies activities that help bring the program to a performance-based initiative.

# Project Considerations

## Training Priority

ADM initially organized the desired courseware into three levels, as shown below. After the first Savvy Start on November 20th, the ADM team met for further discussion and decided to focus on the Level 201 training as a starting point. ADM further divided Level 201 into two separate courses:

* Overview (201): Learn definitions, concepts, categories, and focus for Scope 3 emission reduction.
* Workshop (201+): Practice initiating, leading, and responding to customers in Sustainability conversations with a specific focus on regen ag.

Text

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## Target Audience Groups

During the Savvy, ADM listed these target audience groups for the two courses:

|  |  |
| --- | --- |
| **201 (Overview)** | **201+ (Workshop)** |
| * Sales & Marketing * Origination * Leadership (Executive council) * Transportation management * Procurement team * Government Relations | * Sales & Marketing * Origination * Government Relations |

## Structure & Sequence

During the Savvy, we discussed the potential sequence of the course modules. For the 201 course, overview topics will be introduced via eLearning to provide context awareness. Then Sales & Marketing and Origination will build on awareness in a performance-based team workshop experience in 201+.

### 201: Overview

The chosen modality for the Overview course is **eLearning** for self-paced learning to reinforce concepts and terminology consistently for the five audiences. The sequence of the Overview modules may be as follows:

### 201+: Workshop

The chosen modality for the workshop is **Instructor-Led Training (ILT), which could be face-to-face, virtual**, or a combination of both. The sequence of the workshop we discussed is as follows, with a focus on **regen ag**:

# Desired Outcomes

ADM is partnering with Allen Interactions to create an engaging program to support the training needs for the five audience groups needing additional specific sustainability training. The program includes eLearning modules and workshop sessions targeted to enable learners to improve performance quickly and effectively. Takeaway resources are included in each course that learners can reference to support the application of skills.

## Performance Objectives and Activities

At Allen Interactions, we believe effective training initiatives focus more on changing behavior than on presenting information. With this idea in mind, we considered the behaviors that we want the eLearning and workshop to develop and reinforce related to Sustainability at ADM.

Allen is envisioning one Overview module with four lessons. We identified the following treatments/interactions related to each lesson that allows learners to practice the desired objectives. The eLearning module begins with a brief introduction to provide awareness and context for the topics to be covered. A module conclusion identifies the key takeaways that learners should remember and be able to apply.

Note the workshop seat times shown are estimates. These times may be modified based on the number of participants and the facilitator’s ability to manage time. The number of workshop sessions may be reorganized to reflect a desired seat time, e.g., designing more sessions with shorter seat times. The workshop portion will be designed as ILT with notes for facilitators to modify it for VILT (Virtual Instructor-Led Training).

**Module 1: Sustainability and Scope 3 Overview (eLearning approximately 15-20 mins duration)**

| **#** | **Lesson** | **Performance Objectives** | **Treatment/Interaction** |
| --- | --- | --- | --- |
| **1** | **Introduction**  **2 minutes** | Identify key concepts, definitions, and goals related to Sustainability at ADM | **Animation:** Learners view a series of sustainability-related words, phrases, concepts, and goals in an engaging timed animation |
| **2** | **Three Scope Levels**  **5 minutes** | Explore and define Scope 1, 2, and 3 | **Scenario-based Drag and Drop Sort:** Learners read a scenario and decide which Scope Level it describes; they receive feedback on their choices |
| **3** | **Focus on Scope 3**  **5 minutes** | Prioritize the top three categories out of 15 with the greatest impact on emission reduction | **Gamified Exploration with meter:** Learners try to reach an emission reduction goal by choosing the three categories with the greatest impact related to size of footprint and ability to influence; learners view a meter to track the goal’s changes based on their choices |
| **4** | **Conversation Framework**  **5 minutes** | Recognize the steps in ADM’s consultative selling framework and how to apply them in customer conversations related to Sustainability, Scope 3 emission reduction, specifically regenerative agriculture.  (NOTE: This prepares learners for the workshop when they’ll practice conversations) | **Select/Reveal + Multiple Choice:** Learners select each step in the framework to learn more about it and then respond to questions related to conversations around Sustainability, Scope 3 emission reduction, specifically regenerative agriculture |

**Module 2: Sustainability, Scope 3 & Regenerative Agriculture Workshop (Instructor Led Training 1 day duration)**

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Session** | **Performance Objectives** | **Treatment/Interaction** |
| **1** | **Introduction**  **(2 hours)** | Recall key concepts, definitions, and goals related to Sustainability at ADM, including the steps of the Consultative Selling Framework | **Quick Quiz:** Teams compete to answer questions related to Sustainability concepts, definitions, and goals |
| Develop a value proposition for ADM Sustainability | **Develop a Value Proposition:** Using a case study focused on regenerative agriculture, including information collected on the customer’s needs and goals, market, etc., learners work in teams to develop a value proposition for the customer related to ADM’s Sustainability |
| Anticipate and prepare for customer questions related to Sustainability and Scope 3 emission reduction to conduct early conversations  (Note: This is framed as “reactive” conversations vs. “proactive” in the next session) | **Prepare for Questions:** Learners work in teams to identify and create ways to address a variety of scenario-based customer questions around Sustainability and Scope 3 emission reduction |
| Receive answers to frequently asked questions | **Facilitator Response:** Learners ask questions related to the workshop so far and/or their real-world conversations with customers |
| **2** | **Conduct Proactive Conversations**  **(3 hours)** | Research customer Sustainability goals and current practices specific to regenerative agriculture to prepare for proactive conversations  (Note: This activity provides the groundwork for pre-work assigned after this session for the next, to research the learners’ real-world customers) | **Research the Customer:** Learners practice using the right tools, e.g., SBTI website, to research several case-study customers, e.g., commitments, announcements with other partners, etc. |
| Review the framework and how to apply it in customer conversations related to Sustainability and Scope 3 emission reduction | **Facilitator Demonstration:** Using one of the case-study customers from the previous activity,learners follow along to a positive-model conversation (role play) and answer questions and/or fill-in-the-blanks as the conversation plays out |
| Initiate and conduct early customer conversations related to Sustainability and Scope 3 emission reduction with competence and confidence | **Role Play**: Learners work in triads (ADM employee, customer, and observer) to practice initiating and conducting customer conversations related to Sustainability and Scope 3 emission reduction; debrief included to discuss overall feedback, real-world application, and presentation of pre-work for next session |
| **3** | **Real World Conversations**  **(2 hours)** | Present customer research related to their readiness for proactive conversations around Sustainability and Scope 3 emission reduction | **Presentation:** Each learner presents their research of their current real-world customers regarding their readiness for conversations; learners then participate in “hot seat” conversations with these customers, i.e., they choose one person in the session to role play with in front of the group and receive feedback at completion |
| Conduct real-world customer conversations |
| Receive answers to questions | **Facilitator Response**: Facilitator conducts a final Q&A session |

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# Sketches

Allen created sketches after the Savvy session to provide a visual representation and help us test the activities’ ability to meet the eLearning performance objectives in the Overview module. Some screenshots of the sketches are included on the following pages that reflect the performance-based approach for each lesson. Note that details of the workshop and structure of the learning exercises in each workshop will be mapped out as one of the next steps following review and approval of this SSR document.

## Lesson 1: Introduction

### Performance Objective:

### Identify key concepts, definitions, and goals related to Sustainability at ADM

### Treatment:

NOTE: Allen’s animator will work with the ADM team independently to design and develop the desired animation to achieve the above performance objective.

## Lesson 2: Three Scope Levels

### Performance Objective:

### Explore and define Scope 1, 2, and 3

### Treatment:

Scenario-based Drag and Drop Sort: Learners read a scenario and decide which Scope Level it describes; they receive feedback on their choices

**Graphical user interface, application, Teams

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**Learners view a description, scenario, or example and decide which scope level is being depicted**

Graphical user interface, application, Teams

Description automatically generated

**Learners drag and drop the example to the correct scope level**

Graphical user interface, application

Description automatically generated

**Learners view feedback on their choices**

## Lesson 3: Focus on Scope 3

### Performance Objective:

Prioritize the top three categories out of 15 with the greatest impact on emission reduction

### Treatment:

Gamified Exploration with meter: Learners try to reach an emission reduction goal by choosing the three categories out of 15 with the greatest impact; learners view a meter to track the goal’s changes based on their choices.

Chart

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**Learners explore the 15 categories and choose the top three categories they think have the greatest impact on Sustainability**

**Graphical user interface

Description automatically generated with low confidence**

**Learners view text and meter feedback after each choice**

Graphical user interface

Description automatically generated with low confidence

Graphical user interface, application

Description automatically generated

**Final feedback reinforces the top 3 categories**

## Lesson 4: Conversation Framework

### Performance Objective:

Recognize the steps in ADM’s consultative selling framework and how to apply them in customer conversations related to Sustainability and Scope 3 emission reduction

(NOTE: This prepares learners for the workshop when they’ll practice conversations)

### Treatment:

**Select/Reveal + Multiple Choice:** Learners select each step in the framework to learn more about it and then respond to questions related to conversations around Sustainability and Scope 3 emission reduction

Diagram

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**Learners select the steps in the framework to view a description of each**

A picture containing text

Description automatically generated

**When selected, each step reveals more information and how it can be used when discussing Sustainability with customer**

A picture containing text

Description automatically generated

**Learners are then challenged with a question they must respond to**

A picture containing graphical user interface

Description automatically generated

**Learners view feedback on their choices**

# Project Next Steps & Specifications

Upon approval of the activities included in this document, Allen Interactions will move toward Design Proof.

## Project Specifications

The number of versions for each deliverable will be limited to the following. For example, two versions mean one initial version and one revision based on feedback. One version means changes are applied to the following deliverable, e.g., changes requested to the Savvy Summary Report are implemented to the Design Proof version; changes requested at Alpha review are made to the Beta version, etc.

|  |  |
| --- | --- |
|  | Maximum  Versions |
| * Savvy Summary Report | 1 |
|  |  |
| * Design Proof | 1 |
| * Alpha version   Client may make reasonable revisions to the graphics, images, instructions, and feedback of the interactions based on mutually agreed upon written description of the treatments, and they will be included in the next version. New interactions or functionality changes will be considered out of scope. | 1 |
| * Beta version * Client revisions to the Beta version of the application will be in scope only if they clarify instructions or feedback, and they will be included in the Gold. New content/script editing or changes to exercises beyond clarifications will be out of scope. * Gold\*   No revisions will be in scope/in budget except for bug fixes that are part of the software warranty. | 1 |

* Note: Reviews are based on obtaining accurate and complete content consistent with Client rules and brand standards.
* Note: Translation is not part of the scope of this work. Client may request translation in the future, which will be covered under a separate SOW.

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# Project Plan & Development Details

Client and Allen will be responsible for the review and approval of the items noted in the schedule. Any deliverable that has a sign-off required is indicated. Email acceptance and sign-off documents are a necessary part of the process to ensure business objectives are met within the budget and time constraints. When both parties sign a document, it is an agreement indicating that the work outlined in the document is acceptable and any future changes will cause change management procedures to be engaged.

**Allen deliverable dates are contingent on the delivery of content, SME availability, deliverable reviews, and signoffs per the project plan**. Allen will notify Client if it is unable to provide a deliverable by a specified due date due to action or inaction of Client.

Client-requested changes in scope (content, functionality, schedule, technical platform, or delivery) will be documented by Allen Interactions. The schedule and budget ramifications of these changes are not always known at the time they occur, but the impact will be defined and communicated to all parties as soon as it is known.

**Project Risks**

| **Risk No.** | **Risk / Impact** | **Mitigating Actions / Status** |
| --- | --- | --- |
| 1 | RISK: Timeline–reviews will need to be timely  IMPACT: Cost and timeframe may be a factor | Monitor progress against plan, issues, and risks on a weekly basis |
| 2 | RISK: Reviews, deliverables, or milestones missed by either party  IMPACT: Cost and timeframe may be a factor | Monitor progress against plan, issues, and risks on a weekly basis |
| 3 | RISK: Any additional changes, feature requests, or additions identified after” email Sign-Off”  IMPACT: Cost and timeframe may be a factor | Monitor progress against plan, issues, and risks on a weekly basis |
| 4 | RISK: LMS Integration  IMPACT: Cost and timeframe may be a factor | LMS test package sent early in the project to test LMS connectivity and communication |

**Review Management**

Client will work to assure that team members and stakeholders understand the purpose of each deliverable and the expectations for reviews.

Maximum review timeframe expectations for major deliverables are listed in the project timeline. To ensure efficient management of the project, Client must conduct reviews in a timely fashion per project schedules. If Client/Allen Interactions reviews cannot be completed in the planned timeframe, the potential impact on project schedule and scope should be discussed by the primary contacts.

**Scope Management**

Client has described the scope of the project in general terms. Allen has described its understanding of this scope in general terms in the Allen Proposal. The scope is further defined and constrained by:

* Performance objectives and content selection (to be refined and finalized prior to and during Production)
* Budget established for contracted services
* Schedule established in the **Smartsheet** (and its updates)

Both parties recognize during project initiation that these elements represent constraints on the scope, but that some of the exact objectives, content, instructional strategies, level of interactivity and media treatments that will define the scope of the design have not yet been completely established.

It will be necessary, therefore, to conduct the development cycles that precede Production in such a way that Client and Allen Interactions jointly establish a design and scope of content that meet identified constraints.

**Change Management**

During the design process, while working closely with the Client organization to find creative and effective solutions to training needs within established constraints, we apply important steps to minimize the likelihood of unplanned redesign in later activities including:

* Collaborative review of prototypes to establish designs (to occur before resources are spent on refining to the planned quality of production)
* Obtaining approvals by relevant stakeholders at key decision points during iterative design cycles:
  + Visual examples of the interface
  + Design Proof of the interactivity
  + Production samples of media assets
  + Addressing the breadth of content before expending too much effort (depth) in any one area
  + Involving end users in usability trials as early as possible

After the key deliverables defining scope (see above) have been approved, proposed changes (in design, quantity of content, or schedule) that may affect the planned budget or schedule will be subject to the following change management procedure.

If either party identifies or proposes changes that affect approved designs or completed work, the cost and schedule implications of the proposed changes must be determined, discussed, and approved by both parties before they are implemented.

Mutually agreed upon changes that do impact the project timeline (e.g., due dates for any deliverables, Client financial obligation, etc.) will follow these procedures:

* Describing the change in writing signed by authorized representatives of each party (which, for Client, may be the relevant Project Manager, or, if the project plan changes result in changes to Client financial obligations or the ownership provisions under this Agreement, the signed writing shall also be signed by an authorized Procurement and Supply ("P&S") manager with corporate authority to sign amendments to this Agreement).
* The writing date of the Project Plan revision, and a description of how the revisions relate to the prior Project Plan. (For example, state whether the revisions are intended to supersede the prior Project Plan, or whether the revisions are to be read together with the then current Project Plan.).

It should be noted that revisions due to any development errors by Allen Interactions would be corrected per Allen Interactions’ quality philosophy and process. Revisions to correct development errors, therefore, are not considered to be scope changes.

**Quality Assurance**

All persons working on the “PROJECT” are accountable for assuring the quality of the finished application. Because of this fact, quality assurance is automatically built into all stages of the development process. Therefore, both Allen and Client will be responsible for Quality Assurance. Allen’s Quality Assurance process will include the development of standards for media, the development of shells for incorporation of the media elements, the development of review and test and LMS deployment stages for developed components.

**Allen Quality Control Checkpoints**

The Allen Interactions Producer will review and approve the instructional interactivity for each section. The Producer will carefully examine all aspects of the instructional interactivity, and that the instructional interactivity will accomplish the identified performance objectives.

**Client Quality Control Checkpoints**

Client will review and approve the content for the sections and overviews.

**Communication Plan**

The primary contact for Client is the Project Manager, Jennifer Alesia, who will direct participation of the Client team members and stakeholders.

The primary contact for Allen Interactions is Ann Iverson, Sr. Instructional Strategist and Executive Producer, who will direct participation of the Allen team members.

The primary contacts will be responsible for communicating significant events and activity to members of their own organizations, as necessary.

If Client should require contact with an Allen Interactions non-management team member or contract consultants, Client will coordinate requests for such contacts through *Steve Lee*, Vice President, Client Success.

We anticipate a high level of collaboration and communication between the Allen and Client teams. Most communication will occur in meetings and teleconferences, use of email and written summaries of verbal correspondence will also be encouraged to provide a record of decisions, issues, solutions, and project status.

The Allen Producer will communicate project status to the Client Project Lead by the following means:

* Starting after acceptance of the Project Timeline/Smartsheet and this SSR, a weekly Project Status assessed and delivered to the Client Project Lead via a status meeting once each week.
* This meeting will provide an overview of project status, schedule status of the deliverables for the project, any issues, and identification of important milestones in the upcoming weeks.
* Throughout the project, Allen will keep the Client Project Lead apprised of the status of project activities through regular verbal and e-mail communications.

Client and Allen will communicate and resolve issues by the following means:

* Upon identification of an issue by either party, the Client Project Lead or Allen Producer will communicate via email or telephone to the other party, the existence of the issue.
* The parties will work diligently to determine a mutually agreed upon action or actions to solve the issue.

**Review Responsibilities/Processes**

To ensure efficient management of the project, Client will strive to conduct reviews in a timely fashion and per a turnaround time schedule mutually agreed upon at the time of the deliverable.

**Content:**

* Client will be responsible for additional content analysis
* Client will be responsible for scenario content
* Client will be responsible for analysis of Client media elements for Allen Interaction media needs
* Client will be responsible for delivering written and media elements to Allen Interaction in format needed
* Client SMEs will review and prepare written input and/or modifications to the content at the phases identified in this plan as well as the phases to be identified in upcoming schedules
* Allen Interactions will revise the content, as necessary
* Client will review and supply feedback for Alpha
* Client will review the revised content and complete sign-off

**Additional Feedback**

Please provide your additional feedback here:

By signing below, you agree to the content, terms, and/or conditions set forth above in this Savvy Start Summary Report.

|  |  |  |
| --- | --- | --- |
| Ann Iverson |  | Jennifer Alesia |
| [Name, Allen Interactions] |  | [Name, ADM] |
|  |  |  |
| Sr. Strategist, Executive Producer |  | Chief Learning Officer |
| [Title, Allen Interactions] |  | [Title, Client] |
|  |  |  |
| January 3rd, 2023 |  | January 9, 2023 |
| Date |  | Date |