OUM

TR.020 Project Team Learning Plan

<Company Long Name>

<Subject>

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# Introduction

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## Purpose of Document

The purpose of this document is to assist the project team in identifying the learning requirements and paths to enable the project team members to successfully fulfill their role on the project. The requirements cover learning of products, tools, technical and functional content, project management and people skills.

## Overview

This document includes the following components:

| Components | Description |
| --- | --- |
| Introduction | Shows the outline for the work session. |
| Project Team Learning Scope | Details the learning needs and paths by role on the project team, including the measurement methods selected. |
| Administration of Project Team Learning Materials/Events | Inventories learning events and required materials, schedule and special consideration for customization. |

1. We recommend an Organizational Development Specialist complete all task steps. Alternatively, the Project Manager and a Trainer could handle core steps 2, 3, 5, 6, 7, 8, 9, 10 and 11, as defined in AIM for Business 1.3 *Solution Delivery Guide*.

# Project Team Learning Scope

**Assumption:** Try to provide just-in-time learning events to meet the need of the project team members, including on-site instruction. **Facilitation Guidelines:**  
1. Give an overview of the process and input required from each team lead.   
2. List all known project members and their corresponding role on the project. In instances where the project team member is not selected yet, list the role.  
3. For each role, determine the required skills; for Oracle Application™ knowledge, see <http://education.oracle.com> for a list and description of the Oracle Education offering such as the Oracle Curriculum Paths (Master Programs) or the Oracle Course Details (Reusable Content Object Matrix) as guide. Include technical skills, functional skills, project management skills, people skills, use of tools, etc.   
4. Compare the role incumbent’s existing skills to the required skills and determine the gap. This gap will drive the content of the learning for that individual. If required, develop a time line for gathering further data (this can include a detailed schedule outlining individual meetings with team leads to gather data specific to their teams). Use the Data Gathering Tool for Project Team Skills Inventory in Appendix.  
Note: Include Tutor workshops for the Tutor team if part of the package.  
5. Discuss learning options with the project leads, for example, Instructor Led Training On-Site, Computer Based Training, Coaching, Tutorial, etc. Determine the learning path per individual/role, based on the skills gap identified. Inventory the sources of learning materials/events listed.  
6. Agree on the high performance team development modules that will be facilitated with the team. These might include (see Conduct Project Team Learning Events, TR.050).  
- Managing conflict in project teams  
- Goal alignment  
- Leadership challenges in project teams  
- Communication  
- Supportive team climates  
- Meeting management  
Add to the content lists.  
7. Put in place the measurement mechanisms to ensure effectiveness of the learning events.  
  
If the plan is not completed in the group setting, make provisions for completion outside the work session.

## Project Team Learning Needs

The following table captures the gap between required and existing skills for each project team member, by role.

| Name of Project Team Members | Role | Required Skills | Existing Skills | Gap = Learning Needs |
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## Individual Learning Paths for Project Team

The following documents the sequence of learning activities for each project team member, by role.

1. Include a variety of different methods of delivering the learning for stronger results. For example, Instructor Led Training, Computer Based Training, demonstrations, workshops, coaching sessions, videos, Course-in-a-Box etc.  
     
   A clear path of learning building blocks needs to be built up. For example, prepare the learning, participate in the learning, practice what has been learned, put this practice in the context of the individual’s role, begin to use what has been learned within the individual’s role etc.

| Name of Team Members | Role | Preparation Activities | | Knowledge and Skills Acquisition | | Skills Transfer and Reinforcement | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Delivery Method | Key Content to Cover | Delivery Method | Key Content to Cover | Delivery Method | Key Content to Cover |
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## Measurement Methods

1. In this section, record the measurement methods which have been selected using Kirkpatrick’s four levels as a framework. Under Measurement Matrix, indicate whether or not a Learner Verification program is underway. Legal implications around learner verification must be considered in selecting, defining and deploying your measurement methods.

The first table of Project Team Learning Needs captured pre-learning data about the project team members and thus provide the first measurement data. By comparing the baseline data with data collected after learning, it is possible to determine how much learning has occurred.

The following measurement matrix, broken out by levels of measurement, has been designed for the project team learning.

* Reaction Measures
* Learning Measures
* Skills Transfer Measures
* Result Measures

In Kirkpatrick’s four levels of evaluation, Learner Verification is a Level II evaluation, measuring learning; and Performance Assessment is a Level III evaluation, measuring behavior. Learning is defined as” the extent to which participants change attitudes, improve knowledge, and/or increase skill as a result of participating in the learning event.” Behavior is defined as “the extent to which change in behavior has occurred because the learner participated in the learning event. Level III, then, describes learner behavior on the job; what learners actually do as a result of the learning event. Do they use their newly-acquired knowledge, skills, and attitudes in the desired manner when they return to their workplaces after the learning events.

Measurement Matrix 1

The following table captures the type of measurements planned for each level of measurement.

| Degree | I - Reaction | II - Learning | III - Skills Transfer | IV - Results |
| --- | --- | --- | --- | --- |
| What we want to know |  |  |  |  |
| What might be measured |  |  |  |  |
| Measurement Dimensions |  |  |  |  |
| Sources of Data |  |  |  |  |
| Data-gathering methodology |  |  |  |  |
| Evaluation Criteria |  |  |  |  |

# Administration of Project Team Learning Materials/Events

1. Consolidate the individual learning paths into common learning events, as applicable, as part of the Inventory of Learning Events. Derive the list of required learning materials.  
2. Develop the schedule for the common learning events.  
3. Identify the logistics for delivery of the learning events, including the learning agents for the learning events.  
4. Note special considerations for customization of learning content.  
5. Capture in the project plan the action items required to develop the required materials, prepare, schedule and hold the learning events, including the preparation of the learning agents and of the Project Team Learning Environment (TR.040).  
6. Validate the learning plan with the project leadership as required. Obtain confirmation from Oracle Education and others (partners, third parties, organization’s learning organization) regarding availability of required materials, for example, scheduling of learning events, etc.  
7. Publish the learning plan to the entire team.  
8. Coordinate technical site visit by Technical Operations.

## Inventory of Learning Events and Materials

The following inventories the events, their description and duration, and the corresponding materials, content and sources of learning event and/or materials.

| Events | Description and Duration | Materials | Content, including Reusable Content Objects | Source: Contract resource, Organization | Contact |
| --- | --- | --- | --- | --- | --- |
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## Schedule of Common Learning Events

The planned learning events will occur as follows.

| Learning Event | Location/Address | Phone Number | Schedule | Preparation Required | Preparation Materials |
| --- | --- | --- | --- | --- | --- |
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The project contact will distribute the preparation materials to the attendee’s work location at least one week in advance of the event.

## Learning Agents for Project Team Learning Delivery

The following people will assist the conduct of learning events.

| Learning Event | Learning Agents | Title | Address | Phone |
| --- | --- | --- | --- | --- |
|  | <Project Contact> |  |  |  |
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If changes or cancellations occur, the learning agents will communicate the changes to the attendees and other facilitators.

## Special Considerations for Customization

1. When using existing materials, note below all needs for material modification.

The following documents the requirements for customization of learningware for the project team.

| Learning Materials, e.g., Application Module | Content to be Added | Content to be Deleted | Duration | Audience Profile | Company Data Set Up |
| --- | --- | --- | --- | --- | --- |
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### Other Considerations

The following are additional considerations for customization:

* Case Study
* Lab Exercises
* Actual Data
* Company
* Business Scenarios

# Open and Closed Issues

1. Add open issues that you identify while writing or reviewing this document to the open issues section. As you resolve issues, move them to the closed issues section and keep the issue ID the same. Include an explanation of the resolution.  
     
   When this work product is complete, any open issues should be transferred to the project- or process-level Issue Log (Manage focus area) and managed using a project level Issue Form (Manage focus area). In addition, the open items should remain in the open issues section of this work product, but flagged in the resolution column as being transferred.

## Open Issues

| ID | Issue | Resolution | Responsibility | Target Date | Impact Date |
| --- | --- | --- | --- | --- | --- |
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## Closed Issues

| ID | Issue | Resolution | Responsibility | Target Date | Impact Date |
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# Appendix - Data Gathering Tool for Project Team Skills Inventory

1. Tailor the following matrix to the learning content identified. Ask the project team leads to complete one for themselves and each extended member of their team.

The following table guides the gathering of skills data for the project team members.

| Part One: Complete for all | |
| --- | --- |
| Name: | Role on the Project Team: |
| Phone Number: | Email Address: |
| Years with the <Company Long Name>: | Background: |
| List of applications used/supported: | |
| Involvement with a technology implementation: (If yes, describe product and role) | |
| Past experience that can assist in the implementation: | |
| Preferred learning methods: Rank in order of effectiveness - 1 to 5 with 5=high  \_\_\_ Instructor-Led Training  \_\_\_ Work Group \_\_\_ Hands-On Exercises \_\_\_ Self-Study \_\_\_ Work with Coach | |

1. To make sure that the list below is current, and reflects any recent additions or deletions to the Oracle product line please check the web site <http://www.oracle.com/products>.

| Part Two: If experience with Oracle products, complete Section 1, items 1 to 10. If experience with Oracle Applications, complete Section 2, items 11 to 51. If experience using Project Management tools, complete Section 3, items 52 to 55. | | | | |
| --- | --- | --- | --- | --- |
| # | Products | Frequency of use  (1 = never and 5 = daily) | Proficiency Level  (1 = no experience, 5 = expert) | Comments |
| **SECTION 1 - Experience with Oracle Products** | | | | |
|  | Designer |  |  |  |
|  | Developer |  |  |  |
|  | Discoverer |  |  |  |
|  | Forms |  |  |  |
|  | Graphics |  |  |  |
|  | Parallel Server |  |  |  |
|  | PL/SQL |  |  |  |
|  | Procedure Builder |  |  |  |
|  | Reports |  |  |  |
|  | Web Application Server |  |  |  |
| **SECTION 2 - Experience with Oracle Applications** | | | | |
|  | Account Payables |  |  |  |
|  | Account Receivables |  |  |  |
|  | AOL |  |  |  |
|  | Application for the Web |  |  |  |
|  | Applications Data Warehouse |  |  |  |
|  | Bills of Material |  |  |  |
|  | Business Agents (Alert) |  |  |  |
|  | Capacity |  |  |  |
|  | Cash Management |  |  |  |
|  | Cost Management |  |  |  |
|  | EDI Gateway |  |  |  |
|  | Engineering |  |  |  |
|  | Financial Analyzer |  |  |  |
|  | Fixed Assets |  |  |  |
|  | GEMMS |  |  |  |
|  | General Ledger |  |  |  |
|  | Human Resources |  |  |  |
|  | Internet Commerce |  |  |  |
|  | Inventory |  |  |  |
|  | Master Scheduling/MRP |  |  |  |
|  | OLAP |  |  |  |
|  | Order Entry |  |  |  |
|  | Payroll |  |  |  |
|  | Personal Time & Expense |  |  |  |
|  | Product Configurator |  |  |  |
|  | Project Billing |  |  |  |
|  | Project Costing |  |  |  |
|  | Project Manufacturing |  |  |  |
|  | Purchasing |  |  |  |
|  | Quality |  |  |  |
|  | Sales Analyzer |  |  |  |
|  | Sales and Marketing |  |  |  |
|  | Sales Compensation |  |  |  |
|  | Service |  |  |  |
|  | Supplier Scheduling |  |  |  |
|  | Supply Chain Planning |  |  |  |
|  | Training Administration |  |  |  |
|  | Tutor |  |  |  |
|  | Work in Process |  |  |  |
|  | Workflow |  |  |  |
|  | Other:........... |  |  |  |
| **SECTION 3 - Experience with Project Management Tools** | | | | |
|  | AIM for Business Flows |  |  |  |
|  | Microsoft Project |  |  |  |
|  | Project Workbench |  |  |  |
|  | Other project tools:............... |  |  |  |