**Executive Memo Organizing a Company Offsite 2-Day Training Session**  
Nate Bachmeier  
CMGT/410 Project Planning & Implementation  
University of Phoenix  
January 27th, 2014  
  
Facilitator: Rosa Chandik

**Subject: Organize a Company Offsite 2-Day Training Session  
To: Employee Training & Planning v-team  
From: Executive Leadership Team**

In an effort to stay competitive the Executive Leadership team has been reviewing many cost cutting options. One of these options is a migration from Microsoft Office to Google Documents. We believe this would be a good investment due to reduced licensing fees and also being minimally invasive to the employees.

As part of this migration plan we would like to have all employees attend a two day offsite training session. This event will be scoped to only the most relevant areas of Google Documents. During the event transportation, food, and lodging will be provided. Once complete measureable deliverables will be quantified and individual’s performance reported.

# Objectives

The primary objective of the training session is that our employees learn how to correctly and efficiently use Google Documents. By ensuring up front that everyone is able to use the software package; a spike in support calls will not occur, previous commitments will not slip, and moral of the staff will not dip.

# Scope

The Google Documents platform is a large collection of applications, of which our business is only interested in a small subset. Our training session will focus only on the replacements to Word, Excel, and PowerPoint. Of the features in these replacement systems only the features used by 80% of the people 90% of the time will be covered.

Some employees will be interested in knowing more about the new system. For these persons, a 1 page document with links and search terms with be available. Due to time restrictions none of this advanced information will be covered in person.

# Preparation Tasks

## Venue Selection

A venue for the training needs to be selected; preferably around in the Boston area. Boston was selected due to having a great airport and being geographically close to 70% of the employees; reducing travel time and airfare. In addition the location will need to have multiple 20-30 person conference rooms and enough total capacity for 500 people.

The budget to acquire the venue, 1 head count will be allocated for 5 business days. The rented space is not allowed to exceed $8,000.

## Hotel Selection

Hotel will need to be provided for approximately 200 of the 500 employees, preferable within a 30 to 45 minute driving radius of the venue. A group rate will need to be lined up in advance and cannot exceed 80$ per room per day.

Based on previous activities, we expect this will take one person 3 business days to line up and coordinate among the traveling employees.

## Transportation

To avoid car rental and parking fees, buses will need to be scheduled to pick-up and drop off employees at the hotel(s). This will require 1 head count 2 business days to coordinate on a fixed budget of 7.50$ per person per day.

## Food Selection

The employees will need to be fed while they attend the training. To take into account dietary restrictions a survey will need to be sent to the employees. The survey will need to be limited to: Vegetarian or Chicken; both options will be provided kosher to comply with any religious concerns.

After the survey a catering company will need to be selected and kept to a budget of $1,000 for per day. To create the e-mail survey and line up catering two head counts will be needed.

## Training Materials

A team of six will need to create the training material, along with presentation slides and workbook activities for participates to perform as they follow along. The team will have a two assistance who will ensure enough laptops, projectors, and networking equipment is available for the material. The entire budget of this task is not to exceed $5000.

# Measurable Deliverables

To ensure that company is getting value of this training, attendance will be tracked for all employees. This will be handled through a registration process before entering the conference room.

At the end of each training module the employee will need to complete a short multiple choice test that measures their understanding of the content. Prices will be awarded for top performers and bottom performers will need to retake the training module before moving on.