

ActiveNet Training Plan

City of Carlsbad

To develop training tools and guides that will help staff use our system to its full potential

Justin Goulet

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Plan Summary

## Note: This is an overview plan. Detail is in pages following

Customers

# Our customers are the heart of our organization. Without them, we don’t have a purpose. It is imperative to serve the community in the most knowledgeable way possible.

## In this section, we will discover our system from both the client and staff perspective. This will help our staff better understand the views the client is looking at while on the phone seeking help.

Enrollment

# One of the most common events on our system just became easier for our clients.

## Activity Registration is one of the most actively used modules within our system. Clients from all over the area will enroll in our classes over the phone and at the community centers.

Where there are a few ways to do these below operations, we will look at particular examples of each and how staff would resolve simple obstacles.

Organizations

# Other organizations use our facilities on a daily basis. Managing them is easy.

## Now that they have learned how to create a client’s account, they will now learn how to create a new organization and how to attach their new client to this organization

Note: I have never seen the organization side from their POV

Point of Sale (POS)

# A critical part to processing simple sales on a daily basis.

## Apart from managing clients and/or their organizations, POS allows staff to input regular transactions into the system from any terminal.

## **Note that this section is only staff**

Discussion: I will need to speak with other staff at other centers about POS due to its limited use at Calavera and Stagecoach Parks (Lighting, Open Play and Kidz Camp T-Shirts). We can add as needed.

Facility Reservations

# Clients use facilities on a regular basis. Creating a permit for a client can take around 15 minutes. Modifying an existing one is even easier.

## We want our clients to complete tasks on their own, but we know this feat is not completely possible. Clients may, and will, ask for help from any center at any time. This is an overview of some options.

Reports

# With the many transactions staff completes on a daily basis, learning how to run and use reports is a great benefit for quick reference and procedural documentation.

## Reports cover a wide variety of references, from rosters to financial information, which are necessary to complete on regular intervals. Staff will be trained on many of the reports which

Discussion: Most front desk staff will not be running these reports on a daily basis. The reports that staff should have knowledge of are mainly just Receipts and Cash Out.

Timeline

Discussion: Dates are subject to change depending on content added. I wish to remain close to these deadlines as we progress through the trainings.

Process Groups and Knowledge Area Mapping

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Knowledge Areas | ***Project Management Process Groups*** | | | | |
| **Initiating Process Group** | **Planning Process Group** | **Executing Process group** | **Monitoring and Controlling Process Group** | **Closing Process Group** |
| Project Integration Management |  |  |  |  |  |
| Project Scope Management |  |  |  |  |  |
| Project Time Management |  |  |  |  |  |
| Project Cost Management |  |  |  |  |  |
| Project Quality Management |  |  |  |  |  |
| Project Human Resource Management |  |  |  |  |  |
| Project Communications Management |  |  |  |  |  |
| Project Risk Management |  |  |  |  |  |
| Project Procurement Management |  |  |  |  |  |
| Project Stakeholder Management\*\*\* |  |  |  |  |  |

Project Documents