

# **Halliburton M&A Central Integration Planning Phase Training Plan**

**HALLIBURTON**

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**M&A Central**

## VERSION HISTORY

Version Number	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
1.0	Miguel Morales	06/17/2015			1 <sup>st</sup> draft - creation
2.0	Miguel Morales	06/22/2015			2 <sup>nd</sup> draft - updates

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# 1. INTRODUCTION

The purpose of this document is to outline the training program for the M&A Central Integration Planning Phase.

## 1.1 Scope

The training plan will address the following areas:

- Introduction
- Training Organization
- Needs and Skills Analysis
- Training Approach
- Evaluations
- Sustainability

## 1.2 Learning Objectives

The objective of this training is to:

- Address both the education and training needs of the end user focusing on specific M&A Central Integration Planning Phase tasks.

The training covers the following learning objectives:

- Integration Planning Overview
- Using and Overview of My Tasks
- Exploring New Homepage Report Panels
- Updating Integration Team Weekly Status
- Updating Integration Plans
- Managing Risks and Issues
- Managing Documents
- Related Topics
  - Tracking Task Dependencies
  - Tracking Synergies

The skills needed to complete these objectives are function and process knowledge, basic computer use and web navigation and M&A Central Discovery Phase skills.

## 2. TRAINING ORGANIZATION

### 2.1 Roles and Responsibilities

Name	Role	Responsibility
Miguel Morales	Training Lead	<ul style="list-style-type: none"> <li>Coordinates all aspects of the training program</li> </ul>
Miguel Morales	Training Program Developer	<ul style="list-style-type: none"> <li>Develops and revises the training plan as needed</li> <li>Gathers user community information</li> <li>Works with instructors on training structure, content, and delivery</li> <li>Assists with the development, collaboration and creation of all training material</li> <li>Measures training effectiveness</li> </ul>
Trish Barkley Miguel Morales	Training Content Developer(s)	<ul style="list-style-type: none"> <li>Reviews systems for training content development</li> <li>Works with key stakeholders to determine content to be captured</li> <li>Develops training content</li> <li>Revises as needed</li> </ul>
Hamed Rahimi Holly Berk Dianna Pourciau Miguel Morales	Training Content Editors/Reviewers (part of the approval process)	<ul style="list-style-type: none"> <li>Reviews training material for content accuracy</li> <li>Works with Training Program Developer and Training Content Developer for content modifications/corrections</li> </ul>
Trish Barkley Hamed Rahimi Holly Berk Miguel Morales	Instructors	<ul style="list-style-type: none"> <li>Delivers training class content and material to end-user group</li> </ul>
Holly Berk Dianna Pourciau	Content Approver	<ul style="list-style-type: none"> <li>Approves all training materials for deployment</li> </ul>

### 3. NEEDS AND SKILLS ANALYSIS

The target audience that would benefit from this training are Halliburton Employees and Contractors assigned to the integration team. Also, Consultants assigned to assist the integration team. The trainees have M&A Central Discovery knowledge and have completed training.

The target audience of this training are Team and Sub-Team Leads:

<b>Finance and Accounting</b>	<b>Corporate Tax</b>
Bryce Tawney, Sue Morris, Barbara Schoen, Sam Pace, Sarah Crane,	Steve Mura, Gary Sella, Aimee Burhoe, Vinay Sanapala
<b>Human Resources</b>	<b>Information Technology</b>
Tracy Josefvosky, Sydney Aiken	Doug Sellers, Daniel Fuchs
<b>Supply Chain</b>	<b>Opportunity to Cash</b>
Tony Wham, Haris Rahi	Andy Smith, Richard Schklair

#### 3.1 Dependencies/Constraints/Limitations

The user must be an approved or authorized user (Team Lead / Sub-Team Lead) to be registered in the training. The user needs an active M&A Central account with correct permissions in a function/team.

#### 3.2 Assumptions

- The trainee completed the M&A Central Discovery training.
- Training completion may require tracking
- M&A Central, Halliburton University or SharePoint can be used to house the course content.

#### 3.3 Risks

Completion of the training content is dependent on the completion of the Integration / Synergies structures and processes.

### 3.4 Training Requirements

- A configured environment must be available to record/capture screens and system procedures.
- The Face-to-Face methodology will be used at the Corporate offices for Team and Sub-Team Leads.
- Convert all PowerPoint training material to Adobe Captivate 6 eLearning course.
- Add Audio to slides (Sec.508 Compliance).
- Halliburton conference rooms with capacity of 10-14 seats will be used for Face-to-Face Training.

## 4. TRAINING APPROACH

### 4.1 Techniques and Tools

We will use the following methodology in our instructor-led and eLearning training initiatives:

#### **Instructor-led:**

##### Classroom:

IMO Team will be delivering the Face-to-Face training.

#### **Web-based:**

##### eLearning:

The electronic version of the course will be available in M&A Central, Halliburton University or SharePoint.

### 4.2 Development Milestones and Deliverable Dates

The PowerPoint training content will be completed by Friday July 3<sup>rd</sup>.

### 4.3 Schedule

The Hands-On training schedule is as follows:

- Face-to-Face training sessions:
  - July 6, 7, 8, 9, 10 and 13
  - 2 sessions can be scheduled each day
  - Each session will be 2hrs
- A total of 12 sessions can be scheduled
- The morning sessions are from 9:00am to 11:00am
- The afternoon sessions are from 1:00pm to 3:00pm

- The eLearning course will be available in M&A Central, Halliburton University or SharePoint
- The Hands-On instructors are: Hamed Rahimi, Holly Berk, Trish Barkley and Miguel Morales
- The course name is: **M&A Central Integration Planning Training**
- Location of sessions are Halliburton North Belt Campus Buildings Plaza 1 and 2 conference rooms.

#### *4.4 Content Development and Approval Process*

The Content developer will contact IBM to determine if the environment has the latest configuration. Then he will develop the Powerpoint slides. A group of IMO members will perform peer review. IMO Team will test the training content and finally, the IMO Manager/Project Manager approves the content.

#### *4.5 Curriculum*

The curriculum follows a a single-course approach. The content has 8 topics. See the learning objectives above.

#### *4.6 eLearning Course Process*

The eLearning Course Process will be the following:

1. The IMO Team identifies the users that would take the eLearning Course.
2. The IMO Team provides the URL to the eLearning content.
3. The IMO updates the trainee as **MAC Integration Planning Trained** in the Master List.

#### *4.7 Competency Management*

The desired competency is expected to come from this training, mentoring, coaching and by providing 1-on-1 assistance.

## **5. EVALUATION**

### *5.1 Metrics*

Some of the metrics which can be tracked include:

- Number of attendees during Face-to-Face training
- Percent of total attended
- Participant Name
- Participant Role



## 6. SUSTAINABILITY PLAN

- After the training is completed, what will happen to the training course materials, student information and other materials?
  - The training course materials will be available in M&A Central, Halliburton University or SharePoint.
- Who will own, manage and maintain the training materials in the future?
  - The IMO Training Developer will own and manage the training content.
- How will training materials be used in the future to train new staff?
  - Via Face-to-Face, or in eLearning format from M&A Central, Halliburton University or SharePoint.
- How will training materials be used in the future for refresher training?
  - Via Face-to-Face, or in eLearning format from M&A Central, Halliburton University or SharePoint.