CI TRAINING GUIDE FOR IT TEAM MEMBERS

OVERVIEW

At UWM, we strive to be better each day. One of our Pillars is Continuous Improvement (CI), and for good reason. We're always looking for ways to innovate and improve, not only as individuals, but as a team and company too. This document will summarize various CI offerings and opportunities available for IT team members and provide resources on how to log CI hours into Academy.

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![UWM - UNITED WHOLESALE MORTGAGE logo]

OPPORTUNITIES FOR CONTINUOUS IMPROVEMENT

Each team member in IT is expected to complete **2 hours** of Continuous Improvement per month. Below you will find suggested internal, online, and external CI opportunities and resources, as well as information on how to log your CI hours into Academy.

INTERNAL OPPORTUNITIES

In this section, you will find 4 internal Continuous Improvement opportunities along with a description of each.

NOTE: All Internal Opportunities mentioned below except for CI Courses Offered by IT Training will need to be logged as External Training in Academy. Click HERE[8] for guidance on how to log your CI hours in Academy.

CI COURSES OFFERED BY IT TRAINING

Each month, IT Training offers CI courses for all IT team members. There are a multitude of courses ranging from C# Fundamentals to Kanban Foundations, and everything in between! Simply sign up, obtain leader approval, and get ready to expand your knowledge.

To view the CI Course Catalog and Calendar, click HERE[1].

LUNCH & LEARNS

Often, leaders and fellow team members will host a Lunch & Learn to deliver new information to their peers off the clock on their lunch break. Topics range from discussing information learned at an external event, a new skill to share, or to discuss a book. The possibilities are endless! If interested in attending a Lunch & Learn, talk to your leader and keep an eye on your email, UZone, and Microsoft Teams for opportunities. They are a great way to learn from your peers while enjoying a bite to eat at the same time!

JOB SHADOWING

Job shadowing promotes collaboration, communication, and better relationships within IT and other teams throughout the organization. Shadowing is intended to be a learning experience for both parties involved through sharing best practices and an understanding of other team's day-to-day functions.

To request a shadow, navigate to the UZone homepage and click **Tools & Resources** in the Mega Menu, then click **Request Job Shadowing** in the How-To column. This will open a task template for you to fill out to request a shadow.
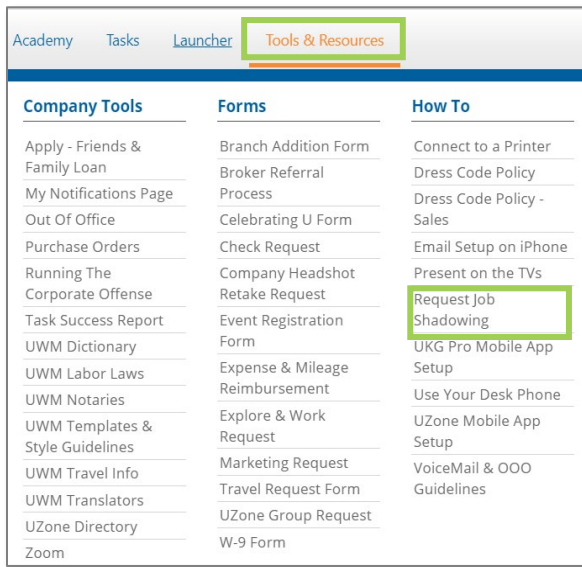
COMMUNITIES OF PRACTICE

Communities of Practice (CoP) are used to develop and maintain practices, standards, guidance and direction around specific domains. Each CoP has recurring meetings and resources for continuous improvement. Membership to all CoPs are open to all IT Team Members.

To join a CoP, complete the following steps:

1. Open KnowledgeBase (KB)
2. At the top of the page, click on the Communities tab
3. Click on the CoP(s) you're interested in to view their KB page
4. Email the Chair or Co-Chair to be added to the email distribution list and receive meeting invites
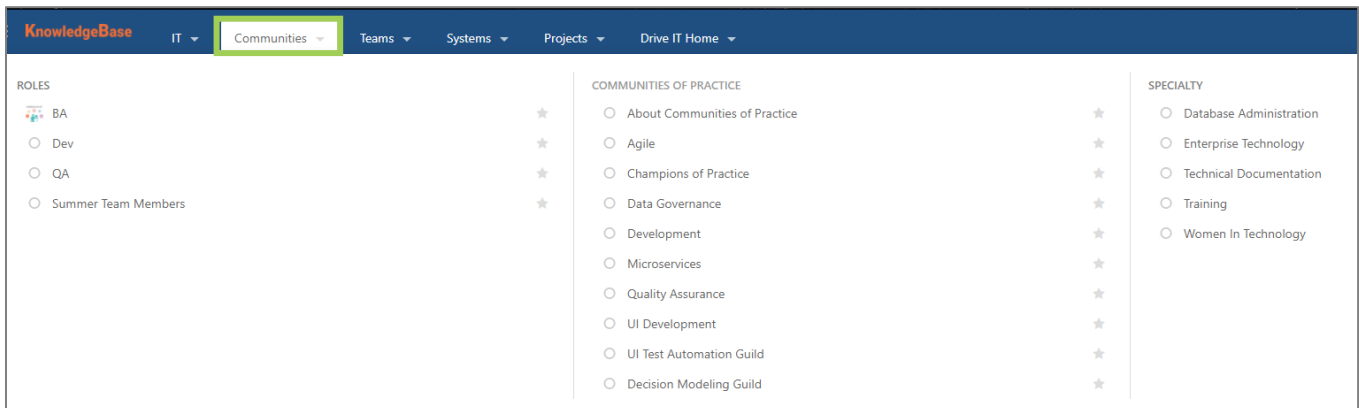
ONLINE OPPORTUNITIES

In this section, you will find three online Continuous Improvement opportunities available to you as a team member at UWM. Many of our vendors offer free online training because we use their products.

DYNATRACE UNIVERSITY

Dynatrace is a full-stack monitoring solution that will provide visibility for all UWM team members to proactively understand how their work will impact both system performance and user activity across our client-facing applications in all UWM on-premises and cloud environments. As part of our partnership with Dynatrace, all IT team members have been given access to Dynatrace University. This is a collection of videos, live training sessions, documentation, quizzes, and more offered to team members to learn what Dynatrace is and how to use it.

To learn more about Dynatrace University. click HERE[2] to view the job aid.

SALESFORCE TRAILHEAD

Trailhead is a series of free online tutorials that coach beginner and intermediate developers on how to code for the Salesforce platform. Gamification is built into the program for a fun, engaging experience, and users are provided with a series of assessments to identify mastery of the content.

To learn more about Salesforce Trailhead click HERE[3].

PLURALSIGHT

Pluralsight is an online learning and workforce development platform that trains users to sharpen or upgrade their skills and adapt to new and developing tools. Individuals can learn at their own pace from thousands of on-demand video courses, and learning programs, engage in interactive projects and take practice certification exams. To request access, follow the link below to submit a ticket in YouSupport.

To request access to Pluralsight click HERE[4].

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EXTERNAL OPPORTUNITIES

In this section, you'll discover a few external Continuous Improvement opportunities as well as some helpful links.

BOOKS

Reading a book is a great way to stretch your thinking, gain new knowledge, and get in some CI hours! Just keep in mind that if you're reading a book for CI, it must be relevant to your role, the industry, or your career advancement goals. If you're looking for book recommendations, check out the IT Library - Books page in KB[5], or you can always reach out to your leader or IT Training for suggestions. There's even an area on the page where you can suggest books to be added to the list. Click HERE[6] to create a task to check out a book from the library.

When beginning a new book for CI, click HERE[7] to launch the External CI Tracker task template so that you and your leader can discuss your takeaways and your plan to implement what you learned into your role. Happy reading!

CONFERENCES, EVENTS, AND CERTIFICATION CLASSES

Attending external conferences, events, and certification classes is a great way to gain a fresh perspective and learn something new! If you're interested in attending, click HERE[7] to launch the External CI Tracker task template to express interest and obtain the proposal form you will need to submit to gain approval.

NOTE:
- If the conference/event/certification class is less than $1,000 and approved, the company may offer to cover the cost
- If the conference/event/certification class is more than $1,000, approved, and the company covers the cost, the team member will need to sign a waiver stating that if they leave the company in less than 1 year after attending the conference/event/class they will be responsible for reimbursing UWM the full amount

INTERNAL USE ONLY

LOGGING CONTINUOUS IMPROVEMENT HOURS IN ACADEMY 2.0

Continuous Improvement is a great way to further your training and improve your skillsets to advance your career here at UWM. It is important that you get credit for all of the hours you put into improving yourself! At UWM, there are two ways hours are tracked: automatically and manually.

- All CI courses offered by IT Training will automatically document your CI hours into Academy
- All other internal, online, and external CI hours will need to be entered manually into Academy. Click HERE[8] for guidance on how to log your CI hours in Academy

Talk to your leader about the opportunities mentioned in this job aid and how to document your CI hours for career progression.

HYPERLINKS IN THIS DOCUMENT

1. https://kb.uwm.com/pages/viewpage.action?pageId=103153992
2. https://uwm.csod.com/ui/lms-learning-details/app/curriculum/8f7e1a63-1231-48b6-a50f-438a25d1fc37
3. https://trailhead.salesforce.com/en/home
4. https://uwm.service-now.com/sp?id=sc_cat_item&sys_id=4f129998db9eaf4018b63220ad9619fd
5. https://kb.uwm.com/display/AR/IT+Library+-+Books
6. https://www.uzone.uwm.com/task/template#/create/535936?
7. https://www.uzone.uwm.com/task/template#/create/1187047?
8. https://uwm.csod.com/ui/lms-learning-details/app/material/ded1c5df-9672-475c-9755-7d802a6c4751

**If you have any questions or concerns,
please reach out to IT Training at ITTRAINING@UWM.COM.**