Scaling Enterprise-Wide Learning Solutions

SunTrust Best Practices

Speaker

Wayne Zitsch

- Group Vice President, Talent Management & Development, Manager of Learning Development
- Leads a team of Project Managers that manage contracts and vendors for the centralized learning function
- Has worked for IBM and Bank of America,
- MS in Instructional Technology and MBA

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Agenda

- Speaker
- About SunTrust
- Introduction
- Starting Point
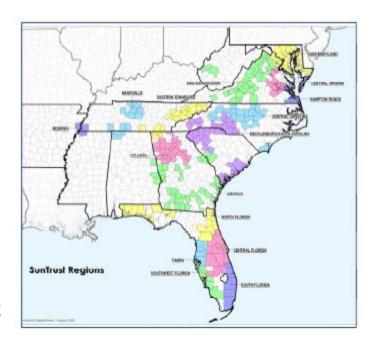- Major Phases
- Summary
- Questions

About SunTrust

Purpose: Lighting the Way to Financial Well Being

SunTrust Banks, Inc. provides deposit, credit, trust, and investment services to abroad range of retail, business, and institutional clients.

SunTrust's business segments:

- Retail
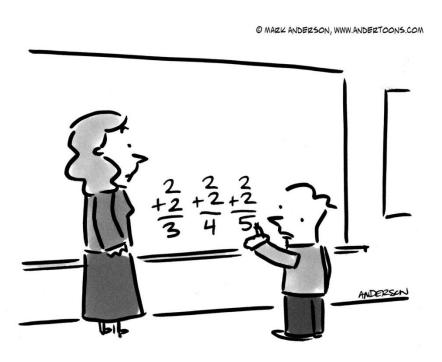- Private Wealth Management
- Mortgage
- Wholesale

Retail Footprint

1,574 retail branches, 2,882 ATMs, and 26,778 employees across a footprint that extends from Florida to Washington, DC.
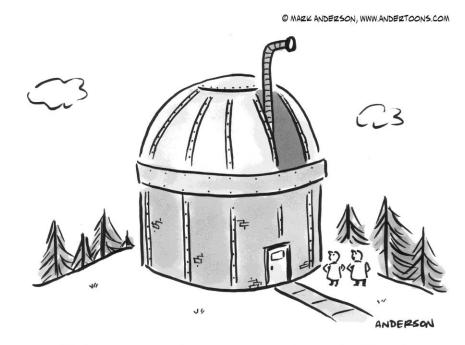
Ever Happen to You?
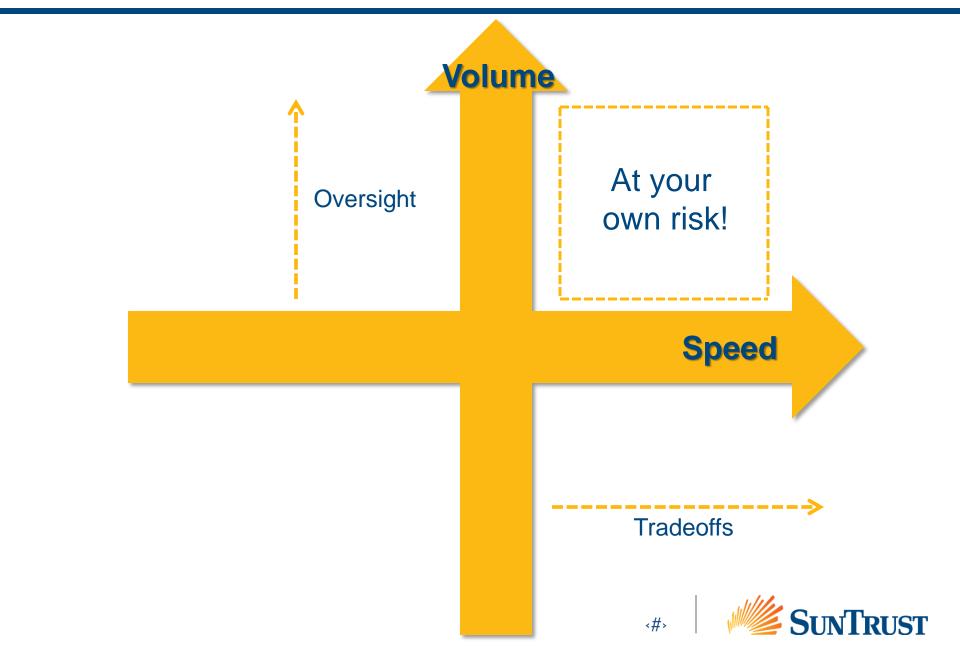

"I've prepared a few different options."

If I have enough options
something will work!

"Hmm... Lemme check that purchase order again."

Periscope, telescope
what's the difference?

What is Scalability?

Volume

Oversight

At your own risk!

Speed

Tradeoffs

Typical Real Life Situation

Line of Business: Mortgage

Story line: The Fed performs an audit and provides a finding that causes SunTrust to need to add a new system, processes, and Teammates in a tight timeline.

Moment of Truth: Learning consultant in their normal weekly business gets the question *"We need to train 600 people on a new system and processes in 60 days. Can you do it and how much will it cost?"*

Are you ready for that question?

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Overall Training Development Philosophy

"If it is training, we will help no matter how challenging the project"
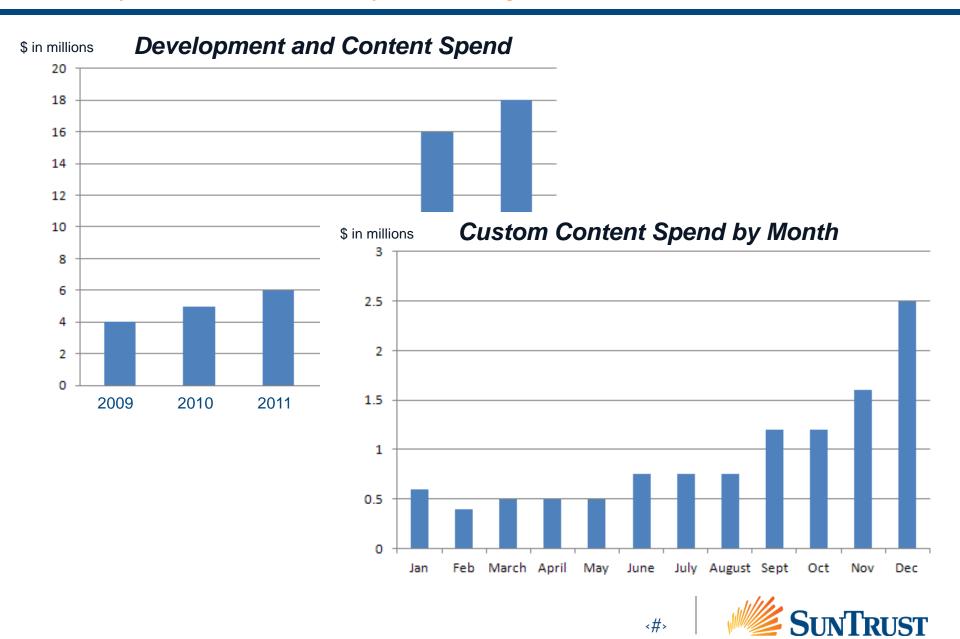
When you start from a place of "Yes" the discussion moves to "Should We?" and "Are You Really Ready?"

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Why is Scalability so Important to SunTrust?

$ in millions

Development and Content Spend

$ in millions

Custom Content Spend by Month

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Top Ten Challenges to Overcome When Scaling

1. Do process & procedures and the IT system exist?
2. Are the Subject Matter Experts available?

   Typically out of the training department's control

3. Can I confirm general scope to start the project quickly?
4. Do I have a prioritization mechanism ready?
5. Do I have vendor relationships in place?
6. Can the vendor or staff hit the ground running?
7. Are my logistics straight?
8. Are my development processes clear and crisp?
9. How do I watch the funds or the staff during the chaos?
10. Do the learners have time to take the training?

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Major Phases Pertaining to Scalability

Pre-Project

You can't win in this phase but you can lose

Sustainability

Project

Don't Forget!

Post Project

Delivery

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Pre-Project

Concepts

- **Forecasting**
- RFP
- **Scoping**
- Build-Buy-Modify
- **Vendor Relationships***
- **Sourcing Catalog Build Out**
- Budget Management
- Project Staffing
- Expectation Setting

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Pre-Project

Best Practices

1. **Teach your organization to scope and forecast**
   - How long does it take to development a 1 hour web based training?
   - How much does it cost?
   - Should we use bottom up or top down estimating?
2. **Work on your vendor relationships before you need them.**
   - Have a Master Services Agreement in place with a lot of vendors
   - Make sure your vendor is open to scaling
   - Complete a few small projects to work out issues before you really need them
3. **Standard Products are required for scalable delivery**
   - Standard products are easy to order
   - Reduce production issues
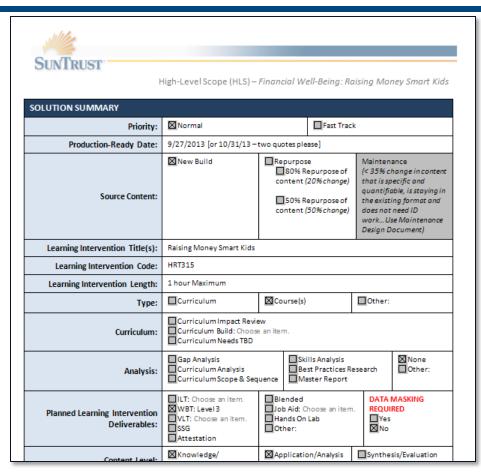   - Have clear costs

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Pre-Project (Forecasting)

Month by month activity in a transparent form

Pre-Project (Vendor Relationship)

Requirements Document

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High-Level Scope (HLS) – *Financial Well-Being: Raising Money Smart Kids*

SOLUTION SUMMARY

Priority:	☒ Normal	☐ Fast Track
Production-Ready Date:	9/27/2013 [or 10/31/13 – two quotes please]	

Source Content:	☒ New Build	☐ Repurpose ☐ 80% Repurpose of content (20% change) ☐ 50% Repurpose of content (50% change)	Maintenance (< 35% change in content that is specific and quantifiable, is staying in the existing format and does not need ID work... Use Maintenance Design Document)

Learning Intervention Title(s):	Raising Money Smart Kids
Learning Intervention Code:	HRT315
Learning Intervention Length:	1 hour Maximum

Type:	☐ Curriculum	☒ Course(s)	☐ Other:

Curriculum:	☐ Curriculum Impact Review ☐ Curriculum Build: Choose an item. ☐ Curriculum Needs TBD

Analysis:	☐ Gap Analysis ☐ Curriculum Analysis ☐ Curriculum Scope & Sequence	☐ Skills Analysis ☐ Best Practices Research ☐ Master Report	☒ None ☐ Other:

Planned Learning Intervention Deliverables:	☐ ILT: Choose an item. ☒ WBT: Level 3 ☐ VLT: Choose an item. ☐ SSG ☐ Attestation	☐ Blended ☐ Job Aid: Choose an item. ☐ Hands On Lab ☐ Other:	**DATA MASKING REQUIRED** ☐ Yes ☒ No

Content Level:	☒ Knowledge/	☒ Application/Analysis	☐ Synthesis/Evaluation

Work Order

GP STRATEGIES™

WORK ORDER

Project Title:	*Financial Well Being Series-Raising Money Smart Kids*
SunTrust IDPM:	Rachel Livermore
GP Start Date:	8/19/2013
Production Ready Date:	10/31/2013

OVERVIEW

Delivery Methodology: 1 Level 3 WBT (1 hour) - $35,700; 1 WBT to Word Conversion-$450.00; Fast Track Charge - $3615.00

Cost: $39,765.00

Billing Schedule:	GP will invoice 50% upon approval of Alpha Content and 50% upon approval of Production-Ready Deliverables.
Schedule:	GP is prepared to begin work on this project upon signature of this Work Order.
Communication Plan:	The GP PM and the SunTrust IDPM will develop a Communication Plan that fits the needs of this project and could include regular emails, phone calls, conferences, and/or progress reports.
Approval of Work Order:	*Web signature and email confirmation are acceptable forms of signatures for this document.*

EXECUTIVE SUMMARY

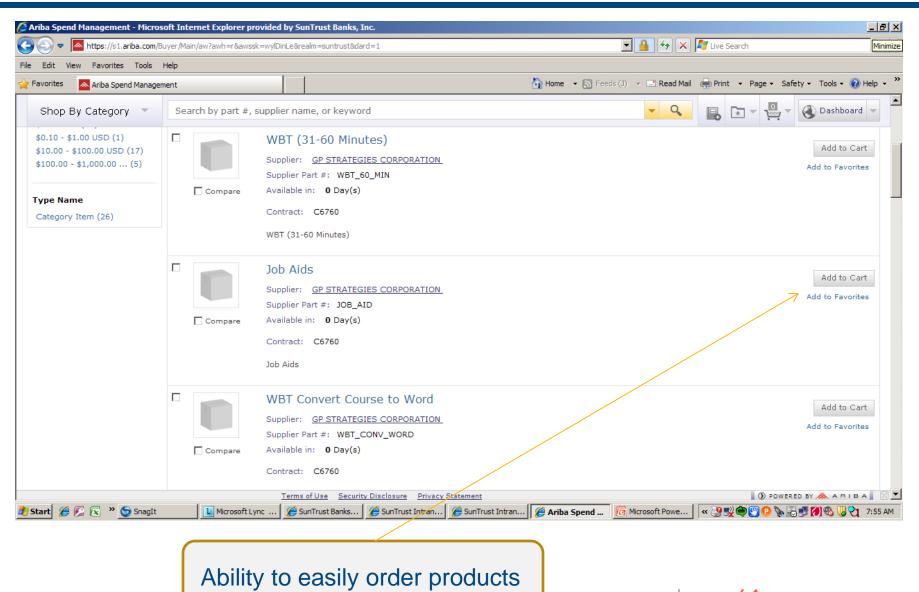|	
This summary is provided for high-level review of the proposed solution's vision and scope. Please include Return on Investment,	The Financial Well Being Series has been established to enable teammates to improve their financial planning capacities with topics that have yielded increased financial literacy, investment strategies, and retirement. This series installment will provide teammates with tools critical to grounding their children with a sound financial foundation and general acumen.

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Pre-Project (Standard Products & Scoping)

Ability to easily order products

Project

Concepts

- Infrastructure Logistics
- Project Management
- **SME Management**
- **Change Control**
- Downstream Communication

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Project

Best Practices

1. **To manage SMEs effectively, three key things are needed**

    - An explicit contract with SMEs defining tasks/responsibility and estimated hours spent per week.

    - Clear communication from the SMEs leader about the importance of the project.

    - Vendor has to be sensitive to client's cultural values.

2. **Change control is not a bad a word.**

    - Change control allows for flexibility in the system, but can be perceived as a penalty or worse inflexibility.

    - A lot of effort is needed to convince SMEs and clients that changing your mind is OK.

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Project (Documented SME Commitment)

Approval of Work Order: *Web signature and email confirmation are acceptable forms of signatures for this document.*

EXECUTIVE SUMMARY

This summary is provided for high-level review of the proposed solution's vision and scope.

Please include Return on Investment, Metrics for Measurement, and Voice of Teammate.

While the CIB PM Analysts know how to navigate a financial model, this instructor led course will teach them to think through a base case, downside case as well as projections and learn how to use this through process in furthering their credit decision. The course will begin with pre – work – running a base case on a publically traded company. They will begin the first day by reviewing their cases and discussing findings. Lecture will follow with in class exercises and discussion. About 4 weeks later, Day 2 will review the downside case pre work, then follow outline of Day 1 finishing with a discussion on the important evaluation of projections.

This course has been built by the CIB PM Team and will be delivered by internal facilitators. We would like a quote from GP as to how how much it would cost to build out the training materials, leaders guides, and exercises. Tom Wilby of Credit Process Improvement would like to use this framework to include this training via the Credit Academy.

TIME COMMITTMENT

| **SunTrust Time Commitment** *(Hours needed by SunTrust staff)* | Position/Role: Lead SME Reviewer | Estimated Hrs: 12-16 Hours |
| | Position/Role: Click here to enter text. | Estimated Hrs: Click here to enter text. |

Last Modified: 15 September 2012

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Clear Contracted Hours

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Delivery

Concepts

Early Engagement

Established Partners

Broad Knowledge Base

Implementation & Logistics

Operational Excellence

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Early Engagement

Best Practices

1. **Business Partnerships that engage the delivery organization with a line of sight into what's coming.**

   - This is when "just in time" and "just enough" can kink the hose.

   - Early engagement gets "the head", making the heart follow at implementation.

   - Know and plan for the runway that works best for your deployments.

   - Clear communication enables #3. *Wait for it…*

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Established Partners

Best Practices

2. **Establish collaborative partnerships with your vendors that have proven talent and that compliment and model your organization's culture.**

   - We have found that having established partnerships, well vetted and sourced before "the big event," increase our ability to support the business through enterprise-wide deployments.

   - Make them your BFF and thought partner even when they are not actively engaged.

   - Foot wear matters. Culture and the organization's nomenclature matters. You want your vendors to walk "your" walk and talk "your" talk.

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Talent Knowledge Base

Best Practices

3. **How broad and agile is your talent's knowledge base?**

   - Look for the light IN the tunnel and know what's coming. Seek to emphasize your talent's strengths but look for the gaps and pitfalls.

   - Don't underestimate the need for flexibility and adaptability to increase your scalability. Seek to grow your bench strength for greater flexibility and scalability.

   - Learning curves can be painful but rewarding. Feed the horses regularly.

Post Project

Concepts

- **Billing Processes**
- Official Acceptance
- **Discipline Archival**
- Survey and Survey Management
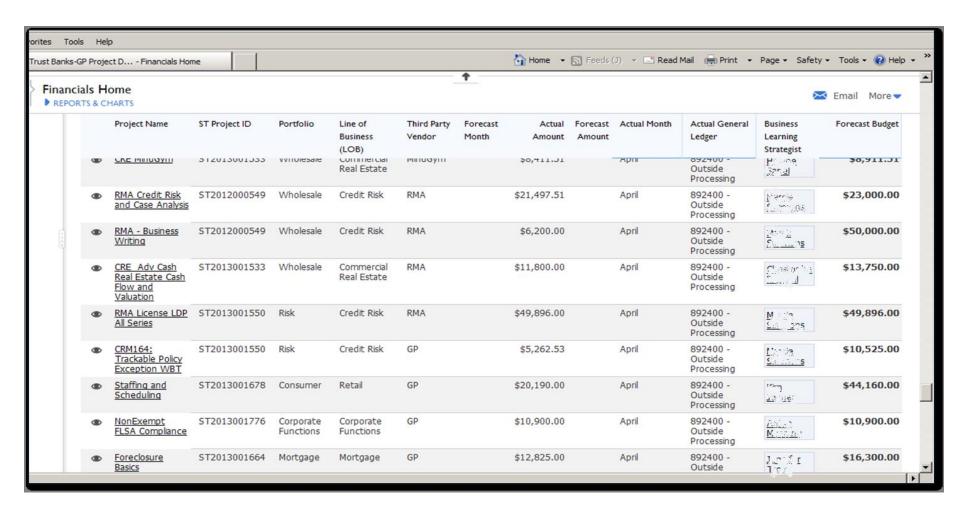- **Communication Deployment Reasoning**

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Post Project

Best Practices

1. **Develop a routine around billing.**

   - Monthly check-ins with all parties

   - Publish billing and costs in document for teammates to check. We publish a document called cost tracker.

2. **Be very clear on who in the organization is required to archive learning products.**

   - Have an audit process with routine audits

   - Quarterly audits are best, considering people's memory and job movement

3. **Most big important projects produce "required" training, verify enrollment authority and track reason for deployment.**

   - Questions around enrollments snarl helpdesk support and create hard feelings with user groups

   - Avoid the dreaded "who authorized this" question

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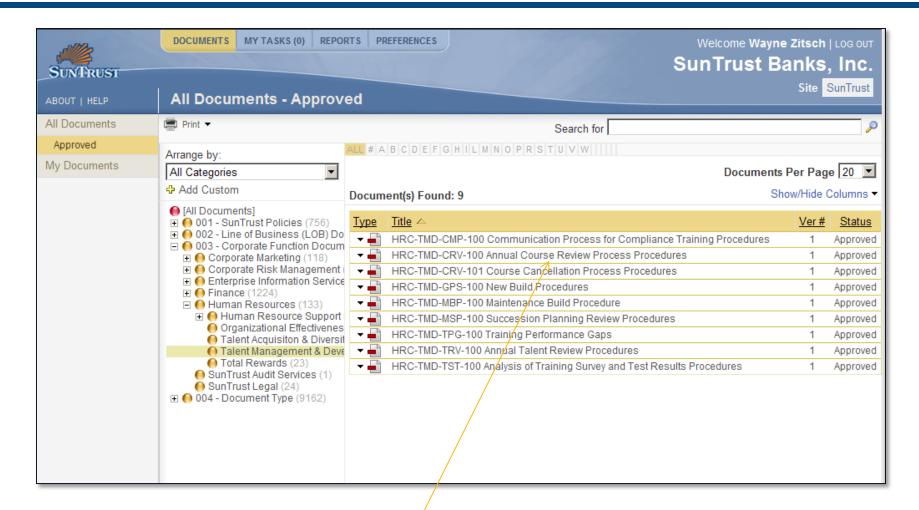# Post Project (Tracking Costs)

Sustainability

Concepts

- **Long Term Ownership**
- Audit Archival Process
- **Standard Review Cycles**
- Standard Products
- Course Feedback

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Sustainability

Best Practices

1. **When a lot of work is going on, it is vital that a long term owner be identified.**

   - Need to remind the owner of their ownership and talk about long-term maintenance, or the learning product will gradually get outdated and need to be retired.

   - Some courses have multiple audiences, make sure the person requesting the change has the authority to do so.

2. **Standard review cycles are a necessity or your course catalog will continually grow.**

   - As you add courses, review old courses to see which ones should be retired so that the overall portfolio of courses doesn't spiral upward.

   - Provide clients a document showing how up to date their courses are. The goal is to get investment (time, money, and interest) in courses you already have, not just the new shiny ones.

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Sustainability

Transparent Stated Process

Summary

In short, scaling your business will test your:

- Ability to scope work
- Execute with vendors
- Keep clients informed
- Watch everything in the chaos

Simple Best Practices

1. Invest in systems and procedures
2. Work those vendor relationships
3. Scaling requires open communication

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Questions