Blueprint for Success Guide

Overview

Having a clear training plan (a.k.a. blueprint) in place is important because it ensures we have the necessary resources and processes in place to enable us to achieve our training goals.

In order to successfully create our plan, we first need to know what we must achieve in a given timeframe. For some that might mean looking at the next quarter, for others the upcoming year, and for those who are very ambitious, 3-5 years out.

The steps to creating a blueprint are simple, but will require focused time and effort on the part of those responsible for bringing it to fruition. This guide will explain each step and provide template for you to use in creating your Blueprint for Success.

Key Steps to Formulating your Blueprint for Success

1. **GATHER PLANNING RESOURCES**
2. **CONDUCT GAP ANALYSIS: TRAINING & RECORDS MANAGEMENT NEEDS**
3. **IDENTIFY GOALS AND CREATE TRAINING PLAN**
4. **EXECUTE TRAINING PLAN**

1. GATHER PLANNING RESOURCES

The first step we need to take is to gather our planning resources. Having these resources available will allow us to access valuable information as we build our plan. Below is a list of resources that you may find helpful. There may also be additional resources you want to gather that are specific to your organization.

- ❑ **Current liability and worker's comp claims**
- ❑ **Current list of mandated training by position or job type**
- ❑ **List of additional training resources (i.e. instructor-led training schedule, conferences, etc.**
- ❑ **List of procedures you want to streamline**
- ❑ **Organizational/ Risk Management and/or Human Resources Goals/Targets**
- ❑
- ❑ **Current Organization Chart**
- ❑ **Stakeholder input – goals, feedback, guidelines**
- ❑ **List of company policies**
- ❑ **Current Copy of TargetSolutions Course Catalog**
- ❑ **HRIS print out with all employee data categories**
- ❑

2. CONDUCT GAP ANYLYSIS: TRAINING & RECORDS MANAGEMENT NEEDS

A gap analysis is essentially identifying where you are and where you want to be. You will need your planning resources to help make those determinations. Once we have that information and understand what our gap is, we can then put together a training plan and goals to help us bridge the gap.

CLAIM TYPES

This section is design to help you capture key information about the claims that have the most negative impact on your business. Based on what you capture here, you can work with your account manager to create a custom ***"Course to Claim" Finder*** for your organization.

Resources:

- ❑ **Current liability and worker's comp claims**
- ❑ **Stakeholder input – goals, feedback, guidelines**
- ❑ **Organizational/ Risk Management and/or Human Resources Goals/Targets**
- ❑ **Current Copy of TargetSolutions Course Catalog**

Claim Type	Groups Impacted	% of Overall Claims	TS Course(s)	Timeframe
EXAMPLE: Illness: Chemical Ingestion, Chemical Absorption, Chemical Inhalation, Heat Stress, Mental Stress	List specific groups that have higher claim numbers and/or groups that have a high level of exposure	20%	• Hazardous Communication • Working in Extreme Temperatures • Work Place Stress	3 months

GOVERNMENT MANDATED TRAINING

Resources:

- ❑ **Current list of mandated training by position or job type**
- ❑ **Stakeholder input – goals, feedback, guidelines**
- ❑ **Organizational/ Risk Management and/or Human Resources Goals/Targets**
- ❑ **Current Copy of TargetSolutions Course Catalog**

Need	Groups Impacted	TS Courses	Custom Activities & Credentials	Timeframe
EXAMPLE: Driver's Safety	All employees who drive a company vehicle	• Aggressive Driving • Defensive Driving Strategies • Distracted Driving • Expressway and Highway Driving • Impaired Driving	Driver's License Policy Review	Every 12 months

REQUIRED POSITION OR DEPARTMENT SPECIFIC TRAINING

Resources:

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STREAMLINE PROCESSES & RECORDKEEPING

Resources:

- ❑ **List of procedures you want to streamline**
- ❑ **Organizational/ Risk Management and/or Human Resources Goals/Targets**
- ❑ **Stakeholder input – goals, feedback, guidelines**
- ❑ **Current Copy of TargetSolutions Course Catalog**

Need	Groups Impacted	TS Courses	Custom Activities & Credentials	Timeframe
EXAMPLE: New Hire Orientation	All New Employees	• Alcohol-Free Workplace • Computer Security Awareness • Drug-Free Workplace • Sexual Harassment Awareness • Workplace Diversity	New Hire Orientation	3 months to complete

NOTES:

3. IDENTIFY GOALS AND CREATE TRAINING PLAN

TRAINING GOALS

Your training goals should be aligned with your overall Organization/Risk Management/Human Resources goals/targets. Listed below are some examples of goals you may want to consider. When identifying your goals you want to keep a few things in mind.

- You should only try to tackle 3-5 goals.
- Your goal is your measure of success.
- It should link to your overall business goals and help close gaps.
- It should clearly identify what you are trying to accomplish – numbers are good.
- It should be time-bound and define who is responsible.

Resources:

- ❑ **Organizational/ Risk Management and/or Human Resources Goals/Targets**
- ❑ **Stakeholder input – goals, feedback, guidelines**
- ❑
- ❑

Goal Type	Goal	Timeframe	Responsible
EXAMPLE: Risk Management	Reduce overall vehicle related claims by 5% by providing comprehensive awareness training program for all company vehicle drivers.	3/1 – 7/31	Risk Manager
EXAMPLE: Human Resources	Streamline new hire orientation by delivering and tracking all training and documents electronically to reduce administrative time by 4 hours per month.	Begin 1/1	HR Team

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TRAINING PLAN

Our training includes the actions we are going to take to help us achieve our goals.

Action/Task	Notes	Responsible	Due Date
EXAMPLE: Build New Hire Orientation Credential and Begin Using by 2nd Quarter.	Customize Imported Activity Templates	Jen	3/31
EXAMPLE: Create Assignments for all 2nd and 3rd quarter training.	Start date is first day of quarter and due date is 1 week before end of quarter	Claire	3/15
EXAMPLE: Site Supervisors to Attend Next Session of TS Academy.	Jen to put on pre-register list	Supervisors	4/17
EXAMPLE: Work with Account Manager to create Custom Course to Claim Finder for 2014 and assign out training as necessary.		Amy	6/1

Action/Task	Notes	Responsible	Due Date

4. EXECUTE PLAN

ORGANIZATION CATEGORIES

❑ **HRIS print out with all employee data categories** ❑ **Current Organization Chart**

Organization Categories exist to help you most effectively assign and track your training. They determine how you can filter your users into manageable buckets and should mirror your organizational structure. It may help to look at your current organization chart or HRIS print out to establish your organizational categories.

Organization Categories are established during the site build process; however site Administrators can request these be amended at any point by contacting their TargetSolutions Account Manager. Only TS Account Managers can edit Organization Categories.

The Organization Categories listed below are those most commonly used across all TargetSolutions clients. You can choose to use these, or you can create your own.

Check the box for each group that you currently have in your organization or would like to include to make it easier to assign and track training and records.

	Group	Definition
❑	**Department**	Used to identify organizational departments.
❑	**Location**	Used to identify different work locations.
❑	**Job Title**	Used to identify organizational job titles, codes, etc.
❑	**Supervisor Status**	Used to specify whether or not a user is responsible for the supervision of others. Most commonly used to assign training, such as: Sexual Harassment for Supervisors.
❑	**Driver Status**	Used to assign training and/or track driver's license for users who drive company vehicles.
❑	**Employee Type**	This can be used to designate full-time, part-time, temporary, seasonal, union, or any other employee type pertinent to your organization.
❑		
❑		

In addition to establishing Organization Categories, you can also determine how they will operate in your site.

	Action	Definition
❑	**Allow Users to be in multiple groups**	Allows user to belong to more than one Group in an Organization Category (i.e. two job titles)
❑	**Editable by employee**	Allows user to edit which Organization Categories they belong to using the Edit function in "My Profile"
❑	**Visible in employee edit profile**	Allows user to view which Organization Categories they belong to in "My Profile" (not able to edit)

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ORGANIZATION SETTINGS

	Setting	Definition
❑	**Lock Allowed Email Domains**	Locks email domain (i.e. @yourorganization.com) so users are not able to use personal email addresses – may choose to lock down more than one domain if your organization has multiple domains
❑	**Email Requirements**	Allows you to require users to have an email address in order to use your site
❑	**Username Type**	You can choose to allow email as username, non-email as username or both
❑	**Tags**	
❑	**Custom Certificate**	TargetSolutions will create a custom certificate for your organization upon request. In order to produce this certificate, your Account Manager will need the following information: • A copy of your existing certificate, if available • Department logo • Electronic copy of the signature needed on the document • This same person's full name and title • CE provider name and number if applicable Once you have gathered these requirements, contact your Account Manager for further information. The process of creating a custom certificate typically requires 3-5 business days.
❑	**Community Resources**	You can choose to include this application in your site or choose to have it removed.
❑	**Forum**	You can choose to include this application in your site or choose to have it removed.

USER PROFILE DEFAULT SETTINGS

TIME SAVING TIP:
Create a consistent and unique naming convention for your non-email usernames and share it with all platform managers

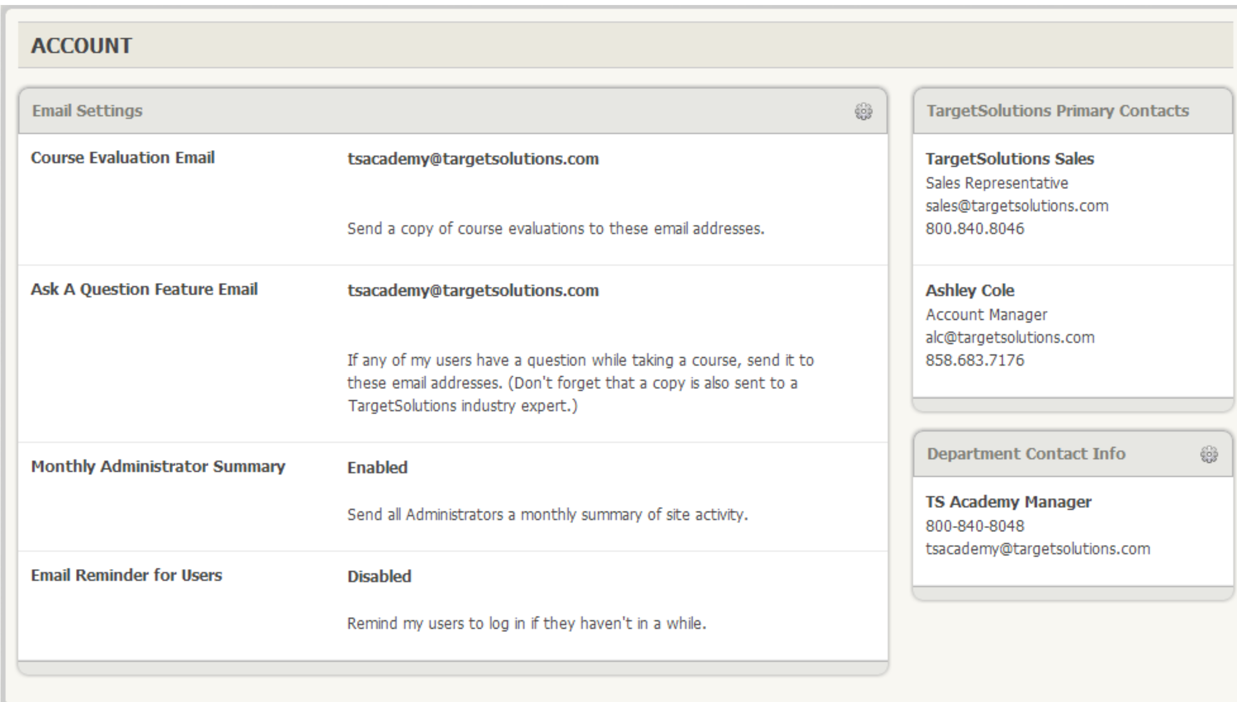
TIME SAVING TIP:
Create a unique default password for all new users/password resets

Which custom activity templates would you like uploaded to your site?

	Activity Title	Description
❑	**NIMS ICS 100**	Introduction to the Incident Command System (ICS 100) from the FEMA website.
❑	**NIMS ICS 100.sca**	NIMS Introduction to Incident Command System for School from the FEMA website
❑	**NIMS ICS 200**	ICS for Single Resources and Initial Action Incidents (ICS 200) from the FEMA website.
❑	**NIMS IS 701**	NIMS Multiagency Coordination Systems from the FEMA website.
❑	**NIMS IS 702**	NIMS Public Information from the FEMA website.
❑	**NIMS IS 703**	NIMS Resource Management from the FEMA website.
❑	**NIMS IS 704**	NIMS Communications & Information Management from the FEMA website.
❑	**NIMS IS 775**	EOC Management & Operations from the FEMA website.
❑	**NIMS IS-700**	Introduction to the National Incident Management System (NIMS) from the FEMA website.
❑	**NIMS IS-800**	An Introduction to the National Response Framework from the FEMA website.
❑	**Accident - Incident Report Form**	Accident - Incident Reporting form for General Liability
❑	**Back Safety Risk Assessment**	This assessment is designed to determine the risk of back injury within a department or organization.
❑	**Confined Space Entry Training**	Tailgate meeting on Confined Space Entry.
❑	**Ergonomics Survey**	The purpose of this survey is to provide you an opportunity to tell us about your computer work and related comfort and productivity issues, which are components of ergonomics.
❑	**Fitness Survey**	Annual Review of our Fitness Program
❑	**General Office Risk Assessment**	This assessment is designed to evaluate the risks in general office space.
❑	**Haz Com Risk Assessment**	Assessment to determine the risk to employees associated with exposure to hazardous chemicals and compliance with DOL guidelines per OSHA 3111.
❑	**Inspection of Administrative Area**	Inspection form to document inspections in large office suites, areas with multiple cubicles, copy rooms, coffee rooms, and other common work areas. It should not be used for individual offices, or for non-administrative areas such as shops, laboratories, and areas containing any hazardous materials.
❑	**Playground Inspection**	Inspection checklist for a typical playground that we are all familiar with in Parks, Schools and other public use playgrounds.
❑	**Portable Fire Extinguisher Inspection**	Checklist for performing monthly fire extinguisher inspections
❑	**Swine Flu Training**	Review Swine Flu Training Presentation.
❑	**Vehicle Pre-Trip Inspection**	Inspection report to be filled out prior to operating a passenger car, van, or pick-up truck
❑	**New Hire Orientation**	Allows users to access and submit new hire paperwork.
❑	**Monthly Safety Meeting**	Allows platform manager to track safety meeting or tailgate content and attendance.
❑	**Driver's License Tracking**	Allows users to provide driver's license information, including ability to upload a scanned copy of the document.
❑	**Policy Review**	Allows users to open, read and electronically acknowledge agreement for company policy.
❑	**Wellness Program**	Available in Late March 2014

ACCOUNT SETTINGS

	Setting	Definition
❑	**Course Evaluation Email**	Contact person who will receive user course evaluations. Evaluations are also sent to the TargetSolutions Content Team. You can add multiple contacts.
❑	**Ask A Question Feature Email**	Contact person who will receive user course evaluations. Questions are also sent to the TargetSolutions Content Team who will respond with an answer. You can add multiple contacts.
❑	**Monthly Administrator Summary**	When enabled all Administrators will receive a monthly summary of site activity.
❑	**Email Reminder for Users**	When enabled will send out message to users who have not logged in
❑	**Department Contact Info**	Main point of contact and decision maker for your site.



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USER PROFILE MAINTENANCE PROCESS

Task	Responsible	Frequency	Notes	Supervisor Functional Access
EXAMPLE: Add New Users	• Departmental TS Supervisor	Within 2 days of Start Date	Contact TS Account Manager mass upload of 25+	**Users: Add User**
EXAMPLE: Edit Existing Users (including password resets)	• Department TS Supervisor	Within 2 days of Effective Date	Contact TS Account Manager for 25+ users with same edit type (i.e. inactivate users or mass password reset)	**Users: Manage Users**
EXAMPLE: Manage Organization Categories	• Designated Administrator	Yearly	Collect recommended changes from Department TS Supervisors and other Admins	**Users: Manage Organization**
EXAMPLE: Conduct Departmental User Profile Audit	• Department TS Supervisor	Yearly		**Reports: Users**
EXAMPLE: Spot Check Department User Profile Audits	• Designated Administrator	Yearly		**N/A**

Task	Responsible	Frequency	Notes	Supervisor Functional Access
Add New Users	•			**Users: Add User**
Edit Existing Users (including password resets)	•			**Users: Manage Users**
Manage Organization Categories	•			**Users: Manage Organization**
Conduct Departmental User Profile Audit	•			**Reports: Users**
Spot Check Department User Profile Audits	•			**N/A**

RESOURCE STRUCTURE AND NAMING – FILE CENTER

TIME SAVING TIP:
Establish and communicate a folder structure and communicate to platform managers responsible for managing the File Center.

TIME SAVING TIP:
Create and communicate a Resource naming convention that includes a date as part of the title.

Platform Application	Task	Responsible	Frequency	Notes
File Center	Add New Folders & Resources	Designated TS Supervisor(s) and/or Administrator(s)	As Needed	
	Edit Existing Folders & Resources	Designated TS Supervisor(s) and/or Administrator(s)	As Needed	Remember to remove "old" resources from Activities and Courses before changing them in the File Center. Re-attach "new" resources as necessary.
	Conduct Audit	Designated TS Supervisor(s) and/or Administrator(s)	Yearly	Collect recommended changes from Department TS Supervisors and other Admins
Course Library	Manage SCORM Uploads/Version	Designated TS Supervisor(s) and/or Administrator(s)	Yearly	Remember that each time a SCORM course is edited and uploaded it becomes a new course. Credentials and Assignments may need to be updated.
	Manage Course Attachments	Designated TS Supervisor(s) and/or Administrator(s)	Yearly	
	Edit Course Settings (timer, test scores, self-assign)	Designated TS Supervisor(s) and/or Administrator(s)	As Needed	Remember that each time a SCORM course is edited and uploaded it becomes a new course. Credentials and Assignments may need to be updated.
Community Resources	Managing Resources (Add, Edit, Delete)	Designated TS Supervisor(s) and/or Administrator(s)	As Needed	
Bulletin Board	Update Content	Designated TS Administrator	Monthly	Link to current safety training calendar/focus.