

# Strategy Document & Action Mapping for <Client>

**Prepared for the management team of <Client> by Winslow's Winning Solutions.**

Instructional Designers/Learning Strategists



# Greetings!

On August 5<sup>th</sup>, WWS met with the management team of <client> to discuss various aspects of their current training situation. Here is a recap of the meeting captures.

Training not being taken seriously, no accountability and little retention.

Consistency of training is non-existent.

Place to work rather than a place to enjoy working at.

Employee satisfaction is a complete unknown other than anecdotal.

Lack of certifications or journeyman titles for employees leads to no motivation to do better, improve skills, or take ownership of career/job.

Generation gap is leading to misunderstanding between ownership and workforce.



## Problem Focus

- Here are the challenges you are currently facing
  - Lack of and low training retention, no team building or company culture building activities.
  - No internal certificates, awards, etc. to create buy-in for employees.
  - No evidence of understanding your current workforces' connection to <Client>, no data on employee satisfaction.



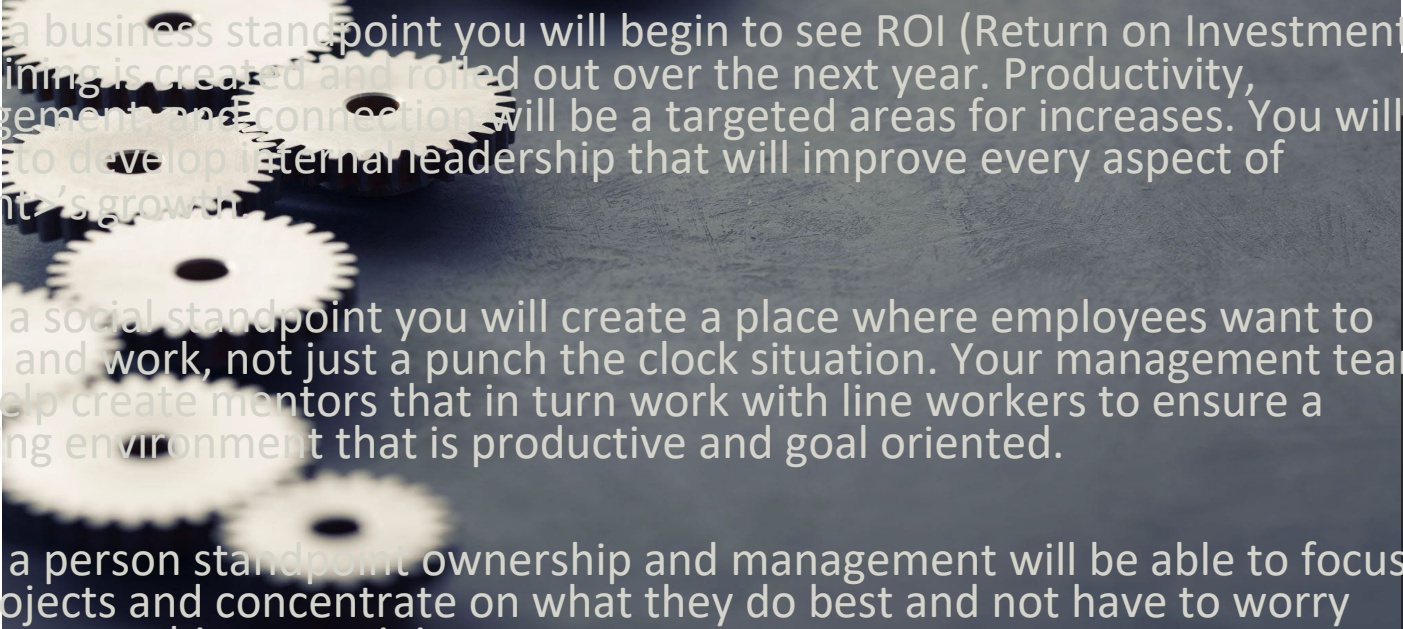
# Problem Focus

From here, this is what we see as worse case scenario if your challenges remain unresolved in 12 months

- High likelihood of costly mistakes, both in financial and safety, on customer orders.
- Low employee satisfaction will continue to create “just good enough” mentality. (Not My Job problems).
- No existing data on workforce connection to <Client> will continue to cause misunderstanding of “why is this happening?”
- As wages rise, low connection or lack of buy-in from employees may lead to labor shortages.
- Lack of connection to <Client> will lead to low motivation, no desire to improve, and ultimately not create an <Client> that can be all that it can be.

# Vision Focus

As discussed in the meeting, here would be the benefits of creating and meeting training goals over the next 12 months

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- From a business standpoint you will begin to see ROI (Return on Investment) as training is created and rolled out over the next year. Productivity, engagement, and connection will be a targeted areas for increases. You will begin to develop internal leadership that will improve every aspect of <Client>'s growth.
  - From a social standpoint you will create a place where employees want to come and work, not just a punch the clock situation. Your management team will help create mentors that in turn work with line workers to ensure a working environment that is productive and goal oriented.
  - From a person standpoint ownership and management will be able to focus on projects and concentrate on what they do best and not have to worry about researching or training.

# Winslow's Winning Solutions proposes the following:

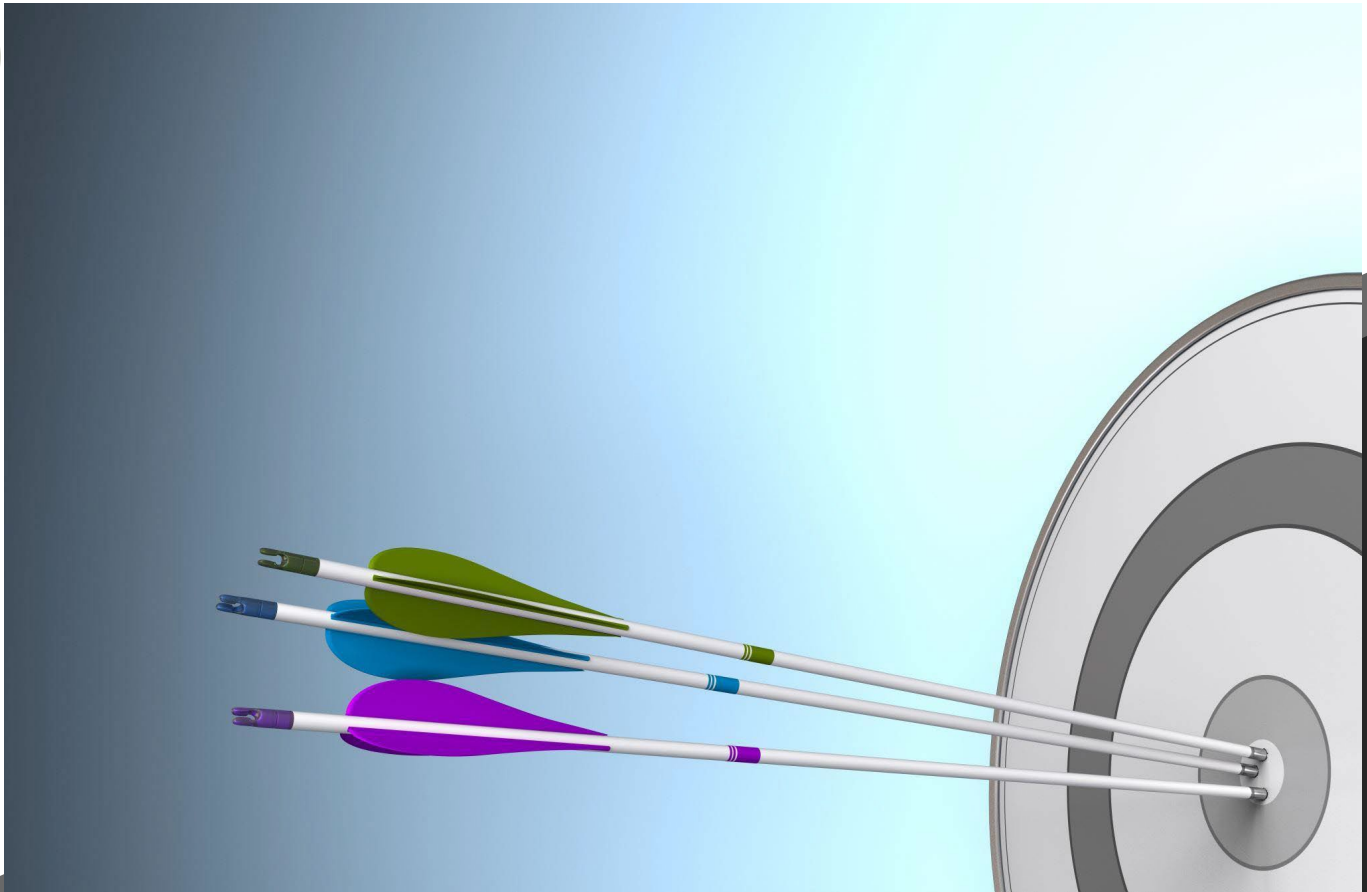
- Help <Client> create quantifiable goals for training over the next 12 months.
- Work with <Client> to create training curriculum and performance evaluations that improve retention of information and provide a way to demonstrate mastery of skills, such as internal certifications, mastery certificates, etc. for employee buy-in.
- Create HR modules such as Conflict Management, Leadership Styles, Listening Skills, etc. to help develop mid-level managers and supervisors interpersonal and soft skills.
- Provide a blended approach to training that combines eLearning along with Instructor-Led Training.
- Connect with performance management software (i.e. Lattice, Trakstar) if <Client> so desires.



# ACTION MAPPING FOR Client 2021-2022



# ACTION STEP 1: GO



This action step will help you realize the business change that you want for the organization. Our focus is to create a measurable business goal that can help your organization in terms of:

- Designing of relevant activities that can help improve productivity, connection, and skills.
- Identify the crucial content that can affect the localization and implementation of this strategy.
- Evaluate the success of this strategy.
- Show how improving training, culture, and personal growth supports or contributes to the overall performance of the organization.



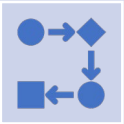
# ACTION STEP 2: PLANNING



In this phase we should focus on the actions your employees must take to meet the goals that we identified in our previous action step.



It is important as well that in this phase we were able to identify why your employees aren't taking the necessary actions that serves as hindrance in attaining the goals of this strategy.



We should identify in this phase the minimum information the employees need to complete each action step.



Surveys can be used to uncover the problems faced by the employees regarding training and job performance.

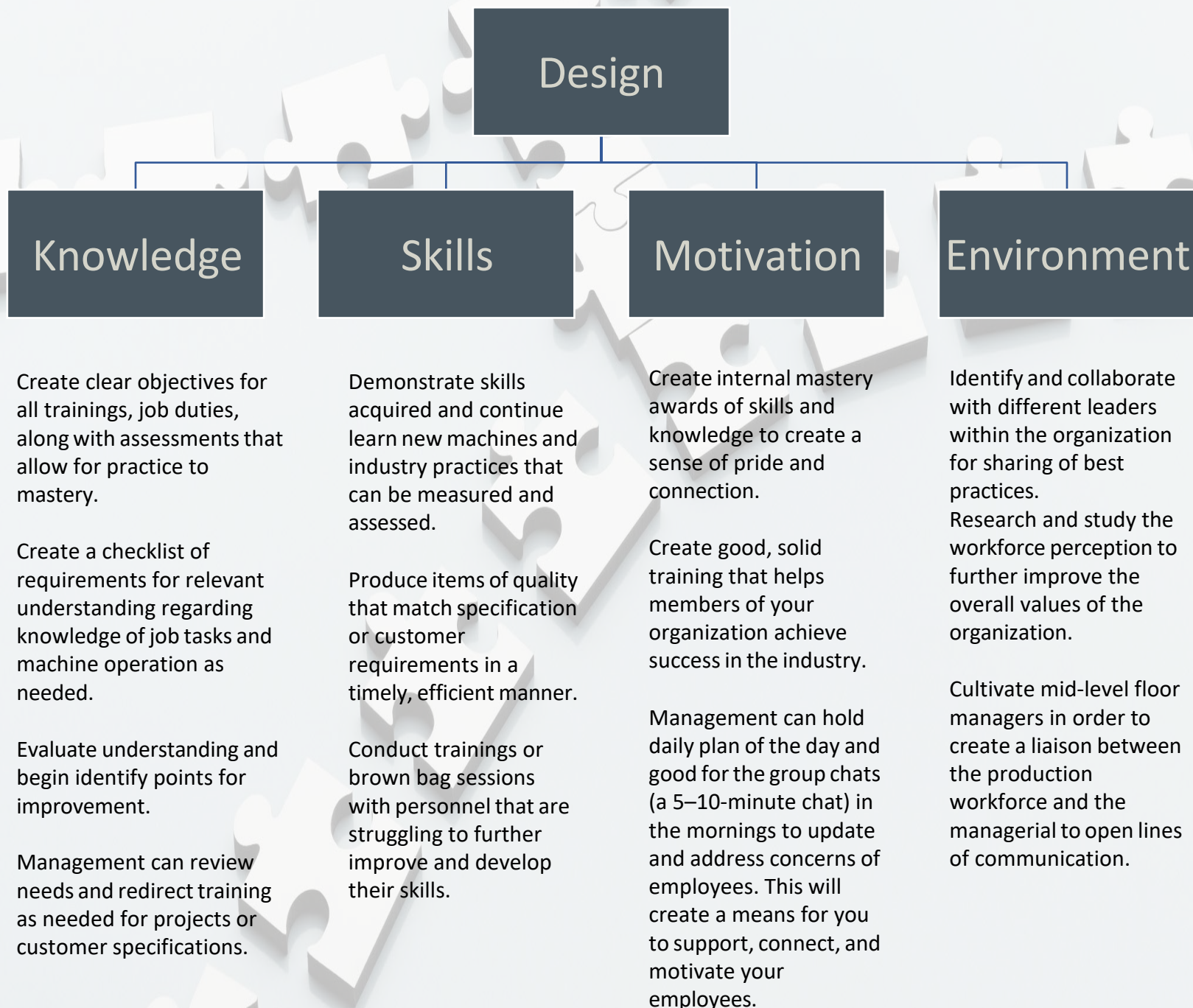
Brainstorming sessions will be conducted with the management team to produce actions steps targeting the following areas:

- Knowledge
- Skills
- Motivation
- Environment

Management team must identify if there is a gap when it comes to Knowledge, Skills and Motivation. They should decide if a training can solve those pain points. They need to create tools as well in measuring these areas and know more about the organizations culture and before proceeding to the next phase of this action mapping.

In this phase we will create action steps to attain the goals of this strategy. These action steps must be practiced to produce significant change on current behavior.


Here are the actions steps your employees should focus on for us to achieve the goals in this strategy roadmap.



# ACTION STEP 4: TEAM MANAGEMENT

- This action step will outline the role and responsibilities of all parties involved for strategy execution on the timeline. In this phase we will be using a RACI (Responsible, Accountable, Consulted and Informed) Matrix to have a clear picture prior to the implementation of this strategy.
- The management team will take ownership of the RACI matrix for each individual project along with Winslow's Winning Solutions. This will ensure that they can cater the needs of the learners in their area. WWS will help develop these along with team.
- Management team must ensure that the information and implementation of the actions steps in this strategy document were properly cascaded to their members for it to work.

RACI Matrix						
Task \ Role	Role 1	Role 2	Role 3	Role 4	Role 5	Role 6
Task 1	R		C			
Task 2	R		A		C	
Task 3	R	R	I	A		I
Task 4			C		R	
Task 5	A	C		I		
Task 6		I	C	C		R




**Responsible**  
Person assigned to do the activity.

**Accountable**  
Person makes final decisions and has the ownership.

**Consulted**  
Person who must be consulted before a decision or action is taken.

**Informed**  
Person who must be informed when a decision or action has been taken.





# ACTION STEP 5:

## STRATEGY

### WEEKS 1-2

#### GOAL IDENTIFICATION

Alignment Meeting with Management Team.  
Create initial plan of training for <Client> to move forward with training and change management.

### WEEKS 3-5

#### PLANNING

Creation of surveys for feedback about training, culture and other topics identified in weeks 1-2.  
Analysis and planning on how to solve the current problems encountered by the employees. Brainstorming sessions with the management team on the gaps on the following areas:  
(1) Knowledge (2) Skills (3) Motivation (4) Environment

### WEEKS 6-9

#### DESIGN

Creation of action steps the employees must take on the job for us to attain the goals of this strategy.  
Evaluation tools and other instruments to assess the effectiveness of the implementation of the strategy will be created as well.  
Outsourcing of freelance Instructional Designers will be considered to ensure content localization.  
Even if you do not hire WWS, you will need IDs to realize your potential, internal or freelance.

### WEEKS 10-12

#### TEAM MANAGEMENT

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### WEEKS 12 +

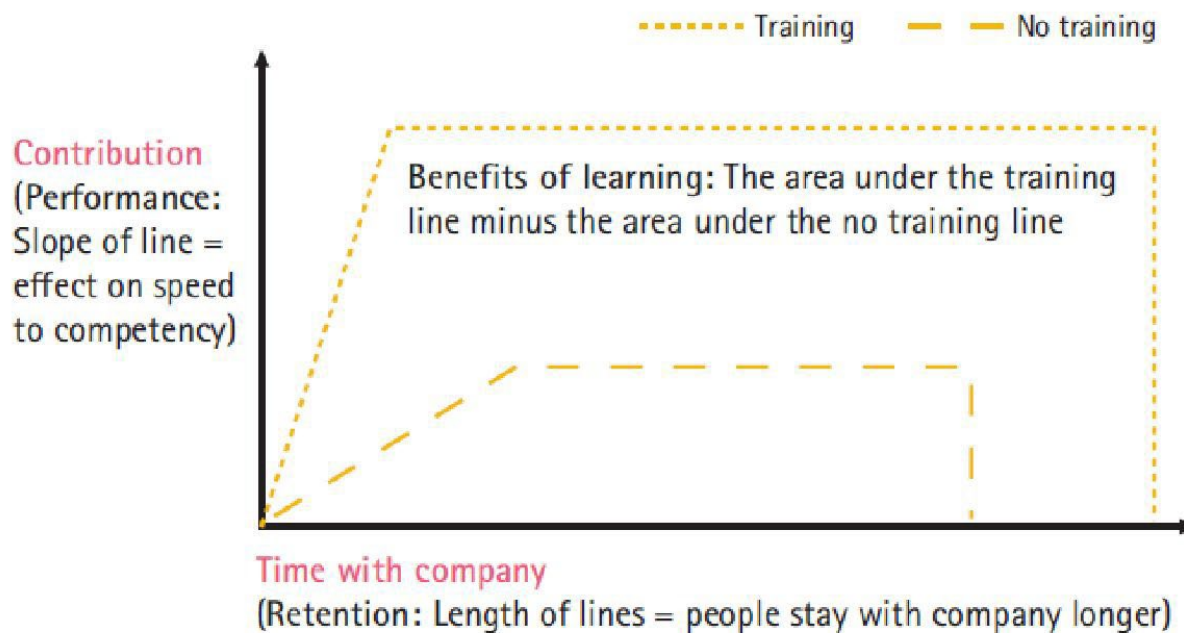
#### STRATEGY EXECUTION

Series of Trainings will be conducted based on the action steps determined on the Design Phase of the strategy.  
Management team will do Team Oversight to evaluate the effectiveness of the strategy in the entire organization.  
Reports and recalibration will be done at the end of each milestone of the project.

- This action step will be the actual implementation of the plans to reach every milestone and ultimately the goal of this project.
- Point persons indicated in the RACI Matrix will evaluate the results of each action step identified in the Design Phase.
- Training evaluated for effectiveness annually.

# The Impact of training on ROI

Accenture's model for measuring the return on learning



- One can not really overstate the dramatic impact learning has on an organizations ROI regarding training. This has been studied and reported on by a variety of business research teams.
- According to *Return on Learning: Training for High Performance at Accenture (Agate, 2006)*, the ROI for every dollar spent created a 4.53 Return on Investment. That is a 353% return on the investment of learning and training in 2006. 1
- We are all aware of how much technology must have moved that needle in the present. Added to this is the reorganization of the labor force we are currently experiencing. Companies wishing to get ahead of this will be the ones who grasp this change and move with it.
- Winslow's Winning Solutions understands this change, and the people who are making the business world change to suit their needs. We can bridge the generation gap and help you overcome these challenges.

Management Team,

As we discussed in our meeting, change can be very hard. Given our current situation it is quite clear that our workforce is changing, and businesses must evolve in order to meet these new challenges.

This is our vision at Winslow's Winning Solutions to help <Client> do just that. We are very excited to work with you on this project, and hope that you choose us to help to achieve the goals of your organization.

Here is what WWS has agreed to for <Client> as it stands-

1. We will create an onboarding module for you to use free of charge to demonstrate how a RISE course would work.
  - However, due to it being pro-bono, we ask to use it in our portfolio, and we hope you would give us a customer statement as well.

Going forward WWS will provide solutions to your problems, we will:

2. Begin creating modules to help solve gaps in knowledge, skills, and attitude.
  - Connect with performance management software (i.e. Lattice, Trakstar) if desired.
  - Create modules such as Conflict Management, Leadership Styles, Listening Skills, etc. to help develop mid-level managers and supervisors.
2. Work with <Client> to create training courses that improve retention of information and improve company culture and productivity.

WWS looks forward to hearing from you. Please reach out if you have any other questions, and we hope you choose WWS to serve your needs!