

IMPLEMENTATION OVERVIEW

CYBER TRAIN

LAST UPDATE: MARCH 2010

IMPLEMENTATION METHODOLOGY

Visibility Software uses a methodology for implementation and training which has evolved over years of service. Having worked with clients over the last five years installing Cyber Recruiter and Cyber Train, we have found most companies do not have the resources to put ongoing activities and projects on hold for an extended time period in order to dedicate days of uninterrupted time to set up a system and perform training. We have also found that most people can only absorb or assimilate about 2-3 hours of new information during a single session.

In response to these observations, we have developed a unique implementation methodology which started with the decision to host all implementation projects on Visibility Software servers. This allows for flexibility within the project in various areas.

- First, it allows the client's IT department time to set up infrastructure without delaying the project start.
- Second, implementations can be more flexible in scheduling since a consultant does not have to be on-site to conduct training or assist with setup.
- Third, it allows for decisions to be made through the process instead of at the beginning of the project.

Taking advantage of these benefits, we have structured an implementation which works for both large and small clients, clients with one location or many, clients with one training contact or several. The implementation generally involves developing a project plan used throughout the project, several 2-3 hour weekly meetings held remotely via conference call and web meetings, and assignments between each meeting. The meetings and 'training sessions' are designed for the core users (Training Contacts, HR, and/or Administrators) of the system and allows the implementation group to continue on with daily responsibilities while implementing a new software solution without being overwhelmed by the implementation project.

During each weekly web meeting, the group will review any previously tasked items, address new topics and allow for a question and answer session. This standardization and breakdown of meetings by topics allows for the content to be covered gradually during the implementation to ensure understanding and allow for setting up of the options during the implementation process. If significant sections of tasks slated to be complete as client homework are not accomplished before the next session the meeting may be rescheduled, allowing the overall project to stay focused. Based on client feedback and satisfaction surveys, we have found our clients and their recruiting processes to be ready for a "live" successful operation upon completion of the implementation process.

PROJECT START

Each project will start with the purchase of software and sign-off on agreements ((1) Professional Services Agreements and (2) Statement of Work for the project). Payment for services and the sign-off of the agreements triggers our Professional Services team to contact the Project Contact to schedule the first call for the implementation team – the Meet & Greet call.

The following process is an example of our typical implementation process which ranges from 30-70 days. This process will be configured specifically for your organization based on our discovery meeting at the beginning of the project.

* Times noted are estimates for meeting times only and do not include time for assignments between meetings, project management, or configuration of the system.



SUMMARY OF IMPLEMENTATION PLAN

Phase 1: Setup & Configuration

Pre-Meeting Tasks

Meeting 1: Meet & Greet

Meeting 2: Developing Curriculum

Meeting 3: Specifying Requirements

Meeting 4: Training Lifecycle

Meeting 5: Managing Students

Meeting 6: Advanced Topics and Security

Meeting 7: Summary & Review

Meeting 8: Transfer of Data (Not for ASP clients)

Meeting 9: Connectivity Meeting (Not for ASP clients)

Phase 2: Internal Staff Training (Managers, Executives, Employees, other HR Staff)

Phase 3: 6-Month Checkup

PHASE 1: SETUP AND CONFIGURATION

PRE-MEETING 1

Client Preparation

Identify Project Team

Start to identify the people who will be involved in the project. The project group should include at least one member of the Human Resources group and someone from IT. Additional members could include a specialist on the website, a manager who will be involved in the implementation process or a VP overseeing the implementation. The group should plan on being in attendance for the first meeting and during that meeting it will be determine what the additional involvement should be for the rest of the project.

Collect Data

Collect various forms, written documents or ideas on processes which you currently have which will be discussed at the first meeting.

Visibility Software Preparation

Identify Project Team

Assign a Project Manager from Visibility Software to act as the primary point person for the project. This person should discuss any known needs of the client with the sales group and transition the project over to the Professional Services group. The Project Manager will also identify any other members of staff who should be involved in the first meeting as well.

MEETING 1: MEET & GREET (2 - 3 HOURS*)

This will be the first meeting of the implementation team. This meeting is designed to provide introductions, discover expectations, review the training lifecycle, determine additional needs or requirements not discovered in the sales process and to set a timeline. This session thoroughly reviews the organization's current training process and what the client hopes to gain by implementing Cyber Train. Based on this meeting, Visibility Software will draft a Project Plan to be used as a guideline for the remaining meetings.

Items Needed:

- Technology Overview – IT Contact should read the requirements
- Implementation Overview – HR & IT Contacts should review this document
- Calendars/Schedules – To set up the rest of the meetings for this project

Items to be discussed:

- Team Members
- Technical Questions
- Goals for this Project
- Current Training Strategy and Changes to Make
- Implementation Process and Expectations
- Project Timeline

Client Homework

Finalize Data Conversion Expectations

Review the current systems and processes to determine which pieces of information will be converted over to Cyber Train during the implementation (student/employee records and/or student history). Visibility Software will assist in bringing in basic information using the tools in the product; reference back to the SOW for a list of the fields to be imported as part of the project.

Visibility Software Homework

Project Plan

Based on the discussions in the first meeting, Visibility Software will update the Implementation overview to include specific topics to cover at each meeting, dates, times, expectations, goals, etc.

MEETING 2: DEVELOPING THE CURRICULUM (2 - 3 HOURS*)

This session will focus on developing the curriculum to be used by students and the training team to build classes and requirements. The group will walk through Admin sections which build the curriculum and into creating new course, program and certification offerings.

Based on the needs of the client, additional items which could be discussed include:

- Modifying Drop-down values
- Creating Courses
- Creating Programs (Groups of Courses)
- Creating Certifications

Client Homework

Population of Data

The client will start to add in drop-down values related to the curriculum. These may include, but are not limited to Companies, Grades, and Grade Types. The client will then take this information and begin to create current existing courses being offered.

Development of Drop-down lists

The client will create a spreadsheet of job titles and organizational codes to be used in conjunction with requirements and students starting with Meeting 3.

Student/Manager Data

The client will create a spreadsheet of all current employees based on the fields which will be used in Cyber Train for communication and requirements tracking. This spreadsheet should be complete by Meeting 3 so this file can be imported into the system during the session.

MEETING 3: SPECIFYING REQUIREMENTS (2 - 3 HOURS*)

This session will focus on building the student/manager records and the corresponding training requirements based on the organizational structure and job title.

Based on the needs of the client, items which could be discussed include:

- Importing the Student File
- Building Requirements based on Organizational title
- Building Requirements based on Job title

- Mass adding Requirements

Client Homework

Population of Data

The client will add any additional drop-down values related to the new topics and complete the requirements identification.

Student Historical Data

The client will create a spreadsheet of all student historical data (courses taken and certifications) which will be imported into Cyber Train.

MEETING 4: THE TRAINING LIFECYCLE (2 - 3 HOURS*)

This session focus on the training cycle. The group will review the process of opening a class based on the course list, mass enrolling students as a training contact, reviewing the student/employee view of the Home page, reviewing the instructor view of the Home page, and closing a class.

Based on the needs of the client, additional items which could be discussed include:

- Standard Correspondence Templates
- Custom Correspondence Templates
- Reports

MEETING 5: MANAGING STUDENTS (2 - 3 HOURS*)

This session focuses on managing the student records. The group will review the 'Manager' view of the system, additional options available to the student and how to navigate through the student view of the training contact's view of the system.

Based on the needs of the client, additional items which could be discussed include:

- Sending emails to students
- Manager generated requirements
- Tuition Assistance
- Manually requesting credit for Courses & Certifications

Client Homework

Custom Communication

The client will start to set up all needed email / letter correspondence for communication to the student.

MEETING 6: ADVANCED TOPICS AND SECURITY (2 - 3 HOURS*)

Now that the group has seen all of Cyber Train they will have a group discussion to finalize the various views and security in the system. The pages to finalize will include views for various roles on the Home Page, the Class List view, and security in general.

Based on the needs of the client, items which could be discussed include:

- Finalize Group Security
- Working with the Views (Home Page, Class List)

Client Homework

Finalize Security

If there are more groups to security than the group covered during the session, the client will work to complete the security settings.

Add Users

Add any users (Approvers, Instructors, Training Contacts, etc.) who will be using the system or need to be listed in any drop-down lists for tracking purposes.

MEETING 7: SUMMARY & REVIEW (30 MINUTES - 3 HOURS*)

This session is designed as a review and working meeting for Visibility Software and the client and is the final implementation meeting. Based on the topics covered to date, this session may be used strictly as a question and answer session or it could be used to assist the client in finalizing various sections of the Admin setup. The goal is to resolve any questions that may have come up during the implementation process and to finalize the remaining tasks needed to transfer the system to the client's location.

Client Homework

Final Review

Client should take the last few days to finalize the system and do a last review. Generally, items to review would include deleting out any testing curriculum & students, and signing off on the setup of the system in preparation for the transfer.

MEETING 8: TRANSFER OF DATA (1 - 2 HOURS*)

–This step does not apply for ASP clients

After the system is approved and all sign-offs are completed, a representative from Visibility Software’s development team will work with the Client’s IT Contact to transfer the SQL database from the Visibility Software server to the client site.

MEETING 9: CONNECTIVITY MEETING (1 - 2 HOURS*)

–This step does not apply for ASP clients

After the transfer is completed, ideally later that day, the HR Team and the Visibility Software Project Manager will do some high level testing.

Items to be reviewed:

- Changing necessary links in Admin
- Test Email
- Test Reports

The Client determines the definition of going “live”, whether that is allowing student/manager access or just using the tool internally to HR. Ultimately, the Client has the final say on how the product is used from this point forward. Once the initial testing is completed, Visibility Software will send the System Acceptance Sign-Off – this signifies the implementation project is complete and Visibility Software will act in a technical support role from this point forward.

PHASE 2: INTERNAL STAFF TRAINING (CLIENT PERFORMED)

Client will develop two trainings for internal staff. The first will be a general overview of Cyber Train, why to use it and basic navigation. The second will be focused on specific actions to take in the system – requesting a new requirement, requesting an opt-out of a requirement, enrolling in a class, communicating with the HR staff. Goal is to get 90% of staff through this training in the first 30 days after the data transfer.

PHASE 3: 6-MONTH CHECKUP (2 HOURS*)

Client will utilize the on-demand training sessions as needed to review various items about the system which may or may not have been covered during the implementation. A meeting will be scheduled with Visibility 120-180 days after data transfer to touch base and be able to have questions answered, work on reports, etc. Outside of this meeting, the client will use the technical support portal and various documents to research questions or obtain assistance.