



CUSTOMER TRAINING PLAN

2021

Customer Training Plan
January 13, 2021 – Version 1.0
Jen Whalen, Training Specialist

Document Sign-off Sheet

1. Document Owner

This Document has been submitted by:

Name	Title	Signature	Date
Jen Whalen	Training Specialist		

2. Roles and Responsibilities

Each stakeholder contributes to the overall success of the SchoolPass Customer Training Program in specific ways. These roles and responsibilities are listed below

Stakeholder	Role	Responsibilities
Jen Whalen	Training Specialist	<ul style="list-style-type: none"> Completing and managing the training program, including the development of instructional materials and training delivery Developing the training strategy
Sam Rosenfeld	Product Manager	<ul style="list-style-type: none"> Connecting training to product Reviewing & editing documents and materials Supporting Training Specialist
Doug Sharp	Marketing Manager	<ul style="list-style-type: none"> Setting branding standards for training presentations and documents Providing graphic design support
Melissa Twibell	Customer Success	<ul style="list-style-type: none"> Communicating customer needs, preferences and pain points Ensuring training resources are being accessed & deployed by CS team
Mark Ruiters	Founder & CEO	<ul style="list-style-type: none"> Connecting training to overall company goals & direction Communicating vision for training content and delivery

3. Review and Endorsement

Endorsement of this deliverable indicates to the Approvers that review has occurred by the undersigned; issues and questions raised during review were resolved to satisfaction; the content of the document is of high quality; and a recommendation for approval is proposed.

Name	Title	Signature	Date
Sam Rosenfeld	Product Manager		
Doug Sharp	Marketing Manager		
Melissa Twibell	Customer Success Manager		
Mark Ruiters	Founder & CEO		

1. DOCUMENT OVERVIEW

1.1 Purpose and Scope

The purpose of the Customer Training Plan is to identify the appropriate training strategies and activities required to achieve the desired learning outcomes during the implementation of SchoolPass Customer Training.

The Customer Training Plan provides a framework for determining how training events and materials will be identified, developed and delivered. This should be a “living” document that is updated frequently to reflect new or changing training information.

The Customer Training Plan provides a clear understanding of what must happen to meet the training requirements that have been defined, thus, providing customers training in the knowledge and skills required to ensure the effective use of the SchoolPass product.

The Customer Training Plan exists at the “macro” level and is intended to be used to organize the larger, more complex approach to training. Specific training projects within the Customer Training Plan exist at the “micro” level and will require separate, deadline-driven project plans.

1.2 Internal Stakeholders

This document is intended for use by:

- *Training Specialist*
- *Product Manager*
- *Marketing Manager*
- *Customer Success Manager*
- *Founder & CEO*

1.3 Training Program Objectives

The objectives for the Customer Training Plan are:

- *Devise a strategic training program structure.*
- *Use data from customer needs assessment to inform training content and delivery.*
- *Create engaging, meaningful training that meets customer need.*
- *Ensure SchoolPass customers are confident product users.*
- *Develop data-driven ways to measure training effectiveness.*

1.4 Assumptions

The following assumptions apply to the Training Plan:

- *The Training Plan will be based on the training requirements and decisions gathered through internal stakeholder meetings and external customer surveys.*
- *The Training Plan is a dynamic document and may be altered by internal stakeholders to reflect changes in customer need or company policy, structure or product.*

1.5 Dependencies

Successful execution of the Training Plan is dependent on:

- *Access to internal stakeholders and business resources for input and review of learning outcomes, planning documents, training materials and finalized presentations*
- *Access to internal stakeholders and business resources for creative support, branding and graphic design*
- *Access to business resources for training facilities, trainer travel, shipping and printed materials as necessary*
- *Access to hardware and software necessary for video editing, document creation and training delivery*
- *Development of data-driven methods for evaluating training effectiveness (view counts, click-through rates, increased product usage, increased renewals, reduced complaints, anecdotal praise, etc.)*

1.6 Risks

The following risks apply to the training plan:

- *Customers want more training than required/feasible*
- *Changes to product and/or project occur during development and delivery of training*
- *Desired speed of training output proves unrealistic*
- *Lack of hardware/software availability*
- *Lack of financial resources for training projects*
- *Lack of support from internal stakeholders*
- *Pandemic challenges trainer travel for in-person events*

2. CUSTOMER NEEDS ASSESSMENT

The Customer Needs Assessment is a critical part of every training plan as it identifies gaps in the knowledge, skills and abilities of customers as well as deficiencies in training offerings.

Prior to the creation of the Customer Training Plan, interviews of customer-facing SchoolPass employees were conducted and a brief needs assessment survey was sent to 416 SchoolPass administrators. The goal of the interviews and this initial survey was to identify customer training priorities and preferences.

2.1 External Stakeholders (Audience)

SchoolPass has three external stakeholder groups that require customer training:

- *Administrators*
- *Teachers*
- *Parents*

2.2 Training Priorities and Preferences

Interviews with SchoolPass employees revealed that all training efforts, regardless of audience, should be in service to the SchoolPass Administrator at each school. They are responsible for implementing and troubleshooting the SchoolPass product at their school and communicate directly with the other external stakeholders – teachers and parents.

To this end, the Customer Needs Assessment survey was tailored to determine the following about the SchoolPass Administrators:

- *What SchoolPass training offerings they currently access most*
- *How they would prioritize their SchoolPass training needs*
- *When the most effective time to deliver/receive SchoolPass training would be*
- *What the most effective delivery methods for SchoolPass training would be*

2.3 Customer Training Survey

A Customer Training Survey was deployed to 416 SchoolPass administrators from Dec. 22, 2020 to Jan. 22, 2021. The purpose of the survey was to ascertain the training priorities and preferences of our SchoolPass admins. Here are the details of the survey:

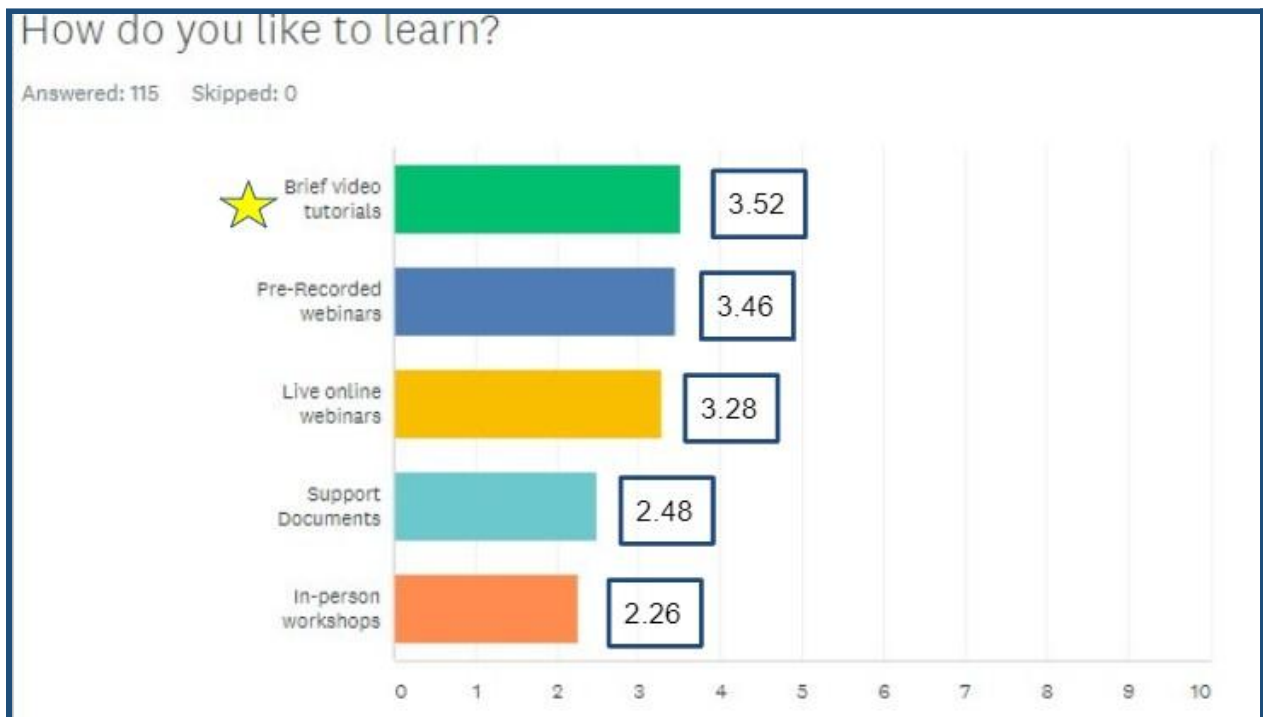
- *416 SchoolPass admins invited*
- *6 emails bounced*
- *5 admins opted out of surveys*

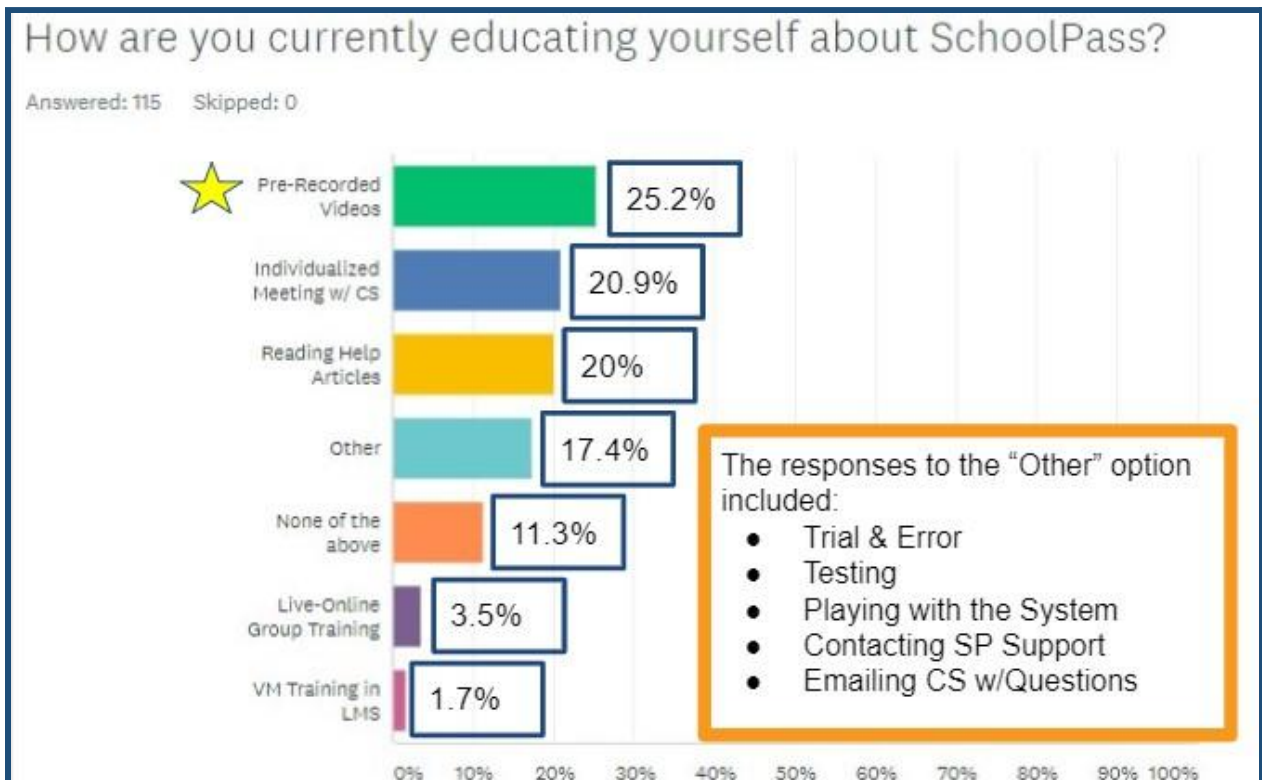
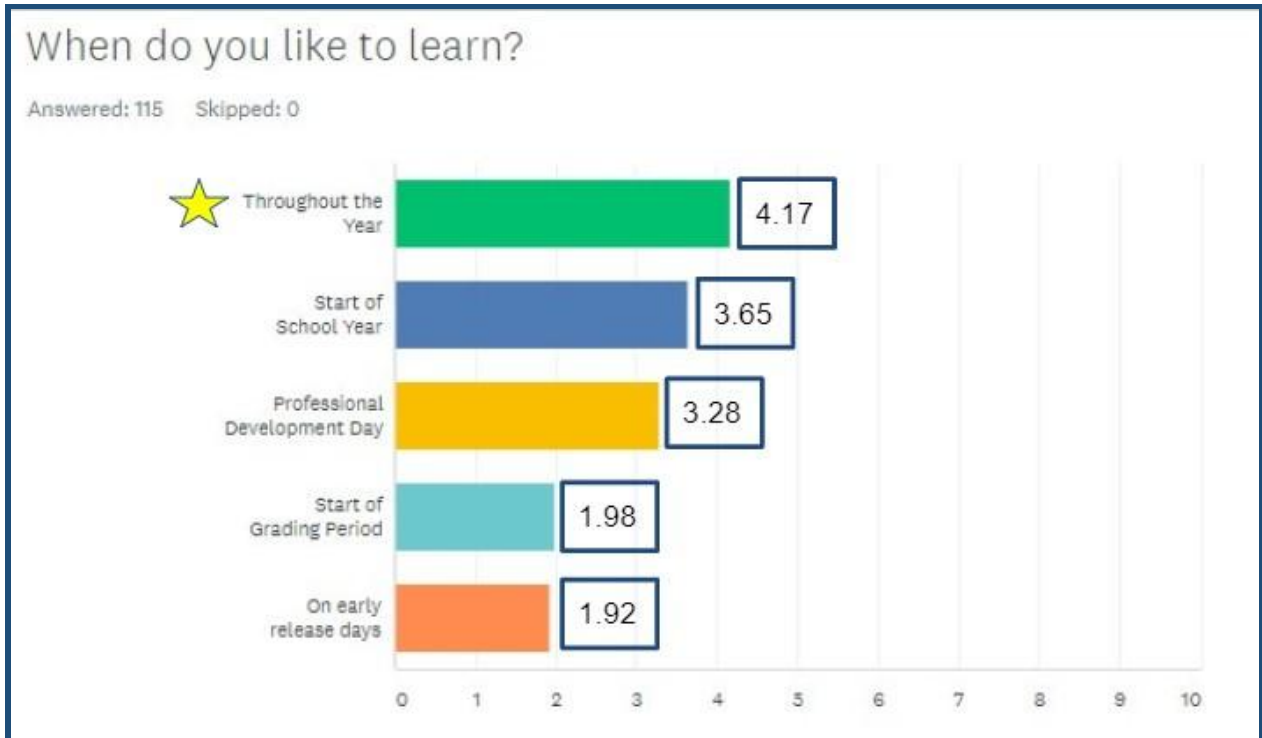
- *Reminders sent weekly*
- *Thank you emails sent*
- *Avg completion time - 4 min 2 sec*
- *Anecdotal feedback collected*
- *28% response rate*

The questions asked on the survey were:

- *How do you like to learn?*
- *When do you like to learn?*
- *How are you currently educating yourself about SchoolPass?*
- *How would you prioritize your SchoolPass training needs?*
- *Please provide us with any additional training-related feedback.*

The survey results will inform our approach to training projects and are as follows:







Upon analyzing the survey data, the following conclusions can be drawn about the majority of SchoolPass administrators:

- *They prefer to learn via brief video tutorials.*
- *They prefer to learn throughout the year.*
- *They are currently educating themselves about SchoolPass by watching the pre-recorded videos created by the Customer Success team.*
- *They see training that supports parents to be their top priority.*

Some suggestions provided in the anecdotal feedback included:

- *Store support videos and documents in one, easily accessible place.*
- *Make short, "how to" tutorial videos for faculty and parents.*
- *Translate support docs into Spanish.*

- *Make sure graphics in training materials match those in the app and web versions.*
- *Share tips, tricks and “did you know’s” via email on occasion.*
- *Host live training events.*
- *Conduct 2 admin overview trainings per year.*

3. TRAINING APPROACH

3.1 Learning Objectives

It was determined, based on needs assessment and program goals, that the training objectives for this program are:

- *Admins will confidently login and use the SchoolPass website, Staff app and VM setup to:*
 - o *Create users and assign roles*
 - o *Create and edit records – student, parent, driver, carpool, etc.*
 - o *Create and edit student schedules – arrival, dismissal, absences, etc.*
 - o *View changes – student, bus, carpool, etc.*
 - o *Manage visitors and campus events*
 - o *Pull reports on each module*
 - o *Manage campus wellness*
- *Teachers will confidently login and use the SchoolPass website and Staff app to:*
 - o *Complete and monitor student wellness*
 - o *Manage carline arrival and departure*
 - o *Manage bus arrival and departure*
 - o *Take activity attendance*
 - o *Make changes to student dismissal*
- *Parents will confidently download, login and use the Parent & Student App to:*
 - o *Update profile - contact info, profile pic, license plates, etc.*
 - o *Enable push notifications*
 - o *Conduct daily wellness checks*
 - o *Make changes to student schedules – bus, activity, carpool, etc.*
 - o *Schedule attendance changes - early pickup, late drop off and absent*
 - o *Announce drop offs & pick ups - also with GPS enablement*
 - o *Authorize drivers*

3.2 Delivery Methods

To help retention of learning, a blend of training delivery methods will best meet the needs of our customer. This section lists the training methods selected based on customer preference, audience subset and options available:

- *Brief video tutorials*
- *On-demand webinars*
- *Live-online training with Q&A*
- *Online support documents*
- *In-person workshops (TBD due to pandemic)*

3.3 Storage and Deployment

The short-term plan is to organize training content by audience (Admin, teacher, parent) and house the information as follows:

- *Brief video tutorials – Created in Camtasia, Stored in Vidyard*
- *Detailed On-demand webinars – Created in Camtasia, Stored in Vidyard*
- *Live-online training with Q&A – Delivered via Zoom, Stored in Vidyard, if appropriate*
- *Online support documents – Stored in Help section of SP web (Legacy)*
- *In-person workshops - TBD due to pandemic*

As projects are completed, an advisory email will be sent to make customers aware of new and updated training options.

The long-term goal for training storage is to weave a training database into the SchoolPass web presence. This will require conversations with the Development and Engineering teams to accomplish.

There is also potential for creating a SchoolPass System Certification program. The training modules for this would be housed on a LMS where compliance and completion can be tracked and managed. Should this project become a reality, we may want to acquire an LMS, like Skilljar, that is specifically built for customer training efforts.

3.4 Evaluation

Evaluation of training modules within the Customer Training Program is crucial for:

- *Determining training effectiveness*
- *Connecting initiatives with results*
- *Developing credibility with customers*
- *Choosing new development and delivery methods*
- *Modifying content and structure*

Sources of feedback will include:

- *Tracking customer responses through support@schoolpass.com*
- *Surveying customers via Survey Monkey*
- *Interviewing the Customer Success team*
- *Reviewing responses in QBR calls*
- *Analyzing metrics (click rate, product usage, customer renewals, reduced complaints)*

Feedback solicited will include customer reactions to:

- *Relevance of content*
- *Effectiveness of instruction*
- *Appropriateness of delivery method*
- *Timing/length of training*
- *Stronger/weaker features of module*
- *Participant suggestions for improvement*

4. TRAINING SCHEDULE & CURRICULUM

4.1 Training Schedule

A preliminary training schedule consists of the key training program activities. The training schedule will continue to evolve as the program progresses and additional projects are added. The Training Needs Assessment and Training Curriculum will be critical inputs to the creation of the detailed training schedule.

Activities	Description	Target Date
Training Program Goals	Determine high-level goals for customer training	Dec. 1
Needs Assessment Survey	Deploy needs assessment survey to SchoolPass admins to solicit feedback on training priorities, timing and delivery preferences	Dec. 15
Pilot Training	Test training design and delivery method on internal stakeholders and use feedback to inform direction of initial projects	Dec. 30
Customer Training Plan	Develop high-level training overview, program goals, learning objectives, design/development process, delivery methods and evaluation process	Jan. 15
PSA Video Series	Create 15 brief video tutorials that teach parents how to use the different functions of the Parent & Student App	Feb. 15
Wellness Videos	Create 2 scripted, click-through tour of Wellness module setup and functionality in both web and app versions for SchoolPass Admins	March 30
Visitor Management Videos	Create 3 scripted, click-through tours of VM module (website, app and hardware) setup and functionality	April 15
Instructional Documents for End of Year Packets	Create 4 End of Year packets for each user demographic including 10 instructional documents to assist with preparing the system for the following school year.	May 3
Summer Program Preparation Packets	Alter/adapt the End of Year packets to assist schools with preparing the system for summer programs.	May 7
Sales videos for Wellness & Visitor Management	Repurpose the Admin-facing videos created for Wellness & VM and create very brief Sales videos on these topics.	May 14
Admin Support Videos & Documents for Back to School	Create scripted, click-through instructions for how to setup and use Carline, Buses, Activities, Attendance, etc.	July 1

4.2. Training Curriculum

The curriculum defines the training courses that will be developed and delivered, including the associated learning objectives, audiences, module names and delivery methods. The table below will help plan and manage the SchoolPass training curriculum as it evolves.

Course Name	Audience	Module Name	Learning Objective	Delivery Method	Completion Date
PSA Video Series	Parents	App download & Login	Download PSA & Login without issue	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Daily Wellness Checks	Conduct daily Wellness checks in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Carpool Changes	Make changes to carpool in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Bus Changes	Make changes to bus ridership in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Activity Changes	Make changes to activity enrollment in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Early Pickup Changes	Schedule early pickup in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Late Drop Off	Schedule late drop off in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Absence	Schedule an absence in PSA	Micro-learning by Video	Feb 15

PSA Video Series	Parents	Authorizing Drivers	Add and Remove Authorized Drivers in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Drop Off & Pick Up (GPS Carline Schools)	Report student drop off or pick up in PSA for schools using GPS Carline	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Enable Notification Settings	Turn on push notifications in PSA	Micro-learning by Video	Feb 15
PSA Video Series	Parents	Update Profile	Update photo, contact details and license plates	Micro-learning by Video	Feb 15
Wellness Webinar	Admins	Module setup and functionality	Review Wellness module usage on web and app	On-Demand Webinar w Q&Q	March 26
Visitor Management Website, App and Hardware Webinars	Admins	Module setup and functionality for web	Review VM module usage on web and app as well as hardware setup	On-Demand Webinar w Q&Q	April 15, April 30, May 15
End of Year Instruction Documents	Admins	How to Add & Delete data in preparation for next school year	Review data practices regarding adding, deleting, archiving data	Printable How-To Documents in PDF format	June 1