

Scaling Enterprise-Wide Learning Solutions

SunTrust Best Practices

2013 ASTD
BE
ST
AWARD
WINNER



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

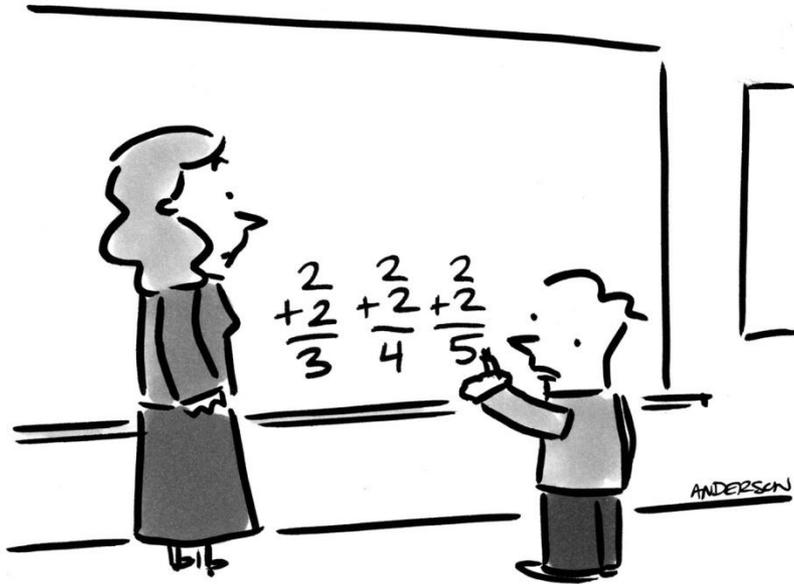


Agenda

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

Ever Happen to You?

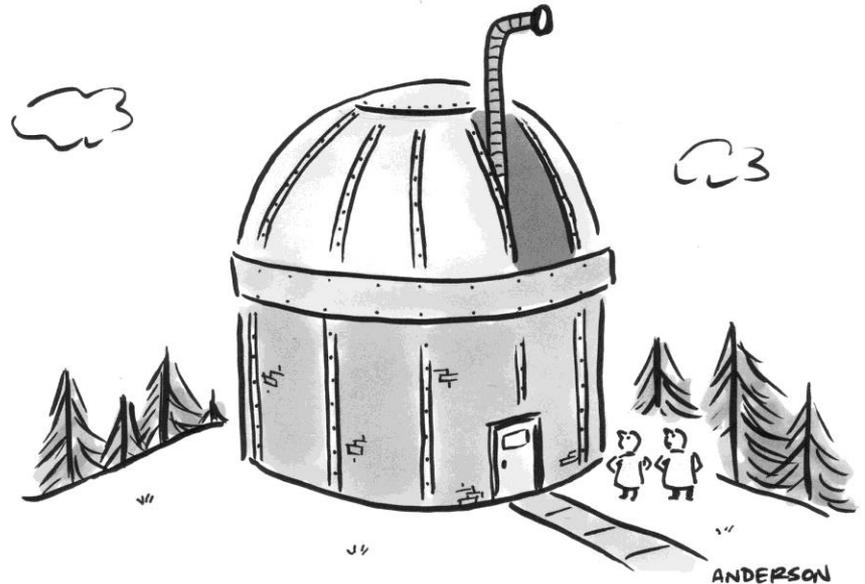
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"I've prepared a few different options."

If I have enough options
something will work!

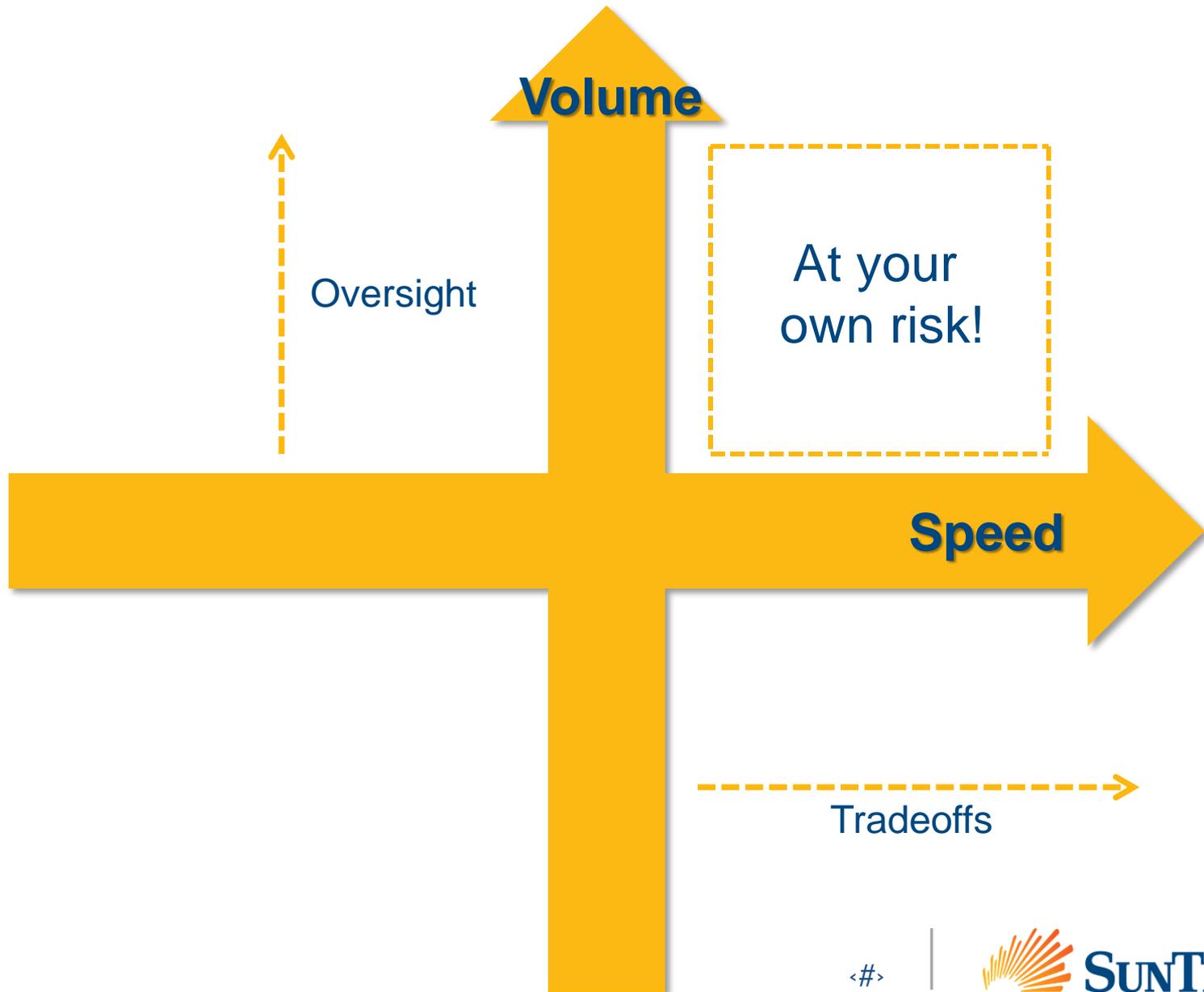
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"Hmm... Lemme check that
purchase order again."

Periscope, telescope
what's the difference?

What is Scalability?



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?

Overall Training Development Philosophy

“If it is training, we will help no matter how challenging the project”



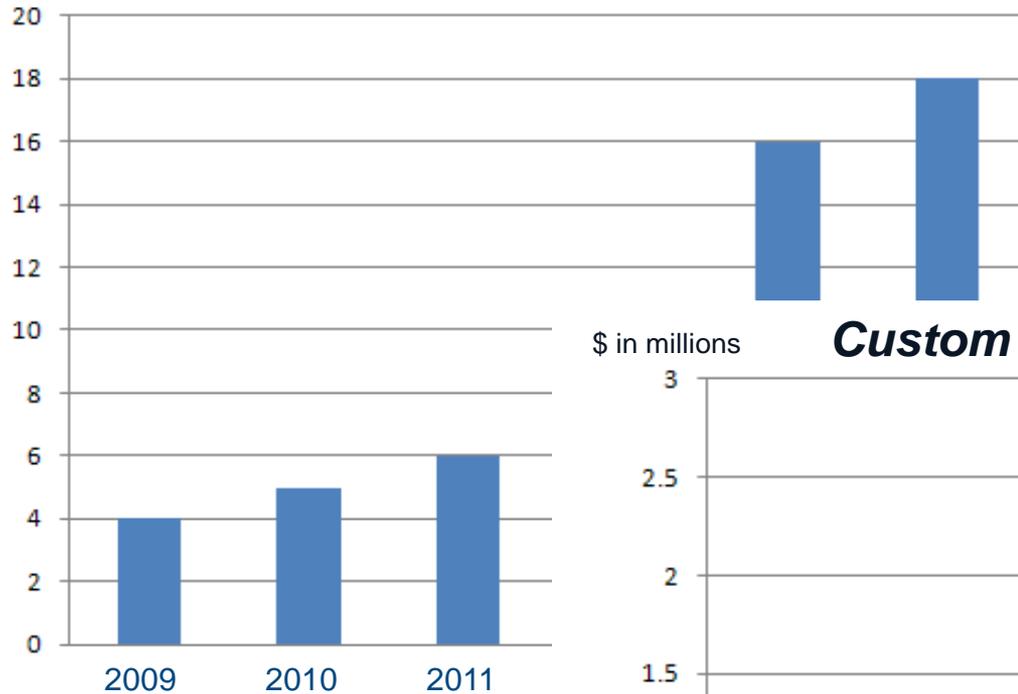
When you start from a place of “Yes” the discussion moves to “Should We?” and “Are You Really Ready?”



Why is Scalability so Important to SunTrust?

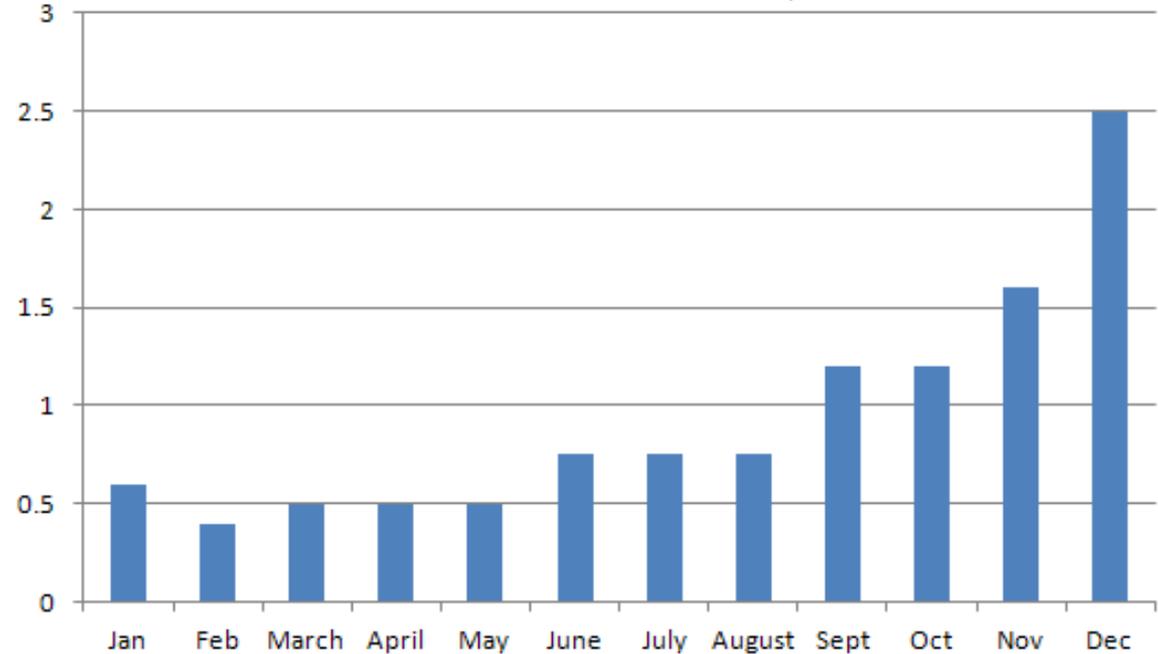
\$ in millions

Development and Content Spend



\$ in millions

Custom Content Spend by Month



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?

Major Phases Pertaining to Scalability



Concepts

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

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

Pre-Project (Forecasting)

SunTrust Banks-GP Project D... - 1 - Active Projects by LOB - Microsoft Internet Explorer provided by SunTrust Banks, Inc.

https://wayne-zitsch.quickbase.com/db/bhr6rw2ae?a=q&qid=29&qskip=0&qrppg=100&dlt=gu.101%7E

File Edit View Favorites Tools Help

SunTrust Banks-GP Project D... - 1 - Active Projects b...

Projects | I - Active Projects by LOB | You've made changes | Save | [undo] | [redo]

REPORTS & CHARTS

Project Name	Course Code (s)	Progress Indicator	Executive Sponsor	Business Learning Strategist	IDPM	Category	Portfolio	Discretionary	Co
Maintenance Renewal									
Diversity and Inclusion Budget		<input checked="" type="checkbox"/>	Mary Slaughter	Mary Slaughter	Miller, Linda	Other	Corporate Functions		

Result Pages: | 2 | >

TOTALS				
Business Go Live Date	Number of Projects	Audience #	Budget Commitment	GP Funding Amount
	Graph	Graph	Graph	Graph
DETAILS (empty)	1	0	\$0.00	\$0.00
DETAILS SEP 2013	32	2014	\$693,413.26	\$730,055.33
DETAILS OCT 2013	38	4500	\$995,482.20	\$655,299.00
DETAILS NOV 2013	12	388	\$984,687.00	\$438,187.00
DETAILS DEC 2013	18	1527	\$1,575,260.05	\$1,227,860.05
DETAILS JAN 2014	1	0	\$8,000.00	\$8,000.00
DETAILS JUL 2014	1	0	\$79,994.00	\$79,994.00
DETAILS AUG 2014	1	0	\$135,000.00	\$135,000.00
Totals (8 groups)	104	8429	\$4,471,836.51	\$3,274,395.38

Start | [icons] | SnagIt | Microsoft Lync | SunTrust Banks-GP Pr...

Month by month activity in a transparent form

Pre-Project (Vendor Relationship)



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

SOLUTION SUMMARY			
Priority:	<input checked="" type="checkbox"/> Normal	<input type="checkbox"/> Fast Track	
Production-Ready Date:	9/27/2013 [or 10/31/13 – two quotes please]		
Source Content:	<input checked="" type="checkbox"/> New Build	<input type="checkbox"/> Repurpose <input type="checkbox"/> 80% Repurpose of content (20% change) <input type="checkbox"/> 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:	<input type="checkbox"/> Curriculum	<input checked="" type="checkbox"/> Course(s)	<input type="checkbox"/> Other:
Curriculum:	<input type="checkbox"/> Curriculum Impact Review <input type="checkbox"/> Curriculum Build: Choose an item. <input type="checkbox"/> Curriculum Needs TBD		
Analysis:	<input type="checkbox"/> Gap Analysis <input type="checkbox"/> Curriculum Analysis <input type="checkbox"/> Curriculum Scope & Sequence	<input type="checkbox"/> Skills Analysis <input type="checkbox"/> Best Practices Research <input type="checkbox"/> Master Report	<input checked="" type="checkbox"/> None <input type="checkbox"/> Other:
Planned Learning Intervention Deliverables:	<input type="checkbox"/> ILT: Choose an item. <input checked="" type="checkbox"/> WBT: Level 3 <input type="checkbox"/> VLT: Choose an item. <input type="checkbox"/> SSG <input type="checkbox"/> Attestation	<input type="checkbox"/> Blended <input type="checkbox"/> Job Aid: Choose an item. <input type="checkbox"/> Hands On Lab <input type="checkbox"/> Other:	DATA MASKING REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Content Level:	<input checked="" type="checkbox"/> Knowledge/	<input checked="" type="checkbox"/> Application/Analysis	<input type="checkbox"/> Synthesis/Evaluation

Requirements Document

Work Order



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.

Pre-Project (Standard Products & Scoping)

Shop By Category

Search by part #, supplier name, or keyword

\$0.10 - \$1.00 USD (1)
\$10.00 - \$100.00 USD (17)
\$100.00 - \$1,000.00 ... (5)

Type Name
Category Item (26)

 **WBT (31-60 Minutes)**
Supplier: [GP STRATEGIES CORPORATION](#)
Supplier Part #: WBT_60_MIN
Available in: 0 Day(s)
Contract: C6760
WBT (31-60 Minutes)
 Compare
[Add to Cart](#)
[Add to Favorites](#)

 **Job Aids**
Supplier: [GP STRATEGIES CORPORATION](#)
Supplier Part #: JOB_AID
Available in: 0 Day(s)
Contract: C6760
Job Aids
 Compare
[Add to Cart](#)
[Add to Favorites](#)

 **WBT Convert Course to Word**
Supplier: [GP STRATEGIES CORPORATION](#)
Supplier Part #: WBT_CONV_WORD
Available in: 0 Day(s)
Contract: C6760
 Compare
[Add to Cart](#)
[Add to Favorites](#)

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Start SnagIt Microsoft Lync ... SunTrust Banks... SunTrust Intran... SunTrust Intran... Ariba Spend ... Microsoft Powe... 7:55 AM

Ability to easily order products

Concepts

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

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.

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 COMMITMENT

SunTrust Time Commitment <i>(Hours needed by SunTrust staff)</i>	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

1

Clear Contracted Hours

Delivery

Concepts

Early Engagement

Established Partners

**Broad Knowledge
Base**

**Implementation &
Logistics**

**Operational
Excellence**

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...*



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.



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.



Concepts

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

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

Post Project (Tracking Costs)

Trust Banks-GP Project D... - Financials Home

Home Feeds (3) Read Mail Print Page Safety Tools Help

Financials Home

REPORTS & CHARTS

Email More

Project Name	ST Project ID	Portfolio	Line of Business (LOB)	Third Party Vendor	Forecast Month	Actual Amount	Forecast Amount	Actual Month	Actual General Ledger	Business Learning Strategist	Forecast Budget
CRE Mktg/Op/III	ST2013001533	Wholesale	Commercial Real Estate	Mktg/Op/III		\$0,711.51		April	892400 - Outside Processing	Home Strategist	\$0,911.51
RMA Credit Risk and Case Analysis	ST2012000549	Wholesale	Credit Risk	RMA		\$21,497.51		April	892400 - Outside Processing	Home Strategist	\$23,000.00
RMA - Business Writing	ST2012000549	Wholesale	Credit Risk	RMA		\$6,200.00		April	892400 - Outside Processing	Home Strategist	\$50,000.00
CRE Adv Cash Real Estate Cash Flow and Valuation	ST2013001533	Wholesale	Commercial Real Estate	RMA		\$11,800.00		April	892400 - Outside Processing	Home Strategist	\$13,750.00
RMA License LDP All Series	ST2013001550	Risk	Credit Risk	RMA		\$49,896.00		April	892400 - Outside Processing	Home Strategist	\$49,896.00
CRM164: Trackable Policy Exception WBT	ST2013001550	Risk	Credit Risk	GP		\$5,262.53		April	892400 - Outside Processing	Home Strategist	\$10,525.00
Staffing and Scheduling	ST2013001678	Consumer	Retail	GP		\$20,190.00		April	892400 - Outside Processing	Home Strategist	\$44,160.00
NonExempt FLSA Compliance	ST2013001776	Corporate Functions	Corporate Functions	GP		\$10,900.00		April	892400 - Outside Processing	Home Strategist	\$10,900.00
Foreclosure Basics	ST2013001664	Mortgage	Mortgage	GP		\$12,825.00		April	892400 - Outside Processing	Home Strategist	\$16,300.00

Concepts

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

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.

Sustainability

The screenshot displays the SunTrust document management interface. At the top, there are navigation tabs for DOCUMENTS, MY TASKS (0), REPORTS, and PREFERENCES. The user is logged in as Wayne Zitsch. The main heading is "All Documents - Approved". On the left, a sidebar shows a tree view of document categories, with "Talent Management & Development" selected. The main area shows a list of 9 documents found, with columns for Type, Title, Ver #, and Status. A yellow arrow points from the caption below to the "Talent Management & Development" category in the sidebar.

DOCUMENTS MY TASKS (0) REPORTS PREFERENCES

Welcome Wayne Zitsch | LOG OUT
SunTrust Banks, Inc.
Site SunTrust

ABOUT | HELP

All Documents - Approved

All Documents Approved My Documents

Print

Search for

Arrange by: All Categories Add Custom

[All Documents]

- 001 - SunTrust Policies (756)
- 002 - Line of Business (LOB) Documents (118)
- 003 - Corporate Function Documents (118)
 - Corporate Marketing (118)
 - Corporate Risk Management (118)
 - Enterprise Information Services (118)
 - Finance (1224)
 - Human Resources (133)
 - Human Resource Support (133)
 - Organizational Effectiveness (133)
 - Talent Acquisition & Diversity (133)
 - Talent Management & Development (133)**
 - Total Rewards (23)
 - SunTrust Audit Services (1)
 - SunTrust Legal (24)
- 004 - Document Type (9162)

Document(s) Found: 9

Type	Title	Ver #	Status
▼	HRC-TMD-CMP-100 Communication Process for Compliance Training Procedures	1	Approved
▼	HRC-TMD-CRV-100 Annual Course Review Process Procedures	1	Approved
▼	HRC-TMD-CRV-101 Course Cancellation Process Procedures	1	Approved
▼	HRC-TMD-GPS-100 New Build Procedures	1	Approved
▼	HRC-TMD-MBP-100 Maintenance Build Procedure	1	Approved
▼	HRC-TMD-MSP-100 Succession Planning Review Procedures	1	Approved
▼	HRC-TMD-TPG-100 Training Performance Gaps	1	Approved
▼	HRC-TMD-TRV-100 Annual Talent Review Procedures	1	Approved
▼	HRC-TMD-TST-100 Analysis of Training Survey and Test Results Procedures	1	Approved

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

Questions

