

AIWCS Training Plan

Information Service Group

Mike Swift, Director,
Training and Educational Technologies

Objectives

- Requirements
- Communication with End Users
- Train Trainers
- Train Business Partners
- Train Help Desk
- Train End Users
- Implementation Support
- Post-Implementation Support

Requirements

- All infrastructure upgrades completed prior to each site installation
- All user desktop upgrades completed prior to each site rollout

Communication with End Users

- Communicate change and process to end users through comprehensive communication and awareness program
 - Prior to rollout
 - During rollout
 - After rollout complete

Train Trainers

- Trainers to rotate into QA for testing
 - Help with testing through their knowledge
 - Begin learning the system
 - December - January
- Train-the-Trainer session
 - 1-2 weeks prior to pilot site
 - 4 days
 - New York training room

Train Business Partners

- ◎ Identify prior to mid-February
 - One per site
 - Serve as resident expert and liaison for communication, training, and support
- ◎ Training session 4-6 weeks prior to pilot site
- ◎ 4 days
- ◎ New York training room

Train Help Desk

- Help Desk experts identified
 - Primary call handlers during rollout
 - Work in QA lab January - February
- Other Help Desk staff to rotate in two week intervals
 - Partnered with trainer to learn system

End User Training

● Audience Analysis

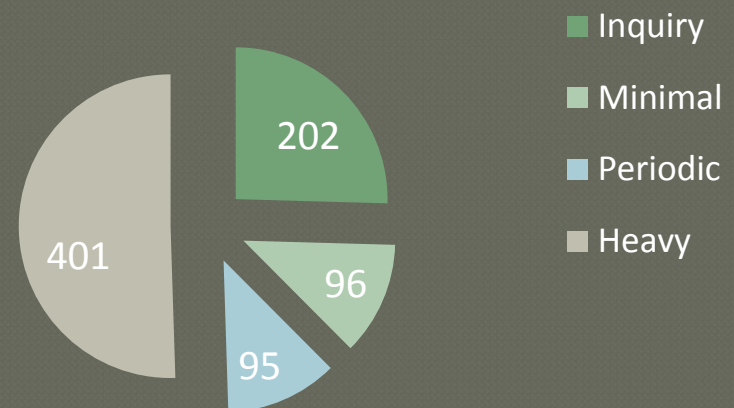
- By frequency and intensity of use and by function performed in AIWCS
- By job title
- By location
- By business unit

End User Training

● Audience Analysis

- 794 users need training
- 37 offices / business units
- 14 training locations to be used

Number of Users by
Frequency / Intensity of Use



End User Training

○ Training Assumptions:

- Inquiry users get 0.5 days of training
- Minimal users 1 day
- Heavy users 2 days
- Periodic users 3 days (less familiar with business rules hence longer training)
- Train 10 users per session
- 130-140 days of training needed (170-180 calendar days)
- About 1,400 training sessions will be required
- Rolling out to 3 locations at a time:
 - Training completed in 55-60 calendar days

End User Training

- Users segmented into four categories:
 - Inquiry only (use AIWCS only for inquiry)
 - Minimal use (occasional inquiry or review)
 - Periodic use (use AIWCS only during periods of heavy processing workloads)
 - Heavy use (use AIWCS every day)
- Determined by site surveys of users
- Confirmed by regional trainers
- Reviewed and approved by local managers

End User Training

- Major job titles / business units:
 - Underwriting Assistant (highest volume user)
 - Underwriter (second highest volume user)
 - Manager
 - Premium Audit (various level of usage)

End User Training

● Six training modules created to address range of training needs:

- T470 AIWCS Quotes 8 hours
- T471 AIWCS Issue 8 hours
- T472 AIWCS Subsequent Transactions 4 hours
- T473 Underwriter Review of AIWCS 3 hours
- T474 AIWCS Demonstration 2 hours
- T475 AIWCS Audits 8 hours

End User Training

Map of Courses to Job Titles and AIWCS Usage

Representative Job Titles Courses	Underwriting Assistants	Underwriters	Managers	Premium Audit
AIWCS Quotes	Both Heavy and Periodic	Inquiry only	Inquiry only	Minimal
AIWCS Issue	Both Heavy and Periodic	Inquiry only	Inquiry only	Minimal
AIWCS Subsequent Transactions	Both Heavy and Periodic	Heavy	Minimal	Minimal
Underwriter Review of AIWCS	Minimal	Heavy	Minimal	Minimal
AIWCS Demonstration	All users	All users	All users	All users
AIWCS Audits	N/A	N/A	N/A	Heavy

End User Training

- Course registration process:
 - Self-service sign-up
 - Trainees will review course descriptions and sign-up
 - Regional trainers will review the selections
 - Managers will review and approve the selections
 - Regional trainers will organize classes for each location as determined by site needs
 - Training schedule 3 weeks in advance of rollout
 - Training classes conducted beginning 1 week prior to rollout

End User Training

● Assumptions:

- Regional training rooms will be used
 - Remote location users will travel to regional offices
- Classes will be conducted by Regional Trainers with local Business Partner assisting and answering business issue questions

AIWCS Training Timeline



Implementation and Post-Implementation Support

- Three resource pools:
 - Help Desk
 - Regional Trainers
 - Local Business Partners
- During rollout Trainers and Business Partners will provide “walk-around” support when not in classroom
- Post-rollout, Help Desk is primary support
 - Trainers and Business Partners as available