CSO-WC (Claims Systems Online – Workers Comp)

Training Schedule Analysis – Feasibility and Options

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Executive Summary

AIGCS is rolling out the new version of it workers compensation claims handling system, CSO-WC, within the several months. This system offers new functionality, improved performance, and tighter workflow controls specific to individual users and user groups.

AIGCS is requesting a deployment over a two-month timeframe with on-site classroom training and follow-up trainer support for several days after the training concludes. The project team is requesting eight concurrent teams to conduct training.

Analysis of the demographics and volume have determined that in order to achieve the two-month timeframe twenty-one teams would have to be training concurrently. Using eight teams will require over five months to complete the rollout.

A creative approach has been developed to utilize contract trainers who are local to the sites that require training. These trainers will participate in depth train-the-trainer sessions prior to the rollout. This will result in a significant reduction in travel costs associated with the rollout. Although train-the-trainer expenses will be high, the estimated total cost of training is $2.2 million; down $300,000 from the original estimates.

Expected Project Metrics

Users to be trained	1,677
Offices/Sites to be trained	31
ISG trainers being utilized	8
Contract trainers being utilized	35
User hours of classroom training to be delivered	36,472
Total user-days classroom training to be delivered	4,559
Train-the-Trainer man days	425
Man-days on-site prep expected	156
Man-days on-site training expected	1,847
Man-days post-training on-site support expected	284
Estimated Total Cost	$2,207,000
Cost per user -- estimated	$1,300
Cost per user classroom hour -- estimated	$61

The User Audience

Almost 1,700 users will need to be trained. The user group is composed of 50 unique job titles. They are in 32 different locations/offices. The office sizes range from small, with 8 users, to very large, with over 120 users. The average office size is about 53 users.

Within the individual office organizational structure there are specialty groups with unique needs. Like other claims groups that Training has worked with previously, they are busy professionals who want tight, focused training. They want to spend the least amount of time away from their work as possible. Training must be targeted to specific needs, convey what is new and different, and what the user needs to know to go back to their desk and use the new tool for their job.

Traditionally, claims offices want to schedule their own people into their training sessions. They take guidance from Training as to what courses people should take and in what order but they prefer to slot their own people. Some offices try to organize by work unit. Others organize by job titles. This has some impact on schedules and sequences of classes. It also impacts users. In a large office a user might start training one day and not be schedule for training again for several days. These gaps can make it difficult to efficiently and effectively train a sequential workflow. Training will need to work closely with the individual offices to make sure their schedules fit with the need for an orderly and timely flow of classes for each user and user group.

The Training Process and Flow

To understand how training schedules evolve and develop, it is important to understand the training process and what has to happen before training begins until all training is completed.

- Approximately four weeks before an office is to be trained the local office management staff is contacted by Training to develop the actual class and user schedule. They are given a list of their staff, what training each user needs, and guidance as to what sequence training courses have to be taught. There are usually discussions as to what approach might work best for their office. Options such as setting up a second training room are discussed. Some offices may have flex schedules where employees may be available for training early and late in the day which allows for more classes per day.
- Once the office has developed their schedule the training team can determine how many resources are need for that office and what the overall timeframe will be for completing training at that site. Resources include trainers to cover the classes and also trainers to walk the floors providing support and desk-side training as needed. Support typically continues for two or more days after all training is completed. Another major resource that is needed is training data.
- All users are trained in a model environment. Prior to training, the team has to be on site to create training claims for the users to work with during training. An adequate number of unique claims need to be created for all users. Some claims need to be "worked" so they are further into the workflow for the needs of specific classes. The training team evaluates the course sequence, number of users, and other factors to determine how many training claims are need in various states of processing. In a small office this can be done the day prior to training. A larger office may require two or three days of prep time.
- The desk-side support for users is available from when training begins until a few days after the classroom training concludes. The number of trainers used and the length of time vary by office. Some offices are on multiple floors which require more support resources. Large offices with more users also demands more support resources. The training team tries to provide a minimum of two days post-training desk-side support. If possible one of the training resources may leave a site early to go on to the next side and begin training prep.
- With detailed requirements for prep, class schedules, and desk-side support, the claims offices can be assigned to training teams. Multiple teams are needed to meet rollout deadlines but there are a number of considerations in building the overall team schedule.
    - The overall schedule is reviewed against the overall timeframe goal. In this case two months. This will determine how many teams are needed.
    - Teams are usually assigned sites within a regional geography. Ideally this is a series of sites close to the trainer's home base to minimize travel time and expense.

- Each team is usually assigned a moderate sized office to start with. This gives them a chance to adjust training and support in a production environment without being overwhelmed by a large user population.
- Teams are assigned additional sites based on geography. The larger sites are usually done first to get as many users converted as quickly as possible.
- As sites are added to each team's schedule, adjustments are made where some of the team can be moved to their next site to begin prep work. This is always balanced against the need to complete the post-training support at the current site.
- When all sites are scheduled the overall schedule is reviewed to see if the deployment goal is obtained. If not, more teams may be needed but this has to be approved by the business and the project team. If the overall schedule goal is met, then each team's schedule is reviewed to make sure they are somewhat balancde and to see if any adjustments can be made to increase efficiency and/or reduce costs.
- After team schedules are finalized they are resourced with internal and/or external trainers.

Available Training Resources

A lead trainer is assigned to the current workers compensation system. Six other trainers have significant experience training on that system. One other trainer has claims training experience but not on the workers compensation system. At present the available training team will include a staff of eight trainers. External trainers are available through our preferred vendor. Any outside or additional internal trainers added to the project will require train-the-trainer sessions to bring them up to speed on company, business, workflow, and systems that are part of this deployment.

Training Volume Analysis

With a large number of users to be trained, multiple locations, and a need to cover ten training tracks to meet the needs of various groups, there are obvious a lot of variables that come into play.

User Identification

A listing of all users with access to the current workers compensation system was obtained from the Data Center Security Group. This data file was matched with Human Resources data to produce a list of all users by location and job title along with details such as phone number, e-mail, and manager's name. This data file identifies who needs to be trained and what training they need. This data file is being refreshed every two weeks throughout the project to update for terminations and new hires.

Training Scope

Training will encompass between 1,650-1,700 claims employees. Claims HR provided a listing of 50 unique job titles. Users have been identified in 46 of those job titles. Instructional analysis of the system changes and additions mapped against the various users has identified the need for 16 different course offerings in nine functional categories. Those course offerings have been mapped to each claims job title. Analysis of that mapping determined that there are 10 unique training tracks that meet the needs of all users. The hours of training required for various job titles ranges from 11.5-29.0. The average is 20.0 hours per user.

Courses flow in a specific sequence. This will be an important part of actually scheduling users into specific training sessions.

Training Scheduling Issues

Since it is impractical to prepare a detailed site-by-site schedule at this point, a cost/resource/schedule model has been developed to evaluate the feasibility of meeting the two-month deployment schedule and to determine what resources are necessary to complete the deployment. The target is to complete the training and deployment in two calendar months using eight teams simultaneously.

Model Assumptions

The following assumptions were made in constructing the schedule feasibility analysis model:

1. The eight teams will be led by an internal trainer – Additional training resources will be contracted. All trainers will attend train-the-trainer. This is assumed to occur prior to the first deployments.
2. Four days of training per user – The average training per user is 20 hours. Breaking this out over four days implies five hours per day which may seem low. However, five hours per day takes into account breaks between classes, difficulty scheduling filler sessions when the longer courses are conducted, and also allows for the addition of make-up classes. Additionally, some sites send users to training even though they are not in the job title being trained for cross-training, pending promotion, and other factors.
3. Number of training PCs per site – Large sites of over 100 users will have to set up a secondary training room of at least eight PCs in addition to their regular training room with ten PCs. Sites with 99-51 users will have ten training PCs. Sites between 50-21 users will have eight training PCs. Sites less than 20 users will have five training PCs.
4. Pre-training prep days – Sites over 100 users will require three prep days. Sites between 99-31 users will require two prep days. Sites less than 30 users will require one prep day.
5. Post-training support days – For the three sites of 100+ users this will be five days of post-training support. For sites with 99-51 users four days of support will be provided. For sites of 50-31 users three days of support will be provided. Two days of support will be provided for the sites with 30 or less users.
6. Resources – Since the sites with over 100 users will have two training rooms they will require four trainers to rotate between training and desk-side support. Sites with 99-51 users will have three trainers assigned. Two trainers will be assigned to sites with 50-21 users. Sites with 20 or less users will be handled by one trainer. [Note: The project team and AIGCS will both also provide some resources at each site to assist with desk-side support.]

Model Results

The model results are shown for each site are shown on the next page. This table breaks out the detailed estimates by site for training, prep, and support days. Additionally, total days and weeks for each site are shown along with the estimated resource requirements.

Site	Users	Training PCs	Days Training Needed	Prep Days Needed	Support Days	Total Site Time	Total Site Work Weeks	Resources
Costa Mesa	123	18	28	3	5	36	7.2	4
Tarrytown	106	18	24	3	5	32	6.4	4
Wilmington	100	18	23	3	5	31	6.2	4
Dallas	89	10	36	2	4	42	8.4	3
San Diego	86	10	35	2	4	41	8.2	3
Atlanta	83	10	34	2	4	40	8.0	3
San Francisco	80	10	32	2	4	38	7.6	3
Bedford/Boston	78	10	32	2	4	38	7.6	3
Phoenix	72	10	29	2	4	35	7.0	3
Parsippany	70	10	28	2	4	34	6.8	3
Portland	68	10	28	2	4	34	6.8	3
Tampa	65	10	26	2	4	32	6.4	3
Louisville	58	10	24	2	4	30	6.0	3
Dallas Wal-Mart	58	10	24	2	4	30	6.0	3
Richmond	53	10	22	2	4	28	5.6	3
New Orleans	51	10	21	2	4	27	5.4	3
Chicago	47	8	24	2	3	29	5.8	2
Hunt Valley	44	8	22	2	3	27	5.4	2
Lansing	42	8	21	2	3	26	5.2	2
Houston	42	8	21	2	3	26	5.2	2
Springfield	40	8	20	2	3	25	5.0	2
Pittsburgh	40	8	20	2	3	25	5.0	2
Jackson	35	8	18	2	3	23	4.6	2
Charlotte	32	8	16	2	3	21	4.2	2
Long Beach	28	8	14	1	2	17	3.4	2
Las Vegas	26	8	13	1	2	16	3.2	2
Little Rock	21	8	11	1	2	14	2.8	2
St Louis	14	5	12	1	2	15	3.0	1
Wichita	10	5	8	1	2	11	2.2	1
Albuquerque	8	5	7	1	2	10	2.0	1
Glastonbury	8	5	7	1	2	10	2.0	1

As the table indicates, given the assumptions made and using an eight team approach, training and deployment will take about 21 weeks or roughly five months.

This is well outside the timeframe established by AIGCS management. Additionally, assuming that one internal trainer leads each team those trainers will be out of service for any other training and projects for five months. Those eight trainers would also be on the road and incurring travel expenses for five months. The rest of the project teams would be filled with contract trainers, who may or may not incur travel expenses depending on their “home” location, but are paid at a daily rate for each day on the project. Contract trainers are also paid a reduced rate during train-the-trainer.

Just looking at the number of weeks required for training and support demonstrates that a two month or eight week deployment will be impossible without numerous concurrent teams. The fourteen largest sites each take over six weeks leaving little time for the remaining seventeen sites. The only way to meet that timeframe is to increase the number of training teams to twenty one. This will require assigning contract trainers to lead deployment teams.

The eight team approach pushes the deployment schedule to five months which is unacceptable to AIGCS management. Using twenty one teams at once is not acceptable to the project team due to resource constraints. A compromise is needed between the desired implementation time frame by AIGCS management and what the project team realistically thinks it can support.

Cost Factors

Resource Costs/Needs

The daily rate for an internal trainer is $350. Contract trainers are paid $550 per day for train-the-trainer and a blended rate of $850 for training, prep, and support. Obviously internal trainers will always be less expensive.

For this project to be accomplished within a reasonable timeframe, contract trainers must be used. The question is how many and where they will be located for their “home” base. It is likely that about 40 contract trainers will be needed. In addition to our qualification standards with the vendor, the criterion for selecting trainers is proximity to one of the training sites for this project.

Train-the-Trainer Requirements/Plan

All trainers on this project will require train-the-trainer. This is an important deployment. Significant effort needs to be put into train-the-trainer for any contract trainer or internal trainer not familiar with the existing system. The internal trainers who are familiar with the current workers compensation system will be able to go through a train-the-trainer in 3-4 days. An internal trainer familiar with claims but not workers compensation will require 4-5 days. An internal trainer not familiar with either claims or workers compensation will require 6-7 days. External trainers who have worked on our systems before can be trained in 8-9 days. External trainers with no prior history with us will need 11 days of train-the-trainer.

The current plan is based on the assumption that we will need to train a significant number of trainers. The trainers are going to be brought into the Parsippany, NJ claims training facility which accommodates twenty trainees at a time. They will arrive on a Sunday night. They will train Monday through Saturday of week one. They will have Sunday off. Training will continue in week two, Monday through Friday. This will provide eleven days of train-the-trainer and gives us ample opportunity to evaluate the trainers as a group and individually. Most likely two sessions will be required.

There will be expenses for these train-the-trainer events. The contract trainers are paid a reduced daily rate during training. We also pay for their travel, lodging, and meal expenses.

The curriculum for train-the-trainer has been well designed and expanded to address the needs of contract trainers with no previous insurance, claims, or workers compensation experience.

Travel Costs/Requirements

With a rollout of this scope that includes long training sessions in multiple locations travel expense is a significant issue. Since the trainers assigned to this project will be onsite for multiple weeks we are using an estimated travel cost of $1,750 per trainer per week. This number will allow the trainer the flexibility to either check out of their hotel and fly home for a weekend or simply stay over in the hotel for the weekend.

Each of the internal trainers identified for this project has a "home" location where they can serve as a lead trainer. Obviously at that site they will have no travel expense. However, for any other site they train they will incur travel expenses. The same is true of contract trainers. If they are hired out of a city where we have a deployment, there is no travel expense during the rollout. However, if we use them in another location they will incur the same travel expenses as an internal trainer.

The cost tradeoff for this project is the expense of bringing contract trainers to Parsippany, NJ for thirteen calendar days of train-the-trainer weighted against those trainers being local to the site and thus having no travel costs during the rollout. The estimated travel, lodging, and food expense for the thirteen days of train-the-trainer is $3,250. This is in lieu of spending $1,750 per week for a trainer to travel to a site. Since no site has less than a two week timeframe it is cost effective to use local training resources and pay for them to attend an extended train-the-trainer.

The table on the following page shows the projected costs for the project, by site, using the local trainers approach. This approach was modified slightly. Trainers were picked from larger markets and assigned some regional travel. This decision was based on the assumption that we may be able to use contract trainers in the larger markets again but in smaller locations it is most likely a one-time relationship.

The original cost estimate for training the CSO-WC system was about $2,500,000. Using localized trainers with selective traveling to remote sites the cost has been reduced to around $2,200,000 saving the business about $300,000. A summary of the costs is presented below:

Internal Trainers Utilized	8
Contract Trainers Utilized	37
Internal Trainer Travel Cost	$62,300
Internal Trainer Salary Cost	$194,600
Contract Trainer Cost	$1,471,350
Contract Trainer Travel Cost	$153,990
Train-the-Trainer Cost	$325,175
Total Project Cost	**$2,207,415**

Summary of Site Users, Training Requirements, and Costs

Site	Users	Training PCs	Days Training Needed	Prep Days Needed	Support Days	Total Site Time	Total Site Work Weeks	Team	Internal Trainer	Contract Trainers	Total Internal Trainer Travel Cost	Internal Trainer Salary Cost	Contract Trainer Cost	Contract Trainer Travel	Contract Trainers Source Location
Costa Mesa	123	18	28	3	5	36	7.2	Costa Mesa	1	3		12,600	91,800		LA
Tarrytown	106	18	24	3	5	32	6.4	NYC	1	3		11,200	81,600		NYC
Wilmington	100	18	23	3	5	31	6.2	Boston	1	3	10,850	10,850	79,050	26,970	Boston
Dallas	89	10	36	2	4	42	8.4	Dallas	1	2		14,700	71,400		Dallas
San Diego	86	10	35	2	4	41	8.2	San Diego		3			104,550		San Diego
Atlanta	83	10	34	2	4	40	8.0	Tampa	1	2	14,000	14,000	68,000		Atlanta
San Francisco	80	10	32	2	4	38	7.6	SF	1	2		13,300	64,600		SF
Bedford/Boston	78	10	32	2	4	38	7.6	Boston	1	2		13,300	64,600		Boston
Phoenix	72	10	29	2	4	35	7.0	SF	1	2	12,250	12,250	59,500	20,300	Phoenix
Parsippany	70	10	28	2	4	34	6.8	NYC	1	2		11,900	57,800		NYC
Portland	68	10	28	2	4	34	6.8	Portland	1	2		11,900	57,800		Portland
Tampa	65	10	26	2	4	32	6.4	Tampa	1	2		11,200	54,400	18,560	Atlanta
Louisville	58	10	24	2	4	30	6.0	Louisville		3			76,500		Louisville
Dallas Wal-Mart	58	10	24	2	4	30	6.0	Dallas	1	2		10,500	51,000		Dallas
Richmond	53	10	22	2	4	28	5.6	Louisville		3			71,400	24,360	Louisville
New Orleans	51	10	21	2	4	27	5.4	New Orleans		3			68,850		New Orleans
Chicago	47	8	24	2	3	29	5.8	Chicago	1	1		10,150	24,650		Chicago
Hunt Valley	44	8	22	2	3	27	5.4	Charlotte		2			45,900	15,660	Charlotte
Lansing	42	8	21	2	3	26	5.2	Chicago	1	1	9,100	9,100	22,100	7,540	Chicago
Houston	42	8	21	2	3	26	5.2	Houston		2			44,200		Houston
Springfield	40	8	20	2	3	25	5.0	Pittsburgh		2			42,500	14,500	Pittsburgh
Pittsburgh	40	8	20	2	3	25	5.0	Pittsburgh		2			42,500		Pittsburgh
Jackson	35	8	18	2	3	23	4.6	New Orleans		2			39,100	13,340	New Orleans
Charlotte	32	8	16	2	3	21	4.2	Charlotte		2			35,700		Charlotte
Long Beach	28	8	14	1	2	17	3.4	Costa Mesa	1	1		5,950	14,450		LA
Las Vegas	26	8	13	1	2	16	3.2	Costa Mesa	1	1		5,600	13,600	4,640	LA
Little Rock	21	8	11	1	2	14	2.8	Louisville		2			23,800	8,120	Louisville
St Louis	14	5	12	1	2	15	3.0	Portland	1	0	5,250	5,250			None
Wichita	10	5	8	1	2	11	2.2	Portland	1	0	3,850	3,850			None
Albuquerque	8	5	7	1	2	10	2.0	Portland	1	0	3,500	3,500			None
Glastonbury	8	5	7	1	2	10	2.0	Chicago	1	0	3,500	3,500			None
Totals			680	58	105	843	168.6		20	57	62,300	194,600	1,471,350	153,990	

Training Team Coverage of Sites

	Team													
Site	Boston	Charlotte	Chicago	Costa Mesa	Dallas	Houston	Louisville	New Orleans	NYC	Pittsburgh	Portland	San Diego	SF	Tampa
Bedford/Boston	7.6													
Wilmington	6.2													
Charlotte		4.2												
Hunt Valley		5.4												
Chicago			5.8											
Lansing			5.2											
Glastonbury			2.0											
Costa Mesa				7.2										
Long Beach				3.4										
Las Vegas				3.2										
Dallas					8.4									
Dallas Wal-Mart					6.0									
Houston						5.2								
Louisville							6.0							
Richmond							5.6							
Little Rock							2.8							
New Orleans								5.4						
Jackson								4.6						
Parsippany									6.8					
Tarrytown									6.4					
Pittsburgh										5.0				
Springfield										5.0				
Portland											6.8			
St Louis											3.0			
Wichita											2.2			
Albuquerque											2.0			
San Diego												8.2		
San Francisco													7.6	
Phoenix													7.0	
Tampa														6.4
Atlanta														8.0
Grand Total	13.8	9.6	13.0	13.8	14.4	5.2	14.4	10.0	13.2	10.0	14.0	8.2	14.6	14.4

Summary

The deployment will deliver training to almost 1,700 users. Over 36,000 hours of classroom instruction will be provided. The sheer volume of training and scattered locations makes this training initiative challenging.

Contract trainers are a necessity for this project. The eight trainers available for this project are simply not enough to get this training completed within a reasonable time. We have a long relationship with our primary training vendor. We have high qualification standards especially for contract trainers who will be delivering business systems training. A comprehensive and detailed train-the-trainer curriculum has been developed to prepare the contract trainers for this assignment.

Careful review of the logistics and costs associated with this initiative uncovered an opportunity to reduce the costs of deployment by $300,000 through the use of contract trainers who will be local to the sites they are training. An additional benefit of this approach is that those trainers will be available after the site deployment for any new or follow-up training that may be needed.

Training will closely monitor the feedback from the initial deployment sites. The sites being led by contract trainers will be given extra scrutiny. Any issues that may arise will be addressed immediately.