Microsoft Office 365 / Outlook Training Needs Analysis – Working Copy as of 12/9/14

Presented by Jody Gardei, Manager of Staff Training & Development

# Purpose

The purpose of this training needs analysis is to design an effective training program for the Microsoft Office 365 / Outlook business productivity tool. All employees receive an Office 365 account. Most users only utilize the email feature, but many power users exists throughout the University. Office 365 has several powerful collaboration tools available that the University could use to improve productivity and collaboration amongst employees.

# Objectives

To educate employees on the Office 365 product and how the different features can be used to increase productivity and collaboration.

Identify user groups and their training needs.

Design a training program that meets the needs of the different user groups.

Reduce time to complete tasks.

# Audience

All employees of the University, with a focus on the different needs of different user groups.

# Things you Should Know

Confidential – Restricted by law

Restricted – Restricted by FSU

Public – no restrictions

Email Encryption Requirements

# Project Roles

Sponsor(s): Lynn Lewis

Project Lead: Jody Gardei

SMEs: Jody Gardei, Lynn Lewis

# Data Collection Plan

Data was collected from the following sources.

## Office 365 / Outlook Learning Community.

* Use Appreciative Inquiry interviews to gather data about what successful communication looks like from employees of the University.
* Analyze data collected.

## End Users

Information gathered from conversations with individuals throughout the University about their knowledge of Office 365.

## Subject Matter Expert (SME) Interviews

Lynn Lewis, Office 365 Administrator

## Survey

A survey was sent out via University Wide Notice during the summer of 2014. There were 26 respondents.

## Materials Review

Lynda.com videos were reviewed. Reviewed video series “Outlook 2013 Essential Training.”

# Data Analysis

This section summaries the analysis of data collected. This analysis helps to answer three specific questions:

1. What themes appeared in past successes with implementing a new system that could be used to successfully implement Office 365 as a collaboration tool at Ferris?
2. What types of training are effective for Office 365 / Outlook?
3. What items other than training need to be considered?

## Themes

I met with the Office 365 / Outlook Learning Community and collected the following themes from the Appreciative Inquiry interviews.

* Open to change
* Power user who is familiar with systems features
* \*Provide system/Purchase product
* \*Provide training
* Vitalist support (support during the learning process, before there was a campus expert)
* Lynda.com videos
* Distribution group for confidential information
* Open to being a learner, learning new things through exploration
* Lacks everyday administration system support
* Positive
* Good communication about change (could have been more concise)
* Training planned for convenient times for end users
* Emphasize new features and different features that make the system powerful (like Lync)
* Think about the little things that were useful features in the past that could have been pointed out in the new system Outlook administration
* Need for Consistent Terminology
* Community with helpful tips and tricks

## Other Findings

As I talked to people individually, I found that there are different types of users. For example, employees who do not have an office computer are less likely to have a need to learn how to use the more advanced features of Office 365. There are also individuals that only manage their personal Office 365 account and others who manage Office 365 accounts for others. The training plan needs to address the different needs of user groups. These user groups need to be further identified by the learning community.

Initial training on Office 365 was outsourced to New Horizons. Instructors came to campus and taught multiple sessions for basic and advanced users. Lynda.com video training resources were also available, in addition to the phone support provided by Vitalist through the Technology Assistance Center main line. Office 365 online built-in support is also available, but rarely used. Most people are in the habit of reaching out to others for support.

Training that is condensed into one session was not as effective as spreading it out and allowing people to use the skills they learned over a longer time period. The extra training resources did help reduce the stress of implementing a new system.

Ferris has a new email policy that needs to be incorporated into the training plan.

# Recommendations

There are four key findings that will help make this project a success:

1. Customized training per user group.
2. Multi-solution approach (workshop, forums, videos, phone, online, blog, etc.).
3. Create a group of Power Users.
4. Spread out advanced skill training over time.

Office 365 is a powerful collaboration tool. May of the productivity features have yet to be fully utilized by the majority of those who could benefit from using them.

## Customized training per user group

### New Employees

New employees are introduced to Lynda.com as a resource to learn how to use Office 365 and Outlook 2013 because there is not enough time during new employee orientation to go in-depth on the products. This community should identify the basic needs of new employees that will fit into a 10-15 minute introduction to the system.

New employees are given quick help cards on Office 365 and Outlook 2013. These can be useful tools, but may be too condensed for users that do not use a computer on a regular basis. Quick help cards will continue to be given during orientation, but will be reviewed for effectiveness after the current stock is depleted.

### Existing Employees

This learning community has determined the user groups for existing employees: Office 365 users, general users, and power users. The next step is to identify their needs and develop learning objectives for each group. Once we have these lists, the learning community can begin to work on the approach that will be the most effective training plan for the users in each group.

Information about new or changing features needs to be disseminated to the University community. The learning community will develop a plan to ensure users are up-to-date on the product through email, university wide notices, blog articles, forums or town halls.

## Multi-solution approach (workshop, forums, videos, phone, online, blog, etc.)

### Video Training

In-depth training on Office 365 and Outlook 2013 is available through the Lynda.com video training resource. The Staff Center for Training & Development has been actively promoting this resource as the primary learning tool for new and existing employees. Employees that work outside of normal business hours for the University should have targeted communications sent to them about the availability of Lynda.com and how to use it to learn about Office 365. Lynda.com has the ability to set up and share playlists with people. These playlists could be set up by the center and communicated out to campus as a training resource.

Online training resources are not a viable resource for all user groups. There are many employees of the university that do not have easy access to a computer, so other training options will need to be made available.

### Workshops

All Office 365 and Outlook training conducted during Fall 2014 has used Lynda.com video resources as part of the delivery of the training. This is to encourage employees to utilize this resource for all their Outlook training needs. This learning community may want to consider supplementing this online training resource with practical ways to use Outlook for productivity and to share tips and tricks specific to the way Ferris utilizes the product. I recommend the use of Lynda.com videos to develop training workshops continue to make the most use out of the limited resources available for training. The staff center has been able to provide much of its training because this resource helps with the content delivery.

## Create a group of Power Users

The learning community members present on November 10, 2014 discussed this learning community becoming the forum for power users of Office 365 and Outlook. I support this recommendation and will plan to set aside time at each of our meeting for question and answer time. Participants may use this time to discuss needs and how others are using Office 365 and Outlook to meet these needs.

## Spread out advanced skill training over time

Advanced training topics will be a natural by-product of the power users group. Topics brought up during the discussions will be documented and considered for inclusion in future training sessions. Each session should focus on a particular topic or skill and its usefulness in the workplace.

Some topics identified:

* If you don’t need it, delete it. Cleaning up your email account.
* How to manage another person’s Outlook account.
* Email encryption.

# Conclusions

The following cost-benefit analysis explains how the training will achieve the projects goals:

To be completed by the learning community after the learning objective for each user group have been defined.

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| Option | Cost | Benefits |
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