

Procure to Pay
Version 2

Training Needs Analysis (TNA) Report

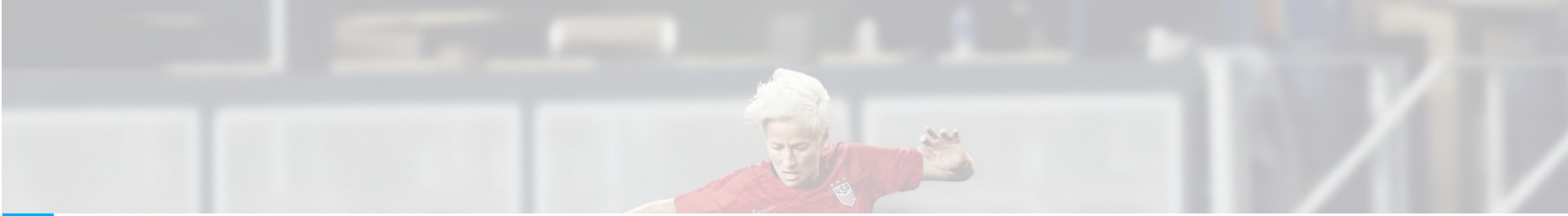

AGENDA

TOPIC

1. Goals and Objectives
2. TNA Process and Needs Assessment
3. Recommended Training Strategy and Impact
4. Training Plan
5. Critical Success Factors and Next Steps



TRAINING NEEDS ANALYSIS: Goals & Objectives

- 
- Identify specific training needs across Procure to Pay (P2P) roles
 - Get an understanding of the business context and critical success factors for the training
 - Analyze the existing source content to identify the high-level scope and training deliverables/outputs
 - Assess the existing tools and technologies to be used for training design and development
 - Determine the appropriate training strategy and approach to ensure effective training on the end-to-end P2P process
 - Get a sign-off on the training approach, scope, and high-level deliverables
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Training Needs Analysis: Process

Training Needs Analysis



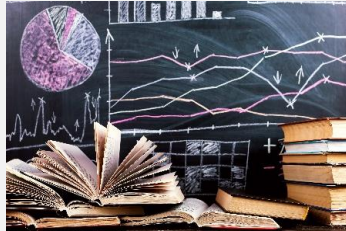
Business Context Analysis

- **5** Subject matter expert/stakeholder interviews
- Established business and training needs
- Analysis of TNA questionnaire responses



Audience Analysis

- Audience profiling
 - Roles
 - Responsibilities
 - Support functions



Content & Task Analysis

- **6 Hours** Coupa transaction walkthrough with DEF process owners
- **10+ Hours** hands on Coupa and Supplier portal
- **20+ Hours** analysis of existing training materials



Tools and Technologies Analysis

- Analysis of DEF U LMS Technical Spec
- Development Tools analysis – Captivate and Storyline
- Understanding of branding specs and image library



Current State Training Analysis

- **1.5 Hours** of classroom training walkthrough
- **4 Hours** analysis of classroom training materials



Business Context and Critical Success Factors



Business Scenario

- DEF, Inc. is a multinational corporation that is engaged in the design, development, manufacturing, and worldwide marketing and sales of footwear, apparel, equipment, accessories, and services.
- DEF's Global Controlling Department provides a classroom-based P2P training to train end users on indirect purchasing for compliance and managing spend process.

- **Enhance effectiveness of the current training:** DEF needs to transform the learning journey and experience to make the training content more relevant to what the users do in their jobs. There is a need to train end users on the purchasing process in Coupa to enable them to compliantly and effectively manage the spend process.
- **Focus on sustainability:** The self-paced P2P training will provide a sustainable solution that can be leveraged across DEF locations in a standardized and consistent way.
- **Optimize helpdesk queries:** The training content to focus on the end-to-end process, tool, and policies to drive first-time-right approach in end users and reduce support queries.
- **Drive compliance:** The training needs to cover the policies and procedures to ensure that end users meet all the compliance requirements.
- **Accurate financial reporting:** This training content will educate end users on creating correct purchase orders and generating reports for accurate financial reporting and decision making.



Business Needs



Business metrics to measure success

- More efficient end-to-end P2P process with touchpoints
- Mitigation of compliance risks
- Increased accuracy in financial statements
- Timely payments to vendors
- Real time visibility to committed spend



Audience Details

Total number of users

~ 15,000 employees across the globe (Potential impact on 10,000 users in North America, and additional 5,000 users from other geographies)

Roles and responsibilities

Four types of roles:

- **Shoppers & Centralized Purchaser:** Responsible for Purchase Order (PO) creation, changes, and cancellations, receipt, and invoice administration
- **Approvers:** Responsible for approving requisitions or PO changes
- **Reporting Users:** Responsible for creating and scheduling P2P reports

Language

Language Preference: US English

Geographical location

Worldwide locations across North America, Europe, Asia, and Africa

Exposure to learning modes

- Experienced in taking classroom training on Indirect Purchasing and Compliance process
- Self serve approach of accessing training materials on Box

Technology Exposure

- Both occasional and frequent users of Coupa tool used for indirect purchasing
- Access DEF U LMS for registering for classroom training

Objectives to be met through the training

- Understand the end-to-end Procure to Pay (P2P) process and use Coupa effectively and efficiently
- Understand the P2P policies for compliance and effective spend management



Shoppers and Centralized Purchasers

- Creating requisitions
 - Creating Catalog PO
 - Creating Free Form PO
 - Adding Lines to Requisition
 - Change the Billing/Cost Assignment
 - Adding Approvers or Watchers
 - Delegating Approvers
 - Checking Approval
 - Copying Requisition
- Working with receipts
 - Creating Goods Receipt
 - Request Voiding Goods Receipt
- PO changes and cancellations
- Invoice administration
 - Approve – PO & Non-PO Invoices
 - Code – Non-PO Invoices



Approvers

- Approving Requisitions
 - Approving/Rejecting Requisitions
 - Approving/Rejecting PO changes
- Approving/Rejecting Invoices
 - PO
 - Non-PO
- Adding Approvers or Watchers
- Delegating Approvers



Reporting Users

- Creating P2P Reports
 - Standard
 - Customized
- Scheduling P2P Reports





Key Observations from Current State Training

As-is State

P2P Content Depth and Details - Process and Policy Details

Training Mode

Limited adoption of technologies

Training effectiveness measurement & tracking

Gaps/Observations

- Lack of an understanding of P2P tool, process, and policies leads to creation of incorrect and/or non-compliant PO
- Unavailability of relevant information at the right time leads to increase in the number of helpdesk inquiries
- Limited understanding of the Coupa tool, its dependencies, and limitations in the P2P process
- Limited communication to drive awareness of training

- Ad-hoc and quarterly classroom training on P2P process
- Manual internal mechanism to provide training to new and existing vendors
- Existing training mode is not flexible enough with respect to just-in-time accessibility and usability
- Dependency on instructors – leading to inconsistent training across regions
- Less cost effective – facilitator, travel, logistics cost etc.

- Classroom sessions and documentation available on Box
- Limited/no use of DEF U LMS – opportunity to leverage LMS for deploying and tracking training
- Limited end user awareness of Financial and Strategy website and its content
- Opportunity to leverage new age rapid authoring tools for training design and development to enhance learner experience

- Limited metrics to evaluate training effectiveness and linkage to business goals at organizational level
- Manual tracking of training completion
- No established mechanism to measure training quality or impact

NEED FOR P2P TRAINING

- Design a role-based training solution across different P2P modalities to ensure and drive PO accuracy and compliance
- Reduce the volume of inquiries coming to help desk by equipping users with training
- Train learners on spend management to take timely action and ensure discounts and rebates are fully captured
- Implement a training and evaluation framework to measure training effectiveness

LMS Details

- Totara 11 - DEF U Learning Management System (LMS) is available for training deployment
- The LMS is SCORM 1.2 compliant



Coupa System Access

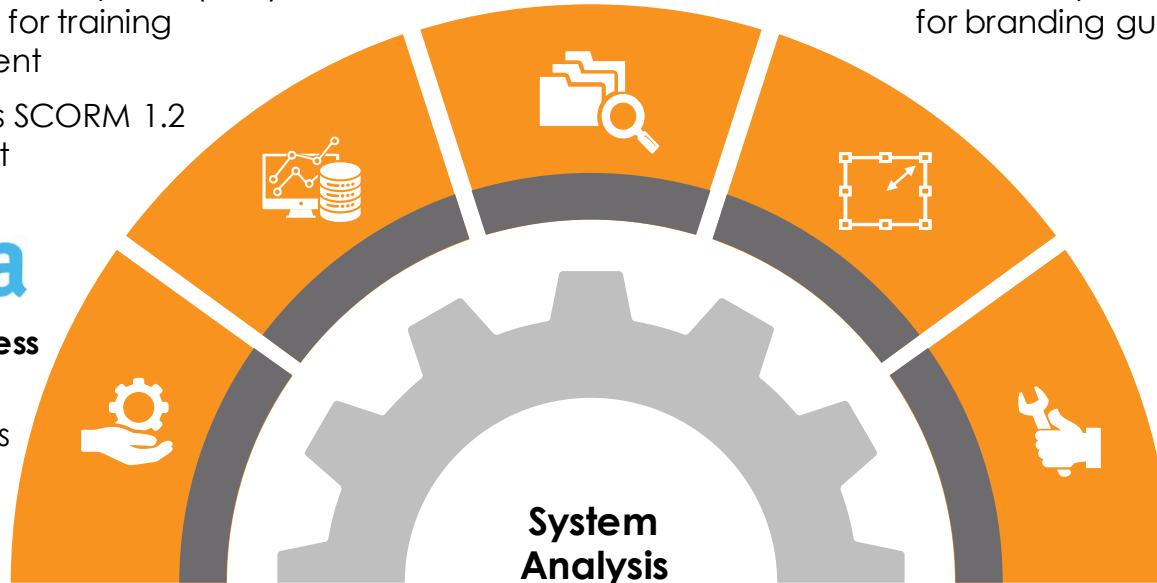
Access to Coupa Stage Environment is provided for the different roles

Image Library

Access to Finance and Strategy Brand Asset Library is provided

Branding Guidelines

Finance and Strategy Brand Template is used for branding guidelines



Tools for Training Development

Articulate Storyline v.X, Captivate v.X and MS Office will be used

Recommended Training Strategy

Accessibility



- Redesigning training materials for easy access and user experience
- Self-paced device-agnostic eLearning modules for anywhere, anytime access
- Bit-sized learning for easy access, understanding, and application of training

Consumability



- Task-role mapping for standardized role-based training experience on the end-to-end Procure to Pay process
- Micro learning to help increase learning effectiveness and retention
- Training to increase in first-time-right processing thus improving Purchase Order penetration in the organization

Applicability



- SCORM-compliant eLearning deployable on DEF U LMS will enable course completion tracking and measurement of training effectiveness
- Enhanced learner confidence (through practice simulations)
- Enhanced learner satisfaction (through scored assessments)

Instructional Design Plan

Training Interventions	Core message & Objectives	Delivery Mode	Number of learning/communication Assets
Communication Collaterals	<p>Message:</p> <ul style="list-style-type: none"> • Generic awareness (new and enhanced training program with emphasis on P2P policies for indirect purchasing) – before the training • What is in it for me? – before the training • What will be the training impact supported by a success story – before the training 	E-mail	3 (Teaser + Detailed communication on the training program)
Leadership Video Nugget	<p>Message: Leadership informing end users on benefits and impact of training program including user experience including an understanding of the Coupa tool and the end-to-end Source to Pay (S2P) process, understanding of S2P policies (provide link/reference to policy documents) for compliance, and driving enhanced value through decrease in support inquiries, better spend management, and accurate financial reporting</p>	Video	<p>1 (Scratch video received from DEF Marketing team will be edited) This will be added to e-mail communication as well as to the DEF U training site</p>
Doodle Video	<p>Message: Challenges faced by end users in the P2P process and how the training program will help to understand the end-to-end P2P process and will help in bringing efficiency and effectiveness in the process, better support touchpoint, and financial accuracy</p>	Doodle Video	1 (2-min video to be delivered before training deployment)
Self-Paced Training	<p>Message: Educate end users on the end-to-end P2P process, tool, and policies</p>	ELearning, Simulation, and Job Aids	8 eLearning modules + 30 simulations + 32 Job Aids

Instructional Design Plan contd..

Deliverable	Who / audience	Delivery Mode	Duration
Purchasing a Goods or Service training	Anyone in the P2P who has a specific purchase need	eLearning / Job Aids	15 min
Creating Requisitions (PO) training	Shoppers, Central Purchaser	eLearning / Simulations / Job Aids	30 min
Approving Requisitions (PO) training	Approvers	eLearning / Simulations / Job Aids	20 min
PO Changes and Cancellations training	Shoppers, Central Purchaser	eLearning / Simulations / Job Aids	25 min
Creating Receipt training	Shoppers, Central Purchaser	eLearning / Simulations / Job Aids	15 min
PO Invoice Administration training	Shoppers, Central Purchaser	eLearning / Simulations / Job Aids	20 min
Non-PO Invoice Administration training	Shoppers, Central Purchaser	eLearning / Simulations / Job Aids	15 min
Generating Reports training	Reporting Users	eLearning / Simulations / Job Aids	20 min
FAQ Document	Shoppers, Central Purchaser	Job Aids	N/A
Tips and Tricks Document	Shoppers, Central Purchaser	Job Aids	N/A



IDP

IMPACT



Enhance User Experience

- **Improved user interactions** through training on a standardized end-to-end Procure to Pay process
- **Improved productivity** through optimized P2P process and accuracy of purchase, whilst releasing bandwidth for other activities
- **Enhanced learning and retention** using bite-sized learning for easy access, understanding, and application of training
- **Increase end user awareness** of training through targeted communication



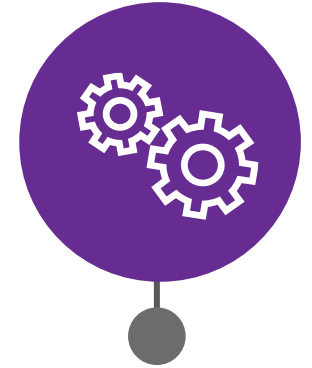
Improved Compliance

- **Adherence to Policies** as self-paced P2P training intervention will lead to correct PO creation and will drive adherence to GSA and PO policies
- **Improved supplier relation** by following P2P policies, timely supplier payment, and building transparency and trust for sustained success



Cost Reduction

- **Cost reduction** from reduced helpdesk support inquiries, reduced P2P cycle times, and accelerated processing that will reduce total PO/invoice processing costs
- **Accurate Financial reporting** enables transparency, improved decisions and cost saving



Business Metrics

- **Improved quality** of purchasing and measurement; guiding users to the right products/services at right time from right suppliers
- **Tracking** course completion and measurement of training effectiveness

Training Plan

Training Needs Analysis							
Project Kickoff and Questionnaire	Responsibility	Planned Start Date	Actual Start Date	Planned End Date	Actual End Date	Completion Status	Comments
Share the TNA questionnaire with the Nike team	Genpact	Wed 1/22/20		Wed 1/22/20		100%	
Introduction of the Nike Stakeholders	Nike	Fri 1/24/20		Fri 1/24/20		100%	
Share responses to the questionnaire	Nike	Thu 1/23/20		Thu 2/6/20		100%	
Training Needs Analysis	Responsibility	Planned Start Date	Actual Start Date	Planned End Date	Actual End Date	Completion Status	Comments
Discussions with Nike team around the information and content to be covered in the training	Genpact and Nike SMEs	Mon 2/10/20		Fri 2/14/20		100%	
Additional meetings regarding the clarification on Content	Genpact and Nike SMEs	Mon 2/17/20		Wed 2/19/20		100%	
Create and share the report out of the TNA discussions	Genpact	Thu 2/20/20		Mon 2/24/20		95%	
Review the TNA report out and provide signoff	Nike SMEs and Casey	Fri 2/28/20		Fri 2/28/20			



Project Plan_V1

Design Document Creation							
Design Document Creation	Responsibility	Planned Start Date	Actual Start Date	Planned End Date	Actual End Date	Completion Status	Comments
Development of the Design Document	Genpact	Tue 2/25/20		Wed 2/26/20			
Walkthrough of the Design Document with Nike Stakeholders	Genpact and Nike SMEs	Thu 2/27/20		Thu 2/27/20			
Review and Share Feedback of the Design Document	Nike SMEs and Casey	Fri 2/28/20		Mon 3/2/20			
Address the feedback in the Design Document	Genpact	Tue 3/3/20		Tue 3/3/20			
Share final version of the Design Document	Genpact	Wed 3/4/20		Wed 3/4/20			
Review and signoff the Design Document	Nike SMEs and Casey	Thu 3/5/20		Fri 3/6/20			

Training Design and Development team

Deliverable	DEF SME/Owner	Bandwidth (Hr)	Inputs
Communication Collaterals	Tasha Gilchrist, Patti Jones, Hope Fletcher, Gigi Lagasca / Casey Dawes	~3-4	<ul style="list-style-type: none"> Review of deliverable Validation and sign-off
Leadership Video Nugget	Tasha Gilchrist, Patti Jones, Hope Fletcher, Gigi Lagasca / Casey Dawes	~1-3	<ul style="list-style-type: none"> Recording of video Review of deliverable Validation and sign-off
Doodle Video	Tasha Gilchrist, Patti Jones, Hope Fletcher, Gigi Lagasca / Casey Dawes	~4-6	<ul style="list-style-type: none"> Review of deliverable Validation and sign-off
Purchasing a Goods or Service training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~4-5	<ul style="list-style-type: none"> Training inputs Query resolution Review of deliverable Validation and sign-off
Creating Requisitions (PO) training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~4-5	
Approving Requisitions (PO) training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~3-4	
PO Changes and Cancellations training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~4-5	
Creating Receipt training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~2-3	
PO Invoice Administration training	Patti Jones and Gigi Lagasca / Casey Dawes	~4-5	
Non-PO Invoice Administration training	Patti Jones and Gigi Lagasca / Casey Dawes	~2-3	
Generating Reports training	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~3-2	
FAQ Document and Tips and Tricks Document	Tasha Gilchrist and Hope Fletcher / Casey Dawes	~2-3	
LMS Deployment	Emily Casey and DEF LMS Team/ Casey Dawes	~8-10	

Critical success factors for training design and development

Key Dependencies

- SME availability for timely inputs and query resolution
- Accessibility to Coupa and dependency on copy back from Production, testing, and system updates (7-10 days downtime during the testing phase to be shared)
- Availability of SMEs during Coupa testing
- Timely approval on designs and user interface for training development
- Sharing of Leadership video and messaging for marketing collaterals
- Development, review, and approval of training deliverables as per the project plan
- Deployment of SCORM-compliant eLearning on DEF U LMS

Next Steps

Action	Owner	Timeline
TNA Report out sign-off	DEF	2/28
Design document walkthrough	Genpact	2/27
User Interface (UI) walkthrough	Genpact	2/27
Sign-off from DEF on design document and UI	DEF	3/6
Initiate doodle development	Genpact	3/9
Start recording Coupa simulations and eLearning storyboard	Genpact	3/9