



# Training Plan

CONTOSO, LTD

MICROSOFT DYNAMICS AX SOLUTION

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# 1 TRAINING PLANNING SUMMARY

Knowledge transfer is a critical aspect in the transitioning of ownership of the Microsoft Dynamics solution to the customer. Adequate training of customer resources is crucial not only to the success of the implementation project, but also for the customer's overall satisfaction with their new Microsoft Dynamics solution. It is important that the customer's resources are committed to the training, both at the beginning of the implementation project and at the end, right before the go-live cutover to the new solution.

The Training Plan for Contoso, Ltd will include the following components:

- Solutions Overview.
- Core Team Training.
- Train-the-Trainer Sessions.
- End User Training.

## 2 OBJECTIVES

Solutions Overview in the Analysis Phase is sometimes referred to as “level setting” even though it resides in the Training Cross Phase. The purpose of the overview is to provide the customer resources that will participate in the Business Requirements Workshop a baseline as to the terminology used within the Microsoft Dynamics solution.

Core Team Training in the Design Phase is focused on educating the customer resources who will actively participate in making decisions about how the software will be implemented.

Training in the Deployment Phase is focused on preparing customer resources for participation in User Acceptance Testing. This training will also provide the users with the knowledge for using the new solution to complete their daily work, and for maintaining the solution in on-going daily operation.

Train-the-Trainer sessions are conducted with the customer resources responsible for conducting end user training. These sessions prepare the assigned customer resources, who may not be accustomed to providing such training, with the necessary skills required to conduct end user training.

If there are significant customizations being developed, additional training and/or procedure documentation may need to be created to supplement the documentation that is provided with the software. This additional documentation is typically created in the Development Phase.

After the successful go-live, final updates may be required to training and daily operating procedure documentation that will be given to the customer. Additional training may be needed for a variety of reasons. This training may be formal sessions for customer resources who were not trained prior to go-live, or it might be informal or follow-up refresher sessions to maximize work efficiency on the new solution. This ongoing training and maintenance effort will be Contoso, Ltd 's responsibility.

## 3 TRAINING REQUIREMENTS

### 3.1 Product Management

The Product Manager's function is to ensure that the solution will meet the business requirements of the customer organization.

- Drive marketing and public relations messages to excite and positively affect the target customer and users
- Understand the competitive landscape
- Place the solution into distribution so that the target customer can easily acquire it
- For packaged solutions, enabling customers to have a positive experience buying and using the solution
- Understand the solution landscape
- Understand and manage stakeholder expectations
- Manage customer expectations and communications
- Define and maintain business justification for the project
- Define and measure business value realization and metrics
- Manage customer relationship
- Gather, analyze, and prioritize customer and business requirements
- Perform market research, market demand, competitive intelligence/analysis
- Determine business metrics and success criteria
- Drive a shared project and solution vision
- Identify multi-version release plan
- Work with the respective teams to ensure solution releases are consistent with the solution road map
- Be the authority on requirements and expectations associated with each release

### 3.2 Program Management

### 3.3 Development

The role of development is to build a solution that meets the customer's expectations and specifications as expressed in the functional specification. The development role cluster adheres to the solution architecture and designs that, together with the function specification, form the overall specifications of the solution.

- Serve the team as a technology consultant.
- Evaluate and validate technologies.

- Participate actively in the creation and review of the functional specification.
- Contribute to defining development standards for the organization.
- Map the Enterprise Architecture (EA) to the solution's implementation architecture by providing solution-specific detail for application, data, and technology views of the architecture.
- Own and implement the logical and physical designs of the solution.
- Code features to meet the design specifications.
- Conduct code reviews during development to share knowledge and experience.
- Carry out unit testing as defined in the test plan with the support of the test role.
- Develop features that meet the design specifications.
- Develop scripts for automated deployment.
- Develop deployment documentation.

### **3.4 Test**

The goal of the test role is to approve for release only after all product quality issues are identified and addressed.

- Develop testing approach and plan.
- Participate in setting the quality bar.
- Develop test specification.
- Develop and maintains automated test cases, tools, and scripts.
- Conduct tests to accurately determine the status of product development.
- Manage the build process.
- Provide the team with data related to product quality.
- Track all bugs and communicates issues to ensure their resolution before product release.

### **3.5 User Experience**

- Gather, analyze, and prioritize user requirements.
- Provide feedback and input to solution design.
- Develop usage scenarios and use cases.
- Act as the user advocate to the project team.
- Drive user interface design.
- Drive accessibility concepts and requirements into design.

- Improve the quality and usability of the solution in international markets.
- Design and develops documentation for support systems (Helpdesk manuals, KB articles, and more).
- Document Help/assistance.
- Develops and executes learning strategy (build/buy/deliver).

### **3.6 Release Management**

The goal of the release management role cluster is smooth deployment and on-going operations.

- Enterprise infrastructure planning
- Build and administer infrastructure necessary to support the various solution delivery activities and environments, such as Development, Lab, Test, Staging, and Training
- Evaluate release readiness
- Coordinate and manage the rollout of each solution release to Operations

### **3.7 IT Administration**

The IT Administration team would receive the Microsoft Dynamics AX Installation & Configuration training, which would give them the foundation to manage the Microsoft Dynamics AX environments. In the event that the IT team member would have development proficiency, they would also take the Development training courses.

### **3.8 Help Desk and Support Staff**

Help Desk and Support Staff would receive overview training across the modules that will be implemented. Typically, one support engineer whose primary role is application or functional would be trained toward the functional aspect; then, a technical consultant would receive training that would apply more to the technical aspects of Microsoft Dynamics AX.

### 4.1 Duration

The duration of the training for Contoso, Ltd is estimated to last up to 12 weeks:

- Solutions Overview - 1 week long
- Core Team Training – 4 weeks (2 sessions, each 2 weeks in duration)
- Train-the-Trainer Sessions - 1 week
- End User Training – 4 to 5 weeks (On average each of 15 roles is expected to take up to 2 days of classroom training)
- Report Writing Training - 1 week

### 4.2 Delivery

The Training scope for Contoso, Ltd will include the following components:

- Solutions Overview.
  - This will be conducted during the Analysis phase and is limited to one session for the Contoso, Ltd Core Team members for both the front office and back office functionality in Microsoft Dynamics AX 2009. This training will be instructor led and will be approximately 1 week long and can include up to 20 people.
- Core Team Training.
  - This will be a hands-on training session, conducted during the Design phase, to prepare the Contoso, Ltd Core team to provide input during solution design. There will be 2 training sessions, each two weeks in duration, one for front office functionality and the other for back office functionality in Microsoft Dynamics AX 2009. Each session can include up to 20 people.
- Train-the-Trainer Sessions.
  - This will be a hands-on training session, conducted during the local country deployments. This will cover the breadth of the end user training roles and content and is estimated to be a focused 1 week effort in duration for up to 5 Contoso, Ltd resources.
- End User Training
  - End User Training on the Microsoft Dynamics ERP Solution will be delivered to up to 15 roles. . These roles would span both the front office and back office functions and would include roles such as:
    - Biller.
    - Account Management.
    - Traffic.

- AP Clerks.
- Time and Expense Users.
- Inquiry Only.

During the End User Training Strategy activity, planned to be completed during the Design Phase of Global Build., we will finalize the list of roles within Contoso, Ltd. Our estimate and scope of work covers up to 15 roles, with the assumption that one individual would be assigned to a role, along with the delivery of one round of end user training for each of these roles in each country. Subsequent training sessions will be conducted by Contoso, Ltd. . On average each role is expected to take up to 2 days of classroom training. Mediums for various training sessions may be different and maximum number of people in any training session will be determined collaboratively between Proseware, Inc. and Contoso, Ltd core team. For the purposes of this SOW, however, we have assumed that any hands on classroom training session can include up to 15 people in each training session.

- Report Writing Training:
  - As part of the Training, Proseware, Inc. will train up to 5 individual per country for 1 week to write reports.

Training will be delivered in the primary language of each country. The countries included for deployment are specified in section 1.2.2.

### 5.1 Hands-on Training

- Core Team Training.
  - This will be a hands-on training session, conducted during the Design phase, to prepare the Contoso, Ltd Core team to provide input during solution design. There will be 2 training sessions, each two weeks in duration, one for front office functionality and the other for back office functionality in Microsoft Dynamics AX 2009. Each session can include up to 20 people.
- Train-the-Trainer Sessions.
  - This will be a hands-on training session, conducted during the local country deployments. This will cover the breadth of the end user training roles and content and is estimated to be a focused 1 week effort in duration for up to 5 Contoso, Ltd resources.

### 5.2 Presentation

- Solutions Overview.
  - This will be conducted during the Analysis phase and is limited to one session for the Contoso, Ltd Core Team members for both the front office and back office functionality in Microsoft Dynamics AX 2009. This training will be instructor led and will be approximately 1 week long and can include up to 20 people.

### 5.3 Computer or Web-Based Training (CBT/WBT)

Microsoft Dynamics AX E-Learning is available.-

### 5.4 Handouts

Training Manuals for Microsoft Dynamics AX are available

### 5.5 Certification

Certification is available for the following roles:

- Consultant – Configuration, Customization
  - Introduction to Microsoft Dynamics AX
  - Installation and Configuration
  - Development I
  - Administration
- Consultant – Installation, Deployment, Methodology

- Microsoft Dynamics Sure Step Methodology Training (for Microsoft Dynamics ERP)
- Administration
- Installation and Configuration
- Business Consultant – Technical Sales
- Developer
  - Solution Development (Introduction)
    - Introduction to Microsoft Dynamics AX
    - Development I – MorphX
    - Development II – Introduction to X++
  - Solution Development (MorphX)
    - Introduction to Microsoft Dynamics AX
      - Development II – Introduction to X ++
      - Development III – Introduction to X \_\_ Advanced
      - Development IV – MorphX Integration
    - Solution Development (Enterprise Portal)
      - Introduction to Microsoft Dynamics AX
      - Development II – Introduction to X ++
      - Enterprise Portal Development 1
      - Development III –Introduction to X ++ Advanced
      - Enterprise Portal Development II
- Project Manager
  - Introduction to Microsoft Dynamics AX
  - Financials I
  - Accounting I
  - Project Accounting II

### 6.1 Materials

It is assumed that standard Proseware, Inc. training manuals will be used. Any modification of these training manuals will be the responsibility of the Contoso, Ltd training team, with guidance from Proseware, Inc. training team. Training manuals for any customizations or enhancements to the application will be dealt with as part of the normal change control process for the relevant customization.

### 6.2 Resources

In accordance with the requirements of Contoso, Ltd, Proseware, Inc. Resources will conduct the first round of End User Training across each role in each deployment country. Contoso, Ltd Trainers will be actively involved in this session, so as to gain enough confidence to conduct subsequent End User Training sessions. Details on the training to be provided are included in the scope section above.