

The Hunley Group Multi-year Learning Roadmap

Montage Learning | 2021



The **Hunley** Group

Contents

<u>Strategy Engagement Synthesis</u>	3
<u>Learning Needs Analysis Themes</u>	6
<u>Learning Roadmap: Programs Year-Over-Year</u>	10
<u>Support Systems for Learning</u>	28
<u>Engaging with Montage</u>	31
<u>Auxiliary Montage Services</u>	33

Strategy Engagement Synthesis

Montage Methodology

Montage spoke with twelve members of the The Hunley Group team in one-on-one conversations. The interviews focused on the opportunities and pain points around learning and development, and the impact that each person has seen on the department, their role, and their direct reports, where applicable. From these conversations, Montage was able to tease out trends and priorities for learning and development in 2021 and beyond.

Learning Goal

Want people to grow in their own way.

Learning Gaps Summary

- Content exists but is difficult to find, understand who knows about it, and ultimately share it
- People are working long hours to ramp themselves up in order to perform in alignment with the Hunley Way
- Unclear definition of each roles (expectations, responsibilities, skillset) making it difficult to understand one's own career path
- Accountability is hard to demand because there are no protocols around having difficult conversations or providing feedback
- The Process is not fully documented or shared so everyone fills in the gaps with their own prior knowledge or ad hoc resulting in no repeatable practices and each project works differently

What employees are saying about The Hunley Group

I love working here!

Everyone I work with is so smart.

I can tell that Penny and Aaron really care about us.

This is the most collaborative and supportive environment I've ever worked.

The Hunley Way was selling point for me to join the company—I liked that they had a shared vision.



Learning Needs Analysis Themes

Content

- Documentation of processes and standards sometimes exists but it isn't widely shared
- Aaron's Bootcamp is very helpful but hard to keep up with day-to-day and get the most out of it. It might be helpful during onboarding process especially for those new to industry
- New hires and existing employees get information and knowledge from each other
- Each person maintains their own knowledge database in regards to the company, industry and role

Time

- People are using outside work hours to study the industry
- Ramp up time for new hires ranges from 1 day to 1 week with little to no guided onboarding into the company or industry
- Videos are great, but too long and there is no time to watch them
- Team training time is blocked but no one has time to create content
- Each new hire is individually onboarded and the time spent with them is typically 3 hours each day (2x), e.g. 3 new hires x 3 hrs each = 9hrs x over 2 days = 18 hrs [Delivery of onboarding, doesn't include prep time]

Roles

- Roles need to be clearly defined, who does what and the expectations
- Career path is not illustrated, goals/milestones not clearly identified in order to move forward in career
 - baseline competencies based on Hunley Way needed
- Project team structure is defined but not each role their responsibilities, the processes they own
- Some roles require information but also shadowing time and hands on practice for onboarding
- No easy way to understand everyone's skillset or who to go to for a particular ask

Behaviors & Skills

- Team building, since all remote some other way to communicate/interact with colleagues other than just Slack about job (hard to interact over Slack for these things because of time working with clients)
- Accountability within Hunley is difficult, managers are new, no formal feedback cycle

Process

- Process standards can't change too much otherwise it might build mistrust in the process
- Hunley Client Lifecycle defined with deliverables described
- Retros on projects are needed to understand best practices, lessons learned
- Need actionable feedback from clients
- No repeatable processes standardized or widely shared
- Need to document best practices
- How do we problem solve the Hunley Way

Business Recommendations

- Executives are the experts in the industry they should set the standards for processes
- "Secret confusion" of people who are afraid to ask a question or document hours spent learning about the industry because of the culture based on the Hunley Way
- Ambiguity for some new hires creates a difficult environment. Structure helps retention of good employees
- Address work/life balance
 - provide the resources upfront to educate employees so they can manage their learning gaps
- Internship program or bootcamp to skill up junior resources



Learning Roadmap: Programs Year-Over-Year

The roadmap is outlined over the course of 3 years from 2021 - 2023. The programs recommended here reflect the needs gathered from the strategy engagement and resulting learning needs analysis.

- 2021: Efficiently onboard employees to the Hunley Group, its industry and its practice.
- 2022: Develop a clear pathway for employees to grow in their role and career at The Hunley Group.
- 2023: Grow and reinforce leadership characteristics to steer The Hunley Group employee culture.

With these programs, we'll be able to hit these yearly goals, growing the learning function as The Hunley Group continues to grow and expand.

2021: Build the Foundation

LEARNING GOAL

Efficiently onboard employees to The Hunley Group, its industry and its practice.

LEARNING PROGRAMS

Company Onboarding

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to describe different aspects of the company and identify resources to enable them on the job.
- ❑ [Application and Behavior Objective] After entering the job environment, participants should proactively engage in the culture of the company while participating on client projects with some guidance.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Reduce time for new hires to ramp into the company while reducing the time, effort, and cost to support them during this process.

Program Description

Onboarding is fundamental to building a solid foundation for employees. Onboarding roots them into the company and sets them up for long-term success. Company onboarding is a way to welcome a new hire into the family - connecting them to their colleagues and immersing them into the company culture. The Hunley Group has onboarding processes that are effective but not efficient. Montage can help ease the time burden of onboarding through automation and self-paced learning. Montage recommends a blended approach to company onboarding:

- Automated and self-paced through myTrailhead
 - Example topics: Company history, company culture & the Hunley Way, systems and tools, and resources
 - Other: Skills assessment during onboarding
- Monthly cohorts (either in-person or virtual)
 - Cultural immersion where new hires meet other employees and leadership
 - Activities that allow for interaction (e.g. scavenger hunts) can facilitate this
- Auxiliary company onboarding tools & programs
 - Week 1 company ramp schedule for new hires (in addition to the myTrailhead orientation information)
 - 30-60-90 day plans
 - Lightweight new hire Buddy system
 - Slack group for newbies

Industry Learning

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to explain different aspects of the industry.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should demonstrate understanding and expertise of the industry through effective conversations with clients.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Client relationships should be strengthened and maintained.

Program Description

Create a comprehensive Industry training utilizing the current relevant content including the myTrailhead modules and the Industry Bootcamp videos from Aaron. Working with The Hunley Group founders and other identified Industry SMEs, Montage recommends:

- Defining the overall Industry training strategy including auditing the current available materials, identifying gaps, and mapping out a full program
- Implementation of an end to end, self-paced Industry training program

Methodology [The Process]

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to describe the company's process when executing on a project to internal colleagues and to clients.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should apply the documented practices effectively to a client project.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Increased project success and client satisfaction through process improvements.

Program Description

Methodology process definition, documentation and training was a considerable pain point and a top priority of many people. Based on our conversations, The Hunley Group still needs to codify methodology and create documentation. Montage recommends this project be carried out in two phases:

Phase 1: Methodology Process Definition and Documentation

The Hunley Group will carry out this phase, with guidance from Montage Learning.

- Methodology Definition
 - Define the phases of the methodology for delivering project to customers
 - Define roles & responsibilities for each phase
- Methodology Documentation
 - Document methodology phases and role responsibilities writing each phase
 - Create necessary templates for carrying out the methodology
- *Montage Recommendation: Build a SteerCo Committee for processes*
 - *Rep from each role, owner*

Phase 2: Methodology Training

Once the Methodology had been defined and documented, Montage will:

- Create a training plan and training content for current and new employees to be introduced to the methodology. Training can conclude:
 - Instructor-led training sessions
 - Self-paced training

2022: Growth

LEARNING GOAL

Develop a clear pathway for employees to grow in their role and career at The Hunley Group.

LEARNING PROGRAMS

Department Onboarding

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to summarize how their role and department fit into the company.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should develop an understanding of departmental subject matter experts for support and other important resources.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Increase understanding of the department's impact on the business.

Program Description

Senior staff are often tasked with onboarding new hires to the department. A robust Department onboarding allows companies to transform tribal knowledge into institutional knowledge, reducing the time tenured staff spend onboarding new hires.

Department onboarding information can include:

- How the department fits within the company structure
- High level overview of roles
- High level overview of disciplines within the department
- Who's who within the department
- How the department operates (resources, meeting cadence, etc)

Role-Based Onboarding for Professional Services

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to recognize how their role operates at the company.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should employ best practices for their role while owning their responsibilities on a project.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequences should be realized—Reduce time and cost to proficiency in role, increasing an employee’s capability on the job.

Program Description

Every company operates in a unique way and will often have different role expectations and processes to follow. A mindful role-based onboarding program helps new hires as well as employees who change roles.

Role-based onboarding can include:

- Clear role responsibilities and expectations
- How the role interfaces with other roles
- Role-specific processes and resources (responsibilities within the methodology)
- Shadowing program

Consulting Skills Building

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to express how specific skills help to develop teams.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should apply and practice the various skills when on a project team and in communication with each other.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Increase team camaraderie and reduce team inefficiencies on a project helping to maintain budget and timeline.

Program Description

After employees have a comprehensive onboarding in place, a grasp on the industry, and an understanding of the methodology, Montage recommends soft skills training for building stronger teams. This can be accomplished with a mix of ready-made content from a content provider and custom content for The Hunley Group.

- Consulting Skills Topics may include: communication, working as a remote team, difficult conversations, unconscious bias, and feedback
- Compliance Topics include: Sexual Harassment in the Workplace, IT Security

Junior BA Training Program

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to apply consulting successes on the job.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should effectively work with clients with some guidance.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Increase the amount of expert junior resources that can execute on projects without additional support.

Program Description

From our interviews, we understand that many junior resources come from a Salesforce Administration background and may have little external consulting experience. Montage recommends a 4-6 week training program for junior BAs to build their consulting skills, allowing them to be billable more quickly. The program would be front-loaded with an emphasis on consulting skills, methodology training, and industry learning, tapering off to include more and more client work. After the initial 4-6 week period, BAs will continue to build skills with a combination of on-the-job training and self-directed learning.

Program components include targeted:

- Mock Project (tied directly to salesforce skills training)
- Consulting skills training
- Hunley Methodology (the Process)
- Industry learning

Career Pathing

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to identify the competencies, behaviors, and skills necessary to steer their career.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should practice specific self-chosen competencies, behaviors, and skills
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Employees express specific behaviors per role per level enabling the organization to promote with confidence, constructively recruit needed talent, and direct salaries.

Program Description

There should be an internal facing career path that employees and managers alike can follow to allow for employee growth. There is internal work needed to be ready for a formal career development path and Montage can help. Montage will work with HR and managers to answer questions such as when do people get promoted, why do they get promoted, and how long they should expect to be in their current role before promotion. We'll also help define competencies, skills and behaviors for each role and level.

2023: Building Leaders

LEARNING GOAL

Grow and reinforce leadership characteristics to steer The Hunley Group employee culture.

LEARNING PROGRAMS

Manager Training

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to consider how their role as a manager impacts the company and direct reports.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should apply management principles and best practices.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Reduce attrition for reasons based on ineffective managers and increase employee job satisfaction.

Program Description

As The Hunley Group grows, so will the number of managers. It's essential that managers are trained on best practices - general and specific to THG. A manager training program can take many forms but is often best delivered through a combination of self-paced training and in-person workshops with role playing and other hands-on learning experiences.

Leadership Development Program

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to identify leadership qualities and how to express them.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should practice the skills necessary to guide their colleagues to success.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Increase employee morale and retention, improve productivity, and promote better decision making.

Program Description

The idea of managing other people is often related to the idea of being a “leader”. However, leaders can be anywhere and at any level within an organization. A leadership development program is a great way to build the leadership skills of people across the organization and identify people uniquely qualified for promotions as you think about success planning. A leadership development program can take many forms, however from our experience a program should include: industry deep dive training, general business acumen, and an in-depth project, or capstone, which helps solve one or business problems that the organization is facing.

Mentor Program

Objectives

- ❑ [Learning Objective] After completing this program, participants should be able to create a mentor-mentee relationship that works on long-term and short-term goals.
- ❑ [Application and Behavior Objective] After returning to the job environment, participants should work together to accomplish the defined mentee goals.
- ❑ [Impact Objective] When the materials are fully implemented, the following consequence should be realized—Minimize impact from employee succession (senior to junior) and increase employee engagement in the company.

Program Description

Through our interviews, Montage heard many employees speak about wanting a mentorship program. A formal mentoring program can be a powerful tool to build leaders within your organization. However, when companies are in a growth phase, the time and attention of all employees is stretched thin. This is not an ideal environment for a mentor program to thrive. Therefore, Montage recommends building a formal mentoring program in 2023 after more structures are in place to support such a vital program.



Support Systems for Learning

To build a continuous learning culture, these are several supporting processes, systems, tools and resources that need to be in place. If these support structures are not implemented and maintained, the long-term success of the individual programs will be in jeopardy.

Processes

If learning and development programs are the body of the car, then processes are the engine that makes the car move. There needs to be accountability for:

- Content creation, intake and maintenance
- Administration of learning platforms
- Knowledge capture and sharing process

Tools & Systems

Implementing and sustaining a learning environment requires a suite of systems and tools that fit the unique needs of your organization.

Currently, The Hunley Group utilizes myTrailhead, YouTube and Google Docs (G-Drive) primarily to store information and videos. Depending on the programming choices, Montage may recommend an additional learning platform and/or knowledge base and an external content provider.

Resources

We know that investing in a full-time resource is expensive. Yet to maintain learning, there needs to be dedicated resources committed to coordinating and maintaining the tools, systems, content and programs in which The Hunley Group chooses to invest. Montage recommends:

- ★ 2021: Contract Montage for a Learning Managed Services contract and designate a point person internally to liaise directly with Montage on administration and maintenance needs. See *Auxiliary Montage Services* for more information.
- ★ 2022: Hybrid: Montage Managed Services + 50% internal resource, likely in the HR department, to own L&D.
- ★ 2023: Hire a full-time L&D Manager who can help lead the more intricate and transformational programs such as manager training, leadership development, and mentorship program. Option to continue to contract with Montage for maintenance.



Engaging with Montage

Montage would love to work with you to implement programs to create a solid learning foundation for The Hunley Group. At Montage, we take a best practice approach to our Learning Design Strategy, which is based on the latest research. We transform your objectives into the appropriate learning solution -- for example: self-paced micro-learning, hands-on shadowing, or some combo of both. We don't throw the kitchen sink at a learner, we give them bite-sized information and resources to learn more. This fosters their curiosity to learn more and helps create that culture of learning in your organisation.

Next Steps

- Review the Roadmap and prioritize your learning programs
- Choose your programming and discuss timeline and cost
- Montage creates SOW for work

What's Included in the Engagement

- High-level change management support for rolling new programs and tools
- Strategic guidance and advice on putting support systems and processes in place (e.g. knowledge capture and sharing, administration, etc)

How Montage Works

- Create processes & templates to efficiently and repeatedly capture knowledge from SMEs
- Work in a sprint model, typically 2-week sprints

What Montage Needs

- Dedicated Project Manager
- Access to SMEs
- Access to necessary tools, systems and resources



Auxiliary Montage Services

Learning Managed Services

Ideal for companies without a dedicated L&D resource, Montage can supply long-term services related to learning platform administration and maintenance, content maintenance, content updates, learning program updates, and more.

Change Management Services

Implementing a multiyear learning strategy requires change management to help employees navigate and adapt to the changes. For an additional fee, Montage can lead change management efforts for your company. In addition to L&D strategy or Montage can support other important initiatives with our Change Management Services.

Salesforce Adoption Services

Montage works with Salesforce Implementation partners (SIs) to implement change management and end user training for their clients to ensure a smooth transition and comprehensive adoption.

- End User Training
- Train the Trainer
- Change Management

Contact Us



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