From:	Darryl Sink <darryl@dsink.com>
Sent:	Monday, December 06, 2010 5:08 PM
To:	Guy W. Wallace
Subject:	Financial Analyst Job Training at HP - your methods at work
Attachments:	HPfin.analystProj.doc

Hi Guy,
I thought you might enjoy seeing the write-up of the training project we did for Christie Westall at HP. This is the one where she used your curriculum and Job processes for the up front analysis. She must be of one of the best students you ever had as she did a great job and the output made our training development work go very smoothly.
Thanks for your contributions to our field.
Darryl

DARRYL L. SINK & ASSOCIATES, INC.

Darryl L. Sink, Ed.D.
President
Phone: 831.649.8384
Web: http://www.dsink.com
Email: Darryl@dsink.com

**PERFORMANCE-BASED CONSULTING: Ten great reasons to have DSA
develop your training:** *http://dsink.com/development-services/training-development-services*

Hewlett-Packard- Customer Support and Service Group

Financial analysts within the Customer Support and Service Group (CSSG) of Hewlett Packard are responsible for developing complex financial models twice during the corporate year. These models are used to measure business results. Organizational changes and a dynamic market place make this task challenging especially for the less experienced analyst.

DSA was contracted to develop a second web-based training course (The first course was a reporting course.) and a web-based performance support system for financial analysts charged with the planning task.

A needs assessment was conducted to determine which topics and tasks were most important and/or most difficult to perform. Based on the results of the needs assessment, 10 training topics were identified as fundamental to the task of planning, and 11 performance support topics were identified as essential for analysts to use in a just-in-time mode as they develop their financial models.

The training modules were modified to make them relevant to the geographic location of the analyst. Thus, programming for this component included a database running in the background. This meant that analysts could log onto the system and view the modules related to their specific geographic location. Managers could run reports to identify which analysts had completed which training modules. Additional reports that computed the evaluation scores and collected comments of analysts as they progressed through each module were also included as a standard reporting option. These reports provided feedback to managers as to the effectiveness of each module. Analysts were also able to run progress reports and were provided with visual feedback on their individual web map as they completed each module.

The web-based performance support system consisted of step-by-step procedures, spreadsheet financial models that could be modified, tips and best practices, flow chart overviews of complex processes, and links to web resources on the corporate Intranet. New analysts found the performance support system especially helpful since financial experts shared their expertise, experience, and financial models in the development of this web site.

A common navigational system was developed for both the training portion and the performance support portion of this

project. This allowed analysts to easily move between the two systems but still clearly identity where they were in either system.

Financial Planning Web Tool

The Financial Planning Web Tool is a combination training and quick job aid tool for financial analysts within HP's Software and Services Group (SSG). The Tool contains ten instructional modules and nearly 100 job aids organized by topics and categories like Process Flow Charts, Resources, Examples, Decision Tables and Tips.

The user can be a person new to the budgeting process who takes the training modules as needed. An experienced person can have quick access to the job aids.

Computer Managed Training System for Financial Analysts

The PACE course

The PACE course, a web-based training solution, was developed for financial analysts within HP's Software and Services Group (SSG). The content of the course focuses on the skills and knowledge related to financial reporting. The acronym PACE represents the four phases of financial reporting:

1. Preparing the numbers

2. Analyzing the numbers

3. Communicating the results

4. Evaluating the process

The course consists of three primary elements: a registration system, curriculum maps, and modules.

Registration System

The registration system is the primary point-of-entry for all learners. It collects demographic information from learners and manages a database that tracks the modules completed by each learner. To log into the system, a learner enters his or her employee number. From that number, the system links the learner to the correct curriculum maps and displays indicators showing which modules were completed by the learner. For administrators of the system, several statistical reports can be generated from the database through the use of a custom-designed Microsoft Excel macro.

Curriculum Maps

Since there are 135 modules in the PACE course, curriculum maps present learners the ideal path for completing modules. These maps are highly visual, with icons that represent the various modules. Clicking an icon links the learner to the appropriate module. After completing a module, the icon on the map is emblazoned with a checkmark, indicating that the module is complete.

The system supports four unique sets of curriculum maps, one for each of the four types of financial report closes. This ensures that the modules that appear on any given map relate to the needs of the individual learners.

Modules

The design of the course incorporates both self-paced modules with structured on-the-job training, as well as a mentoring program. To accommodate this design, the PACE course features three types of modules.

Independent Modules

These modules provide content related to processes, procedures, and concepts. These modules are self-contained and can be completed by learners without assistance. In addition to content presentations, these modules typically include scenarios, multiple-choice self-check questions

Facilitated Modules

For content that involves higher-level problem solving skills, facilitated modules provide both content and an open-ended case study activity. After the learner completes the case

study, he or she meets with a mentor to discuss the case and debrief the results. To aid the mentor, the module includes instructions for the mentor on how to debrief the case study.

Activity Guides

Financial analysts use many different computer systems. Additionally, the methods and processes used by financial analysts vary based on the business and geography the analysts support. To accommodate these nuances, Activity Guides aim to localize learning by engaging the learners in structured on-the-job training activities. The Activity Guides provide both the learner and his or her mentor the instructions and resources for completing and debriefing the activity.

Embedded within each of the above modules are job aids that provide just-in-time knowledge for common tasks and activities. Each module also features a Click When Done button. By clicking this button, the system links learners to an short, optional evaluation form. After completing this form, the database updates the learner's profile as having completed the module and stores the evaluation data in a secondary, anonymous database.

Other Features

The PACE course also features:

- A Preferences page that allows the user to choose which set of curriculum maps to use

- An index that lists all modules within the PACE course

- A search engine that allows learners and mentors to find specific modules, content, and job aids

- A self-paced mentor training program

within the Customer Support and Service Group (CSSG) of Hewlett Packard are responsible for developing complex financial models twice during the corporate year. These models are used to measure business results. Organizational changes and a dynamic market place make this task challenging especially for the less experienced analyst.

DSA was contracted to develop a second web-based training course (The first course was a reporting course.) and a web-based performance support system for financial analysts charged with the planning task.

A needs assessment was conducted to determine which topics and tasks were most important and/or most difficult to perform. Based on the results of the needs assessment, 10 training topics were identified as fundamental to the task of planning, and 11 performance support topics were identified as essential for analysts to use in a just-in-time mode as they develop their financial models.

The training modules were modified to make them relevant to the geographic location of the analyst. Thus, programming for this component included a database running in the background. This meant that analysts could log onto the system and view the modules related to their specific geographic location. Managers could run reports to identify which analysts had completed which training modules. Additional reports that computed the evaluation scores and collected comments of analysts as they progressed through each module were also included as a standard reporting option. These reports provided feedback to managers as to the effectiveness of each module. Analysts were also able to run progress reports and were provided with visual feedback on their individual web map as they completed each module.

The web-based performance support system consisted of step-by-step procedures, spreadsheet financial models that could be modified, tips and best practices, flow chart overviews of complex processes, and links to web resources on the corporate Intranet. New analysts found the performance support system especially helpful since financial experts shared their expertise, experience, and financial models in the development of this web site.

A common navigational system was developed for both the training portion and the performance support portion of this project. This allowed analysts to easily move between the two systems but still clearly identity where they were in either system.

Financial Planning Web Tool

The Financial Planning Web Tool is a combination training and quick job aid tool for financial analysts within HP's Software and Services Group (SSG). The Tool contains ten instructional modules and nearly 100 job aids organized by topics and categories like Process Flow Charts, Resources, Examples, Decision Tables and Tips.

The user can be a person new to the budgeting process who takes the training modules as needed. An experienced person can have quick access to the job aids.

Computer Managed Training System for Financial Analysts

The PACE course

The PACE course, a web-based training solution, was developed for financial analysts within HP's Software and Services Group (SSG). The content of the course focuses on the skills and knowledge related to financial reporting. The acronym PACE represents the four phases of financial reporting:

5. Preparing the numbers

6. Analyzing the numbers

7. Communicating the results

8. Evaluating the process

The course consists of three primary elements: a registration system, curriculum maps, and modules.

Registration System

The registration system is the primary point-of-entry for all learners. It collects demographic information from learners and manages a database that tracks the modules completed by each learner. To log into the system, a learner enters his or her employee number. From that number, the system links the learner to the correct curriculum maps and displays indicators showing which modules were completed by the learner. For administrators of the system, several statistical reports can be generated from the database through the use of a custom-designed Microsoft Excel macro.

Curriculum Maps

Since there are 135 modules in the PACE course, curriculum maps present learners the ideal path for completing modules. These maps are highly visual, with icons that represent the various modules. Clicking an icon links the learner to the appropriate module. After completing a module, the icon on the map is emblazoned with a checkmark, indicating that the module is complete.

The system supports four unique sets of curriculum maps, one for each of the four types of financial report closes. This ensures that the modules that appear on any given map relate to the needs of the individual learners.

Modules

The design of the course incorporates both self-paced modules with structured on-the-job training, as well as a mentoring program. To accommodate this design, the PACE course features three types of modules.

Independent Modules

These modules provide content related to processes, procedures, and concepts. These modules are self-contained and can be completed by learners without assistance. In addition to content presentations, these modules typically include scenarios, multiple-choice self-check questions

Facilitated Modules

For content that involves higher-level problem solving skills, facilitated modules provide both content and an open-ended case study activity. After the learner completes the case study, he or she meets with a mentor to discuss the case and debrief the results. To aid the mentor, the module includes instructions for the mentor on how to debrief the case study.

Activity Guides

Financial analysts use many different computer systems. Additionally, the methods and processes used by financial analysts vary based on the business and geography the analysts support. To accommodate these nuances, Activity Guides aim to localize learning by engaging the learners in structured on-the-job training activities. The Activity Guides provide both the learner and his or her mentor the

instructions and resources for completing and debriefing the activity.

Embedded within each of the above modules are job aids that provide just-in-time knowledge for common tasks and activities. Each module also features a Click When Done button. By clicking this button, the system links learners to an short, optional evaluation form. After completing this form, the database updates the learner's profile as having completed the module and stores the evaluation data in a secondary, anonymous database.

Other Features

The PACE course also features:

- A Preferences page that allows the user to choose which set of curriculum maps to use

- An index that lists all modules within the PACE course

- A search engine that allows learners and mentors to find specific modules, content, and job aids

- A self-paced mentor training program