PRACTICE PLANS

SCOPING DECK

Leadership Development

Scope

Practice Plan | Overview

Problem Statement:

How do we ensure all Distribution leaders feel inspired, prepared, and confident when creating their 2024 practice plans and supporting their associates?

Focus:

Develop a course using the new L5 Refresh strategy to support leaders in a scaffolded, self-led learning experience that provides them with the value of this skill, builds foundational knowledge, provides authentic practice opportunities, provides real-time feedback on their understanding of the skill, and helps them confidently use the skill following course completion.

Audience:

PI Distribution Leaders with emphasis on leaders new to their role and/or the Practice Plan process

Practice Plans | Objectives

Performance Objectives:

Support a growth-mindset for all employees that encourages learning, development, and career mobility.

Ensure an appropriate level of standard practice regarding Practice Plan use across PI Distribution.

Provide leaders with opportunities to develop essential skills to support their team, practice, and the business.

Learning Objectives:

Develop a growth-mindset that fosters learning, development, and career mobility.

Explore best practices for practice plan creation, documentation, conversations, and progress tracking to support consistency across roles.

Apply practice plan best practices including documentation requirements to effectively support individual, team, and business development.

Practice Plans | Current Gaps & Opportunities

Current: Leadership 5: Practice Plan | Pathway | Degreed and LDR_L5_SOD_Practice Plans.pdf (fmr.com)

Current Gaps:

- No skill development opportunities, all knowledge-bearing with little rationale around the "why"
- Majority of content is outdated/inaccurate based on recent changes
- Multiple Practice Plan worksheets and practices/requirements exist
- No data available to support informed decision making on quality, frequency, or completion

Opportunities:

- Develop one robust experience that provides authentic practice and feedback opportunities
- Ensure there is one source of truth that develops common approaches and standard requirements for PI Distribution
- Collect learning and business data that informs future changes, learner experience quality, impact of training on business KPIs, and learning objective mastery
- Provide leaders with a scaffolded, linear, and direct opportunity to upskill and receive feedback to allow for deeper coaching conversations

Practice Plan Course Development Working Team

Primary Contact: Jen A.-Blair | jennifer.andrews@fmr.com

Name	Role on Project	Project Involvement
Jen A-Blair	EXA/PC Support	**Responsible** for the course quality, structural wireframe, and alignment to (new) L5 course model and in conjunction with Tom, project update communication.
Tom Siewert	Squad Lead/ PC Support	**Accountable** for the project's completion and timely release and in conjunction with Jen, project update communication.
L5 Working Group*	Business Partners	**Informed** on course development progress and approach, **consulted** as needed on larger skill ecosystem.
Alex Steckl (Mark Schweitzer as backup)	Subject Matter Expert- content	**Accountable** for valid, current content and key terms and ensuring that responses and work is completed within agreed upon timelines.
Lucas Mcomber/ Nathan Risenmay	Subject Matter Expert- skill	**Consulted** on how practice plans are used in the field, common scenarios, and common gaps in skills and ensuring that responses and work is completed within agreed upon timelines.
Rebecca Peirce	Senior Business Analyst	**Responsible** for defining and ensuring the measurement strategy is viable and the appropriate data is collected.
Carolyn Preston	Implementation Lead	**Consulted on** delivery and deployment from the LMS standpoint.
Design Team	Learning Experience Designers	**Responsible** developing a completed course that aligns to requirements and best practices within the agreed upon timeframe.

Practice Plans | Content Evaluations

Key Resources for New Course:

- IPP MIB.pptx – goldmine; ready middle of week of 11/6
- Practice Plan Template.url
- Workday Instructions.url
- Individual Practice Plan - SAMPLES.pptx
- IPR Guide (fmr.com)
- TPR Guide (fmr.com)
- - - myHR (service-now.com)
- HR Topics - Quarterly Check-in/Performance Discussion ABC's (service-now.com)
- Accessing and Managing Goals (fmrcloud.com)- Associate guide ONLY
- Practice Plan Degreed Scrub.xlsx (pathway review from Alex and Mark)

Revise

- Skills on Demand Learn video (incorporate new verbiage/initiatives and update visuals)
- ~~Practice Plan Samples by Grade (move to new template)~~ done and on left
- WHY videos for advisors/non advisors to be one piece of content (video, audio, text, whatever works) for **all** audiences
- See "Modify" assets in Practice Plan Degreed Scrub.xlsx

Keep

- Practice Plan Observation Checklist - update file name and move to PIL server
- NEW Practice Plan Template
- NEW How to Add Your Practice Plan to Workday guide
- PI_PracticePlanAdvisors.pdf (fmr.com) (Move to PIL server)- this is the only thing from the current Degreed pathway that can move over as-as.
    - Branch/ FFS team template

Retire

- All practice plan templates/worksheets/guides that are not the verified new template
- All "How to Upload your Practice Plan into Workday" guides that aren't the new guide
- Degreed pathway (when course is complete, some individual assets are in the Revise and Keep columns)
- See "Remove" assets in Practice Plan Degreed Scrub.xlsx

Practice Plans| Proposal of Work

Projected Quarter: Q4 2023 | Q1 2024+

Phases:

Phase I

Plan and Develop:

- Finalize plan, including wireframe, to kick off development
- Acquire access to key data points
- Begin development of course with emphasis on (flat content OR lessons 1, 2, and skill assessment)
- Wireframe/draft interactive components and new multimedia developments of course

Projected Completion: By 11/16/23

Phase II

Develop and QC:

- Finalize development of MVP 1 of course
  - Meets L5 model, all lessons have content, data collection points are complete (Qualtrics)
- QA course with a few users and incorporate prioritized feedback/QC course for readiness
- Publish course in SumTotal/on Elevate

Projected Completion: By 12/15/23

Phase III

Evaluate and Plan:

- Review learning and business data to evaluate effectiveness
- Review feedback and completion data
- Gather and prioritize maintenance and enhancement requests by ROI and plan for MVP 2

Projected Completion: By 6/1/24

Practice Plan | Risks and Dependencies

Risk	Approach
Limited time for development	A SWARM approach will be used by PIL; No “buffer” time built into timeline; if capacities unexpectedly change then the project will require additional resources to stay on track
SME availability	Scheduled out meetings prior to kickoff; alternates available if needed
Holiday season	Careful planning to work and frequently communicated updates/roadblocks

Dependency	Approach
Practice Plan content updates	Separate SME identified for content who is closest to/decision maker on the topic; initial content review completed
Squad availability	SWARM approach and awareness of PTO/ other priorities

Practice Plan | Next Steps

Task	Owner	Status
Confirm working group and set up Teams chat	Jen	Complete
Finalize scoping materials with BPs, BA, IL, and squad	Jen/Tom	In Progress
Work with Onboarding group to determine onboarding needs	Jen	
Create stories for project based on squad approach	Jen	In Progress
Kickoff with SMEs	Jen	Complete
Wireframe based on L5 course model	EXA	
Develop and refine content with SME (Alex)	EXA/D	
Develop and refine practice opportunities and assessments with SME (Lucas)	EXA/D	
Collect user feedback and prioritize potential action items	Jen	

Practice Plan | Next Steps

Task	Owner	Status
Incorporate prioritized feedback	EXD/A	
SumTotal and Qualtrics testing/QC	Squad	
Publishing	EXD/A	
Demo for RCC upskilling / Train-the-Trainer	Jen, Lucas, and Nate	
Incorporation into LR1	Tamara and Maribeth	
Phase 2 of Measurement Plan	Rebecca and Tom	
Prioritized MVP 2 enhancements	TBD	
Phase 3 of Measurement Plan	Rebecca and Tom	

Plan and Develop

Practice Plan | Core Tenets

Personalization

Each leader and coach is unique and has different needs and perspectives. Where possible a variety of examples and practical application perspectives will be used.

Human-Centered

Our end users are people, and research provides insights into what people like in their experiences such as gamification, simplicity, and plain language.

Consistency

We will aim for a consistent L5 experience using the new course model to support user-friendly design, reducing code shifting and increasing intuitiveness for leaders and coaches.

Data Friendly

As we prepare to collect and leverage more data to support our decisions and leader growth, our new design should make it easy to collect and analyze data as well as share it with key collaborators.

Modularized

Each skill is one part of a leader's toolkit, and relevant throughout their career journey. To reduce rework and increase consistency, the course will be modular in that it can be stacked with other skill offerings to develop a larger, more customized experience.

Practice Plan | Architecture and Design Requirements

Requirement	Approach
Uses L5 Course Model	5 standard lessons with emphasis 20m or less by lesson, Qualtrics incorporation, and practice opportunities using the L5 Rise template.
Practical Application	At the end of each lesson at least one authentic practice opportunity is provided that includes correct/incorrect feedback.
Clear communication of required standard practices	Moving forward there is one template, one Workday approach, and one set of requirements for all - in the past different groups has different approaches. Standard practices will be net-new and essential content.
Modules are used across Leadership Development	Module (likely lessons 1-2) can be used in LR1 as well as L5.

Requirement	Approach
KC/ Assessments	Learn the Basics & Beyond the Basics lessons have short KCs using the squad Qualtrics template, Advanced Concepts has a reflective check-in using the squad template, and the Skill Assessment assesses learning objectives using the squad template.
PIL/ L5 Design Standards	The course applies PIL design standards and requirements (plain language, accessibility, image guidelines, etc) as well as L5 branding
Embedded asset use	As new assets are created and used in the course, ensure that they are stored in the appropriate places and follow PIL guidelines
Variety	To engage all learners, leverage a variety of content types (visual, written, audio, multimedia, etc).

Test and QC

Project | Testing and Feedback

Audience	Purpose	Timing	Owner
Volunteers (aspiring leaders, current leaders- we have many who have raised their hands to get involved) * Make sure to get a variety of leaders who have used them in the past and those who have not	Test the learning experience for general user feedback around block types, length, language, and clarity of content with a focus on Lessons 1&2	End of Sprint 43	Jen
L5 Group	Demo the course for general feedback around the learning experience, coach-centric feedback, and key topics/concepts covered in the course	End of Sprint 43	Jen
Dana and her PCs	Share the initial thinking on content and approach to ensure alignment with associate materials- primarily an FYI.	Beginning of Sprint 44	Tom
RCCs	Demo the course to generate awareness, offer for feedback to be sent to Tom/Jen for consideration.	End of Sprint 44	Tom
Volunteers (aspiring leaders, current leaders- we have many who have raised their hands to get involved) * Make sure to get a variety of leaders who have used them in	Test the entirety of the MVP 1 experience using the User Testing Guide for a focus on navigability and functionality.	End of Sprint 44	Jen

Project | QA & QC

QA Criteria QA is design focused	**In Scope Feedback** Feedback should be communicated as high priority, general suggestion, or future enhancement consideration.
Uses L5 Course Model	EXA reviews course structure and provides general feedback on alignment to course model.
Practical Application	EXA reviews activities in course and provides general feedback related to learning best practices.
Clear communication of required standard practices	EXA reviews course content and provides general feedback on clarity of standard practice coverage.
KC/ Assessments	EXA reviews Qualtrics use in course and provides specific feedback related to assessment best practices and Qualtrics back-end setup.
PIL/ L5 Design Standards	EXA reviews activities in course and provides general feedback related to PIL/L5 design standards/branding.
Variety	EXA reviews activities in course and provides general feedback related to variety and appropriateness of learning style variety.

QC Criteria QC is functionality focused	**Purpose** Feedback should be communicated as "works" or "doesn't work". This is not the time for suggested changes, ideas, or anything more than fixing broken items.
All course links work as intended	All links open to the intended document (should match title/description in course)
All course activities work as intended	Course activities provide accurate feedback and flow smoothly
Qualtrics assessments work as intended from a front- and back-end perspective	Qualtrics surveys open in a new tab/window, survey can be completed, and data is collected
All content/activities are complete; there are no placeholders	There are no extraneous blocks, notes, or duplicates in course
All content (written, visual, multimedia) is free of grammar, spelling, and conventional errors	Spelling, grammar, and conventions are appropriate; plain language is used; any acronyms used in a lesson are defined before being presented as an acronym
Most recent course launches as intended through SumTotal and learner progress is collected	Course is in SumTotal with description; opens when clicked; "roster" updates with learners and their general progress (registered, in progress, complete)

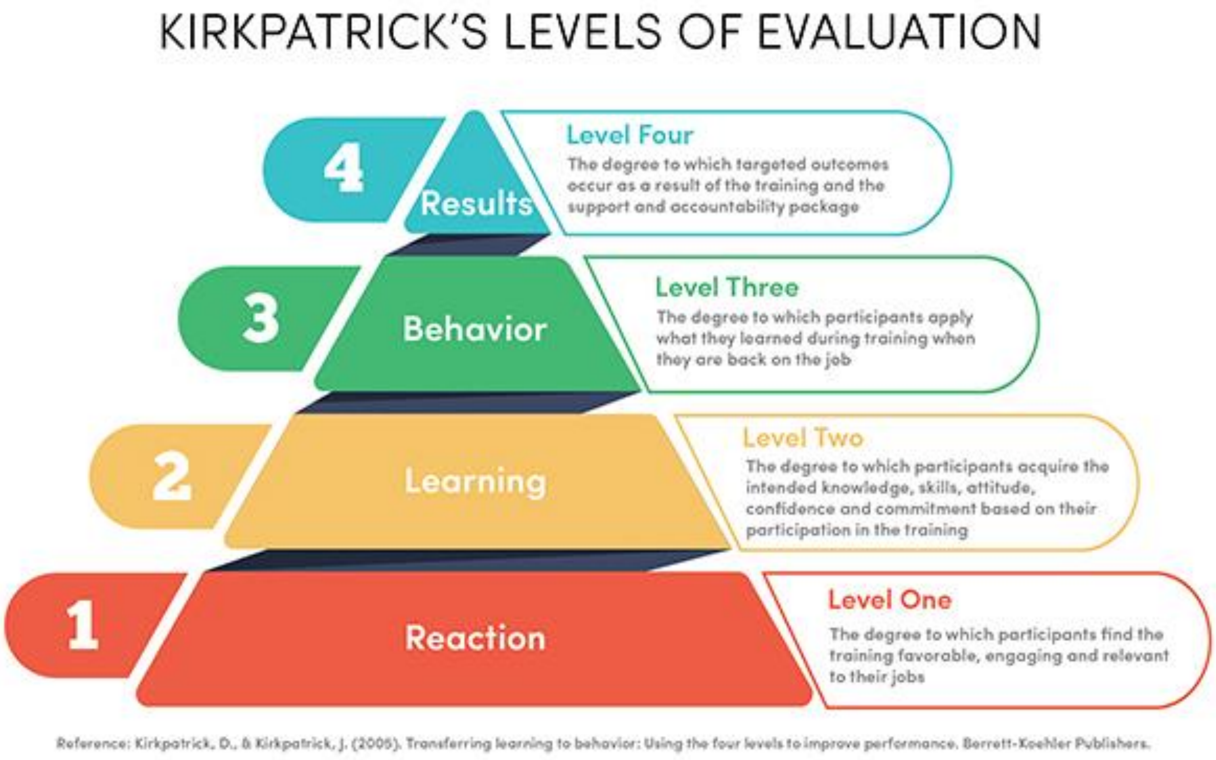
Deploy

Practice Plan | Deployment Plan

Considerations	Requirements
Launches from SumTotal	Course listing/code is created and updated by EXA/D when ready
Learner progress can be tracked/ pulled	Activity type is set to Course
Completion certificate is available	Provide/ collaborate on the custom completion email
Specific audiences are assigned	Not needed; open enrollment
Deadlines are set	Not needed; self-paced
Practice Plan is downloadable in SumTotal	Standalone SumTotal “course/eLearning) and use that link in SumTotal to track Practice Plan usage from course

Evaluate

Practice Plans| Measurement Approach



We need to collect a variety of qualitative and quantitative data that helps us understand:

- Learner's ability to apply what they've learned (skill)
- Learner levels of understanding (knowledge)
- Learner engagement
- Learner usage data (enrollment, completion, time to complete, how they're accessing the training, etc)
- Demographic data and how it corresponds to above
- How the learning may be impacting business objectives
- How the learning may be able to influence business objectives and priorities

Long-Term M&E Strategy:

Level 1 – Reaction: degree to which participants find the training favorable, engaging, and relevant.

Post-training survey strategy

- Leadership Development Course Modality Survey – NES variation leveraging customized URL to tag responses with their course of origin.

Registration and completion data to assess engagement and re-engagement

- SumTotal data

Interaction with course and activities – are different components being completed?

- Completion of Qualtrics knowledge checks and assessments embedded into course.
- Engagement with "Action Items" embedded within the course that navigate the learner through SumTotal for a silent launch linkcompletion.***

Level 2 – Learning: degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitments based on participation in the training.

Knowledge check and assessment performance data

- Knowledge check scores, most missed questions, confidence data

Skill data and skill progression

- L5 Skill Progression Tool
- Leader's self-selected skills to include in Practice Plan – survey question.

Post-training survey strategy

- LR1 post-training survey

Long-Term M&E Strategy:

Level 3 – Behavior: degree to which participants apply what they learned during training when they are back on the job.

Practice Plan Submission to Workday

- Have leaders uploaded their Practice Plan to Workday?
- Timeline from training completion to Practice Plan submission
- Goals/Objectives tied to their Practice Plan and their status
- Correlation between leaders submitting a Practice Plan to Workday and their associates submitting a Practice Plan in Workday
- Are Goals/Objectives being completed throughout the year?

Alignment of Practice Plan to L5 Skills

- Question included in Qualtrics knowledge check or survey asking "What are three L5 skills you will add to your practice plan?"
- Prompt leader (and leader's leader) to rate the leader on these three L5 skills**
- Progress on these L5 skills throughout the year– lift when skill is re-rated, completion of trainings tied to these L5 skills

Team Perception on Leader's Skills

- Survey that leaders can opt into sending to their team to get feedback on a specific skill.**
- Feedback can be requested through Workday.
- Humu surveys could be expanded in the future to include skill-based questions

Impact on Coaching Skillset

- Are associates progressing in their growth and development through improved coaching?
- Does a leader's prioritization and expanded knowledge around Practice Plans impact their associates' development and performance?

Practice Plans | Measurement Plan Level 4

Long-Term M&E Strategy:

Level 4 – Results: degree to which targeted outcomes occur because of the training and the support and accountability package.

Objective 1: Support a growth mindset for all employees that encourages learning, development, and career mobility.

- Are associates progressing in their growth and development through improved coaching?
- Does a leader's prioritization and expanded knowledge around Practice Plans impact their associates' development and performance?
- Lateral and upward career mobility data and attrition
- Humu themes regarding development and mobility

Objective 2: Ensure an appropriate level of standard practice regarding Practice Plan use across PI Distribution.

- Adoption of Workday submission process
- Progress on development goals throughout the year

Objective 3: Provide leaders with opportunities to develop essential skills to support their team, practice, and the business.

- Leader's skill progression – isolate L5 skills and goals through Workday and survey. Track engagement with development opportunities related to these goals and nudge them with opportunities to upskill.
- Understand how a leader's team is developing their skillset – progress against development goals, progress against business goals, attrition
- Progress on development goals throughout the year

Practice Plans| Measurement Plan

	Phase I	Phase II	Phase III
Projected Quarter:	Q4 2023	Q1 2023	Q3 2024
Phases:	Phase I	Phase II	Phase III
	Get setup for success by: • Exploring data points and get access to key reports and dashboards • Developing a structure/report to share measurement findings over time with stakeholders and the squad • Verifying that squad-created measurement collection points are functioning properly	Review initially available data from January LR1 cohort and L5 users to inform: • Changes needed to the measurement strategy • MVP2 enhancement recommendations • Immediate maintenance items	Evaluate six months of data to provide insights around: • Alignment to Kirkpatrick levels as identified in measurement strategy • Inform squad prioritization • Influence business priorities and KPIs
Projected Completion:	By 12/20/23	By 1/20/23	By 6/20/24

Appendix