Training and Education Business Requirements Document Template

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FY09



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# Introduction to the Template

The Training and Education Business Requirements document outlines the need for an educational intervention, due to a new hire, a work-related performance issue, or the introduction of an unfamiliar process, strategy, or tool within the workplace. When training appears to be the answer to this need, the consultant, designer, trainer, or subject-matter expert must gather the requirements for the education and training intervention to ensure that, at its end, the goal of the educational program has been met and that participants return to their duties with enhanced knowledge, skills, and/or abilities (KSAs), as necessary. Defining the goals and results required from an educational intervention forms the basis of the business requirements document. This template may be used by anyone hoping to understand what need will be met and defining the desired outcomes. It is helpful to think of this document as a mini-plan for what you will do as the training project progresses.

## How to Use this Template

There are twelve parts to this template, listed below.

Contents

[Introduction to the Template 2](#_Toc223938350)

[How to Use this Template 2](#_Toc223938351)

[Summary 4](#_Toc223938352)

[Background, Business Case, and Audience 4](#_Toc223938353)

[Task Inventory 4](#_Toc223938354)

[Educational Objectives and Performance Measures 5](#_Toc223938355)

[Desired Instructional Setting(s) 5](#_Toc223938356)

[Risk Assessment 6](#_Toc223938357)

[Dependencies 6](#_Toc223938358)

[Constraints 6](#_Toc223938359)

[Estimated Budget and Resources Required 7](#_Toc223938360)

[Timetable 7](#_Toc223938361)

[Stakeholder Sign-Off 8](#_Toc223938362)

Filling out the template should not be a labor-intensive process. Although there are twelve sections, each one may only require a few sentences to complete.

Instructions on how to use the template appear in italicized text, with examples in normal text. Simply delete the instructions and replace the examples with your own text. Don’t forget to:

* Modify the page header text to reflect the name of your project.
* Delete the paragraphs of instructions on this and the previous page, as well as any italicized instructions
* Update the Table of Contents (just right click on it)

# Summary

[Once you have filled out the other sections, type a brief overview of the problem to be solved by an educational solution, giving brief facts about the overall business requirements and the proposed solution(s).]

In July 2011, this office will implement ABCDEFG, a new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project implementation team, and will require that the entire project management workforce be trained to use it. This document outlines the business requirements to bring staff up-to-speed with the new software and reduce productivity losses.

# Background, Business Case, and Audience

[In this section, describe the background to the need. In general, a needs assessment and/or a root cause analysis should have been conducted that points to a gap in knowledge, skills, and/or abilities, for which training or education is the solution. What performance gap was identified? What population requires this educational intervention? What urgencies were uncovered?]

After a significant six-month-long study, the office decided that the current project management software application, developed in the mid-1990s, is inadequate for today’s business environment. An RFP was written, and, after a competitive process, ABCDEFG Software was selected as the new application. The IT department has identified hardware and configuration requirements.

In July 2011, this office will implement ABCDEFG, the new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project team, and will require that the entire project management workforce be trained to use it, a total of 75 project managers and other staff.

The Training Design and Development teams will be required to stay abreast of the ABCDEFG application development team’s activities, partnering to understand and use the software, document the differences between the old and new applications, and to develop educational solutions, including training, job aids, and a web-based reference library, to ensure a smooth transition from the previous project management application to the new one.

# Task Inventory

[The task inventory details the flow of events that are executed in order to accomplish some business goal. Examples of a task inventory are such processes as how a support request gets escalated or defining how an account gets allocated for charges among multiple funds. In this section, list the high-level tasks that the learner must master. Task inventories help the instructional designer understand what must be taught so that s/he can make decisions about instructional methods.]

All project management tasks as implemented in the new software will need to be taught, including entering and managing:

* Basic project information
* Project Scope, Budget, Funding, and Schedule
* Vendor Contracts
* Contract Change Orders
* Contract Payments
* Project Deliverables and Deliverable Reviews
* Contract Closeout
* Project Closeout

# Educational Objectives and Performance Measures

[Educational objectives describe what the participant will know, apply, and be able to do when the training completes and/or when the participants are on the job as a result of the training event(s). Describe the goals of the training in terms of the performance measures that will demonstrate that the participants 1) know the material and 2) can use that material on-the-job as required.]

At the end of the educational session(s), depending upon role, participants should be able to:

* Enter and save basic project information
* Enter, save, and edit project scope, budget, and schedule
* Enter project contracts and payments
* Enter contract change orders
* Work with outside vendors to ensure high-quality deliverables
* Attach project deliverables
* Review and mark up project deliverables
* Close out project contracts
* Run project reports
* Enter individual project effort, as time recording toward the project
* Close out a project

Performance will be measured against successful completion of tasks with minimal (<3%) errors. Each task will be performed within a task-dependent timeframe(s), to be determined as the Design phase completes.

# Desired Instructional Setting(s)

[Instructional settings vary depending upon the educational goal. Note the desired instructional setting set out by a project sponsor, project manager, or suggested by the need itself. The desired setting may be altered if instructional methods are selected that require a different venue.]

Because the training events require hands-on experience with the software, the instructional setting should include computer workstations and instructor-led in classroom training, rather than computer-based self-study. However, job aids and a web-based reference library will provide support to the workforce after classroom training has completed. In addition, three individuals will provide first-line support within the project management workforce. Those individuals will be provided in-depth training.

# Risk Assessment

[A risk assessment identifies risks to the training project’s success and mitigation strategies for those risks. In the requirements document, it is enough to identify risks and to assess the probabilities. In this section, list the risks to project success and the probability of occurrence for each risk. Identifying these risks up front allows for full disclosure to stakeholders and helps to frame the project’s real needs so that budget and schedule can be adequately estimated and plans for mitigation can be developed later. Strategic plans for mitigation can be performed during the design phase.]

Risks to this project’s success include the lack of available human resources to work the project, due to a hiring freeze at the present time. Funding for training has been included within the overall project budget and we have been assured that it cannot drop from the budget, regardless of delays in software implementation, inevitable in a project of this scope. Lack of resources could delay implementation of training.

|  |  |  |  |
| --- | --- | --- | --- |
| Risk | Estimated Severity | Estimated Probability | Potential for Mitigation (if known) |
| Human resource availability | Medium | High | High |
| Project funding loss | High | Medium | Low |
| Software installation and implementation delays | Medium | High | Medium |
| Access to SMEs | Medium | Medium | Low |
| Time to develop materials (compression) | High | High | Medium |
| Time to pilot materials | Medium | High | Low |

# Dependencies

[The training project’s phases may be dependent upon a software installation, the on-boarding of new employees, the completion of a construction project, or any number of variables. Note those dependencies in this section. If there are no dependencies, this section may be omitted.]

The training design phase cannot begin until the servers arrive, are up and running, and the relevant software is installed and configured. The training design team requires access to the software in a near-end use condition, with permissions sufficient to perform all required tasks.

# Constraints

[Note any constraints that may limit any element in the fulfillment of the training. In project management circles, the “triple constraint” often limits what can be delivered. Those constraints are: cost, time, and quality. It is often said that a project can deliver only two out of the three. But additional constraints, such as scope, human resources limitations, and customer satisfaction requirements can also constrain a project. The simplest type of constraint is that shown in the example. If there are no constraints, this section may be omitted.]

The IT department anticipates the tasks noted under Dependencies to be complete or near-complete during the first quarter of the 2010 fiscal year. Therefore the training project is constrained by that time frame, as illustrated in the Timetable section below.

# Estimated Budget and Resources Required

[In this section, outline the expected resources required to complete the training project. An example matrix is shown below. The initial plan may be less detailed that the illustration.]

The following budget assumes a Design team, a Development team, and an Implementation Team, but members of the teams may overlap. Currently all human resources are on staff, so no new hires are required. The budget also assumes that current workstations are adequate to implement the training program. A total of 10 business days are budgeted for training implementation, to include training sessions and make-up sessions for those who are unable to attend the initial training.

|  |  |  |  |
| --- | --- | --- | --- |
| ****Resources Required**** | | | |
| ****Human Resources**** | | | |
| **Role** | **Duration** | **Effort** | **Estimated Total** |
| Project manager/ Instructional designer | 24 months | 20 hours per week | 2080 |
| Administrative | 24 months | 8 hours per week | 832 |
| Content experts | 18 months | 20 hours per week | 1440 |
| Developer – Web-designer | 3 months | 40 hours per week | 480 |
| Writer/Editor | 3 months | 16 hours per week | 192 |
| Trainers | 3 months | 16hours per week | 192 |
| Total Human Resources |  |  |  |
| ****Tools and Other Resources**** | | | |
| **Resource** | **Number / Amount** | **Unit Cost** | **Estimated Total** |
| Workstations | 12 | $2000/each | $2400 |
| Training Room Rental | 10 days | $50/day | $500 |
| Total Resources |  |  | $2900 |

# Timetable

[Here provide a high-level schedule for the project. If a training event has dependencies, list those in subsequent sections. An example timetable appears below.]

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Phase** | **Q1 2010** | **Q2 2010** | **Q3 2010** | **Q4 2010** | **Q1 2011** | **Q2 2011** |
| **Analysis** |  |  |  |  |  |  |
| **Design** |  |  |  |  |  |  |
| **Development** |  |  |  |  |  |  |
| **Implementation** |  |  |  |  |  |  |
| **Evaluation** |  |  |  |  |  |  |

# Stakeholder Sign-Off

[Here, provide signature(s) for project sponsor(s) and other relevant stakeholders. Asking sponsor(s) to sign off formally helps everyone understand the goals and objectives of the project, budget allocated and the timeline for each phase.]

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Sponsor Project Manager / Planner / Designer