



New Employee Compliance Training Portal

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Problem

All associates at X-Rite are required to annually complete compliance training programs regarding environmental, health, and safety (EHS). These programs are designed not only to keep X-Rite compliant with all laws, but also to protect associates from workplace injuries, build a healthier workforce, and demonstrate our social responsibility. These programs are essential to X-Rite's integrity, but the way they were previously delivered was outdated and inefficient.

Compliance leaders within X-Rite were only delivering this training content to managers, who would then take this information and train their associates on the same materials they had learned. This training was performed in multiple sessions and face-to-face, requiring managers to attend a designated time. This method of delivery required large amounts of time from both managers and associates and was problematic because this would often be placed on the backburner, leaving many associates untrained in important compliance issues. If a manager simply missed their training session, their whole department would remain untrained.

The method of keeping track of when an associate did complete their training was also ineffective. Once associates completed their training, they were required to sign a sheet of paper confirming so, which was then handed into human resources and filed away. This was unmanageable and resulted in no follow up to determine who had not completed their training.

Intervention

Project Goals & Rationale

The next training cycle is set to begin in March of 2018. To handle the immediate demand for a better content delivery method, I proposed setting up an internal training portal to deliver this content and keep track of who had completed it. It would be accessible by all associates using their network credentials. Burkman's (1987, p. 451) five step user-oriented instructional development (UOID) approach was followed to guide in the rollout of this new system:

1. Identify the potential adopter.
2. Measure relevant potential adopter perceptions.
3. Design and develop a user-friendly product.
4. Inform the potential adopter.
5. Provide postadoption support.

Objectives

To following tasks were the key milestones for this implementation:

1. Moodle, a customizable open source learning management system, would be installed and used for the delivery of training.
2. Moodle was connected to Active Directory for ease of access (single sign on).
3. Courses on Ergonomics and Environmental, Health, & Safety were created from existing content (e.g. PowerPoints).
4. Final employee rollout and training.

Cost-benefit Payoff

Since Moodle is open source and freely available, there was no additional software or licensing costs to X-Rite. Minimal IT time was also needed because I was more than capable of installing and configuring Moodle myself. The actual server/Moodle setup took approximately eight hours of my time to fully implement. Though there was this initial time investment, longer term benefits included better record keeping of the training programs associates have completed, as well as time savings for associates, managers, and trainers.

Accommodating Needs of Diverse Participants

There were two very different groups of adopters for this new system; all associates required to complete the training and the trainers currently creating the compliance programs. It was important to keep both of these groups in mind. Not all associates had computer access (e.g. those in production) so I would also have to discuss with managers in those departments how we might setup a system for them to complete their training.

Evaluation

The success of an innovation depends on how well it evolves to meet the needs of more and more demanding and risk-averse individuals in a population (Robinson, 2009). To determine the success of this training portal, these five qualities that determine the success of an innovation were used.

- **Relative advantage** – Do associates see the training site as a greater advantage to how compliance training is currently delivered?
- **Compatibility with existing values and practices** – Is the training site consistent with other systems we currently have in place? A user experience consistent with associates past experiences was more likely to be adopted faster.
- **Simplicity and ease of use** – How easy is it for associates to log in and begin taking a compliance module?
- **Trialability** – How effortless is it for associates to interact or experiment with the new training site?
- **Observable results** – Are the results visible? It was important for the senior leadership team to see the new training site as beneficial in order to ensure long term acceptance.

Implementation

Identifying and measuring potential adopter perceptions was an important starting point because resistance to change has been present in some of my previous experiences. There were two particular departments I was interested in (my trial groups); Customer Success, because they are more thorough in testing new systems, and production, since there was no computer access on the production floor and I would have to figure out how they would be able to access their training. As I designed and setup the Moodle site, I shared what I had done with these two groups to continually acquire feedback.

I also had to work with the trainers themselves, since they were the ones that developed the original course content and I was basically asking them to move it all online. After showing them how the new Moodle system would be beneficial to their time, and making them feel invested in the new system, I was able to obtain their buy-in.

The first two classes, on Ergonomics and EHS, were made available only to the two trial groups mentioned above and for the most part it seemed to go smoothly. The content itself is still a little dry because I only transferred the materials currently in place, but this will improve. Since this site is due to launch to all employees in March of 2018, the next few months will be used to clean up the content and make it more interesting.

Conclusion

Now that the basic framework for the new compliance training portal is in place, there will be a push to update all of our existing training content. This was planned as part of post adoption support and will require working closely with the trainers of these courses. Each course will require an action plan and its own amount of development time, these updates will be staggered throughout next year.

Lessons Learned

This project was a big undertaking and not something that would be 100% complete in just one semester. Even though I thought the IT component, which was just setting up a server for Moodle and connecting it to active directory, would be easy, there were a few considerations I never initially thought of. First, my request had to go into the project queue where it was ranked for the amount of time and effort required. Then, there were also some security concerns that had to be addressed before work could even begin. These were addressed by making the site accessible only to employees on the corporate network or using VPN. Both of these aspects caused the implementation of the Moodle site to be delayed.

One other piece that isn't exactly in place right now, are rewards or incentives. Ely (1999) attributed these as one of eight conditions that contribute to a successful implementation of an invention. I didn't have the ability to provide any sort of positive reward for associates to use this portal at this point, so the biggest selling points I focused on were ease of use and relative advantage. A future feature that I'm looking at adding to help with this are badges.

References

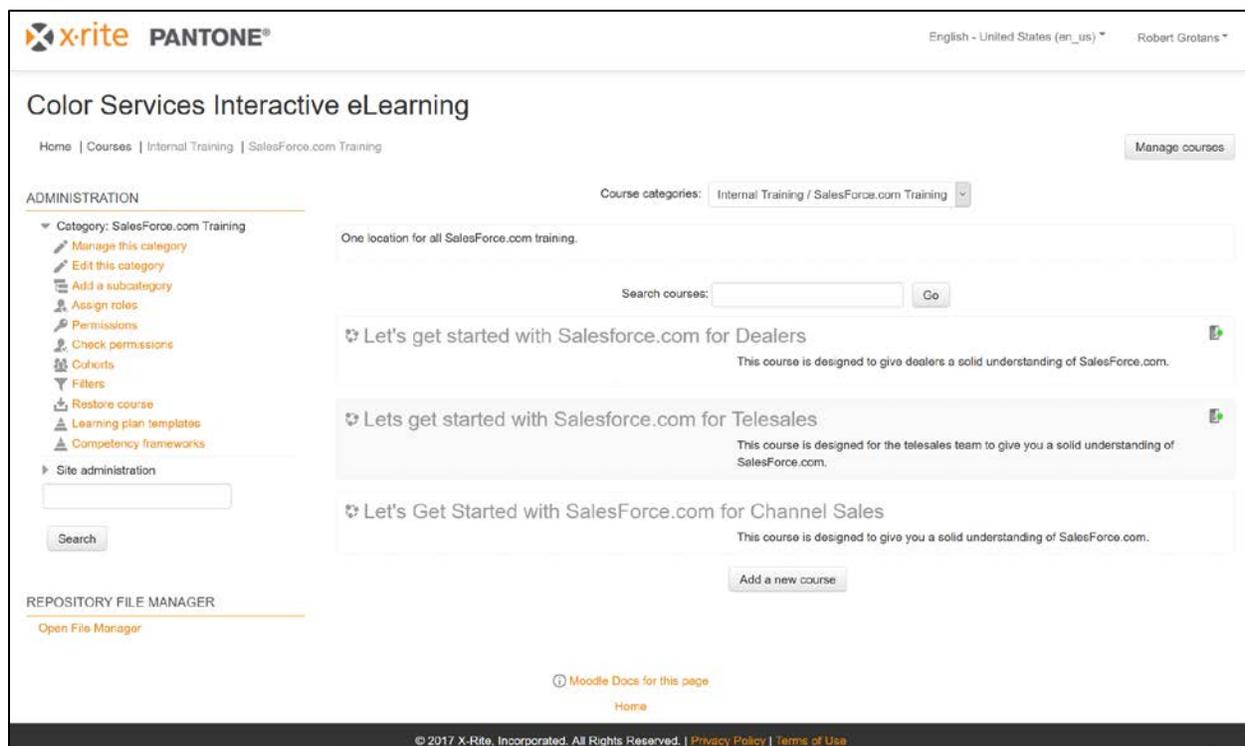
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Appendix

One section of the Moodle website showing new courses currently in development.



The screenshot displays a Moodle course page for 'Color Services Interactive eLearning'. The page header includes the X-rite PANTONE logo, language settings (English - United States), and the user name Robert Grotans. The course title is 'Color Services Interactive eLearning', with a breadcrumb trail: Home | Courses | Internal Training | SalesForce.com Training. A 'Manage courses' button is visible in the top right. The left sidebar contains an 'ADMINISTRATION' section with various management options like 'Manage this category', 'Edit this category', 'Add a subcategory', 'Assign roles', 'Permissions', 'Check permissions', 'Cohorts', 'Filters', 'Restore course', 'Learning plan templates', and 'Competency frameworks'. Below this is a 'REPOSITORY FILE MANAGER' section with an 'Open File Manager' link. The main content area shows 'Course categories: Internal Training / SalesForce.com Training' and a search bar. Below the search bar, three course cards are listed, each with a plus icon in the top right corner, indicating they are in development: 'Let's get started with Salesforce.com for Dealers', 'Lets get started with Salesforce.com for Telesales', and 'Let's Get Started with Salesforce.com for Channel Sales'. Each card includes a brief description of the course's purpose. At the bottom of the main content area is an 'Add a new course' button. The footer contains a 'Moodle Docs for this page' link, a 'Home' link, and a copyright notice: '© 2017 X-Rite, Incorporated. All Rights Reserved. | Privacy Policy | Terms of Use'.