Initial Need and Background Information

Due to the past 2 years of COVID-19 cases rising and falling, the company has made various accommodations for many employees to work from home. At times, these accommodations had to be made in response to government mandates regarding the amount of people in a room or building and the proximity they could have between them. This change happened at short notice, and the company was not able to fully train its marketing team to use one single piece of software for their proposals and reports. The majority of the team uses software like Microsoft Word and Adobe PDF Editor, meaning that document formats and file types are changed repeatedly throughout the creation process. This often leads to delays and frustration.

At this time, the company needs to implement training for its marketing team to ensure that all members can effectively use Google Docs to create, share, and edit their work-related documents. Effective immediately, the company will utilize a training plan to educate their marketing department on using Google Docs to create a proposal with effective headings that correspond to a clickable table of contents. After this, the department will be instructed to share their documents for viewing and/or editing. After the training, employees are expected to have the following skills:

The Company Now and After Training

Currently, the company sees a two-business day delay on most marketing proposals. This can be accredited to the amount of time it takes employees to do the following for each proposal/report:

- Find a document that was emailed to them
- Download the document
- Open it in their selected software (Microsoft Word or Adobe)
- Overhaul the formatting
- Place their content or edits

This delay in turn affects the speed at which marketing campaigns can be approved. Without approval, a campaign cannot be implemented. If a campaign has not been implemented, then the company will not bring in new customers at a desirable rate. This minuscule training issue directly affects the company's sales and revenue.

After training the marketing department on one single software and process, the company should see a decrease in wait-time for marketing campaigns. This success can be measured in the timeframe campaigns are created, approved, and implemented. With less delay time, there are more campaigns that can be drafted each quarter, offering a potential for a higher influx of customers. Aside from financial effects, with proper training provided to the marketing team, the company should achieve the following goals as well. First, the department will be using a cohesive method to create, edit, and share documents rather than flipping between multiple methods. Next,

communication via collaboration will be increased within the company.

Finally, the company will know they have succeeded when the marketing team finishes the training process and can use Google Docs to create and share organized campaigns.

Primary and Secondary Audience

The primary audience for this training is the marketing team at the company. This is the team that has been primarily affected by the issues surrounding creating and editing reports/proposals on different platforms. The secondary audience is the CEO and the CFO of the company, as the marketing team reports directly to them. The secondary audience needs to view this training in order to see what the team should know, and to understand how documents will be shared with them.

The primary audience has knowledge of computers, the internet, and using email to send and receive files and information. They also have background knowledge of Google software (like Docs) and Google Drive and the way it stores files. Within Google Docs, the marketing team knows how to create a basic document to type up a proposal. After this training period, the primary audience should know how to create a proposal or report in Google Docs and share it amongst their team format the first page of their proposals/reports to include a clickable table of contents and use the 'Styles' option in Google Docs to create headings that correspond with their table of contents.

Factors that Affect This Change

While this training will bring about a necessary change, there are both internal and external factors that may affect the change. Most of the internal factors come from the members of the marketing team. Many people are resistant to extra training if they feel as though they are already doing things "right". Obviously, upper management and outside sources can see that what the team is currently doing is not the most effective, but it may be difficult for the team to see this. The internal factor for the business that affects this specific change is that the company currently allows employees to use whatever software they understand to create reports/proposals. This causes a delay in completion as every team member changes the software and formatting of the documents. Unfortunately, the current methods cause a delay in reception, which leads to delays for all other business operations.

The biggest external factor that the company has to be mindful of is COVID-19. Due to the pandemic, training conditions must be modified from what would traditionally be used. For example, remote training options must be made available to train the marketing team that contains remote workers.

Proposed Solutions

While simply stating "more training" as a solution to this problem would work, here are a few specific training solutions for the marketing team. I recommend the company selects either option

one or two, and pairs either choice with option three for success.

1. Members of the marketing department might be invited to attend a Zoom meeting where the instructor shares their screen and provides a demonstration of the expected tasks. This method gives team members an opportunity to ask questions and collaborate vocally with one another. In addition to this meeting, team members should be provided with hard copies of instructions via email and a recording of the class to be used at a later date (if needed). My recommendation is an initial Zoom class with 2-3 follow-up meetings to ensure understanding is uniform across the department.

2. The marketing department may be provided with a step-by-step video on what is expected along with practice documents to format and share. This allows room for practice- and possible error- without risking actual company documents. This provides an asynchronous method of learning that may work better for the ever-changing availability of each employee. The employees should submit their samples to an instructor for feedback multiple times throughout the learning process to guarantee skill development.

3. Finally, the business needs to address some company policy in order to help the marketing team ensure their goal. If each employee is allowed to use the software of their choosing, it is unlikely they will learn and use Google Docs regularly. By changing a policy that allows multiple software options to be used, the company can ensure that the department is working uniformly.