Getting the Word Out on AiM

How to Train Your People

with Effective and Dynamic Training Tools
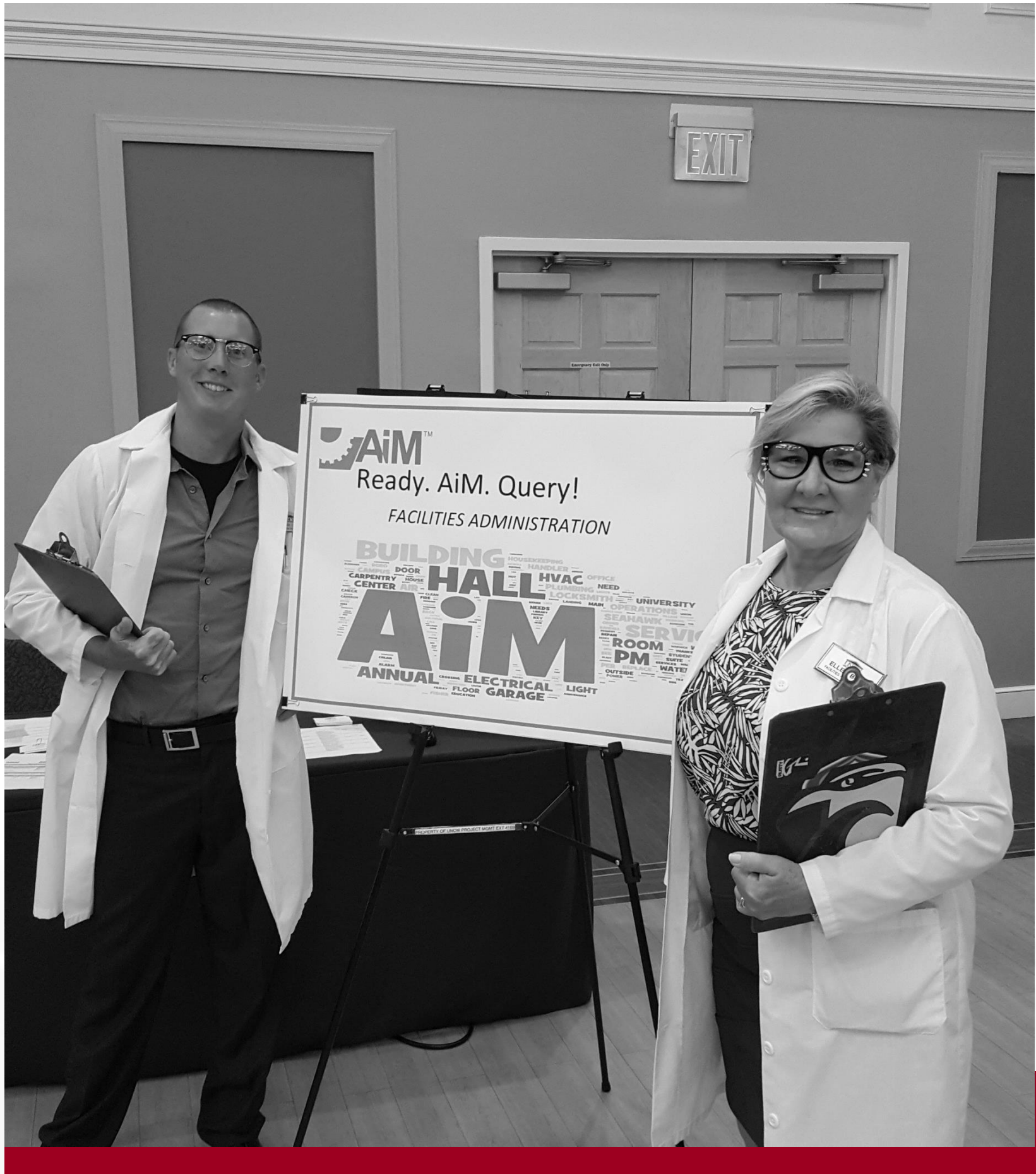
Presented By: Ellen Boyd and Mike Last

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Here's a little story about Mike & Ellen …

Two AiM users growing up at UNCW

ⓘ About Ellen & Mike

ELLEN BOYD – Assistant Director Facilities Administration

MIKE LAST – AiM System Administrator

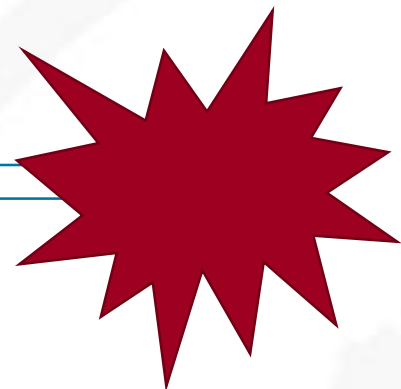*18 years combined experience in Work Control Management*

TRAINING

30 %

PROMOTING

20 %

AiMing HIGHER

Off the Charts!

✉ Ellen Boyd   BOYDE@UNCW.EDU
Mike Last   LASTM@UNCW.EDU

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About University of North Carolina Wilmington

Here I am, Rock you like a Hurricane!

ABOUT US

North Carolina's Coastal University

16,000 + students

2,383 employees

225 Facilities employees

170 Buildings   4.2 million square feet

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5 Steps to a Successful Training

**Step 1:
Training Needs
Assessment**

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Step 1:
Training Needs Assessment

Identify Audience

Determine the Tasks

Determine the training activities

Determine the learning characteristics
Create Matrix showing Roles vs. Tasks.

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Identify Audience

"Who are you?

Who, who, who, who?"

Customers

Create and Search Customer Requests
Follow Up on Work Orders

Technicians

Create Customer Requests
Search Work Orders
Enter Labor, Notes, Status Changes

Supervisors/Schedulers

Create Customer Requests
Search Work Orders
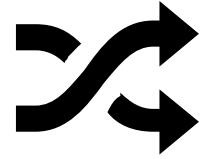*Scheduling Work Orders*
Enter Notes, Status Changes, Time
Approvals

Business Officers

Focus on Financial Reporting

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Roles vs Tasks

Tasks	Customers	Business Officers	Technicians	Supervisors
Customer Requests	✕	✕	✕	✕
Searches and Queries	✕	✕	✕	✕
Navigation	✕	✕	✕	✕
Time Card Entry			✕	
Time Card Approval				✕
Scheduling				✕
Cost Analysis		✕		

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5 Steps to a Successful Training

Step 1:
Training Needs Assessment

Step 2:
Develop Learning Objectives

Step 2:
Develop Learning Objectives

What are your takeaways?
List what you want them to be able to do by taking the class.

Choose 3 or 4 takeaways per session
3 is ideal, 4 is pushing it.

More than 4 takeaways?
Your class is too long. Develop shorter sessions specializing in a topic.

Example: Phase Status
Changing how phase status will be used.

Phase Status

OPEN	ESTIMATE	PLANNING	PARTS ON ORDER	READY TO SCHED	SCHEDULED	WORK COMPLETE	SUPERVISOR REVIEW
New WO. Has not been acknowledged by shop	Providing Customer with Estimate	Requires Investigation	Lead time more than 48 hours	Job is planned & Ready to Assign	Assigned to shop person	Work completed by shop	Repeat calls/Special Attention

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Shop Phase Status Definitions

Standard usage amongst all shops

OPEN
New WO. has not been acknowledged by shop
> *As work orders come in they should be reviewed and moved to the appropriate status*

ESTIMATE
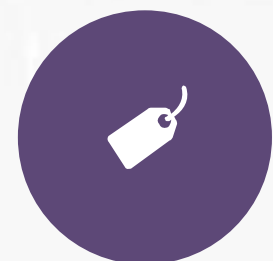*Provide estimate to customer and wait for customer's approval to move forward*
> *Next status should be PLANNING, READY TO SCHEDULE or PARTS ON ORDER*
> *Time type should be ESTIMATE on AiM Timecard*

PLANNING
Requires investigation for parts/scope/scheduling/notification/etc.
> *Next status should be READY TO SCHEDULE, SCHEDULED or PARTS ON ORDER*

PART ON ORDER
Require parts order lead time more than 48 hours
> *Next status should be READY TO SCHEDULE or SCHEDULED*

READY TO SCHEDULE
Job is planned, estimated, parts available and ready for DAILY ASSIGNMENT
> *Primary status to pull from for Daily Assignments Work order would move from OPEN, PARTS ON ORDER, PLANNING or ESTIMATE*

SCHEDULED
Assigned to shop person and on their daily assignment
> *Work order would move from OPEN, ESTIMATE, PLANNING, READY TO SCHEDULE, PARTS ON ORDER*

SUPERVISOR REVIEW
Special review and monitoring is needed by the supervisor and/or assistant supervisor
> *Repeat calls/Re-Opened Phases/Patterns/Special Attention Needed by Supervisor/ Work that only involves supervisors (ie. Contracted jobs).*

WORK COMPLETE
Requested work is completed including notes and applicable assets and time

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Phase Status

OPEN
New WO. Has not been acknowledged by shop

ESTIMATE
Providing Customer with Estimate

PLANNING
Requires Investigation

PARTS ON ORDER
Lead time more than 48 hours

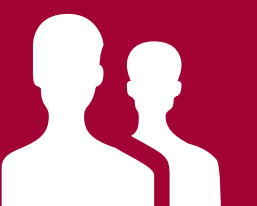**READY TO SCHED**
Job is planned & Ready to Assign

SCHEDULED
Assigned to shop person

WORK COMPLETE
Work completed by shop

SUPERVISOR REVIEW
Repeat calls/Special Attention

5 Steps to a Successful Training

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Step 2:
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Step 3:
Design & Develop
Training Materials

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Step 3:

Design & Develop Training Materials

✓ **CLASSROOM LEARNING**
ENGAGE your participants!
Searches from other websites
Small Group presentations
Small Group On line problem solving

✓ **ONLINE LEARNING**
Written step by step materials
Point and Click Tutorial Videos
Taped Live training sessions
FAQ's – Executive Summary

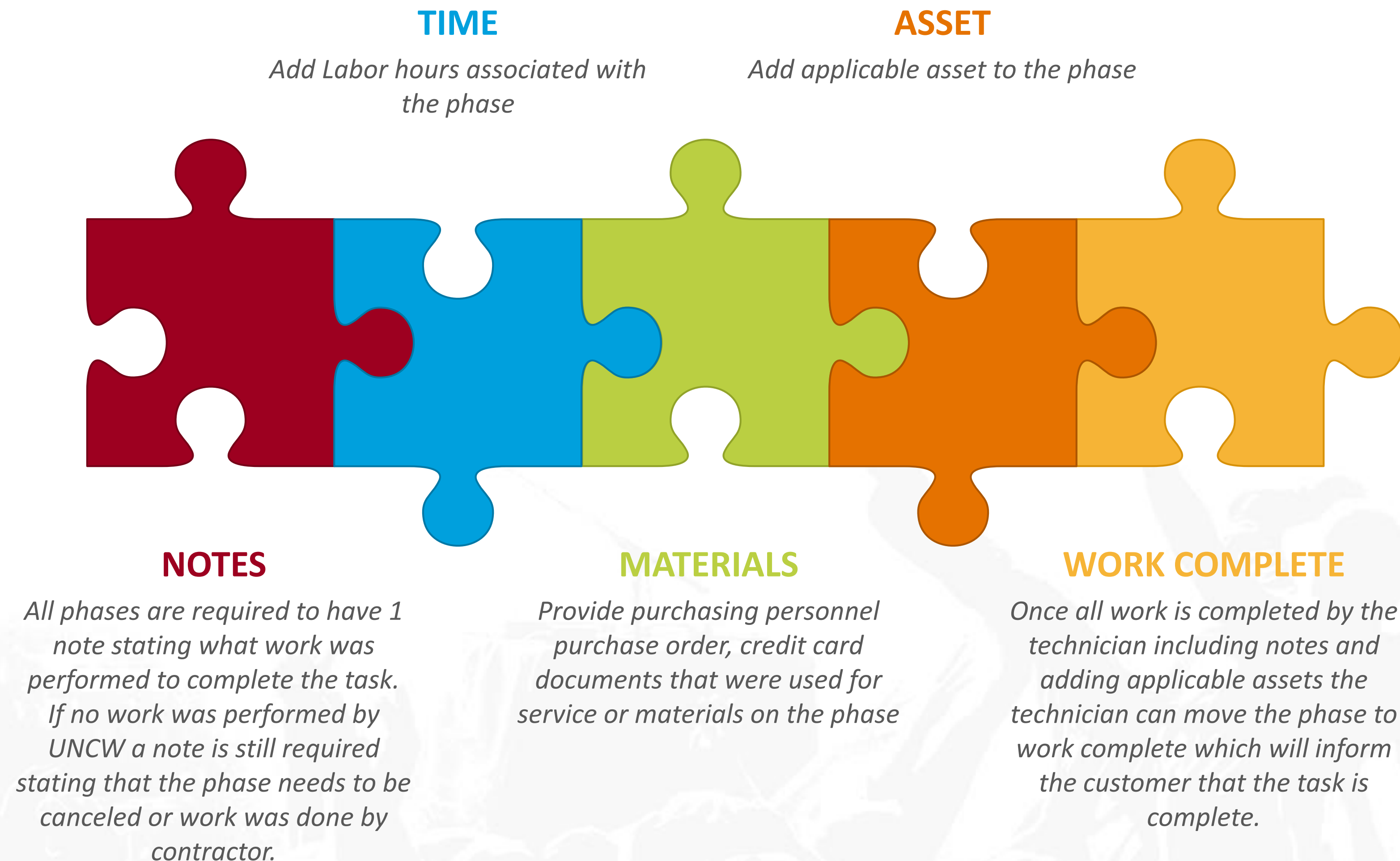✓ **FIELD TRAINING**
One-on-One
Small Groups
Ride-a-longs

✓ **Think DYNAMIC, ENGAGING, SUSTAINABLE**
Keep materials "edit-friendly" for easy updates
Get up and move at least once in a session
Keep your Website current

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Required Elements of a Phase

TIME

Add Labor hours associated with the phase

ASSET

Add applicable asset to the phase

NOTES

All phases are required to have 1 note stating what work was performed to complete the task. If no work was performed by UNCW a note is still required stating that the phase needs to be canceled or work was done by contractor.

MATERIALS

Provide purchasing personnel purchase order, credit card documents that were used for service or materials on the phase

WORK COMPLETE

Once all work is completed by the technician including notes and adding applicable assets the technician can move the phase to work complete which will inform the customer that the task is complete.

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Quick Reference Guide

5 Steps to a Successful Training

Step 1:
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Step 2:
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Step 3:
Design & Develop Training Materials

Step 4: Implement &
Promote the Training

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Step 4:

Implement & Promote the Training

Get yourself a GREAT DRIVER!
Team up with another to share the load.

I have to PRESENT?!
Tap into your HR Training and Talent Development for your own training.

Use EXISTING RESOURCES
Advertise classes
Register and track participants
Post links to taped Webinars and classes for review

Use Campus RESERVATIONS & TECH
Find the training room set up and technology you need.
Smart classrooms, video taping

5 Steps to a Successful Training

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Assessment**

**Step 2:
Develop Learning
Objectives**

**Step 3:
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Training Materials**

**Step 4: Implement
&
Promote the Training**

**Step 5: Evaluate
&
Revise Training**

Step 5:
Evaluate & Revise Training

Did I hit it OUT OF THE PARK?
Takeaways accomplished!?   Get FEEDBACK!

Review and ACT on Feedback
Revise Training Materials and Sessions
Be ready to GROW as your participants gain more knowledge

Schedule FUTURE Training Sessions
Determine how often you need to present each class and schedule it NOW.

Let's do it AGAIN!
You may not have changed, but your employees have. Turnover, position changes all present a new group to train.
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https://uncw.edu/aim/

THANK YOU
UNC WILMINGTON
FACILITIES

UNCW
SEAHAWKS