



Academic Advising Training Plan

June 2025



Contents

1. Terminology & Approach
2. Project Deliverables
3. Curriculum Overview
4. Responsibilities and Logistics
5. Schedule
6. Next Steps



Training Terminology

- **QRG** - A short “how to” document, 2-5 pages long focusing on a single learning outcome
- **TTT & EUT** - “Train the Trainer” and “End User Training.”
- **UAT** – User Acceptance Testing
- **Trailmix** – A customized “trail” of self-paced learning modules from Salesforce Trailhead



Phased Learning Approach



Pre-work

Change Management
Communications,
Trailmix



Train the Trainer

Instructor-led sessions
led by Salesforce ID
for SMEs



End User Training

Instructor-led sessions
led by SMEs for End
Users



Ongoing Training

Self-paced materials
including QRGs, Office
Hours

Adult Learning Principles

1. Focus on motivation and WIIFM
2. Sessions limited to 90 minutes max
3. Outcomes-based learning
4. Hands-on learning for each learning outcome
5. Case-based learning scenarios

Project Deliverables

Project Deliverables for Each Stage



Pre-work

- Build and deliver one custom Trailmix, if desired
- Regular change management communications

Train the Trainer

- 1 Training Cohort
- 6 total training decks, one for each module
- ~ 7.5 Hours of Instructor-Led Training (recording provided)

End User Training

- 1+ Training Cohort
- 5 leader's guides (training decks with speaker's notes)
- Up to 10 Hours of ride-alongs

Self-Paced

- QRG template
- Up to 8 Custom QRGs (total)
- Up to 5 hours of Office Hours

Training Curriculum (WIP)

Instructor-led Training Hours



1. Introduction to Salesforce - 90 Minutes
2. Learner Success App - 90 Minutes
3. Scheduling and Advising Tools - 90 Minutes
4. The Learner Portal - 60 Minutes
5. Analytics - 60 Minutes

0. Facilitation Success for Trainers - 60 minutes

Training Curriculum

Module 1



1. Introduction to Salesforce - 90 Minutes

- What is a CRM?
- Pirate360 Landing Page
- The App Launcher
- Objects, Records, and Fields
- List Views
- Record Layout
- Global Search
- Activities

Training Curriculum

Module 2



2. Learner Success App - 90 Minutes

- Learner Success App
- Learner Accounts
- Advisee Cases
 - Academics
 - Advising
 - Learner Programs
- Staff Accounts
- Activities and Tasks

Training Curriculum

Module 3



3. Scheduling and Advising Tools - 90 Minutes

- Scheduling Setup
 - Using the Resource Record
 - Creating a new shift
 - Outlook synchronization
- Scheduling an Appointment for a Learner
- Case notes and sharing
- Advising Tools
 - Learner Plans
 - Watch Lists

Training Curriculum

Module 4



4. Learner Portal - 60 Minutes

- Learner Portal Landing Page
- Navigating the Portal
- Notifications
- Scheduling as a Learner
 - Scheduling an Advising Appointment
 - Notifications
 - Re-scheduling
- Notes and Plans
- Success Team
- Courses

Training Curriculum

Module 5



5. Analytics - 60 Minutes

- Reports
 - Accessing existing Reports
 - Creating a new Report
- Dashboards
- Analytics Studio

Training Curriculum

Module 0



- **Facilitation and Success for Trainers - 60 Minutes**
 - Preparing for Your Session
 - Using Decks
 - Setting Expectations
 - Delivery Techniques
 - Data Prep
 - Hands-on Activities
 - Ride-alongs
 - Feedback and Debriefing

ECU Training Lead

Training Lead for ECU (Nikia) will be responsible for

- Book TTT and EUT sessions
- Attend regular training check-ins
- Act as the point of contact for all training questions
- Provide final sign-off on training materials

Training Logistics



Where will we share documents?

All Training Documents will be stored in the Training folder in Teams. This is the source of truth for all training materials.

Deliverables will be stored in this folder.

Deliverable Tracking

Deliverables will be tracked on the [Phase 1 Schedule document](#) (see ~row 100)

What Software will we use for deliverables

All training deliverables will be completed using Microsoft Office Products.

Training Decks – PowerPoint .pptx format

QRGs – Word .docx format

In-app guidance (text draft) – Word . Docx format

What Method Will We Use for Regular Communication?

Teams is the preferred method of regular communications.

Training has a dedicated channel in Teams for all Training-related discussions.

What Platform Will We Use for Training Delivery?

TTT sessions will be delivered virtually on Teams. Sessions will be recorded.

Training Logistics

How will Trainers and End Users receive training?



Who Delivers Training?

- Trainers are responsible for booking and leading EUT
- ECU is responsible for booking TTT
- Salesforce Trainer is responsible for designing and leading leading TTT

How Long is each TTT?

- 1 cohort, 3 Trainers
- ~7.5 hours total
- Delivered in six sessions
- Sessions divided over 2 weeks

How will ECU sustain future training?

- Further TTT and enablement led by ECU trainers
- SME/trainer leaders
- Self-paced materials (QRGs)
- QRG Templates
- Office Hours

Recommended Training Schedule

TTT = Train the Trainer
EUT = End User Training

Monday	Tuesday	Wednesday	Thursday	Friday
August 4	5 TTT Module 1	6 TTT Module 2	7 TTT Module 0	8
UAT				
11	12	13 EUT Module 1 AM EUT Module 1 PM	14 EUT Module 2 AM EUT Module 2 PM	15
UAT				
18	19	20 ★ UAT Complete	21 ★ Final Training Material Signoff	22
UAT				
25 TTT Module 3	26 TTT Module 4	27 TTT Module 5	28 Office Hours	29
September 1 – Labor Day Holiday	2 EUT Module 3 AM EUT Module 3 PM	3 EUT Module 4 AM EUT Module 4 PM	4	5 EUT Module 5 AM EUT Module 5 PM
8	9 ★ Advisor Go-live Office Hours	10 Office Hours	11	12
15	16 ★ Learner Go-live Office Hours	17 Office Hours	18	19



Next Steps:

1 Develop Learning Outcomes

2 Complete Training Build

3 TTT and Training Handover

Q&A