

Training Plan

Prepared for: Project Lead, Training Facilitator, OCM Lead & HR Business Partner | Initiative:
 | Assessment Date:

SECTION 1 — TRAINING FRAMING

The training scope for covers foundational AI literacy, tool-specific workflow training, and mandatory compliance content for disclosure and documentation requirements — this is 's first AI implementation, so no assumption of prior AI familiarity is built into the design. Five distinct role groups require training under this plan. This change includes policy or compliance impacts: this Training Plan explicitly covers the applicable disclosure and monitoring requirements named in the training scope, with completion tracking and mandated timelines. This plan defines what training is required, who must complete it, when, and how readiness will be confirmed; the Training Program Framework (D09) provides the learning design, Manager Enablement Kit, and adoption support infrastructure that sits underneath this plan.

SECTION 2 — TRAINING PLAN TABLE

Role / Topic	Learning Objective	Delivery	Duration	Timing	Completion	Flag
All roles — AI Literacy Foundations	Colleagues can explain, in plain terms, what an AI copilot does and does not do and why human review of its output is required	eLearning	30 min	Week 5 (cohort start)	Required	
All roles — Change Overview and Context	Colleagues can state why is being implemented and what changes for their specific role	eLearning + job aid	20 min	Week 5	Required	
Contact Center/Branch — What Does and Does Not Do	Colleagues can identify the specific tasks automates vs. tasks that remain their responsibility	Workshop	45 min	Week 5-6	Required	
Contact Center/Branch — Working Alongside AI: Day-to-Day Workflow	Colleagues can complete a full customer interaction using 's summary and next-best-	OJT + Coaching	2 hrs + 2-wk shado	Week 6-8	Required	⚠ COMPLIANCE

Role / Topic	Learning Objective	Delivery	Duration	Timing	Completion	Flag
	action prompts, from draft to confirmed documentation		w			DEADLINE
Contact Center/Branch — How to Evaluate and Correct AI Outputs	Colleagues can identify an incorrect AI-drafted disclosure and correct it before confirming	Workshop	30 min	Week 7	Required with Certification	COMPLIANCE REQUIRED
People Managers — Coaching Your Team Through [REDACTED]	Managers can run a structured team check-in using the Manager Enablement Kit and answer the top five anticipated employee questions without deflecting	Workshop + Job Aid	1 hr	Week 4 (ahead of frontline cohorts)	Required	△ FACILITATOR NOT CONFIRMED
People Managers — Manager Sustainment Toolkit Orientation	Managers can execute the 30-day structured check-in cadence and recognize regression signals specific to AI adoption	Workshop	45 min	Week 6	Required	
HR/People Org — New Servicing Role Onboarding	Redeployed colleagues can perform core tasks of their new servicing role	OJT + Coaching	Min. 1 week	Weeks 5–9	Required	
HR/People Org — [REDACTED] Workflow	Same objective as frontline colleagues, applied to the redeployment cohort's new servicing duties	eLearning + OJT	2 hrs + shadow	Weeks 6–9	Required	
Legal & Compliance — Policy Overview and Disclosure Monitoring	Analysts can apply the updated call-monitoring policy to AI-assisted interactions	Workshop	1 hr	Week 4	Required	COMPLIANCE REQUIRED
Legal & Compliance — Compliance Procedures and Documentation	Analysts can document a monitoring finding using the updated procedure	Workshop + Job Aid	45 min	Week 4	Required	COMPLIANCE

Role / Topic	Learning Objective	Delivery	Duration	Timing	Completion	Flag
						REQUIRED
IT — Post Go-Live Support Tools Orientation	Engineers can triage and route a [REDACTED] technical support ticket per the defined escalation path	Workshop	30 min	Week 8	Recommended	
All roles — Q&A and Support Resources Orientation	Colleagues can name where to get help and how to submit feedback	Job Aid	15 min	Week 5 (with first module)	Required	

SECTION 3 — GO / NO-GO GATE

Go-live authorization from a training perspective requires 90% completion of required training across the affected population, and 100% completion of the compliance-specific pathway (disclosure evaluation and monitoring procedure content) — partial completion is not acceptable for compliance training, and colleagues who have not completed it are not authorized to use [REDACTED] on live customer interactions after go-live. Named conditions that must also be true before the training program is considered go-live ready: site-level facilitators confirmed for the manager coaching module (currently unconfirmed), job aids distributed to all cohorts, and the peer champion network briefed and operational ahead of each cohort's go-live. If the completion threshold is not met by a cohort's training cutoff date, the OCM Lead and [REDACTED] jointly make the go/no-go call for that specific cohort — cohorts should not be forced live on a fixed calendar date if their completion data does not support it.

SECTION 4 — TRAINING MEASUREMENT APPROACH

Training effectiveness will be measured through knowledge-check quizzes at the end of each module, system adoption metrics tracked post-launch, and structured manager observation during the first 30 days. Measurement occurs at three points: immediately following training (knowledge checks), at go-live (completion rates and shadow-mode readiness), and at 30/60/90 days post go-live (adoption metrics and manager observation). This data feeds directly into the Adoption & Outcomes Dashboard (D13) and the pulse check-in system defined in the Listening Plan (D10). Compliance training completion and the disclosure-evaluation certification pass rate are required measurement outputs for this initiative and must be reported to the compliance owner and retained per record-keeping requirements before the go-live gate is confirmed for each cohort.

TRAINING CONTENT REQUIREMENTS CHECKLIST

Training Content Requirements — What GOccelerate Produces vs. What Must Be Built Separately

GOccelerate produces the change readiness and people infrastructure layer of this training program:

- Training Plan (this document)
- Training Program Framework and Learning Journey Map (D09)
- Manager Enablement Kit (D09)
- Training Communication Templates (D09)
- Support Model Documentation (D09)
- Adoption tracking and measurement approach

The following training content must be built separately by the implementation partner, internal IT team, or training vendor — GOccelerate does not produce system-specific content:

- [REDACTED] screen walkthroughs and navigation recordings
- Role-specific transaction guides and job aids for the CRM/[REDACTED] workflow
- Process simulation and shadow-mode practice environment
- [REDACTED]-specific FAQ and troubleshooting guide
- Test/sandbox environment access for pre-go-live practice

Recommended handoff: Share this Training Plan and D09 with IT and the [REDACTED] implementation partner as the OCM requirements brief. Request that they confirm which content items they will produce and by what date.

Prepared by GOccelerate™ | [REDACTED] | Confidence: Very High (100%)

The GOccelerate People Risk Index (PRI) is a formative, expert-derived index of people and adoption risk across four dimensions — Leadership, Stakeholder, Capability, and Sustainment — grounded in established organizational change management practice. Dimension scores reflect equally weighted, normalized risk points assigned through expert judgment rather than statistically estimated weights. Baseline results derive from a structured intake completed by a single informant and reflect that respondent's knowledge of the organization at the time of assessment; the accompanying Data Confidence indicator reflects the completeness of the information provided. Risk bands are provisional and subject to recalibration as GOccelerate's outcome-validation program accumulates post-implementation adoption data.