

TRAINING PLAN
for
MenuLink Back Office System





Document Purpose

The purpose of this document is to summarize the requirements and tasks for the MenuLink training development project.

MenuLink is a new back office system that will streamline and centralize restaurant management. It will replace the SAILOR system and handle inventory, purchasing, and invoicing procedures. It will also facilitate employee scheduling, record maintenance, sales, payroll, and forecasting.

This plan and the related Gantt chart (Appendix) are **living documents**, and will be updated as needed. However, changes to this document will require review and approval.

Project Overview

Blended Strategy and Goals

The training activities and materials will provide learners a foundational understanding of the MenuLink client application, its features, and the integrated tools for managing a restaurant's key business and labor information.

The main training goals are to enable Restaurant Managers and Support Center staff to use:

- Purchasing, Inventory, Recipe, Sales, and Period End applications.
- Employee, Payroll, Scheduling, Staffing, and Projected Data features.

Course Names:

- MenuLink Super User Training
- MenuLink Elearning Suite
- Change Leadership

Scope:

- TGIF USA Corporate and Supported Franchises

Target Audiences:

- Support Center and Carlson Minneapolis personnel who will use MenuLink for reporting and research
- Super Users who will provide regional support to restaurants
- All MenuLink users in the field (VPOs, DOs, SDHR, GM, AGM, KM, BM, SM, MTs, FTMs, RAs, Stewards, Shift Supervisors, hourly team members, and any others)



- Training Types:**
- Leader-led Change Leader training for Super Users and executive management
 - Leader-led Change Management and MenuLink Overview training for users in the field
 - Web-based interactive training and assessments
- Client Priority Rating:** **High**

Out of Scope

Specialized training for the pilot restaurants is outside the scope of this plan. The training that will be available to pilots will be the same as that of other markets.

Change Leadership Aspects

The implementation of the MenuLink system touches every aspect of how managers run their restaurants. Managing the human side of the implementation is crucial to a successful outcome where the managers feel equipped to deal with the change by their go-live date with minimal disruption to business as usual.

As a result, Learning and Development will provide **Change Leadership Training** as part of the initial rollout to key Support Center executives and support personnel as well as for Super Users.

Change Leadership training is essential to a smoother transition to MenuLink. If the human factor is mismanaged, the possible impacts are:

- People have little understanding of why the change is happening, creating a greater degree of resistance to the change.
- Productivity (and the resulting revenue) drop sharply as the system is rolled out.
- Valued employees resent the change and leave the company.
- Employees seek work-arounds to avoid learning or implementing the system.
- Organizational divisions are created as employees form “us” and “them” mentalities.

Whenever possible, the training will be scheduled in proximity to market go-live dates to ensure maximum effectiveness.

Super User Concept

Critical to the overall success of the training (and, accordingly, of the overall project) is the role of the **Super User**. The Super User will be a designated leader in each market who will facilitate the transition in the field. This individual will receive in-depth system training and Change Leader training so they can provide a local point of contact and support as the MenuLink system is deployed.



The Super User Concept is expected to provide these benefits:

- As field employees, they will have additional “real world” credibility.
- They can be a front-line source of help, so that the Project Team is not always in transit and unable to solve problems centrally.
- People are more likely to accept a change when they feel ownership.
- They can provide early feedback on training content so it can be fine tuned.
- It shows confidence in the system and in the people in the field.
- It is an excellent development opportunity for the Super User.

The Super User will not provide in-depth training to end users but rather will provide a half-day MenuLink Transition meeting to discuss reasons for the transition, articulate the benefits, and provide a general system overview. The Super User will also be familiar with the elearning curriculum in StripesU.

Project Contacts

Project Champions

Name	Organization/Role
Barbara Coakley	Accounting and Project Manager
Jerry Maddox	VP Controller
Don Vietti	CIO and SVP IT
Steve Coe	VP Communications
Paul Rumsey	VP Learning and Development
Andrew Robinson	VP HR Friday's USA
Lee Sanders	USA Franchise
Stuart Gee	VP Central Operations Services



Training Project Core Team Members

Name	Role(s)
Rebecca Marmaduke	h U
Trecia Wood	L&D Training Manager
Bob Rycroft	VP Operations Planning
AC Williams	Director Operations Services
Barbara Coakley	Subject Matter Expert
Scott Viilu	Subject Matter Expert
Pete Foley	Sr. Internal Communications Specialist

Physical Resource Requirements

The resources for elearning delivery are in place. Train-the-trainer training of Super Users will take place in the support center just in advance of market rollout. For that training, the following resources will be required:

- Netbook computers or laptops
- Support Center training room

Critical Dependencies

The Learning and Development team is committed to the successful design, development, and delivery of this training. **Dates provided in this timeline are contingent upon all responsible persons, such as subject matter experts, design peers, system administrators, stakeholders, and legal reviewers, completing their tasks by the designated dates. If a deadline is not met, all subsequent dates in the timeline may be pushed out in direct proportion to the delays.**

1. Due to the request for training development on a large scale and in such a short timeframe, reviewers have been given **3 days** to complete their reviews and approve each milestone.



2. The designation and training-up of the Super User is critical to end-user adoption and minimal disruption by market go-live dates.
3. Any significant software functional changes must be communicated to the Designer via email immediately as they are identified. This does not ensure that the changes will be captured.
4. If the implementation schedule for the overall MenuLink project shifts, this project plan will be adjusted accordingly.
5. Not all of the target audiences are clearly differentiated at the time of this plan being written. As those roles are clarified, the curriculum can be more customized to suit the individual user's needs.
6. Translation and the related costs are not addressed in this plan. If material/course translation is required, those requirements must be communicated to Learning and Development with sufficient notice.
7. The plan is to use one primary development resource. If the scope or nature of the project changes, additional resources will be required.

Possible Risk Events

The level of risk that the project will be successfully executed is moderately high, given the scope of the project, the time frame, and the volatility of the content.

Risks can result in the following possible impacts:

- **Monetary Value** Any rework due to insufficient analysis, design (or redesign), change in content or requirements, or lack of validation can increase development costs (time, labor, money).
- **Quality** Any process tasks that are skipped, not completed, or rushed may affect the quality and accuracy of the content and transfer of learning and job performance. Sign-off by approved person(s) is imperative to ensure quality.
- **Schedule** Insufficient planning and designing, lack of resources (SMEs, Designer, reviewers), and changes to scope will impact the schedule. External issues may impact the schedule and drive due dates.



Some possible risks and their reduction strategy are listed below:

Potential Risk	Risk Reduction Strategy
Overall project schedule will most likely change.	Adapt training plan to master schedule.
Insufficient development resources—missed due dates.	Engage additional resources as needed.
Interface/functionality of MenuLink unstable—content inaccurate.	Clear communication between Project Team and Designer. Recommend major features “frozen” before training go-live date.
Failure to identify/train Super Users—Super User concept not implemented.	<ul style="list-style-type: none"> Learning & Development management will promote concept of Super User among TGIF leadership and obtain buy-in. Deadlines for naming Super Users are imposed. Related arrangements are carried out.
Interface inaccessible either to Designer or to Super Users during development and/or training—content cannot be developed or interface cannot be accessed.	<ul style="list-style-type: none"> The Designer must have access to a development environment during the entire course creation process. A training environment will be made available to Super Users to perform all the functions of the application.
Super Users fail to deliver Transition Training—transition is more difficult and more productivity is lost.	In a worst case scenario, users make the transition using elearning only. However, this is not recommended.
End users fail to complete online training in advance of go-live date—critical back office functions cannot be performed.	<ul style="list-style-type: none"> Detailed communications plan will be executed, ensuring that all concerned understand the impacts and necessity of training completion. Training department will prepare for influx of support calls.

Project Milestones and Timeline

Activity/Milestone	Responsibility	Target Date
Executive Change Leadership Training	L&D	TBD
Super User training	L&D	(prior to rollout)
Training plan complete	R. Marmaduke	5/10/2012
Elearning Design initiated	R. Marmaduke	5/11/2012
Training plan reviewed	Project Champions	5/17/2012
Communication Plan approved	L&D, Communications	6/27/2012
Super Users identified	Operations	8/15/2012
Elearning Design complete	R. Marmaduke	9/19/2012
Courses in LMS	L&D	9/19/2012



Notes:

- Reviews will be **completed by course** (rather one comprehensive review) to ease the workload for reviewers.
- Storyboarding will be skipped for this project since the vendor's user guide may serve as a storyboard.

Communications Planning

A detailed communication plan will be developed that outlines all the tasks associated with the implementation of the system and training. This sub-plan will be developed in the next month.

Course Descriptions and Objectives

Instructor-Led

Executive Change Leadership Workshop (Name Subject to Change)

Target audience: Key Support Center personnel, Executives

Learning and Development deliver this training as scheduled in a separate communication plan. The objectives for this course are:

- Describe the change management model as it relates to the MenuLink transition.
- Discuss opportunities during the MenuLink transition to positively lead change.
- Identify change implementation strategies.

Super User Train-the-Trainer (Name Subject to Change)

Target audience: Super Users

This Super User course will be delivered in advance of market go-live dates. Super Users will learn how to:

- Describe the reasons for the change.
- Present the benefits of the change.
- Describe the differences between current operating procedures and MenuLink procedures.
- Provide a high-level overview of the interface and functions.
- Identify available resources for support.



End User Transition Training (Name Subject to Change)

Target audience: End users in the markets

This Super User-led course will be delivered in advance of market go-live dates. This training will enable users to:

- Describe the reasons for the change.
- Present the benefits of the change.
- Describe the differences between current operating procedures and MenuLink procedures.
- Provide a high-level overview of the interface and functions.
- Identify available resources for support.

Elearning

Note: The grouping of topics is subject to change/review based on learning needs and the amount/type of content. This is a best effort to capture the content as understood at this time.

Course 1: Introduction to MenuLink

Target Audience: All Users

Duration: 15 minutes

This course will present an overview of the MenuLink system, including features, functions, and benefits.

The objectives for this course are:

- Define what MenuLink is and list its benefits.
- Identify the features of the MenuLink System.
- Identify the functions of the MenuLink System.

Course 2: Getting Started in MenuLink

Target Audience: All Users

Duration: 15 minutes

This course will explain the basics of logging into and navigating MenuLink.

The objectives for this course are:

- Topic 1: Start and login to the MenuLink Client.
- Topic 2: Identify the large buttons in the Inventory and Labor main windows.
- Topic 3: Sort and search for information.



- Topic 4: View and print reports and worksheets.

Course 4: Inventory—Purchasing Functions

Note: Due to the amount and complexity of the information to be presented, Inventory will be divided into two courses.

Target Audience: All Users with Purchasing Responsibilities, Super Users

Duration: 30 minutes

This course will describe how MenuLink is used to manage vendors, create purchase orders, and manage invoices.

The objectives for this course are:

- Topic 1: Create and manage orders.
- Topic 2: Create, edit, and submit vendor purchase orders.
- Topic 3: Manage and convert invoices.
- Topic 4: Follow the unique processes for keg beer and free product.
- Topic 5: Create and manage invoice adjustments.
- Topic 6: View purchase history.
- Topic 7: Generate purchasing reports.

Course 5: Inventory Management

Target Audience: All Users with Inventory Management Responsibilities, Super Users

Duration: 30 minutes

This course will describe how MenuLink is used to manage and post inventory.

The objectives for this course are:

- Topic 1: Manage inventory items and perform counts.
- Topic 2: Post inventory.
- Topic 3: Look up a previous inventory.
- Topic 4: Transfer inventory.
- Topic 5: Complete inventory worksheets.
- Topic 6: Print inventory worksheets.
- Topic 7: Recognize how the system automatically creates suggested prep based on invoices, inventory, and forecast.
- Topic 8: Run inventory reports.



Course 6: Recipes

Target Audience: Kitchen Managers, GMs, Super Users

Duration: 15 minutes

This course describes how the Recipes screen in MenuLink is used to print recipes.

The objective for this short course is: Print recipe worksheets

Note: this content will most likely be folded into another course. It is listed here, until a more logical location is identified.

Course 7: Sales

Target Audience: Managers, Support Center, Operations, Super Users

Duration: 30 minutes

This course describes how the MenuLink system is used to import POS data, enter and manage deposits, view sales mixes, reconcile sales data, and forecast sales information.

The objectives for this course are:

- Topic 1: Reconcile sales, perform safe count, and make deposits.
- Topic 2: View the sales mix.
- Topic 3: Import information from the POS System.
- Topic 4: Run sales reports.
- Topic 5: Review Daily Flash and Comp Sales reports.

Course 8: Forecasting

Target Audience: Managers, Support Center, Operations, Super Users

Duration: 20 minutes

This course describes how to use the Forecast feature to predict Sales and Guests.

The objectives for this course are:

- Topic 1: Generate a Sales and Guest forecast for a specified interval.
- Topic 2: Forecast ordering
- Topic 3: Forecast prep scheduling
- Topic 4: Forecast recommended staffing.
- Topic 5: View Sales and Guest reports.



Course 9: Payroll

Target Audience: Managers, Shift Supervisors, Super Users

Duration: 30 minutes

This course describes how the MenuLink system is used to maintain and track employee information and manage payroll.

The objectives for this course are:

- Topic 1: Identify the payroll functions that are performed in MenuLink.
- Topic 2: Recognize the payroll functions that close automatically at specific times.
- Topic 3: Borrow employees.
- Topic 4: Run employee reports.
- Topic 5: Adjust employee time.
- Topic 6: Manage shifts worked and time off.
- Topic 7: Manage employee information.
- Topic 8: Run payroll reports.

Course 10: Scheduling

Target Audience: Managers, Shift Supervisors, Super Users

Duration: 30 minutes

This course describes how the MenuLink system is used to maintain and track employee schedules

The objectives for this course are:

- Topic 1: Explain the Scheduling function at a high level.
- Topic 2: Distinguish the employee maintenance tasks performed using MenuLink versus My HR.
- Topic 3: View, edit, and generate employee schedules.
- Topic 4: View and edit workflows.
- Topic 5: View recommended hours and tasks.

Course 11: Period End

Target Audience: Managers, Shift Supervisors, Super Users

Duration: 15 minutes

This course describes how the MenuLink system is used to complete period end procedures.

The objectives for this course are:

- Topic 1: Complete Week End tasks.
- Topic 2: Complete Month End tasks.



- Topic 3: Re-class entries.
- Topic 4: Research cost issues.
- Topic 5: Run Weekly Reports in Vista.

Training Evaluation Strategy

The effectiveness of training will be evaluated as follows:

1. Assessment—learners will be tested for their ability to recall and apply the information.
2. Business results:
 - a. End-user can perform their required tasks as the interface is rolled out, and restaurants experience no downtime.
 - b. Support calls are minimized during rollout phase.
 - c. Within weeks, users perform functions with greater accuracy, improving reliability of sales data.

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