

## Zebra's Training Prepares End-Users for Complex Change

Zebra Technologies Corporation  
Best Learning Program Supporting  
a Transformation Business Strategy  
November 2017



### Company Background



Company At-a-Glance	
Headquarters	3 Overlook Point, Lincolnshire, Illinois 60069
Year Founded	1969
Revenue	US\$3.6 billion net sales (year-end December 31, 2016)
Employees	Approximately 6,500 employees
Global Scale	Approximately 6,500 employees in nearly 120 offices across more than 40 countries; and close to 10,000 channel partners in more than 100 countries.
Customers/Output, etc.	Zebra offers complete end-to-end solutions – mobile computers and scanners to specialty printers, RFID, software and services. Its broad range of products, understanding of its customers and productive R&D ensure that it offers relevant solutions that take advantage of key technology trends. Zebra has a comprehensive network of value-added resellers, integrators, independent software vendors, distributors, original equipment manufacturers, and sales to end users. Zebra has customers in more than 100 countries, and more than 95% of all Fortune 500.
Industry	Computer Hardware and Computer Software
Stock Symbol	NASDAQ: ZBRA
Website	www.Zebra.com

### Budget and Timeframe

<i>Budget and Timeframe</i>	
Overall budget	\$11m Business Readiness, includes Change Management (CM), Learning & Training and Communications
Number of employees involved with the implementation?	8 CM Learning employees from Zebra (3 Functional Learning Leads, Quality/Content Lead, Learning Program Lead, Learning Delivery Lead, Learning Logistics Coordinator and CM Lead).
Number of Operations or Subject Matter Expert employees involved with the implementation?	~52 unique Subject Matter Experts; 45 Business Engagement Leads; 264 Change Agents; 6 BTO Communication Advisors; 10 Global Process Owners; 4 BTO Leads
Number of contractors involved with implementation	Approximately 41 at peak – mixture of onshore resources (CM and Learning Development Managers) and offshore resources (Content Developers) plus 7 CM Learning Zebra contractors (Functional Learning Lead, CM Learning Project Manager (PM), Curriculum Delivery Coordinator, 3 Learning Logistics Coordinators and 1 Learning Management System (LMS) Administrator).
Timeframe to implement	10 Months for Release 2
Start date of the program	July 2016

### Business Conditions & Business Needs

Zebra Technologies Corporation completed the acquisition of the enterprise business from Motorola Solutions Inc. (MSI), in October 2014. The acquisition significantly expanded and strengthened Zebra's product portfolio, geographic reach, go-to-market channels, and industries served while nearly doubling the size of Zebra. Given the scale of the acquisition, Zebra leaders understood that integrating global processes, key systems, tools, and cultures would be paramount to the company's success to blend as one new Zebra. Most of Zebra's Transitional Service Agreements (TSAs) with MSI also needed to end.

A Business Transformation Office (BTO) was created to lead integration efforts shortly after the acquisition. The BTO was charged with managing the blueprint of the new capabilities and guiding Zebra to a new way of working by creating greater efficiencies in

operational performance and improved program delivery for employees, channels, and customers.

To illustrate the scale and complexity of integrating Zebra, consider:

- Zebra operated nine Enterprise Resource Planning (ERP) systems to enable the business and consolidated to two ERP systems.
- Zebra uses more than 700 applications — all require compatibility with the systems.
- Zebra operates its business within 160 legal entities in 56 countries. The company had to consolidate to 60 legal entities to lead to a more efficient supply chain.
- Zebra standardized the technology infrastructure at approximately 100 facilities around the world and impacted 6,500 employees and thousands of partners globally.

Many of these systems were part of TSAs with MSI for use during a defined period to enable continued operations and customer continuity. However, these TSAs were costing Zebra millions of dollars, so there was an urgency to migrate to a structure independent from MSI.

Given the importance of enabling the business to operate as One Zebra, integrating businesses was a strategic priority communicated directly and regularly from Anders Gustafsson, CEO of Zebra.

**Figure 1: Ander Gustafsson's Slide from Q2 2016 Town Hall**



Source: Zebra Technologies Corporation 2017

The magnitude of this integration program, sense of urgency, and overall CM strategy required, warranted the support of Accenture LLP, management consulting resources, to partner with Zebra to help scale, address scope, and apply leading practices with the right structure, rigor, and management.

In line with the CEO's strategic priorities and with the guidance of Accenture, the BTO deployed a cross-functional team that included members from IT, Finance, Marketing, Services, Engineering, Communications, Legal, Supply Chain, and the learning organization known as the Zebra Knowledge Center (ZKC).

This group served as a joint Business and IT Governance team to support collaborative planning and execution of programs and projects across the following six integration initiatives:

1. **Trilogy exit.** Transfers MSI back-office systems and processes to Zebra's ERP.
2. **Master data management.** Provides a consistent and managed approach to the conversion of existing master data.
3. **Channel, sales & marketing.** Provides a seamless, consistent go-to-market experience for distributors, partners, customers, and employees.
4. **Services.** Transforms Zebra's global-services capabilities to achieve an integrated experience for end-customers and partners.
5. **Infrastructure & security.** Creates business value by migrating, delivering, or upgrading software/systems, network, voice, hardware, and storage management solutions to operate and manage the IT environment.
6. **Engineering.** Exit Enterprise Engineering IT Services to achieve systems autonomy and simplify the Engineering application portfolio.

The integration initiatives were implemented across the enterprise in a phased release to 6,500+ employees and 10,000 channel partners worldwide.

Release 1, first phase of transformation, completed the transition to the new ERP system (Trilogy Exit) in the Asia Pacific (APAC) and supporting regions on May 3, 2016, as well as conversion of Engineering, Channel, Sales & Marketing, Infrastructure & Security, and Services on August 1, 2016. Release 1 served as a pilot for successful deployment of Release 2, a larger, more complex project.

Using lessons learned from Release 1, the BTO embarked on Release 2, concentrating on the six integration initiatives detailed above with a global transformation date of May 1, 2017.

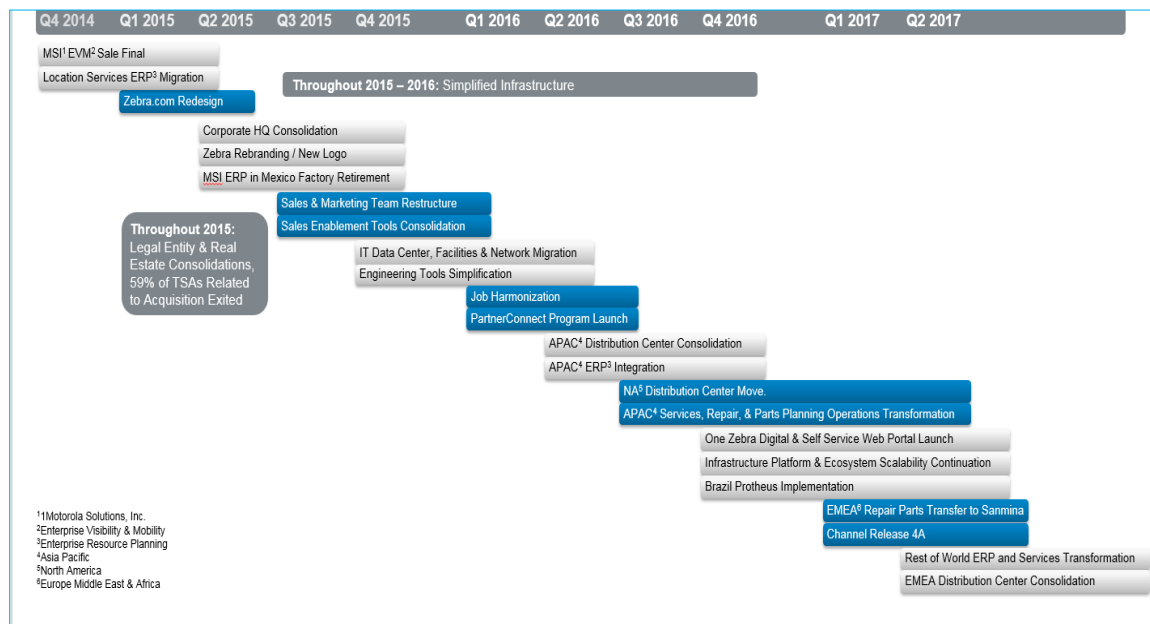
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## One Zebra

The Release 2 learning program designed, deployed, and measured to support change transformation during the final integration period to build One Zebra.

**Figure 2: Transformation Accomplishments Q4 2014 - Q2 2017**



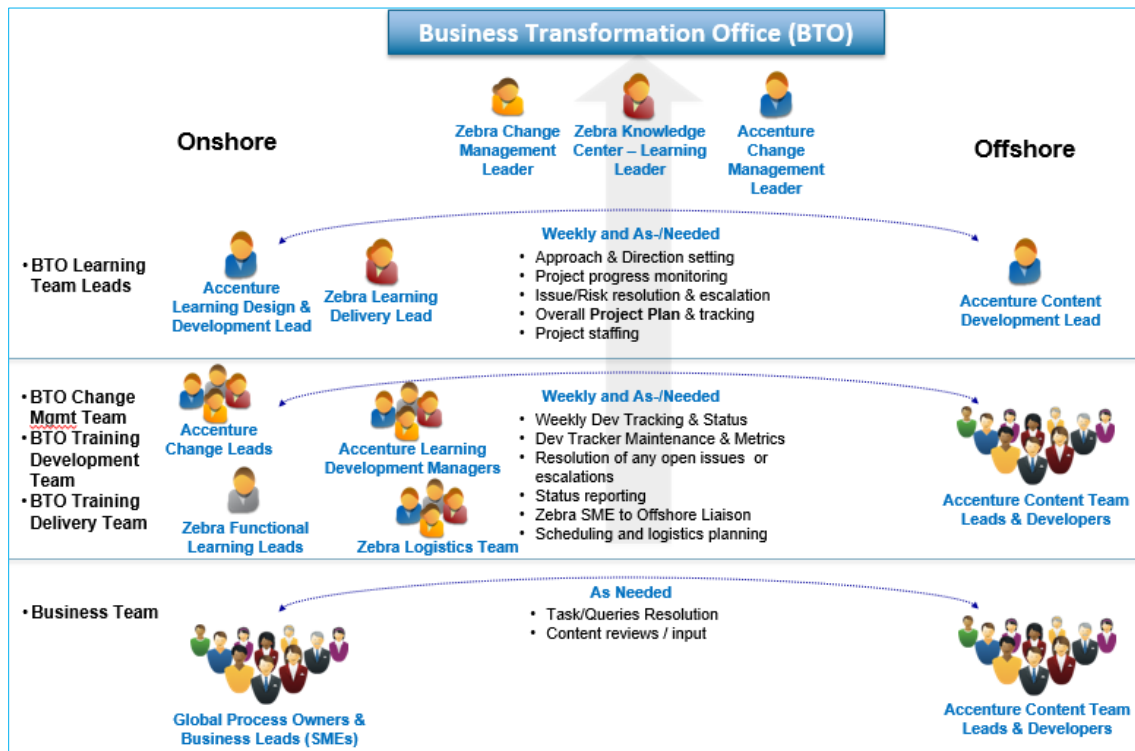
Source: Zebra Technologies Corporation 2017

## Overview

The BTO knew training was one of the core elements for successful CM and included the training team early in the project planning process to build One Zebra. The ZKC Training leadership also recognized the need to build a dedicated BTO CM Learning team that would focus on a single goal – to ensure end users would be business ready for the transformation on May 1, 2017.

The CM Learning team, Zebra and Accenture leads, came together and rapidly staffed experts in Learning & Development, Knowledge Production & Operations, along with CM professionals. An onshore/offshore model was established to meet the urgency of the project.

Figure 3: CM Learning Program Governance – BTO



Source: Zebra Technologies Corporation 2017

The CM Operational Model was supported by a Global Business Engagement Network that represented business functions and sub-business functions.

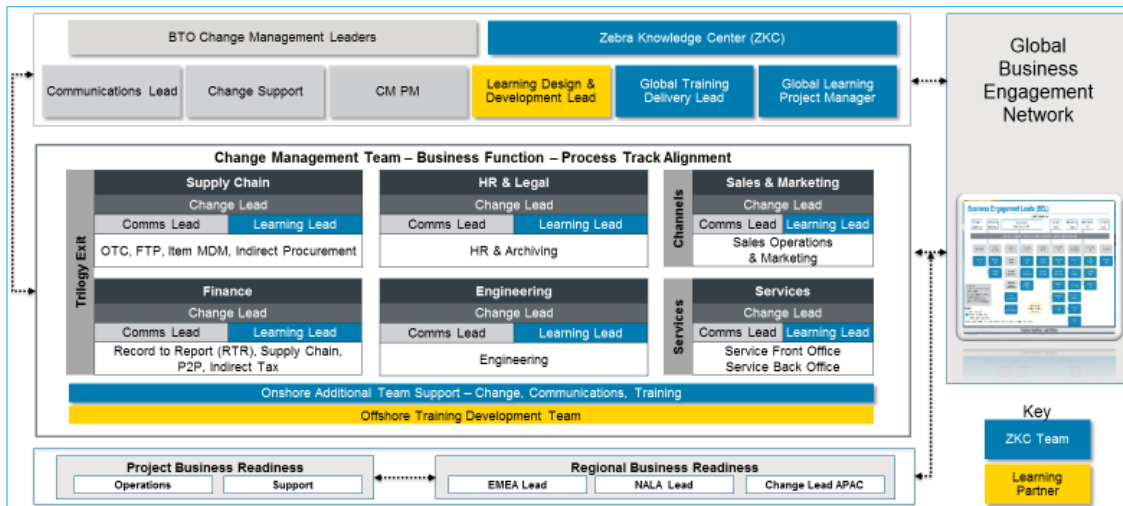
In Release 1, the lesson learned was to improve capacity planning by:

- Earlier involvement of mid-level management to help build awareness of detailed project scope and management responsibility.
- Manage roles and expectations and help socialize training schedules and CM.

The Global Business Engagement Network was instrumental in driving CM and learning throughout Release 2.



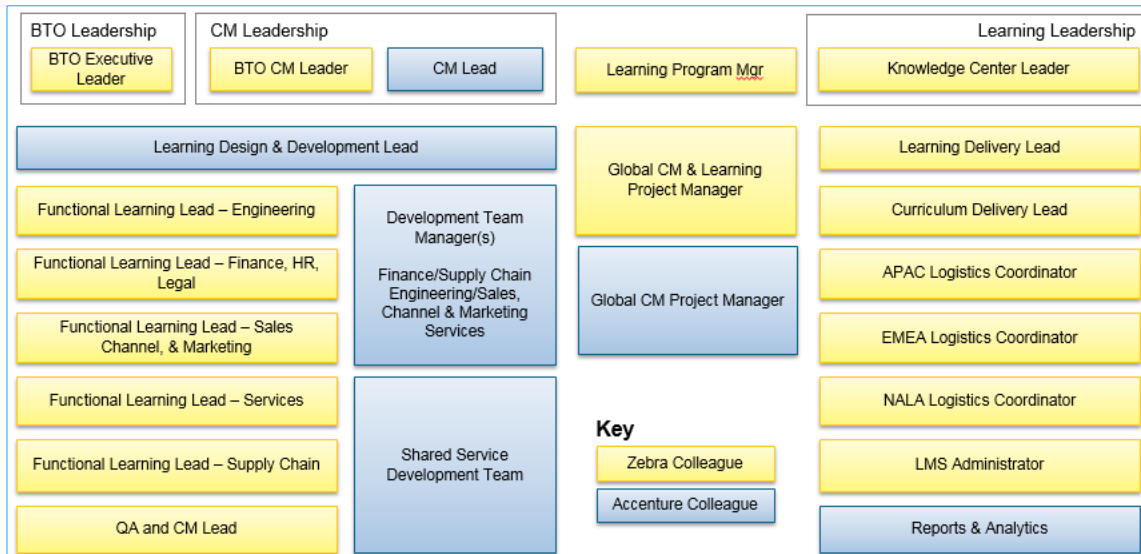
Figure 4: CM Operations Model



Source: Zebra Technologies Corporation 2017

Zebra Functional Learning Leads (FLL) developed business stakeholder relationships in key areas: Engineering, Finance, Sales, Channel & Marketing, Supply Chain and Services.

Figure 5: CM Learning Team



Source: Zebra Technologies Corporation 2017

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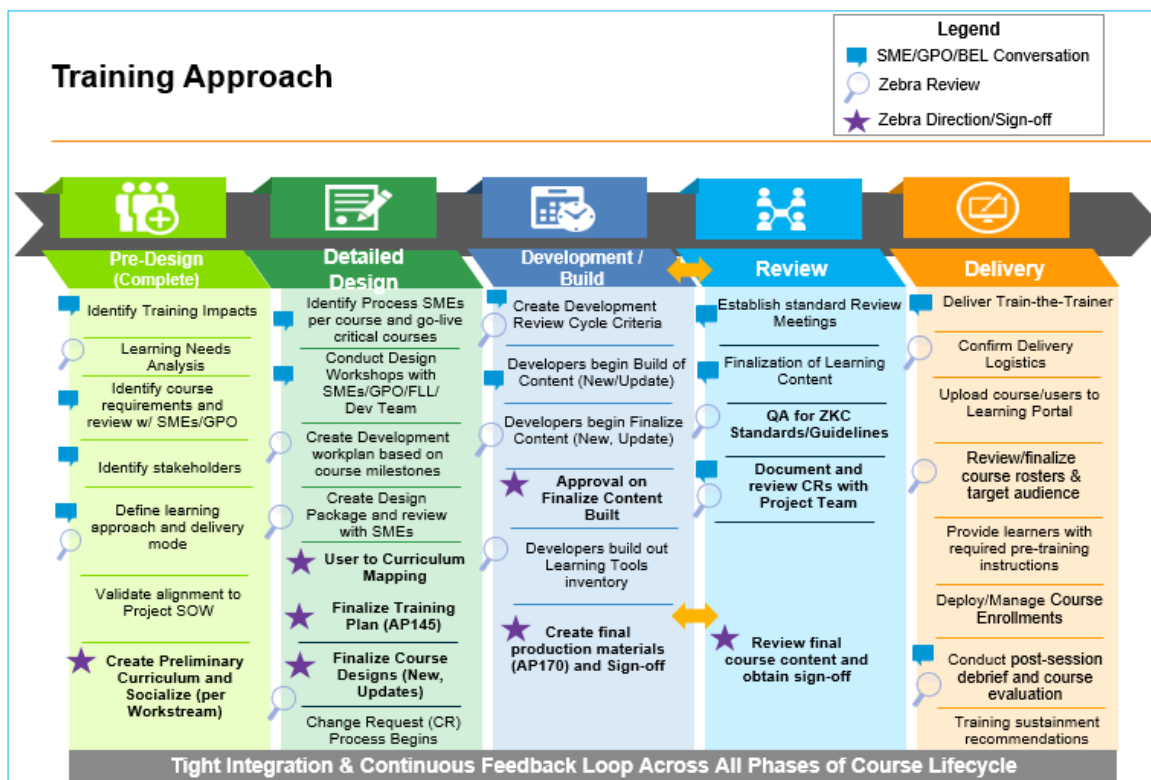


The CM Learning Team set four supporting goals for Release 2 to meet the May 1 business readiness corporate goal:

1. Deliver training courses and other performance tools that enable colleagues to sustain business continuity during and after BTO Release 2 changes in systems and processes.
2. Mitigate risk for BTO Release 2 by offloading training work from the business unit teams where possible and desirable to do so.
3. Meet commitments to time, quality and budget.
4. Capture mission-critical knowledge about core Zebra systems and processes in a central training repository that could be leveraged after May 1.

To accomplish these goals, a training approach was designed by partnering with each of the cross-functional teams to ensure employees, partners, customers, and suppliers were trained prior to the May 1, 2017 Go Live. There are numerous activities within each stage of the approach, Figure 6 below provides an overview of the key activities.

Figure 6: Training Approach



Source: Zebra Technologies Corporation 2017



Throughout the process, discussions took place with Business Engagement Leads (BEL), Global Process Owners (GPO) and Subject Matter Experts (SME).

Project goals were achieved with the delivery of on-time learning via Instructor-Led Training (ILT), Virtual Instructor-Led Training (VILT) and Self-paced/Online Training (OLT). Completion dates were also monitored for informal knowledge transfer sessions.

**Figure 7: Results Achieved by Goal**

Goal	Results
Deliver training courses and other performance tools that enabled our colleagues to sustain business continuity during and after BTO Release 2 changes in systems and processes.	<p>A curriculum that provided users the appropriate knowledge to execute business processes within the new systems/tools on May 1, 2017. Utilized the LMS for enrollment and reporting of training progress. As of May 12th, 2017:</p> <ul style="list-style-type: none"> <li>• 3,723 employees and contractors trained</li> <li>• 4,889 of 5,155 enrollees completed training or were waived by their managers</li> <li>• 2,651 of 2,603 enrollees of critical courses completed training</li> <li>• 339 Internal and 37 external course sessions were conducted around the globe</li> <li>• 37 Knowledge Transfers and 16 Assessments</li> <li>• 23 OLT courses delivered</li> <li>• Materials available on company intranet</li> </ul>
Meet commitments to Time, Quality and Budget	The CM Learning team met all project management tollgates, resulting in approval to cut-over to the new systems and processes on May 1, 2017. We delivered quality learning (as expressed in the employee Feedback Overview shown in the Deployment section) on time and within budget to meet our organizational readiness goal.
Mitigate risk for BTO Release 2 by offloading training work from the business unit teams where possible and desirable to do so.	Release 1 training content was utilized where possible. The offshore team and Functional Learning Leads aided the SMEs in development of net new training materials for Release 2. Our program was tightly project managed with individual project plan trackers, yet allowed flexibility for SMEs to concentrate on critical integration milestones such as Situation and User Acceptance Testing.
Capture mission-critical knowledge about core Zebra systems and processes in a central training repository that could be leveraged after the end of the BTO program initiatives.	<p>Posted on On Zebra SharePoint or Zebra Learning Portal, net new R2 materials included:</p> <ul style="list-style-type: none"> <li>• 56 Job Aids</li> <li>• 36 User Guides</li> <li>• 83 Presentations</li> <li>• 28 Exercise Packets</li> <li>• 23 online learning programs</li> </ul>

Source: Zebra Technologies Corporation 2017

Figure 8: Curriculum Summary – Courses & Learning Hours by Delivery Method

	Delivery Method		Total
	Instructor Led Training (ILT)	Online Training	
Count of Courses	91	23	114
Sum of Course Durations	367.5	23.5	391

Source: Zebra Technologies Corporation 2017

Figure 9: Curriculum Summary – Courses & Learning Hours by Workstream

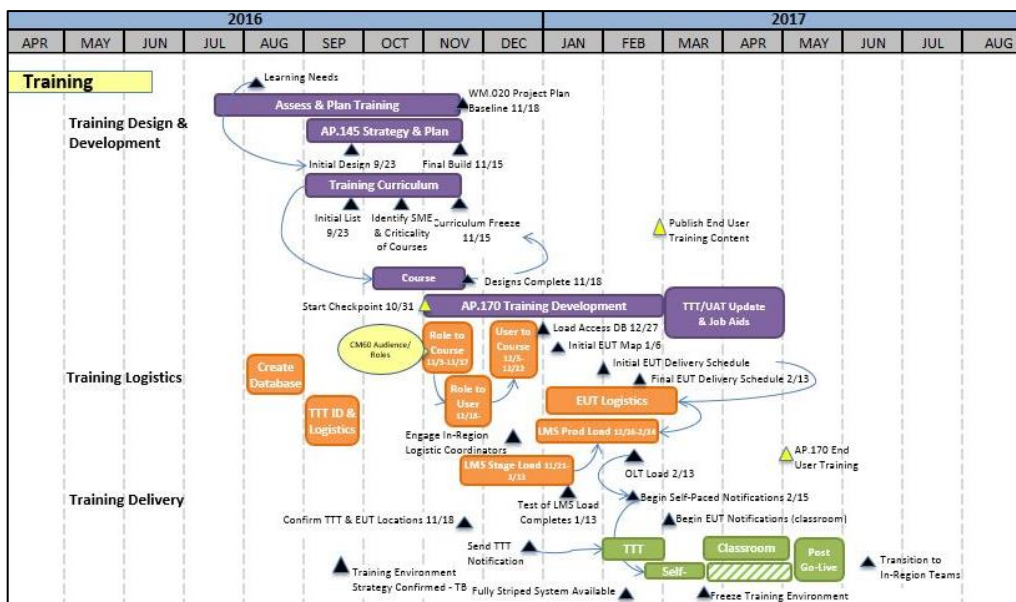
Workstream	Courses Count	Course Learning Hours
Engineering	3	6
Finance	15	86
Sales & Marketing	13	26
Services	41	152.5
Supply Chain	42	120.5
<b>Grand Total</b>	<b>114</b>	<b>391</b>

Source: Zebra Technologies Corporation 2017

## Design

Using the Training Approach from the Overview section, a strategic milestone timeline was implemented to guide CM learning activities with corresponding due dates.

Figure 10: Training Approach from Overview Section



Source: Zebra Technologies Corporation 2017

The starting point of the learning program was the development of the AP145 Training Plan, which is part of Zebra’s Rapid Implementation Methodology (RIM) used to describe the approach, assumptions, and activities to carry out the plan. The AP145 included these objectives:

- Identify the topics needing courseware to be enhanced or developed in the chosen language and identify the business owner to develop and own the courseware.
- Determine delivery methods to deploy the training to the audience.
- Identify responsibilities (which determined the users) that should receive training on each topic.
- Establish a detailed training deployment schedule considering user locale, available training facilities and other relevant factors.

The learning program delivery addressed pre-Go Live critical materials, the training needs of users, and the activities to be performed in the training environment. Delivery was performed by four methods: self-paced online training, Instructor-led classroom, virtual presentations and hands-on with simulation exercises. Training needs focused on users who required Oracle ERP system/process exposure and those who needed to understand the changes to the Siebel Customer Relationship Management and Salesforce.com systems. Training activities included course presentation with set-up and permission access managed by the SMEs, CM Learning PM and training environment leads.

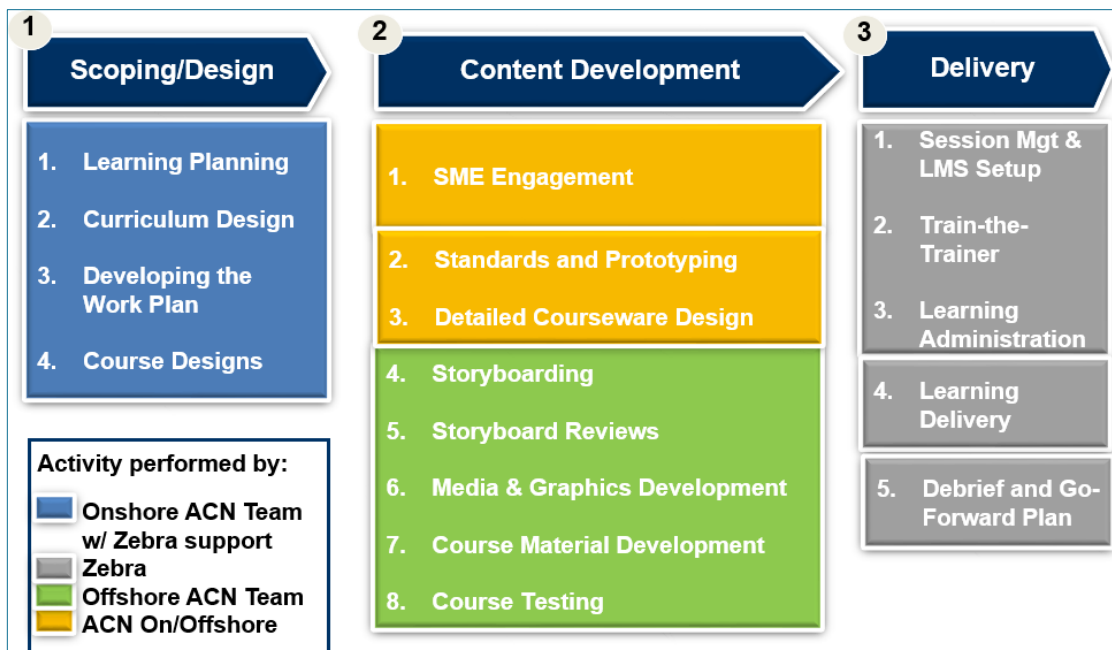
**Figure 11: Training Topics in the Workstream and Process Areas**

<p><b>Engineering</b> Master Data Mgt. MCAD Data Release Process Tooling Asset Mgt.</p>	<p><b>Sales &amp; Marketing</b> CMDM (Master Data Mgt) CPQ-Price Concessions CPQ-Sales Reporting CPQ-Solutions Bldr Upgrade PC Rebates Validation Sales &amp; Mktg Trilogy Release</p>	<p><b>Supply Chain</b> Forecast to Pay (FTP) Indirect Procurement (IP) Item Master Data Mgt (MDM) Order to Cash (OTC)</p>
<p><b>Finance</b> Accounts Payable Accounts Receivable &amp; Collections Costing Fixed Assets General Ledger &amp; Intercompany iExpense Month End Oracle Projects</p>		<p><b>Services</b> Case Management External Repair Field Service Internal Repair Knowledge Management Repair Order Portal Service Contracts Siebel</p>

Source: Zebra Technologies Corporation 2017

The end-user training plan and learning goals were approached by business functional workstream with a blended-training development team. In an introductory meeting with the blended team, goals and objectives were reinforced and discussions covered where in the process the learning activities would be performed and who would be accountable for them.

**Figure 12: How Learning Activities are Delivered Using Onsite/Offshore Resources**

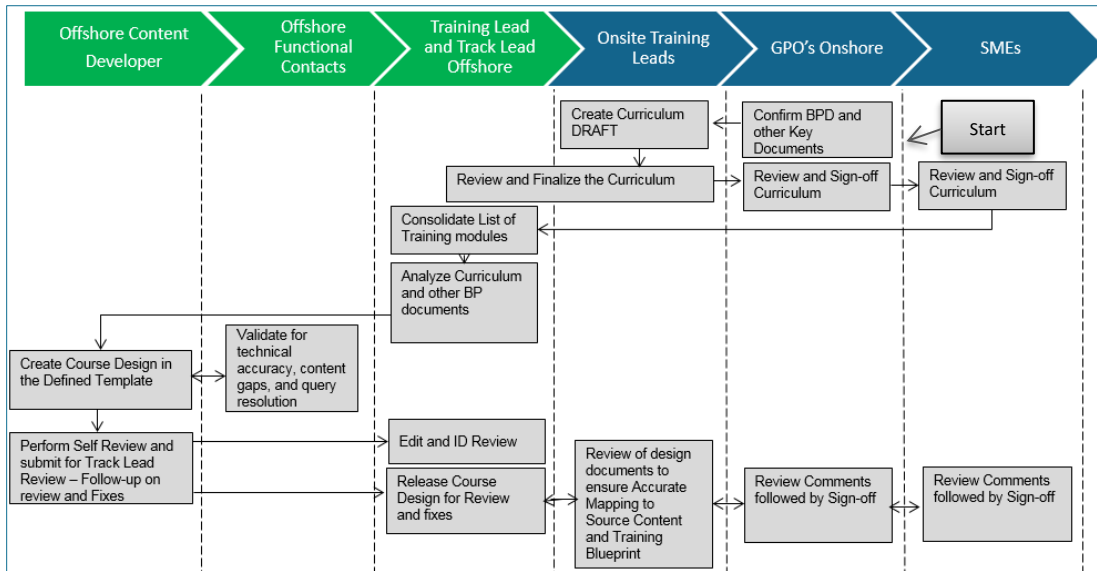


Source: Zebra Technologies Corporation 2017

An overview of the training design process and workflow was provided to all the BELs, GPOs, and Zebra SMEs responsible for creating training content. How the teams would work together and what the approval workflow looked like were shared to get their alignment on the process and understanding of their responsibilities.



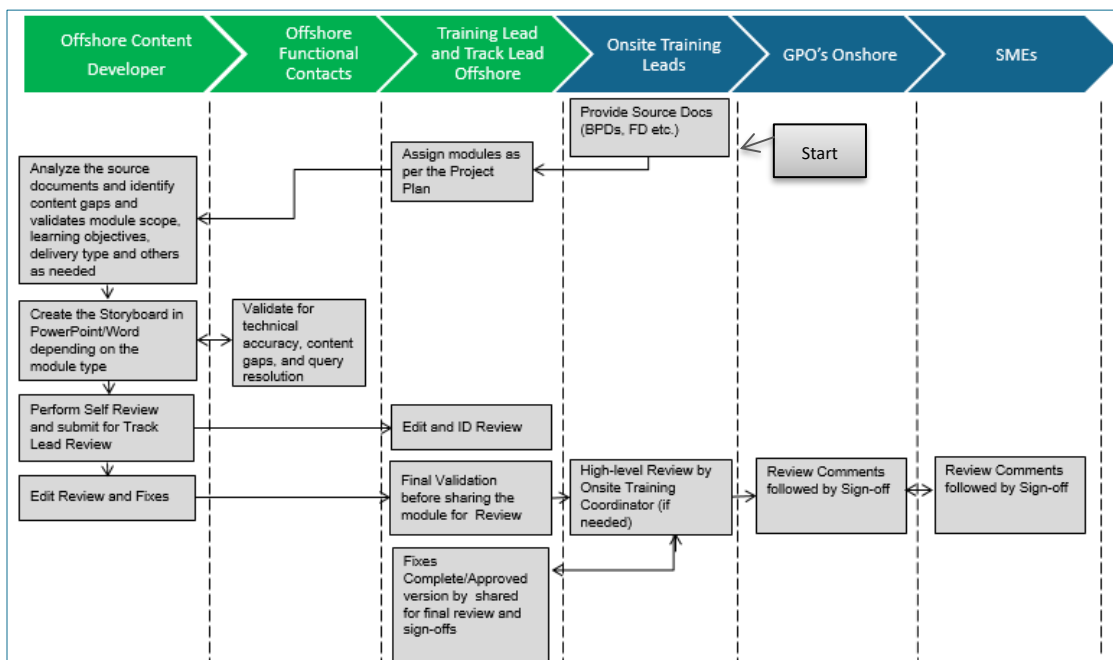
Figure 13: High-Level Training Design Process



Source: Zebra Technologies Corporation 2017

The CM Learning team shared the formal review, document, and approval process with Zebra SMEs, who created the course materials using ZKC templates and standards.

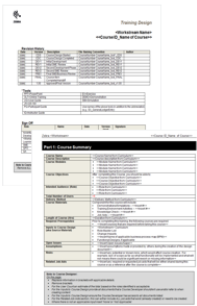
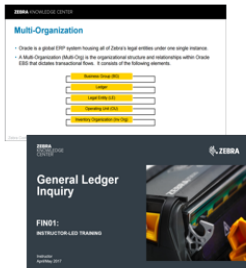


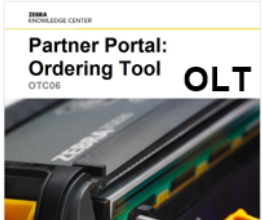


Figure 14: High-Level Training Development Process:



Source: Zebra Technologies Corporation 2017



Figure 15: Key Training Deliverables Made Available to Instructors

Course Design	Presentation	User Guide	Exercise
			
<ul style="list-style-type: none"> <li>• Course outline detailing course flow, topics, exercises, audience, duration, delivery method</li> <li>• Used by Offshore team to start building the course</li> </ul>	<ul style="list-style-type: none"> <li>• Used by the Trainer to run the entire class</li> <li>• Provides intro, process information, key up/down stream tasks, checkpoint questions, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Contains screen by screen, click by click detail on how to execute transitions in the system</li> <li>• Utilized in class for teaching and as post go-live support</li> </ul>	<ul style="list-style-type: none"> <li>• Contains scenarios and sample data to perform a task in the training system</li> <li>• Used by the learners to perform hands-on practice in the classroom</li> </ul>
Self-Paced	Job Aids	Supporting Guide	
			
<ul style="list-style-type: none"> <li>• Self-paced course covering non-screen level process overview information</li> <li>• Taken online by learners before attending classroom training</li> </ul>	<ul style="list-style-type: none"> <li>• 1-2 page "cheat sheets" on key data items and/or tasks – AS NEEDED</li> <li>• Developed as needed to support user post go-live</li> </ul>	<ul style="list-style-type: none"> <li>• Provides Trainers with tools, contacts and information for successful employee training</li> <li>• Instructions with screenshots for securing student rosters and marking attendance in the Zebra Learning Portal (LMS)</li> </ul>	

Source: Zebra Technologies Corporation 2017

After design sessions with key stakeholders, role-based change impacts on end users were understood and creation began on the detailed course outline. Timelines were fine-tuned and communicated and development began on materials, which were tested throughout the development process.

While developing the content, training delivery and assessment were simultaneously planned. Release 2 had a larger impact with more change and risk than Release 1. The approach required tighter scope to address only end users who needed the training to perform their jobs at the time of the integration.

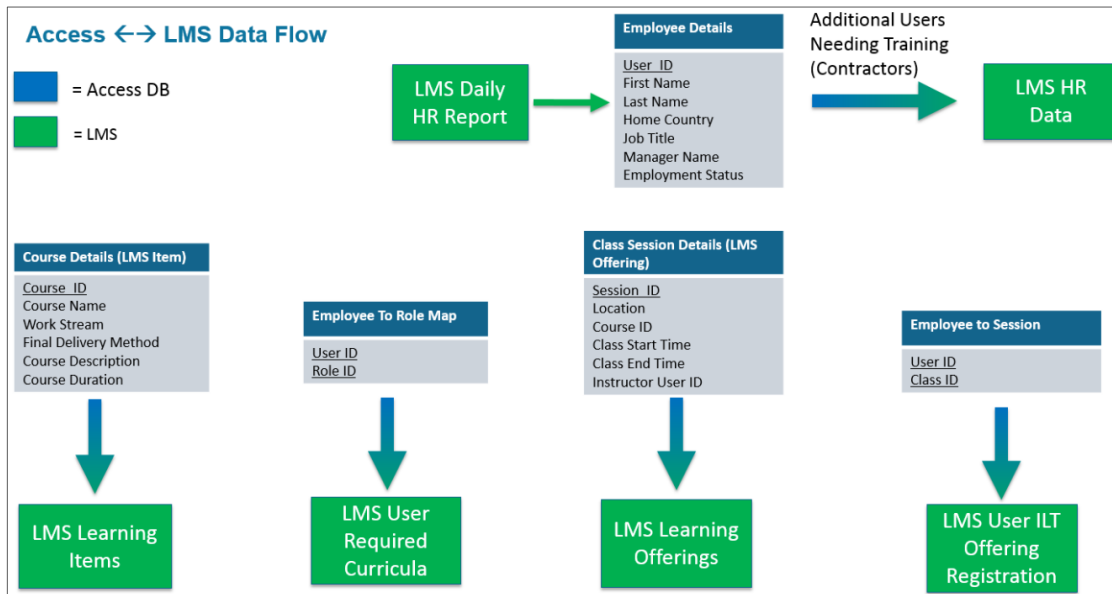
In the company, 498 roles were identified and 410 required CM Learning and/or some informal knowledge transfer. Those roles were mapped to curricula and then mapped the end users to the roles. That information was captured and stored in a standalone database synchronized with the LMS. Utilizing a standalone database prior to uploading to the LMS helped to avoid errors and make easier updates. The database approach was adopted based on lessons learned in Release 1.

**Figure 16: Database Build Steps**

Access DB Build Steps	Corresponding LMS Actions (timing of LMS loads is TBD)
<ol style="list-style-type: none"><li>1. Establish Daily Import of HR LMS data</li><li>2. Confirm complete list of courses</li><li>3. Confirm list of roles</li><li>4. Determine which courses are required by which roles</li><li>5. Determine which users are in scope for BTO R2 training</li><li>6. Assign in-scope users to role(s)</li><li>7. Assign users to courses based off of roles</li><li>8. Evaluate user demand and demographics to determine course modality/delivery method</li><li>9. For courses requiring ILT, determine number of sessions, locations, and dates/time</li><li>10. For users needing to attend ILTs, assign users to sessions for their required courses</li></ol>	<ol style="list-style-type: none"><li>1. Create daily export of HR data for Access import</li><li>2. Upload courses as LMS items</li><li>3. No action</li><li>4. Create Curriculum for each role?</li><li>5. No action</li><li>6. No action, possibly assign users to curriculum</li><li>7. Load course assignments for users</li><li>8. Update Learning items to reflect delivery method</li><li>9. Load class sessions in as item offerings</li><li>10. Load user enrollments in sessions (ILT offerings)</li></ol>

Source: Zebra Technologies Corporation 2017

Figure 17: Database to LMS Data Flow



Source: Zebra Technologies Corporation 2017

The learning program resulted in a strategy and delivery schedule that would meet the organization's business readiness. Courses that were critical for business readiness would require 90% attendance and/or 100% pass completion of assessments. Non-critical but required courses would require 75% attendance.

As the masses were reached with training content and knowledge transfer, the metrics would be secured to help pass important toll gates and provide the validation needed for Go Live readiness.

## Deployment

The CM Learning Logistics Team established early communication with IT and administrative personnel at the 23 locations where on-site training was to be held. The onsite ILT with numerous courses and sessions was conducted across eight countries. Coordination included training logistics, IT support from resources in Penang, Brno, Lincolnshire, Holtsville, Bourne End, and India plus LMS support from France and the United States.

Figure 18: CM Learning Logistics Training Locations

Countries	Training Location(s)	Total
<b>Brazil</b>	Sao Paulo	4
<b>Canada</b>	Mississagua	1
<b>Czech Republic</b>	Brno	49
	EMEA	2
<b>Malaysia</b>	Penang	19
<b>Mexico</b>	Juarez	6
	Mexico City	4
	Reynosa	38
<b>Netherlands</b>	Heerenveen	2
<b>UK</b>	Bourne End	13
<b>US</b>	Agoura Hills	1
	Atlanta	3
	Baltimore	3
	Bentonville, AR	10
	Buffalo Grove, IL	4
	El Paso, Texas	4
	Holtsville	21
	Lincolnshire	18
	McAllen	5
	Minnesota	1
	North Carolina	3
	San Jose	1
South Carolina	2	
<b>Grand Total</b>		<b>214</b>

Source: Zebra Technologies Corporation 2017

The training plan and schedule were communicated to the IT and administrative teams to prepare such necessities as updated PC imaging, network stability, secured and readied back-up laptops, IT support, and a process for the Application Security Team to follow if trainers or students experienced any challenges accessing the Zebra training environment for classroom exercises or hands-on learning.

Logistics management concentrated on two methods of training delivery: ILT and VILT conducted via WebEx® or Skype®.

The LMS was utilized for scheduling students for classes. Employees received a general notification that they had been pre-enrolled into courses. The general enrollment notification was followed by detailed invites from the trainer and an attached .ics

calendar file that employees could save to their Outlook calendars. Zebra's Communications team and the BEL Network were leveraged to help students and their managers stay current on their course session assignments and corresponding details.

- 339 scheduled offerings (214 ILT) were created for 114 courses developed for Release 2.
- 91 courses were instructor-led (traditional or virtual classroom) plus 23 online eLearning courses were used as standalone learning, supplemental learning, or prerequisites for some of the instructor-led courses.

The Release 2 training started on February 9, 2017, and continued through May 19, 2017 (post May 1 Go Live for non-critical courses). SMEs and designates served as trainers. It was important that they be prepared to present materials effectively and be provided an opportunity to practice with the learning materials and course content.

A trainer-readiness approach and assessment was created to evaluate and score each trainer so a Train-the-Trainer (TTT) program could be recommended.

**Figure 19: TTT Approach**

### Executive Summary

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- **Objectives:**
  - Mitigate Q2-2017 launch readiness risk due to trainer inexperience
  - Adopt Most Viable Product (MVP) approach given resource constraints and timeline
- **Approach:**
  1. Score all trainers on the basis of multiple criteria  
Assessment spreadsheet available for review
  2. Sort courses into tiers by criticality
  3. Distinguish multiple levels of train-the-trainer (TTT) support we may extend to instructors
  4. Focus TTT interventions on high-risk instructors teaching critical courses

Source: Zebra Technologies Corporation 2017

Scoring criteria for each trainer included: 1) level of overall training experience, 2) Release 1 training experience, 3) knowledge of the training materials, and 4) consensus recommendation of the Business Lead (BL), FLL, and GPO. The CM Learning Team made the final decision to accept or reject a trainer.



The prioritization of attendees for a TTT program was based on the course rank and the impact on organizational readiness.

**Figure 20: Prioritization View with All Workstreams**

Course Tiers	# for Full TTT	# for Lite TTT	# for Logistics Only	Total
Tier 1 (90% & Test)	26	12	3	41
Tier 2 (90% attend.)	11	7	4	22
Tier 3 (All others)	29	23	13	65

Plans aligned with GPOs:

- Services: Tier 1 (34 of 41) , Tier 2 (9 of 24) and Tier 3 (16 of 66)
  - *Highest Risk - Service Contracts, Case Management and Repair per Laura Palmiter*
- Sales, Channel & Marketing: No Tier 1, Tier 2 (9 of 24) and Tier 3 (19 of 66)
  - *High Risk – Experienced trainers with new content (28 people)*
- Supply Chain: Tier 1 (7 of 41), Tier 2 (12 of 24) and Tier 3 (13 of 66)
  - *Risk – Newer trainer focus (Ketan Sharma) (EMEA OM may be mute point to TTT)*
- Finance: Tier 1 (0 of 41), Tier 2 (1 of 24) and Tier 3 (11 of 66)
  - *Risk – Low risk, GL Inquiry addressed by Mary Zeck with team (in Tier 3 area) (Luis ILT)*
- Engineering: Tier 1 (0 of 41), Tier 2 (1 of 24) and Tier 3 (4 of 66) *Risk – Little to no risk.*

Source: Zebra Technologies Corporation 2017

It was decided to provide full TTT sessions to Tier 1 and Tier 2 high-risk trainers and support all other trainers with self-study and online sessions. The CM Learning Team created sessions to address trainer preparation, WebEx instructions, facilitation skills, handling challenges, and other professional-training tips.

**Figure 21: Train-the-Trainer Support Options**

- 1. SELF STUDY (TTT Lite)** Listen to online recordings and view job aids for best practices in presentation ILT, Virtual and How to Set-up WebEx. (2.5 hrs)
  - 2. FULL TTT SESSION** Group or Individual session to get comfortable presenting with training content. Includes suggestions and feedback after presentations. (8 hrs avg per person)
  - 3. LOGISTICS ONLY** Virtual session set-up how-to closer to training dates where the Trainer Support Guide is reviewed along with onsite logistics (1 hr)
- ✓ Analysis Conducted Based on R1, BL/GPO/FLL Input, Training Experience

Source: Zebra Technologies Corporation 2017

An instructor guidebook and checklist supplemented the trainer preparation and online session. The guidebook included step-by-step instructions to obtain class details, student roster, and mark attendance in the LMS. The guidebook also shared detailed information

on securing IT, training environment support, and administrative assistance where needed to ensure both the instructor and learner could have an uninterrupted experience.

After delivering a course, trainers updated attendance by marking a status as complete, no-show, or waived. With the LMS data, the CM Learning team was able to regularly report on progress to ensure critical courses would meet 90% attendance.

After a course, employees were sent a survey focused on end-user. Results were tracked via the LMS Training Evaluation Report.

## Figure 22: LMS Feedback Overview



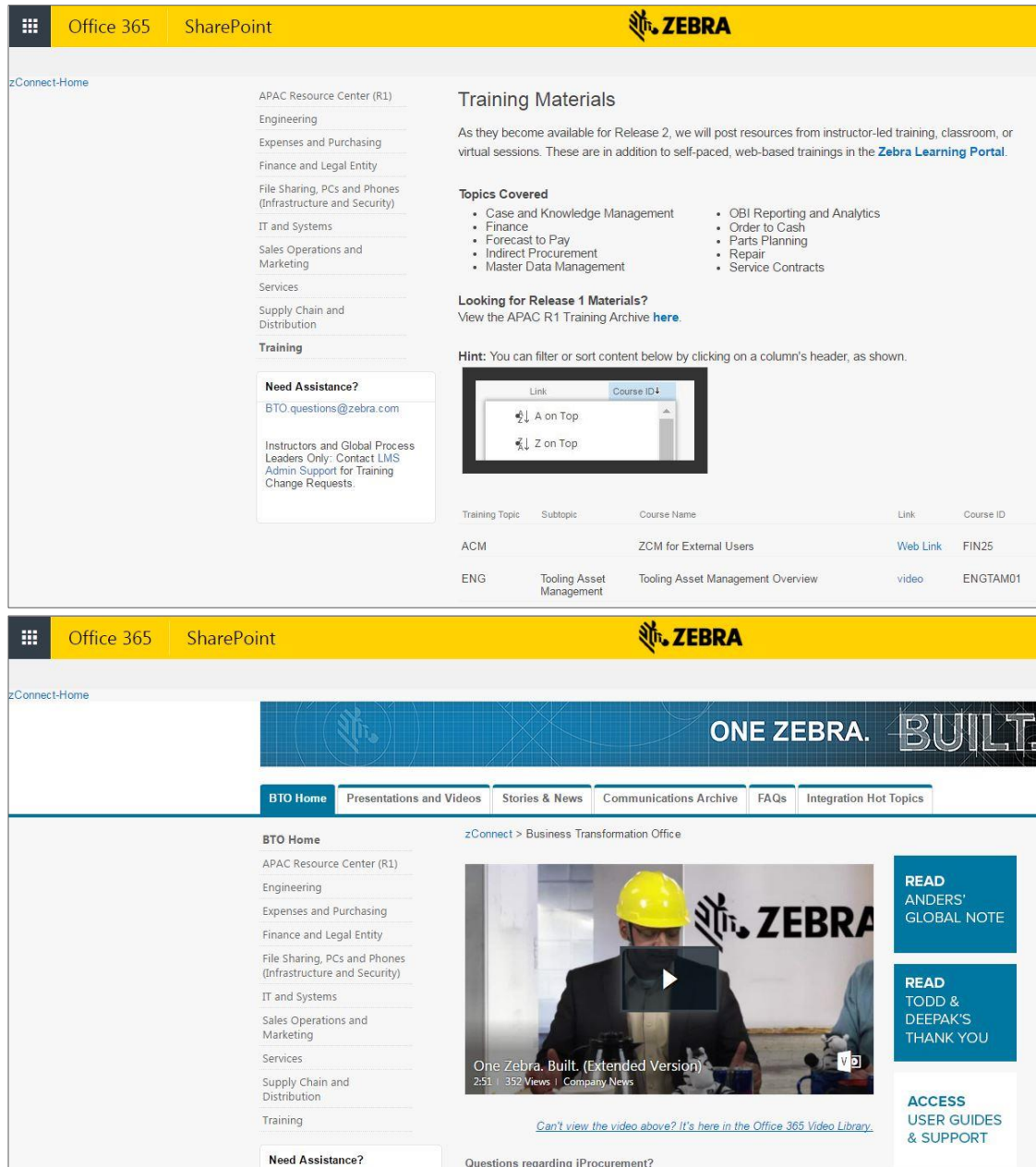
Source: Zebra Technologies Corporation 2017

After May 1 Go Live, support was provided by instructors who remained onsite to help with the transition. Instructors trained Super Users to assist with learning support and sustainment so immediate response could be given to those who needed help after the trainer left.

During the weeks following Go Live, a Command Center captured issues and created service tickets. The need for additional training or support was identified based on the ticket description and criticality of the issue. To date, no known gaps in training have been identified by the command center.

Sustainment of learning for Release 2 was achieved by password-protected access to all training materials in a company SharePoint location. Users can filter and find content such as course presentations, user guides, and job aids, and links to the LMS for OLT, recordings, and third-party training content.

Figure 23: Screenshots of zConnect SharePoint Platform



Source: Zebra Technologies Corporation 2017

Upon completion of CM training, the ZKC will work with the business-unit functional leads to manage training-content maintenance and change requests and to govern quality and usability for end users.

## Change Management Efforts

Given the global scope and impact of Release 2, there were two main challenges faced by the BTO CM team:

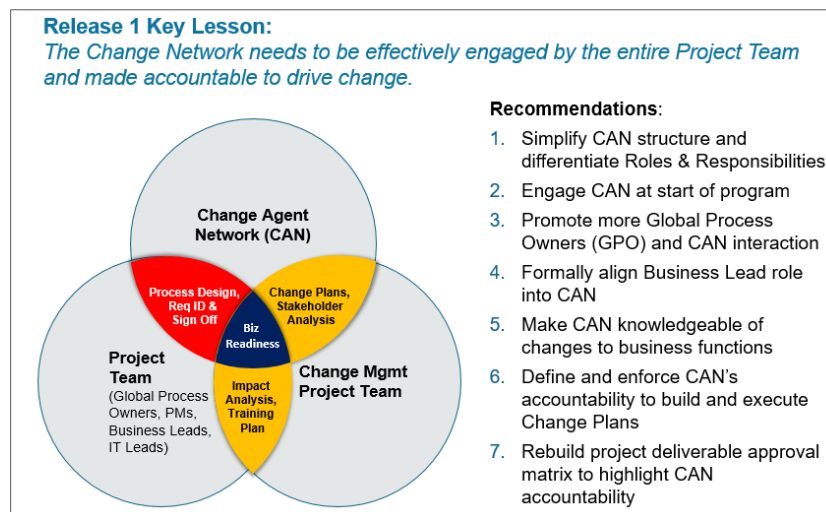
- Navigating multiple process-solution tracks to create a holistic cross-functional view of changes.
- Creating a pull from business stakeholders so that they drive change within their organizations.

Building upon Release 1 lessons learned, the BTO CM team tackled these challenges in the following ways:

**Re-Defining the CM Operating Model.** The BTO CM Leadership understood that business engagement was a critical component of the transformation. In Release 1, the Zebra team established a Change Agent Network (CAN) comprised of regional team members who had knowledge of the overall project goals as well as the day-to-day business needs. The CAN was effective in championing and reinforcing each aspect of the CM approach but there were areas for improvement. A post-Release 1 review highlighted the need for an expanded network held accountable to drive change.

A revised CM operating model was implemented to create pull from the business and better alignment among Business Stakeholders, the CM Team, and the Process Teams.

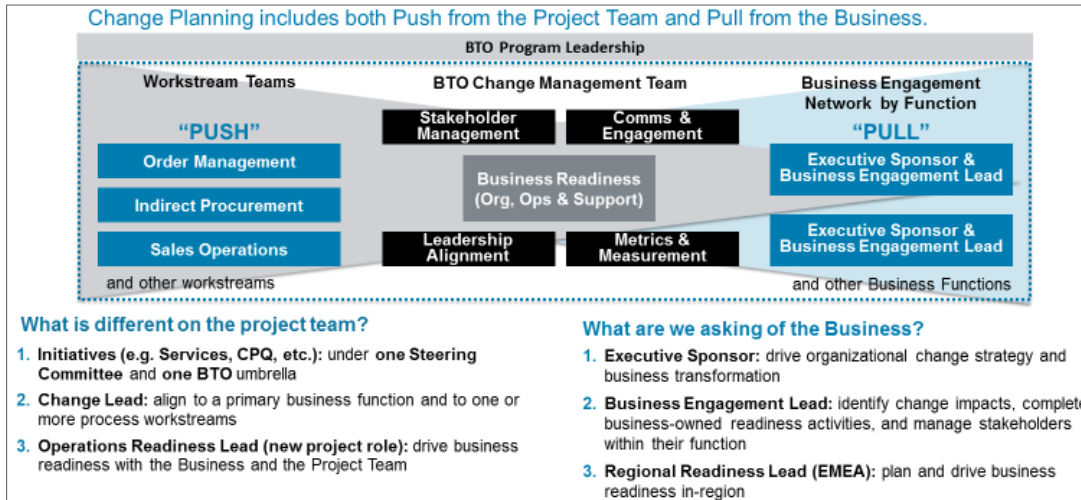
**Figure 24: Key Differentiators of the Revised Operating Model**



Source: Zebra Technologies Corporation 2017



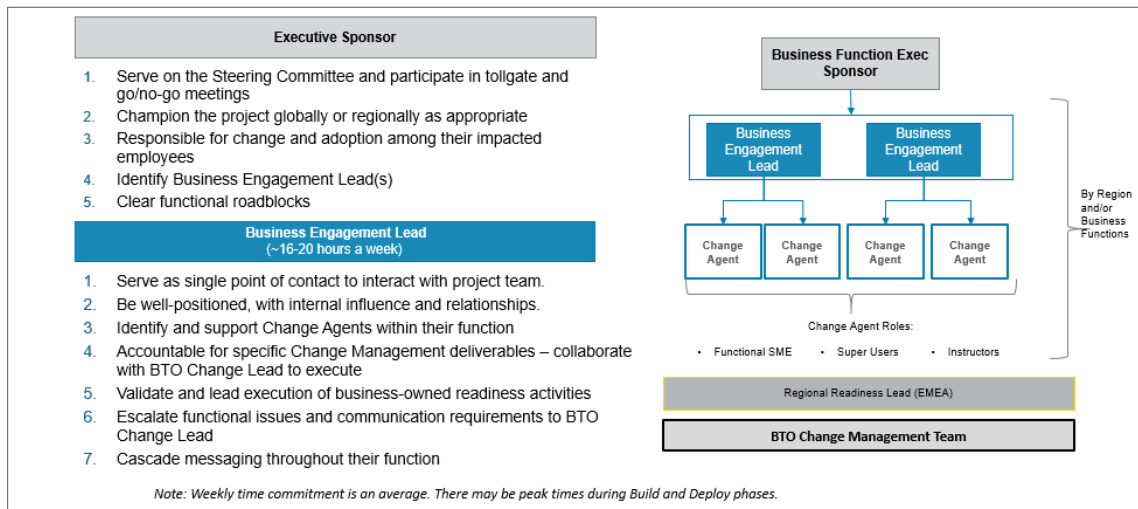
**Figure 25: Business Readiness Approach**



Source: Zebra Technologies Corporation 2017

By aligning CM Leads functionally with the BELs, the team successfully proposed, socialized, and implemented what the organization needed to support the changes. The CM Team met with executive sponsors and BELs biweekly to provide updates and assign business-readiness tasks.

**Figure 26: Key Responsibilities of Executive Sponsors & BELs**

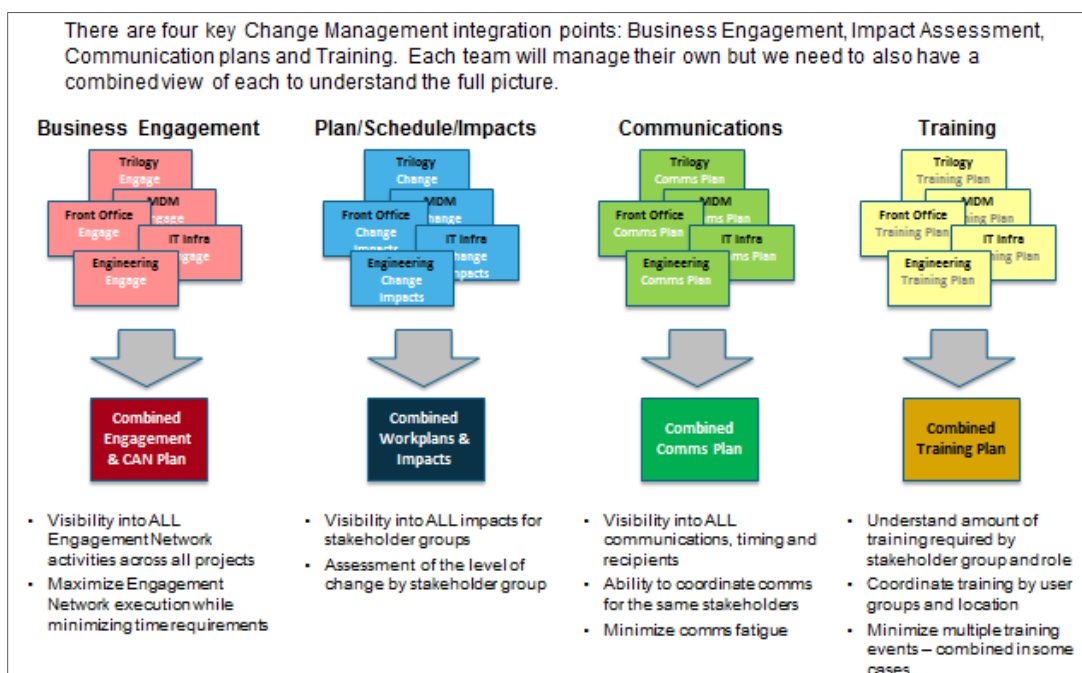


Source: Zebra Technologies Corporation 2017



**Integrating Initiatives & CM.** The BTO provided overall CM Leadership and CLs. In Release 1, CLs were aligned to each initiative with a “4-in-the-box” governance model: BL, IT Lead, CM Lead, and Program Manager. As outlined in the previous section, CLs in Release 2 were primarily aligned to a business unit and to one or more process initiatives. For example, the CM Lead for the Supply Chain organization supported Order to Cash, Forecast to Pay, Item Master Data Management and Indirect Procurement.

**Figure 27: Integration CM Across Initiatives**

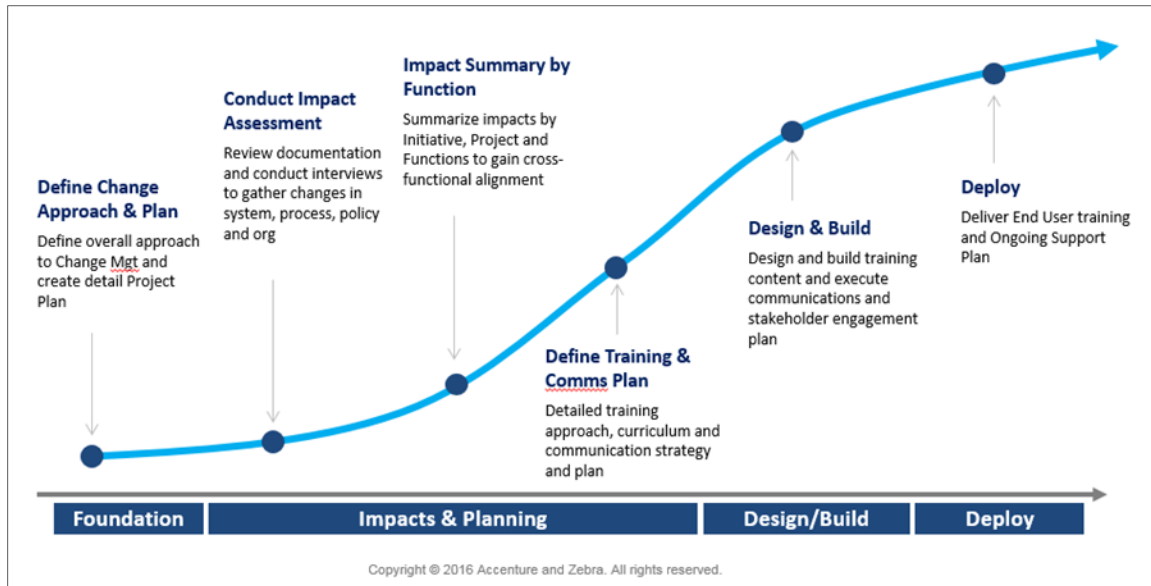


Source: Zebra Technologies Corporation 2017

The CLs collaborated with GPOs and BELs to provide valuable inputs to the Communications and Training Teams which followed a shared services model.

**Establish a Common Change Approach.** To prepare people to adopt the new way of working at Zebra, the Zebra team adopted a CM approach that led people through the change from current state to future state.

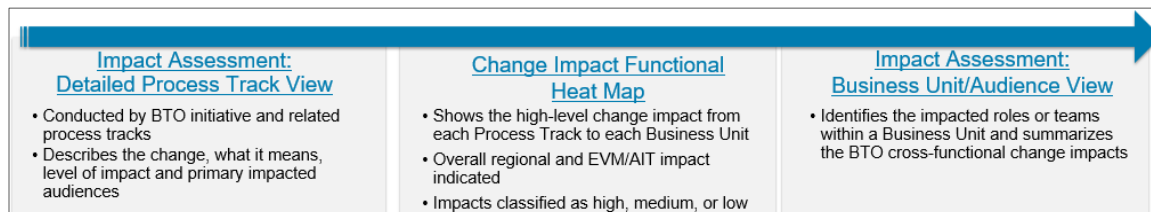
Figure 28: CM Approach



Source: Zebra Technologies Corporation 2017

Given the new CM operation model, the BTO CM team modified some activities and templates. Certain deliverables were simplified to enable business consumption. For example, the CM Team created a cross-functional impact assessment by process and impact summaries by Business Unit roles. In other cases, more rigorous approaches and processes were put in place to manage large volumes of information (e.g., End User Functional Roles and Training Mappings).

Figure 29: Change Impact Assessment Views



Source: Zebra Technologies Corporation 2017

**Establishing Common Business Readiness Framework.** The BTO deployed a common business-readiness framework across program initiatives to help guide activities, milestones and reporting. This framework was effective in helping understand key project activities regardless of how those activities were being managed behind the scenes. The business readiness framework was applied until Go Live.

Figure 30: Business Readiness

<ul style="list-style-type: none"> <li>Structured approach to identify, manage, and track <b>go-live critical activities and issues/risks</b></li> <li>Tasks span <b>across project teams and business functions</b></li> <li>Readiness tasks are tracked in <b>4 readiness categories</b> or pillars</li> <li><b>Regular checkpoints</b> to assess task completion and business readiness</li> <li>Provides inputs to <b>Tollgates and Go / No-Go</b> recommendations</li> <li>Given the Q2 2017 scale and scope, engagement with the business is critical to <b>drive readiness and adoption</b>.</li> </ul>	<p><b>Organizational Readiness</b> <i>Are employees, customers, partners, distributors ready?</i></p> <ul style="list-style-type: none"> <li>Training</li> <li>Communication</li> <li>Organization</li> <li>Roles</li> </ul> <p>Examples:</p> <ul style="list-style-type: none"> <li>People in their new roles/roles defined</li> <li>Training completed</li> <li>Change leads in correct site locations</li> </ul>	<p><b>Solution Readiness</b> <i>Are processes defined &amp; ready?</i></p> <ul style="list-style-type: none"> <li>Application</li> <li>Technology</li> <li>Legacy</li> </ul> <p>Examples:</p> <ul style="list-style-type: none"> <li>Successful Test Completion</li> <li>Open Issue analysis</li> <li>Production Environment availability</li> </ul>
	<p><b>Operational Readiness</b> <i>Are systems ready for handoff to business?</i></p> <ul style="list-style-type: none"> <li>Cutover Plan &amp; Data Conversions</li> <li>Business Data Cleanup/Validation</li> <li>Pre cutover Business Tasks</li> <li>Business Cutover Tasks</li> </ul> <p>Examples:</p> <ul style="list-style-type: none"> <li>Cutover Communications sent</li> <li>Legacy shut down / switch complete</li> <li>Master Data loaded</li> </ul>	<p><b>Support Readiness</b> <i>Are support teams ready?</i></p> <ul style="list-style-type: none"> <li>Stabilization</li> <li>End State support</li> </ul> <p>Examples:</p> <ul style="list-style-type: none"> <li>Support team in place</li> <li>Super Users in place</li> <li>End users know how to obtain support</li> <li>Ready to communicate</li> </ul>

Source: Zebra Technologies Corporation 2017

## Measurable Benefits

### Primary Goal

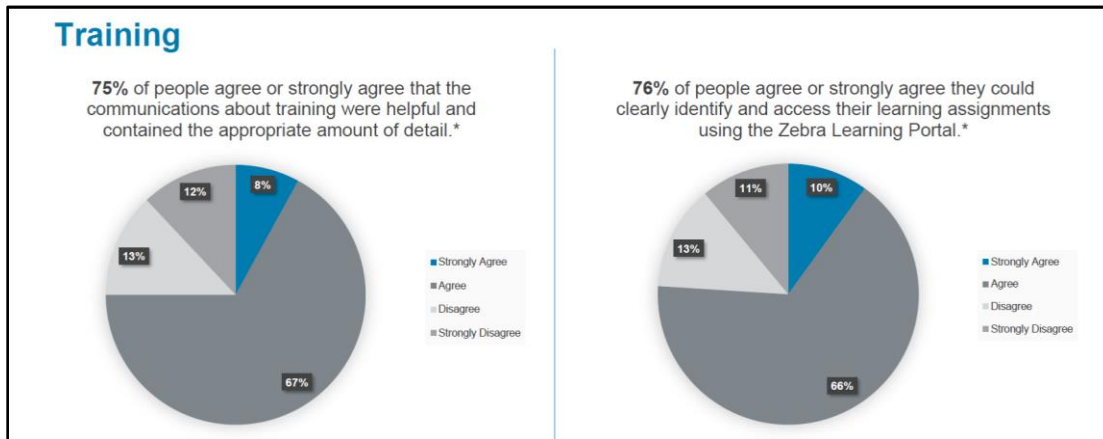
The primary goal of this program was to ensure end users would be business ready for the transformation on May 1. That objective means the training team needed to mitigate the risk to business continuity of a major-integration Go Live by preparing ~3,500 employees to perform their new roles on launch day and for the weeks and months following. The BTO had confidence that the general approach adopted in the initial phase of the integration would secure this result if employees were successful in executing at scale.

At this writing, they are at Go Live + 14 days and the results observed validate the training approach. Business continuity has been achieved. Most core workstreams have been at green status during the immediate Go Live critical support window. Most of the significant issues have been localized in a single workstream and traced to data/systems issues unrelated to employee readiness.

The initial results are evidence that the CM learning program fulfilled its primary goal. Training courses and other interventions delivered were, in most or all cases, at least directionally appropriate for the change in processes and systems and reached the populations who required the information. The learning team also received employee

confirmation of readiness through the Employee Readiness Survey sent by BTO Communications. Survey results shown below were captured one month prior to Go Live.

**Figure 31: BTO Communications Survey - Organizational Readiness**



Source: Zebra Technologies Corporation 2017

## Program Measures

The CM Learning Program met the project goals of schedule, budget, and quality. The programs were developed and delivered on time, on budget, and with the requisite quality.

**Figure 32: Zebra Program Scale at a Glance**



Source: Zebra Technologies Corporation 2017

Change Requests (CRs) were common as the business refined solutions, continued to onboard workers, and rescheduled key resources due to adjusted priorities (517 requests were logged, disposed, and actioned as appropriate). CRs occurred from the latter half of the development window through the delivery window.

**Figure 33: CM Learning Volume Trendline of Managed CRs**



Source: Zebra Technologies Corporation 2017

**Key performance indicator (KPI) thresholds.** Training courses in the program were divided into critical and non-critical categories. A subset of the critical courses was assigned formal knowledge assessments. Go Live readiness thresholds were established for these categories:

- 100% of learners assigned knowledge assessments passed the assessment.
- 90% of the learners assigned to each critical course completed the course.
- 75% of the learners assigned to each non-critical course completed the course.

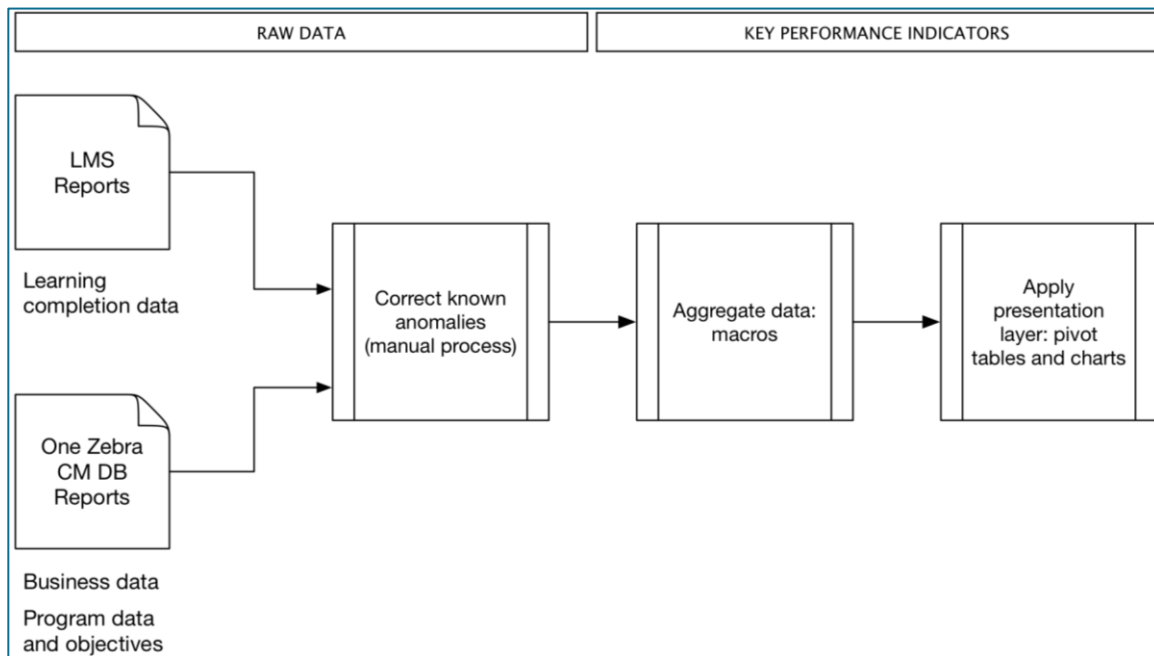
**KPI reporting.** During the volume-execution phase of the program, the CM team presented weekly or twice-weekly reports to the business transformation steering committee, business and process leads, and senior executives.



**KPI approach.** The reporting process relied upon multiple data sources:

- The Zebra Learning Portal (LMS).
- A standalone program and roles database (CM Database).

**Figure 34: CM Learning KPI Approach**



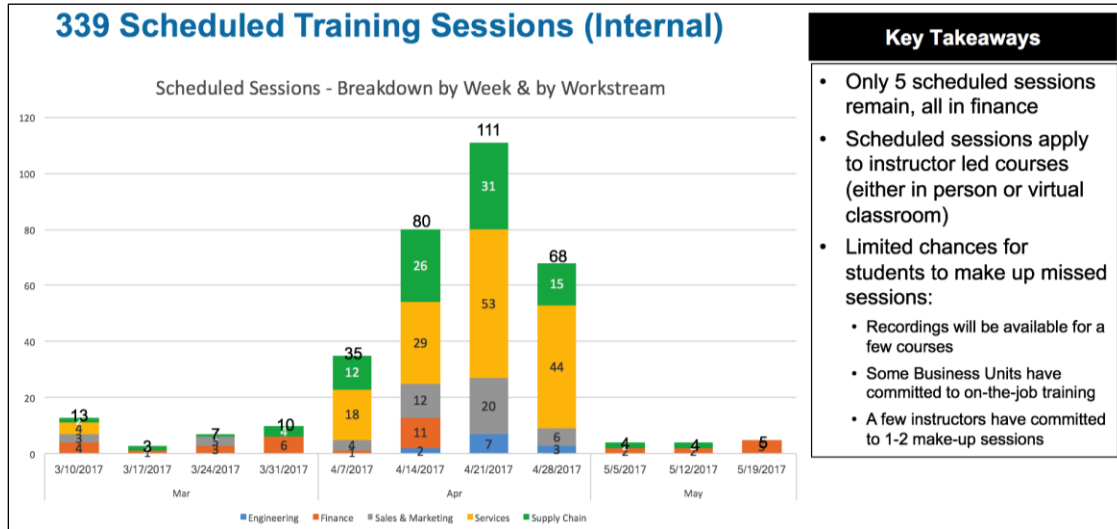
Source: Zebra Technologies Corporation 2017

**KPI package contents.** The program’s regular KPI package had two parts. The first was a summary presentation designed for consumption by business-area leads and senior leaders.

The second part was a detailed workbook containing raw measurement data with a presentation later comprised of pivot tables. This enabled BELs or their reports to review completion status (and overdue completions) at whatever level of detail they wished.

## Sample Completion Views

Figure 35: Volumetric View of ILT Scheduled Sessions by Week of Delivery



Source: Zebra Technologies Corporation 2017

Tracked instructor-session completions for the subset of courses deemed critical for business readiness.

Figure 36: ILT Completions View

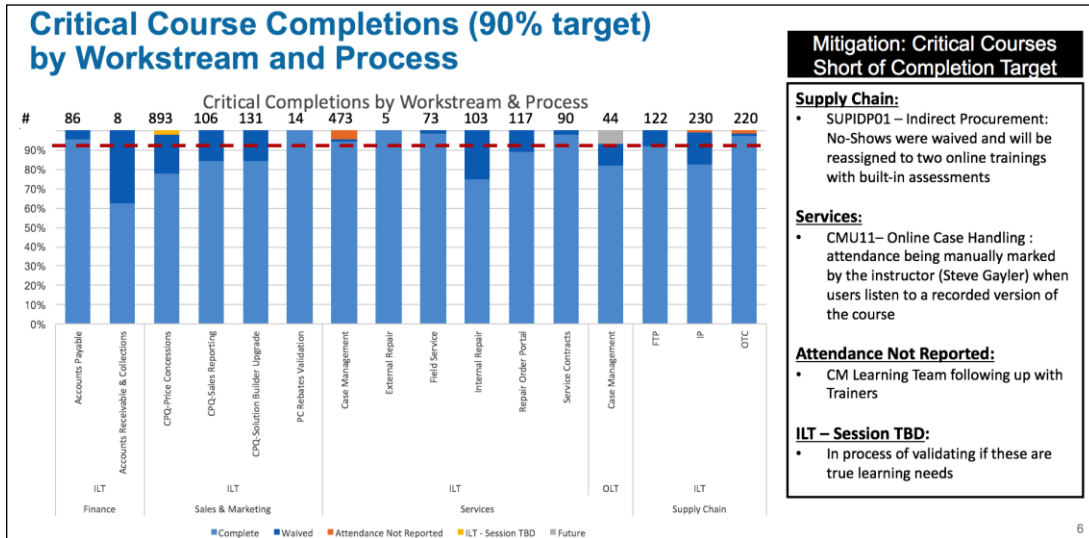


Source: Zebra Technologies Corporation 2017

## Completion Data

This data also was presented to enable business stakeholders to assess readiness in their area of operations.

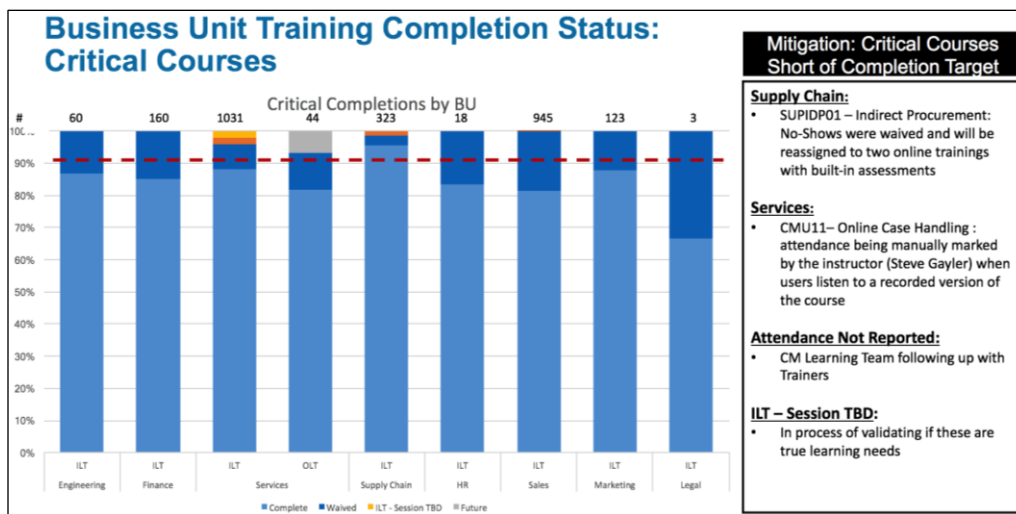
Figure 37: Critical Course Completions by Workstream and Process



Source: Zebra Technologies Corporation 2017

In some cases, courses in one functional area were assigned to learners across multiple functional areas. Views were provided that allowed leaders to assess the progress of the members of their extended organizations.

Figure 38: Training Completion-Critical Courses by Business Unit



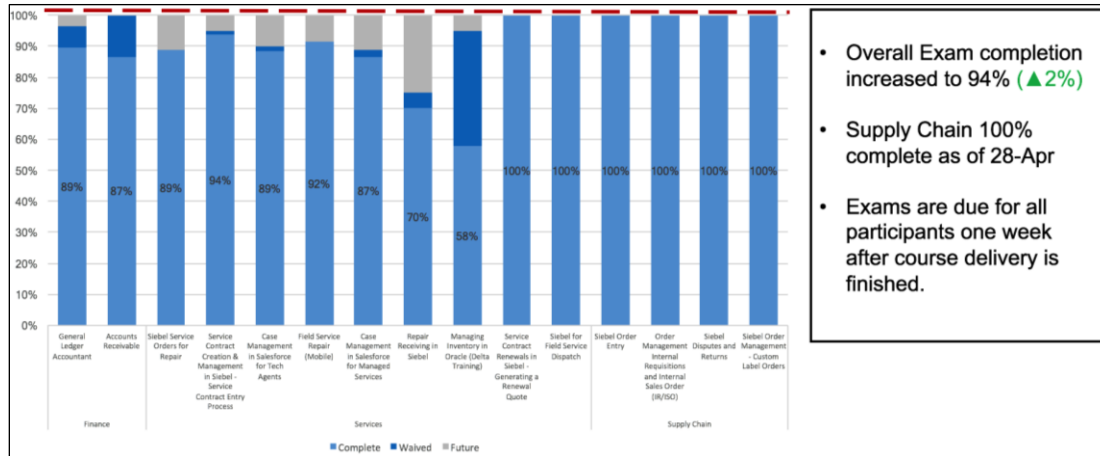
Source: Zebra Technologies Corporation 2017

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Knowledge assessment completions were reported by exam instance and workstream.

Figure 39: Assessments (Exams) by Workstream



Source: Zebra Technologies Corporation 2017

The CM learning program included an external learning component reported separately.

Figure 40: External Training Summary View

Live Sessions = 100% Delivered [34 total sessions: 9 Partner, 29 Distributor, 9 Customer, 5 Supplier]

Course	Business Unit	Delivery Method	Delivery Plan	# Sessions Delivered / Total	Invite Sent (target date)	CM50 ID (Invite Link)	Audience			
							Partner	Distributor & Tier 1	Customer	Supplier / 3PL
Solution Builder Catalog Upgrade for Partner Users (SMSB01)	Sales	Recorded Webinar	Available on 20-Apr	Done	4/20	446	X	X		
eContracts for Distributors (COE01)**	Services	Virtual Instructor Led WebEx	April 24 – April 25	Done (4)	4/11	447		X (EMEA)		
Zebra's Repair Order Portal for Partners & Distributors (RPE01 and RPE02)**	Services	Virtual Instructor Led WebEx	April 18 – May 4	Done (9)	4/06	448	X	X	X	
ZCM for External Users (FTP25)	Supply Chain	Classroom Instructor Led	April 10 – April 18	Done (2)	Done	NA				X
Partner and Customer eCommerce Ordering (SUPOTC06)* [8 English sessions + 8 local language versions]	Supply Chain	Virtual Instructor Led WebEx	April 3 – April 13	Done (16)	3/27	449		X		
Partner and Customer eCommerce Ordering (SUPOTC06)* [English-language recorded version]	Supply Chain	Recorded Webinar	Available on 20-Apr	Done	4/20	450		X		
3PL Inventory Management (SUPOTC25)	Supply Chain	In Person Instructor Led	April 26	Done (1)	Done	NA				X
3PL Outbound Operations (SUPOTC26)	Supply Chain	In Person Instructor Led	April 26	Done (1)	Done	NA				X
DC Operations Delta Training (SUPOTC33)	Supply Chain	In Person Instructor Led	April 25	Done (1)	Done	NA				X

Source: Zebra Technologies Corporation 2017

Pending completions for examinations and online, asynchronous training was shared. Managers could expand the listings to view learners with unmet requirements.

**Figure 41: ILT Completions by Workstream**

End Week	(All)				
Active User	Yes				
Critical Status (<90% attendance)	Yes				
Count of User ID	Column Labels				
Row Labels	Complete	Waived	Attendance Not Reported	Grand Total	
Sales					
ILT					
INTR2-CMU02					
Siebel Service Orders for Repair	100.00%	0.00%	0.00%	100.00%	
INTR2-SMPC01					
One Zebra End-to-End Price Concession Process for Sales Operations & Channel Operations	82.50%	17.50%	0.00%	100.00%	
INTR2-SMPC02					
One Zebra End-to-End Price Concession Process for Sales/Sellers (NALA & EMEA)	83.64%	16.36%	0.00%	100.00%	
INTR2-SMPC03					
One Zebra Price Concession Approval Process for PC Approvers	69.67%	30.33%	0.00%	100.00%	
INTR2-SMSB03					
Solution Builder Catalog Upgrade Overview for Sales Operations and Channel Operations	82.50%	17.50%	0.00%	100.00%	
INTR2-SMSR02					
One Zebra Sales Reporting for Sales Operations and Channel Operations	83.08%	16.92%	0.00%	100.00%	
INTR2-SUPIDP01					
Indirect Procurement	78.26%	19.57%	2.17%	100.00%	
<b>Grand Total</b>	<b>81.38%</b>	<b>18.52%</b>	<b>0.11%</b>	<b>100.00%</b>	

Source: Zebra Technologies Corporation 2017

## Overall

Detailed line-item recommendations identified in Release 1 across each area of the training strategy plan were applied in Release 2. Examples included improved socialization of CM training activities to improve awareness, adoption and organizational readiness, and improved processes and project plan management.



Figure 42: Overview – Documented Training Approach/Recommendations – Release 1

	PRE-DESIGN	DESIGN	DEVELOPMENT	DELIVERY	SUSTAINMENT
<b>TASKS</b>	<ul style="list-style-type: none"> <li>Confirm Approach</li> <li>Assess Needs</li> <li>Define and Approve Curriculum</li> <li>Confirm Impacted Roles</li> </ul>	<ul style="list-style-type: none"> <li>Confirm standards, templates, repository</li> <li>Identify and Engage Des. &amp; Dev. Team</li> <li>Confirm Training Environment Strategy</li> <li>Draft, Approve, and Socialize Dev. Plan</li> <li>Create/Modify Course Designs</li> </ul>	<ul style="list-style-type: none"> <li>Create/Modify/Finalize Course Content</li> <li>Publish Web-based &amp; Transition Content to Delivery</li> <li>Approve Role to Course Mapping</li> <li>Load &amp; Test Content</li> </ul>	<ul style="list-style-type: none"> <li>Confirm End User to Course Mapping</li> <li>Confirm Delivery Strategy</li> <li>Engage &amp; Confirm Local Logistics</li> <li>Send Invites &amp; Reminders</li> <li>Support TTT &amp; EUT</li> <li>Gather, Analyze &amp; Report EUT Metrics</li> </ul>	<ul style="list-style-type: none"> <li>Draft Support Strategy</li> <li>Transition Responsibilities to CAN</li> <li>Identify Content Revision Needs</li> </ul>
<b>TIMING</b>	1 Month after End of Project Design Phase – During Project Build	6wks after End of Project Design Phase – During Project Build	19wks after End of Project Design Phase – During Project Build	26wks after End of Project Design Phase – During Project Build	26wks after End of Project Design Phase – During Project Build
<b>KEY ROLES</b>	R: BTO Training Lead, Project Training Lead A: Project Lead, GPO, SPOs	R: Change Lead, Project Training Lead A: BTO Training Lead, Project Lead, Project Lead, GPO, SPOs	R: Course Developer, Project Training Lead, BTO Delivery Lead A: BTO Training Lead, Project Lead, GPO, SPOs	R: Project Training Lead A: BTO Training Delivery Lead, Project Lead	R: BTO Training Lead, BTO Delivery Lead A: Project Lead, CAN Lead
<b>RECOMMENDATIONS</b>	<ul style="list-style-type: none"> <li>Implement Scope Lock &amp; Change Control process</li> <li>Formalized Curriculum</li> <li>Socialize Training Project Plan</li> </ul>	<ul style="list-style-type: none"> <li>Refine Delivery Methods</li> <li>Implement UPK</li> <li>Improve Handoff process</li> <li>Implement course assessment</li> </ul>	<ul style="list-style-type: none"> <li>Stricter enforcement of deadlines</li> <li>Revise Role Mapping process</li> <li>Super User enablement</li> <li>Generic User IDs (env.)</li> </ul>	<ul style="list-style-type: none"> <li>Create success metrics</li> <li>Improve user-to-course mapping process</li> <li>Stricter enforcement on deadlines</li> <li>Dedicated Analytics resource</li> </ul>	<ul style="list-style-type: none"> <li>Implement formal transition to region</li> <li>Create Maintenance process</li> </ul>

Source: Zebra Technologies Corporation 2017

## Additional Lessons Applied in Release 2

- **Formalized curriculum approach.** Improved role identification/mapping process.
- **Training strategy supported with new tools.** Updated LMS database and licenses purchased for WebEx/InterCall® Audio resulted in reliable virtual-training delivery and attendance reporting.
- **Improved timeline management.** BTO CLs / CM PM, and Learning CM PM held responsibility. They enforced deadlines and managed revised activities with due dates, a weekly meeting cadence, and accountability via the Learning Project Plan.
- **Database implemented.** Under the direction of a database administrator and an LMS administrator. Improved management of curriculum enrollment activities and transfer of data to the LMS.
- **Improved capacity planning.** The BEL Network oversaw communication with mid-level management, training schedules, and CM socialization.

- **Increased LMS familiarity.** Occurred with an experienced LMS administrator supported by an LMS Operations team. The entire Zebra nation of end users received mandated compliance training through the LMS prior to Release 2.
- **Improved end-user learning and sustainment.** Super Users assisted with knowledge share, feedback from surveys, end-user prompted additional training sessions, recordings, and job aids. All employees have access to the learning content via the company intranet.

### Future Learning – Subject to Business Unit Approval

- Existing Q2-2017 online courses will be released through the general employee catalog in the LMS named Zebra Learning Portal.
- Updated and new courses are primary implementation options involving business-unit ownership or shared service (centralized ownership).
  - Approach can vary by functional business unit and work group. Shared service benefits tend to accrue with scale.
  - Strongly recommended: Best-practice learning program and portfolio discipline based on collaboration between business units and learning team to avoid ad hoc, non-prioritized activity that could have significant direct and opportunity cost.
- Key courses developed for Release 1 and 2 that require ongoing support after the close of Q2 2017 CM Learning activity were recommended to the BTO.

### Figure 43: CM Team Recommendations

- The CM team recommends that **66** training courses be considered for maintenance and ongoing development after close of the Q2-2017 CM learning activity:
  - **23** online courses (recorded webinars or eLearning self-study)
  - **43** instructor-led courses
    - **26** of the 43 instructor-led courses have lab hands-on exercises
- Rationale for maintaining these courses:
  - Ensure business continuity by making core functional learning available after Q2-2017 go-live
  - Improve new employee (and role transfer) time-to-proficiency and retention rates
  - Leverage the Q2-2017 investment in learning courses and knowledge assets
  - Ensure that core functional knowledge is maintained in a way that is easily shared and scaled
- Immediate use cases:
  - Onboard new employees or transferred employees in Zebra core systems and processes
  - Retrain employees with updated courses as systems and processes are changed

Source: Zebra Technologies Corporation 2017

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In closing, Zebra leaders are proud of the enormous effort of its learning team and the results achieved in the goal to build One Zebra. This learning approach proved successful by meeting the company's business-readiness goals and learning objectives.

**Figure 44: Training Delivered, Knowledge Transfer Accomplished, One Zebra Built**



Source: Zebra Technologies Corporation 2017





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Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 20 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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- Survey
- Process Integration

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