Allied Universal Enrichment Training Program:
Best Use of a Blended Learning Program

Allied Universal

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January 2024

Brandon Hall Group
HCM Excellence Award
LEARNING AND DEVELOPMENT
GOLD
2023

Company Background

ALLIEDUNIVERSAL®
There for you.

Company-at-a-Glance	
Headquarters	(Irvin, CA and Conshohocken, PA))
Year Founded	(1957)
Employees	(280,000 North America)
Global Scale (Regions that you operate in or provide services to)	((USA, Canada, UK, Europe/Middle East, Latin & South America, Asia Pacific, Africa) **Application is for North America.**
Customers/Output, etc. (Key customers and services offered)	(Retail, Construction, Commercial Real Estate, Condominium and High-Rise Transportation, Defense & Aerospace, Financial Institutions, Education, Distribution & Logistics, Chemical and Petrochemical Security, Healthcare, Hotel & Hospitality, Manufacturing & Industrial, Residential, Transit, Utilities, Government Institutions, Nuclear)
Industry	(Security)
Website	(www.aus.com)

Budget and Timeframe

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Number of (HR, Learning, Talent) employees involved with the implementation?	(40)
Number of Operations or Subject Matter Expert employees involved with the implementation?	(75)
Number of contractors involved with implementation	(1)
Timeframe to implement	(8 months)
Start date of the program	(April 2022)

Business Conditions and Business Needs

One of the most challenging projects the organization undertook was to design and deliver a new onboarding program for managers across the United States (similar program in Canada). This program, called the Allied Universal Enrichment Program, aims to equip new or newly promoted managers with the skills and knowledge needed to succeed in their roles. The training was established at the request of the organization's CEO in 2022 to ensure no manager begins without the training and tools required for any Allied Universal manager.

The program's focus is to provide the new or newly promoted managers with the foundational information needed to properly operate a profitable book of business. During the training program, there is an intensified focus on the proper scheduling and payroll reconciliation practices that each manager should follow. The organization uses various internal systems, including a business intelligence tool, to track the performance of their managers and portfolios. Therefore, it's important that new leaders understand these systems, the organization's culture, and the organization's commitment to I Care Leaders.

Overview

The Training & Talent Development Team officially launched the AU Enrichment Training Program on April 11th, 2022.   This one-week Management training course is designed to prepare and develop AU Account Owners (AOWs) and Account Operators (AOPs). Participants are invited to join the assigned AU Enrichment cohort the week prior to the training.

Before new hire or newly promoted Account Managers and Account Operators start in their new role, they are required to attend Virtual Instructor-Led Enrichment Training. This is a mandatory five-day program that begins the Monday following their hire/promotion date.

The training is delivered virtually via Microsoft Teams, and each participant receives a calendar invite with the classroom link. The daily virtual instructor-led sessions are conducted daily from 10:45 EST - 3:45 EST today and are facilitated by our Corporate Training Team.

Required equipment for each participant includes a laptop and power cord for each participant. If participants have not received their AU assigned hardware, the branch will provide temporary Chromebooks. Each participant is required to join from their own computer AND log into the virtual classroom individually so they can chat in questions and participate. Participants are required to be on camera throughout the entire training.

Pre-Work: Participants are required to complete EDGE (AU learning management system) courses prior to day 1 of training. i.e., New Employee Orientation (NEO) for Administrative (3 hours), WinTeam Overview (1 hour) Global Code of Ethics/Business Conduct (1 hour).

Training Topics over the five days include: Enrichment Introduction, Phenomenal Start Onboarding, I Care Leadership, HR overview, Hiring Process, WinTeam Basics, Electronic Timekeeping, Lisa/Mercury, WinTeam, Finance for Managers, Courier, Core, DOMO, Workforce Management, Professional Development, Training Compliance, etc.

PHENOMENAL START

AU Institute Enrichment Training

AUinstitute
AOP/AOW ENRICHMENT TRAINING

DAY 1
Virtual Training
- ❑ Phenomenal Start Introduction
- ❑ I Care Leadership
- ❑ Introduction to WT Life-cycle

Self Instruction Assignments
- ❑ New Employee Orientation - NEO (3 hours)
- ❑ WT Overview (1 hour)
- ❑ Code of Ethics/Business

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DAY 2
Virtual Training
- ❑ HR Overview
- ❑ Hiring Process #1 Session
- ❑ Introduction to Safety

Self Instruction Assignments
- ❑ Creating & Maintaining a Master Schedule (30 min)
- ❑ AU Culture/Values (1 hour)
- ❑ Cultural Diversity (25 min)
- ❑ Lawful Hiring, Assig. & Promotion Practices (20 min)

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DAY 3
Virtual Training
- ❑ Finance for Managers
- ❑ Courier
- ❑ WT Basics: Introduction & Review

Self Instruction Assignments
- ❑ Completing JSA (30 min)
- ❑ Maintaining Your Working Schedule (30 min)
- ❑ eHub Mobile; Open Position Claim in eHub Mobile-Sched.Persp.; Open Position in WT, eHub Web and Mobile- Scheduler's
- ❑ Negotiating Profitable Rate Increases - **AOWs ONLY** (1 hour)

DAY 4
Virtual Training
- ❑ CORE
- ❑ ETK
- ❑ SAR / WT Reports
- ❑ WT Scheduling Workshop
- ❑ Client Retention/Relations - **AOWs ONLY**
- ❑ Rate Increases - **AOWs ONLY**

Self Instruction Assignments
- ❑ Navigating Your Working Schedule (30 min)
- ❑ Workforce Management Basics (9 min)
- ❑ Workforce Management Fundamentals (13 min)
- ❑ WFM 3 DOMO (13 min)
- ❑ DOMO Training (15 min) - in DOMO

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DAY 5
Virtual Training
- ❑ DOMO Review
- ❑ WFM
- ❑ Lisa / Mercury Review
- ❑ Hiring Process Session #2

Self Instruction Assignments
- ❑ Ind. Sec. Licensing: Understanding Your Role (40 min)
- ❑ Complete Final Assessment

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Once attendees complete the training program, they are required to attend a monthly virtual training session with their Regional Training Director. Additionally, the Corporate Training Team also hosts quarterly cohort sessions for each graduating class.

The organization established clear goals that require all newly hired and newly promoted managers to complete this weeklong training program. AU Enrichment requires roughly 20 hours of synchronous training time, averaging about 4 hours per day. The other 20 hours consist of self-paced learning and supervisor mentoring/coaching. Sessions run every non-holiday week.

The training program is tied to the organization's objectives to "Drive and I Care Leadership & Safety Culture, meet and exceed revenue & profit goals, retain at least 97% of client base and reduce non-billed overtime". It is currently required for all personnel in North America. The organization is working to implement a similar program in Globally.

Design of the Program

- This training is a week-long management onboarding course designed to support the success of newly assigned Account Operators (AOPs) and Account Owners (AOWs) by providing best practices, tools, and guidance.
- The program requires regional training directors from each region to connect with their respective region's participants prior to the start of class to:
  - Welcome and congratulate (either a New Hire, Promotion or Re-hire).
  - Confirm that the participant is aware of the training commitment for the week (dedicated and focused, not scheduled to work a post).
  - Confirm that the participant has the TEAMS invite and access to necessary systems (if not, immediately notify corporate training re invite and the participant's BM/GM or RRM re system access).
  - Verify attendance with Corporate Training Team on Monday and reach out to participant and BM/GM if missing from class.
- The program design includes tips for success for participates which include the following:
  - Complete all EDGE (LMS) assignments noted in Enrichment schedule.
  - Actively participate in each session.
  - Find time to connect and start building their Allied Universal network with their classmates as much as possible. Participates are given time to do this throughout the week.
  - Write down each presenter's information so they have a point of contact to reach out to with questions after the training session ends. They are also provided with contact information for each presenter and guest speaker.

Delivery of the Program

The program consists of a blended learning approach that combines live instruction conducted by a team of Allied Universal® subject matter experts with eLearning modules provided via the EDGE®.

The overall objectives of the program are:

- To deliver a consistent onboarding program for all salaried/hourly employees
- Provide self-paced eLearning courses (EDGE) with both virtual vILT and instructor-led training (ILT) conducted by subject matter experts (SME)
- Ensure retention of the material being covered by providing built-in "Knowledge Checks".

- Outline a career path for employees with directions on how to prepare to take the "Next Step".

Change Management Efforts

The organization faced several obstacles along the way, such as:

- Finding a way to build a fully remote, consistent onboarding training that would meet the needs and expectations of managers from different regions, backgrounds, and levels of experience. The organization had to balance the core competencies that were common to all managers with the specific challenges and opportunities that each manager faced in their local context.

- Frequent changes to participant list due to turnover, transfers, or scheduling conflicts. The organization had to constantly update our records and communicate with the managers and their supervisors to ensure that everyone who needed the training would receive it in a timely manner.

- Managing a large volume of virtual participants every week, ranging from 30 to 50 managers per cohort. The organization had to coordinate with multiple instructors, facilitators, and guest speakers to deliver engaging and interactive sessions that would cater to different learning styles and preferences.

- Accommodating both new hires and internal promotions in the same program. The organization had to ensure that the program was relevant and useful for both groups of managers, who had different levels of familiarity with the organization, its culture, and its policies. The organization also had to foster a positive and collaborative learning environment where managers could share their insights and experiences with each other.

- Ensuring all participants have the correct equipment and system access. This requires careful planning and coordination with the IT department, the HR department, and the new hires themselves. Some of the steps involved are:
  - Sending out a list of technical requirements and instructions for setting up the equipment and accessing the online platform to the new hires before the training date.
  - Providing technical support and troubleshooting options for any issues that may arise during the training week.
  - Testing the system access of each participant prior to the appropriate training session and resolving any problems or glitches.
  - Having a backup plan in case of technical failures or disruptions during the orientation program.

- o Ensuring the sustainability of the program in terms of quality, impact, and cost-effectiveness. The organization had to monitor and evaluate the program regularly to assess its effectiveness and identify areas for improvement. The organization also had to secure adequate resources and support from senior leadership and stakeholders to sustain the program in the long run.
- To ensure a smooth transition and adoption of the program, the organization followed several change management practices, such as:
  - o Communications: The organization communicated the purpose, benefits, and expectations of the new program to all stakeholders, including senior leadership, managers, and participants. They also sent confirmation emails to managers when their direct reports were enrolled in the program.
  - o Collaboration: The organization created a Teams channel to share updates, feedback, and best practices among the program facilitators and coordinators. They also relied on other departments to help present information on topics such as Human Resources, Recruiting, and culture.
  - o Ongoing follow-up: The organization tracked the progress and completion of the participants using Business Intelligence tools. They also followed up with non-compliant participants and their managers to ensure they completed the required modules. They sent certificates of completion to the participants and their leadership as a recognition of their achievement. They also partnered with our regional training team members for added support and guidance.
  - o Partnership with applicable support departments and senior leadership: The organization presented the new program on HR and training community meetings to showcase its agenda and expectations. They also received strategic communications and information from senior leadership to reinforce the importance and value of the program. The support and guidance from our CEO have been critical in the ongoing success of this program.
- These change management practices helped the organization to successfully launch and deliver the new onboarding program and achieve our goals of enhancing employee engagement, retention, and performance. The feedback from the participants and their supervisors was overwhelmingly positive, indicating that the program met its objectives and enhanced the performance and satisfaction of the managers. The organization is proud of their achievements and look forward to continuing their work on this important initiative.

Measurable Benefits

- The new onboarding program for managers has been a great success since its launch in April 2022. The program's focus is to provide the new or newly promoted managers with the foundational information needed to properly operate a profitable book of business. During the training program, there is an intensified focus on the proper scheduling and payroll reconciliation practices that each manager should follow. The organization uses various internal systems, including a business intelligence tool, to track the performance of their managers and portfolios. Since its inception, the Allied Universal Enrichment Program has trained 1,250 new or newly promoted managers in the skills and knowledge they need to lead their teams effectively. Out of these, 1,008 are still active in the company, which shows a high retention rate. The program has a 94% completion rate, which indicates a high level of engagement and satisfaction among the participants.

- The benefits of the program are not only quantitative but also qualitative. Each day, participants complete a survey that helps the team incorporate their feedback so they can continue to improve the program for future cohorts. Managers who have completed the program report feeling more confident and prepared to take over a new book of business. They also demonstrate better decision-making and problem-solving skills, as they are able to identify and correct mistakes in their schedules more quickly and accurately. The Allied Universal Enrichment Program has a positive impact on the performance and morale of the managers and their teams, and the organization is proud to share these results as part of this application process.

- Payroll and/or Invoice Discrepancy Decreased YOY
  - Discrepancy Trent 4/1/21 – 4/1/22: .61
  - Discrepancy Trent 4/1/22 – 4/1/23: .54

- Weekly Scheduling Metrics Improved YOY. (Live scheduling measures the number of shifts that were worked which were scheduled correctly within 24 hours of the work date.)
  - Live Scheduling 4/1/21 – 4/1/22: 91.3%
  - Live Scheduling 4/1/22 – 4/1/23: 93.4%

- Electronic Timekeeping Process
  - Successful Manager On-Time Approvals April 2022: 93%
  - Successful Manager On-Time Approvals April 2023: 95%

Overall

- One of the key lessons learned is the importance of having consistent content updating intervals. The organization found that the virtual onboarding program needs to be updated regularly to reflect the latest changes in policies, procedures, and best practices. This ensures that the managers receive accurate and relevant information that they can apply in their daily work. To achieve this, the organization have conducted a comprehensive audit of all the e-learning trainings assigned during the program and have established a content review team that meets regularly to evaluate and revise the various presentations used during the training.

- As the program moves forward, the team has identified some next steps that will help improve and expand the virtual onboarding program. One of them is to identify ways to make the program more valuable to the local leader's book of business. This will help ensure that the program aligns with the specific needs and goals of each leader and their team. To do this, the team is working to identify ways to incorporate more coursework assignments that involve the managers auditing their new book of business, resulting in them developing a business summary of their findings and a 90-day action plan. This will lead to new ways of tracking the ongoing impact and additional ROIs of the program.

- Finally, the organization plans to expand the virtual onboarding program globally. They believe that this program can benefit managers from different countries and cultures who face similar challenges and opportunities in leading their teams. To achieve this, the organization will work with their global training counterparts to help them adapt the program content and delivery to suit the local context and preferences of each country/region.

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