Consolidated Training Curriculum

Braden Myers
Dear Operations Department:

Thank you for the opportunity to provide my suggestions for the implementation of a new Learning Management System at your firm. You can find these recommendations outlined on the following pages. They should include my opinion on implementation, links to helpful resources, and other supporting information.

Additionally, if you potentially want any help with the full implementation this summer, I would be available and willing to further assist with that process. If you have any questions or concerns about the recommendations expressed below, please don’t hesitate to contact me at the information provided above. Thank you again for this opportunity and I wish you the best with your new system!

Sincerely,

Braden Myers
Recommendations:

Learning Plans Overview:

According to the LCVista documentation, a Learning Plan is a “collection of organized training programs.” During our discussion about the capabilities of this system, you expressed your interest in the Programs function. While these are the main building blocks of the system, I believe that structuring them using a Learning Plan could potentially help streamline any pieces of training that require more than one program. A different way that helped me to understand a Learning Plan is that it functions like a curriculum at a school, while programs function like the individual classes that make up that curriculum. This “path” function is created by using Milestones. These function as prerequisites that keep the individual on a set learning path. This can also provide the individual with the ability to know their completion level of the requirements organized by management.
The image (previous page) shows an example of a Learning Plan. As seen on the grey dropdown in the middle of the image, this is an Onboarding Learning Plan. Within this plan, the management outlined different Milestones to be completed. These include “Technical Skills” and “Accounting Soft Skills.” Within each of these Milestones, the management allocated Programs that would satisfy these requirements. The available Programs are customizable as well. In other words, you can provide options of Programs that would satisfy the requirement, or you can mandate a single Program. Referring to the image, the individual can view the Qualified Programs by clicking on the link below each Milestone. Additionally, the pie charts can provide a quick reference for the individual to know their progress and what is left to be completed. Overall, I believe that these Learning Plans can provide a level of control over the training process that simple Programs cannot provide. In the following sections, I will continue to outline the different control functions of Learning Plans and show a potential application to your current training outlines.

**Learning Plans Controls:**

Learning Plans have a variety of variables that allow for specific control over who and when someone has access along with what they can access. You can find an overview of Learning Plans and control functions at the following [LINK](#). While many of these control functions are straightforward, like setting up Milestones, some allow for more customization to your program. For example, registration. The registration function allows management to either force registration or allow it to be optional. This could be beneficial in requiring registration for new hires or allowing options for established employees. Another control that can be placed on
Learning Plans is date requirements. These allow management to set start and end dates for different Plans. This may be beneficial for new hires who have set days for training or for employees who must complete training before a certain date. These represent a few examples of controls that Learning Plans can offer, and a full list of Learning Plan capabilities is provided in a link found later in this document.

**Learning Plans Application:**

After meeting with the Tax Department and receiving the current outline of their curriculum, we can see how a Learning Plan can be applied to their training. The following is the provided outline:

- Locator
  - Timesheet
  - Dashboard
  - Firm-wide Scheduling
  - Sign out Sheet
- PDF
  - Flyers
  - How to set up favorites
  - Structure
  - Case Studies
- Excel
  - Tips/Tricks
  - Template Structure
  - Case Studies
- Workpapers
  - 1040s
  - 1120-S/1065
  - Case Studies
- 1040s
  - Maybe break out manual sections
  - Case studies
- Accounting 101/Retained Earnings
  - Interactive quizzes/examples
  - Journal entries
- Fixed Assets
  - Adds/Disposal
  - Printing
- Caseware
  - Making AJEs
  - Mapping
  - Printing reports
- Book to Tax
  - Accrual to Cash
  - Meals/Entertainment
  - Interactive quizzes
  - Etc.
- 1065s
  - Maybe break out manual sections
  - Case studies
- 1120s
  - Maybe break out manual sections
  - Case studies
For example purposes, let’s assume this is the curriculum for newly hired interns. This entire curriculum could be organized into a single Tax Intern Learning Plan. To accomplish this, you could create individual Programs for each “Chapter.” For example, a Program for learning Locator, PDF, Excel, etc. From here, you could structure these Programs into a sequential Learning Plan. This would allow management to control the way information is released. Using this method helps the new information be easily accessible and in a set order decided by management. Additionally, this Learning Program can have Auto-Enrollment for the new interns helping with the onboarding process. By leaving the “Chapters” as Programs, also allows for easy referencing. In other words, if after training I needed a refresher on a topic, I could easily search for that individual Program I needed. A final benefit of using Programs for individual topics is cross-compatibility. This means you can re-use certain Programs that may overlap with other Learning Plans. In other words, if both tax interns and audit new hires need to learn about Locator, you can create a single Program and assign it to each Learning Plan individually. This could save a substantial amount of time for management as there will be some level of overlap within all your training courses.

**Programs:**

Programs function as a sort of building block for learning within LCVista. According to their website, LCVista describes Programs as “what” you are learning. Programs offer a variety of settings and controls that help specialize the system to your needs. These include jurisdiction information that may be beneficial when organizing CPE training. A full description of these features can be found at the following [LINK](#). Regarding simple curriculums for new hires and
interns, Programs can provide a place to organize content for individual chapters. Returning to the example above, creating a Program for Locator would be reasonable. Here you can upload videos and other content that the individual may need for the lesson.

After creating a Program, they can be found in the Program Catalog (see left menu). Here an intern or new hire could easily find all the applicable lessons in an unorganized setting in case they would need to review any content. Overall, Programs allow for the creation of building blocks that can be used to create larger Learning Plans.

Conclusion

Based on my conversations with management and review of the system, I would recommend looking into implementing Learning Plans for your training. They provide an easy method to organize your material in a single place and allow for progress tracking, and the centralization of your system. Additionally, I feel the ability to use a single Program for different Learning Plans can streamline your release of the system and standardize training across departments. Below I have linked a variety of helpful resources I used when compiling my
recommendations. Also, if you need any additional assistance with implementation, please don’t hesitate to reach out at the information provided on Page 1.

**Links:**

[LCVista Admin Support](#)

[Learning Plans Overview](#)

[Learning Plans Detail](#)

[Programs](#)

[Example](#) – Shows how a Learning Plan page would look for an employee.