Technology-Based Programs for Learning Management and Budgeting

Susan E. Russell

Keiser University

Dr. Rosa

Funding of Educational Institutions - EDU 730

March 12, 2013

Introduction – Automated Tools for Managing Training Budges and Resources

There are various automated tools available to help training and education practitioners manage their education programs, resources, and budgets. These tools range in complexity from basic Microsoft Excel and Microsoft Project templates to robust learning and budget management software. They also range in cost from free downloads to hundreds of dollars in price. It is important to keep in mind that the tools are only as good as the data that is entered into it. This papers reviews three various software options for automating resource and budget management for training and education programs.

BNH Expert's ADVISOR Enterprise software

ADVISOR© is a software tool for managing and optimizing training budgets. ADVISOR was developed by Jay Bahlis of BNH expert software, as a tool for tracking and managing training resources. ADVISOR© analyzes the costs of training and learning activities and stores costing data for comparison. ADVISOR© is a SAAS (Service as a Software) program than is accessed through a browser connected to the internet, rather than downloaded to a local hard drive (Bahlis, 2002).

This software tool assists users in determining which training program are having the most impact, tracks costs of many aspects of the training business, analyzes the return on investment of training and uses past data to forecast training budgets. ADVISOR© also keeps track of both direct and indirect training costs of the training development lifecycle from analysis to evaluation. The software records costs and benefits data to allow for the comparison of various delivery options (BNH Expert Software Inc., 2009).

ADVISOR© has the functionality to compare the cost of off-the-shelf training to the cost of in-house courseware development to help training leaders and administrators make informed decisions as to the best delivery choices from both a learning and cost perspective. It has the capability to use if/then scenarios to compare the anticipated outcomes of different training options and evaluate specifics of success or failure to reach the specified learning objectives (Bahlis, 2002).

BNH's analysis software, the enterprise version of ADVISOR©, is a very powerful tool that can perform a variety of different functions for the management and administration of training. The program can be used in its entirety or in components. Module 1 is for aligning training with organizational goals, Module 2 is for selecting delivery options, Module 3 is for managing budgets and resources, Module 4 is for project management, and Module 5 is for measuring the impact of training. This comprehensive tool combines theoretical knowledge of training systems development and program logistics, with the needs of practical user. It allows the user to determine the variables and automatically calculates the differentials. The data structure can be designed to mirror the hierarchical relationship from employee to manager to director, and so on.

ADVISOR is backed by sound learning design principals, and uses instructional design methodology and theory in its functionality. It uses the ADDIE (analyze, design, develop, implement, evaluate) instructional design model as a foundation for its design. The graphic interface is clean, clear and user friendly. The user has the option to specify which parameters are of most use and customize the tool for specific needs. The documentation is thorough and easy to understand.

Two corporations of note have utilized this tool and have provided reviews, Lockheed Martin and First Data Corporation. Both Lockheed and First Data concurred that the software aided them in the analysis of their training needs. Lockheed Martin used ADVISOR© to analyze the training needs of pilots and aircrew. Lockheed found the software to be effective in reducing the time needed to conduct their training analysis, and they were easily able to measure the potential success of various individual scenarios. They were also able to produce a report that measured the return on investment to influence key decision makers (BNH Expert Software, 2013).

First Data had a similar experience with ADVISOR© and provided a review. First Data needed to know the options of various delivery systems and used ADVISOR© to assist them in making a choice. They found, thorough the use of the ADVISOR© program that they were able to eliminate bias that resulted from other methods of comparison (BNH Expert Software, 2013).

Training Orchestra

Training Orchestra is a multifunctional software program for managing all aspects of the training function from budgeting to logistics to content management and more. Training Orchestra is a UK based company dedicated to producing learning management software for the training industry. Training Orchestra is appropriate for small, medium, and large companies (Training Orchestra, 2013).

Training Orchestra's budgeting function allows users to enter the details of their training plans into the software. Needs can be organized by variables such as population, course, division, etc. and then calculated to forecast the budget for the entire training program or

curriculum. The management function can be used to track profits against expenses, and monitor expenses against budget. Costs can be tracked in real time to allow for continuous adjustment as needed.

Training Orchestra also has the ability to manage the logistics of the training function. Users can schedule training events and manage the registration process. It can used to input variable to predict training audience size, and manage resources, locations, equipment needs, and facilitators.

The program can also be used to manage documents associated with training programs, such as instructor and participant materials, course catalogs, facility details, class lists, and certificates of completion. Administrative functions such as booking facilities, scheduling class times, and engaging instructors can also be controlled through the software.

The software also offers portals for both employees and managers. The employee portal allows employees to view training offerings and submit a request for training to their manager. The manager portal allows managers to view their teams training schedule and progress. Managers can run reports to monitor attendance, scores, and completion requirements.

There is limited information available on user's experience of Training Orchestra. Two businesses cases on their website discuss how the tool is being used by the companies, but does not indicate not what the user experience has been. Areva, an international energy company, and the National Institute for Nuclear Science and Technology, an educational institution, both use Training Orchestra to manage their training function; each has between 8000 and 75000 potential trainees that are managed via this software (Training Orchestra, 2013).

Other Tools for Managing Training Budgets

Microsoft Excel is another tool for managing training budgets. Microsoft Excel is a generic spreadsheet, but there are many pre-designed templates available for creating budgets, planning budgets, and tracking against budgets. Users can download templates from a variety of sources. Microsoft has an Excel training budget template on its website that is comprehensive and well designed (Pcubed, 2013). Some of these templates are free and others have associated download costs.

Project planning software such as Microsoft Project, can also be used to manage time and resources (both financial and human), and track against plan. Project can be used in concert with Excel for more robust planning and reporting. The advantage to using these tools is that there is a lot of support behind the software.

Conclusion – Automated Resource and Budgeting Tools and Data Integrity

These three tools all have advantages and disadvantages when it comes to managing training resources and budgets. ADVISOR© is powerful software that can be used for high level planning and reporting. Training Orchestra is a more limited tool with fewer options than ADVISOR© , but still has some automated features that could prove useful in managing training budgets. The Microsoft Excel template is very clear, easy to use, and has no associated costs if the user already owns Microsoft Office, but it has limited functionality. Again, even the most powerful tool can be useless if the proper data is not entered and kept up to date.

References

Bahlis, J. (2002). *How to effectively manage and optimize training budgets and resources.* Quebec: BNH Expert Software Inc.

BNH Expert Software. (2013, 2 20). *http://www.bnhexpertsoft.com/english/home/ukmfts.pdf*. Retrieved from www.bnhexpertsoft.com: http://www.bnhexpertsoft.com/english/home/ukmfts.pdf

BNH Expert Software Inc. (2009). *ADVISOR enterprise training planning system: Manage training budget and resources user guide.* Quebec: BNH Expert Software Inc.

Pcubed. (2013, 2 20). *http://office.microsoft.com/en-us/templates*. Retrieved from www.microsoft.com: http://office.microsoft.com/en-us/templates/training-budget-TC001144354.aspx

Training Orchestra. (2013, 2 20). */www.training-orchestra.com*. Retrieved from www.training-orchestra.com: http://www.training-orchestra.com/en/

Training Orchestra. (2013, 2 20). *Customer case*. Retrieved from www.training-orchestra.com: http://www.training-orchestra.com/en/clients-Customers-case-50--420.html