White Paper:
PUBLIC SECTOR ERP

PLANNING AND EXECUTING A TRAINING PROGRAM: COMMON PITFALLS AND HELPFUL HINTS

IN THIS WHITE PAPER

INTRODUCTION

Implementing an enterprise resource planning (ERP) system is a costly, labor-intensive initiative that dramatically impacts business processes. If not meticulously planned and expertly managed by both the integrator and the client, the implementation will be burdened with budget and schedule overruns, significant changes in scope, and missed expectations.

Each ERP implementation is unique and will impact an organization differently; however, common among all implementations is that the resultant change is significant. The root cause of many ERP project problems is project stakeholders failing to grasp the breadth and depth of the change required. Change not only impacts system configuration, it also impacts the organization's policies and procedures, job roles and union agreements, numerous interfaces familiar to the organization's customers and vendors, and access to information that was once readily available.

To properly prepare an organization for such significant change, the implementation requires effective change management, training, and communications initiatives. Although most ERP projects recognize the importance of these initiatives, many fail to maximize their effectiveness for three key reasons:

- Initiatives are started too late,
- Efforts between initiatives are not coordinated, and
- There is a lack of full-time, experienced resources.

A successful training program combats these three pitfalls as well as other common ERP project hazard zones. This white paper offers helpful hints to avoid the common pitfalls that negatively impact the planning and executing of a training program.

HELPFUL HINT 1: KICK-OFF TRAINING PROGRAM AT PROJECT LAUNCH

An effective ERP training initiative kicks off at project launch with project team training, continues through end user training, and then is transitioned to the parent organization for operations and maintenance (O&M). Training lifecycle management should start during project scoping to ensure that the needs of the organization and project can be met within project budget and schedule. Early assessments of the organization's current training program and technical infrastructure will mandate what training delivery methods are feasible so that the most effective, cost-efficient training plan can be designed.

For example: A project conducts an organizational training assessment during project scoping and learns that the organization has set a goal — within five years it will deliver 50 percent of all training via e-learning. The organization has invested in a learning management system (LMS) to facilitate attaining this goal. Although the initiative is still in its infancy and current technical infrastructure and desktop configurations cannot support delivery of e-learning to all business units, the training assessment determines that the majority of the ERP end user population would be able to access courses via the LMS. A training plan is then developed around a blended learning solution that incorporates e-learning, traditional classroom training, and training labs. A properly tailored blended learning program will decrease training lifecycle costs through the use of reusable, stand-alone content while increasing end user acceptance, proficiency, and overall organizational readiness.

A properly designed training initiative supports the organization from project launch through O&M, whereas a poorly designed initiative wastes resources and may spell project disaster. Start early and invest sufficient project resources for proper assessment, design, and development.

HELPFUL HINT 2: COORDINATE EFFORTS AMONG CHANGE, TRAINING, AND COMMUNICATIONS TEAMS

Readying an organization for a significant business modernization is the responsibility of the change team. The change team must ensure that the organization proactively evolves from current to future state business processes. This evolution is only possible with heavy project stakeholder interaction and management sponsorship. Processes and needs requirements have to be defined and assessed, future impacts understood, and plans drafted to execute a smooth workforce transition.

Much of the information required by the change team for an effective change initiative is also required by the training and communications teams. This information is vital for training assessment, design, and development to properly prepare end users for go-live. Typically, however, the information is gathered by redundant and sometimes conflicting efforts. These redundant efforts delay schedule, burden resources, and waste budget.

A coordinated effort among change management, training, and communications teams is imperative. The communications and training teams are often led by the overall change lead, which is a great start. Yet, in the majority of ERP projects, both communications and training teams tend to operate in silos without the requisite cross-team interaction. This silo effect creates conflicting, overlapping information pools that waste, confuse, and frustrate the resources involved.

Communications should ensure that the change effort, including training, is speaking with one voice. That one voice must be coherent, timely, and pertinent. Involve your communications resources in key project stakeholder meetings and various information-gathering sessions to help standardize meeting formats and project correspondence. Communications should create a user-friendly file structure on a shared server to place all project meeting agendas, presentations, and follow-up minutes. This effort fosters a cross-team project atmosphere while creating an invaluable information repository for training content development. This project approach also provides cross-team visibility, and therefore reduces redundant efforts that may overlap and conflict.

For example: The security and authorizations team needs to create roles within the ERP system. Once defined, these roles help form an end user's job function and contribute significantly to the training curricula. This job function needs to be tested and trained. Before being tested and trained, workforce relations, configuration teams, and process teams need to approve the role. Without effective communications, clear leadership, and a consolidated effort, roles are in a constant state of change, making it extremely difficult to ready the organization for the transition to the new system.

It is very difficult to develop a training plan and subsequent training content without items like roles, processes, and configuration being fairly stable. Much of a project's stability is derived from the strength and interaction of the change initiatives. A proactive communications initiative keeps stakeholders informed and involved. Proper stakeholder involvement is critical to receiving the required input up front. The bottom line is that you must have a strong change lead that will align project communications and training work efforts with the overall change process. This dramatically reduces rework of your training curricula and corresponding materials.

HELPFUL HINT 3: BASE LOAD CLIENT SMEs ON TRAINING TEAM

Transitioning from multiple legacy systems to an enterprise system is costly and can be quite painful. Much of the pain and associated costs can be reduced when client subject matter experts (SMEs) are base loaded on the project from requirements gathering through O&M. When client SMEs are base loaded on the project, they provide critical information on how the organization does business today while learning how the system can benefit them tomorrow. These resources are instrumental to:

- Identifying key stakeholders for information gathering and task assignment,
- Defining future state processes and roles,
- Formulating training and transition plans,
- Developing end user training content,
- Reducing review cycle times,
- Running test cases and scripts,
- Communicating project status to coworkers and midlevel management,
- Delivering training, and
- Augmenting helpdesk and superuser groups.

Training for a business modernization effort revolves around bridging the gap between current and future state processes. This bridge must have its foundation based on terminology and processes that are familiar to the participant to maximize training comprehension and retention. The task of defining the current terminology and processes should be delegated to client SMEs who can quickly and adeptly translate how the organization works and talks today.

For example: The task of defining formal and informal acronyms is made easy through the use of client SMEs. SMEs often can pool internal business unit lists and then modify the conglomerated list. This modified list can be used project-wide to bring personnel up to speed on the organization's language and then can be incorporated into the training materials to bridge the gap between old and new terms.

Base loaded SMEs, on the project from start through O&M, are always in short supply and in high demand. They hold the knowledge that numerous teams on the project require. Ironically, training is typically a big concern for SMEs, but a low priority because of their competing responsibilities within configuration, testing, and their parent organization. During project blueprinting, designate full-time SMEs to training once training content development begins. Maintain these same resources through training delivery, where they either instruct or assist with instruction. Having a knowledgeable, seasoned client project resource in the classroom for delivery dramatically increases participant acceptance of training.

HELPFUL HINT 4: HIRE EXPERIENCE AND AUGMENT WITH MOTIVATION

Adequate staffing will forever be an issue on projects. A project can be short bodies, skill sets, or even both. On the SME side, the organization is asked to "place on loan" resources that are vital to its day-to-day operations. As discussed in Helpful Hint 3, these resources are invaluable, but often are found to be in short supply. On the consulting side, staffing fluctuates due to project delays or competing staffing requirements within the consultants' company. Throughout the project's lifecycle, it is critical to maintain experienced consultants and client SMEs who are knowledgeable about the organization's processes and needs.

On the training side, project management must ensure that the key training consultant personnel have the required skill sets and are experienced with similar implementations. Ensuring that key personnel have the required skill sets has to go past reviewing the resume and a quick phone interview. During a face-to-face interview of a potential training lead, provide a brief project and organizational overview and then ask the interviewee for a high-level training strategy. The interviewee should follow with a series of questions that mold a training development and delivery strategy that works best for you. When brought on to the project early enough, a good training lead provides a quality training program in conjunction with substantial training lifecycle costs savings.

Another benefit of an experienced training lead is his or her ability to provide critical staffing insight, which reduces costs without sacrificing schedule or quality. Your training lead requires a core group of experienced training developers and knowledgeable SMEs, but can fill many positions with eager junior consultants and junior client personnel. The junior resources require little experience, but motivation and general technical proficiency are musts. Many of their tasks involve chasing down processes, documenting the system, and providing content for e-learning development.

Experience and motivation reduce costs, maintain schedule, and provide a quality training product.

HELPFUL HINT 5: MAXIMIZE USE OF ACCELERATED DOCUMENTATION TOOLS

System documentation is a necessity for all ERP projects. Documents such as business process procedures (BPPs), test scripts, and end user step references all require screenshots of transactions within the system and take time to create. A variety of commercial off the shelf (COTS) products are available that reduce documentation time while increasing end product quality. These accelerated documentation tools standardize the look and feel of your documentation while incorporating a way to track document change history. Like most products, however, their ability far exceeds their use.

Many projects purchase documentation tools for use by their training development teams, but the product goes unused by configuration. Use of one tool by all teams permits documents to be leveraged and resources pooled to reduce costs.

For example: The project purchases an accelerated documentation tool. Base loaded client SMEs and project team consultants are trained on its use and implementation. Consultants create the initial document within the system and then SMEs add the business-specific information. The training team monitors the development process while gathering content for end user training. SMEs and the training team will learn the system earlier and therefore require less of the consultants' time during testing and system cutover. This process reduces redundant efforts while maximizing documentation consistency and quality.

A tool is only as good as how it is being used. Get your consultants and SMEs trained and using the tool as early as possible. Leverage experienced documentation resources to monitor quality from the start to save you from an inconsistent, poor quality product that becomes a contracting nightmare. Also investigate the variety of inexpensive simulation and video cams that record actions within the ERP application. These simulation and video cams drastically reduce your e-learning development costs.

HELPFUL HINT 6: REDUCE REVIEW CYCLE TIMES

Getting it right the first time is easier said than done especially when configuration and roles are not stable. Even when a system is relatively stable, system documentation often gets caught within endless review cycles before getting approved. The best way to reduce the number of review cycles and the time of each review is to break down the barriers between those that develop the documents and those that review and approve the documents. These barriers are best removed by adding a catalyst to your project team's DNA.

A typical project team DNA is segmented into various smaller teams grouped by skill set and corresponding project deliverables. Although needed, this structuring builds natural communication barriers and causes disputes over task ownership when a task crosses several teams. For system documentation development, a good way to mitigate these barriers is to create a cross-team process that leverages the existing team structure, but uses a catalyst to facilitate interaction points.

For example: The project has purchased an accelerated documentation tool to be used for BPP, test script, and end user step reference development. A configuration consultant records a transaction in the system using the tool and then steps the assigned client SME through the transaction using the document. The SME then takes the document and adds the required organizational information. Once complete, the SME walks the consultant through the document for their interim approval; the SME then walks the designated client approving authority through the document for final client approval. This process uses project SMEs as a catalyst to increase communications, improve knowledge transfer, and reduce time to document approval.

Reduction of document review cycles through the use of SMEs as process catalysts provides many project benefits. Use review cycles as opportunities to educate consultants on the processes and needs of the organization while educating the client on the system. Review of cycles used as knowledge transfer points helps instill a sense of ownership for the client and increases configuration, role, and process stability.

HELPFUL HINT 7: UNDERSTAND FULL LIFECYCLE TRAINING NEEDS AND COSTS

A successful ERP training program must support the project and organization from project kick-off through O&M. A common pitfall in most ERP training programs is that, once the training consultants and instructors leave the project, much of the training knowledge leaves with them because stand-alone, reusable content was not developed. This could have a drastic impact on organizational readiness if a high workforce transition is expected within the next few years due to retirement, transfers, or reorganization.

The cost of this lost knowledge is high and normally not considered when scoping and budgeting for the training required for an ERP implementation. What is typically considered is that the development costs of reusable, stand-alone content that supports full lifecycle training is too high and cannot be justified.

To offset the increased costs of developing reusable content that supports O&M activities, like refresher and new employee training, decrease the costs of training delivery. Training delivery costs can be reduced by several methods:

- Reduce instructor idle time with proper scheduling,
- Increase e-learning content to reduce classroom time, and
- Reduce participant travel in favor of instructor travel.

Although e-learning can reduce classroom training time, many organizations still opt for classroom training only because of the high costs associated with e-learning and because hands-on practice within a training environment is best for end user readiness. Fortunately, the cost of e-learning is quickly being reduced through the use of accelerated web development tools that reduce the cost of both populating templates and creating flash demonstrations. Many of these tools are now SCORM-compliant, meaning that they should work with the organization's LMS. Organizations may also have standard templates for e-learning content that further reduce development costs.

Using e-learning can be extremely effective. It can replace classroom instruction time and leave users with a readily available, reusable training tool. Because nothing can replace hands-on practice within a training environment, supplement e-learning with a series of 1-day labs to reinforce the content delivered via e-learning. Labs can be augmented with client SMEs, consultants, and/or training instructors to further add to their effectiveness. Use of this method can reduce delivery costs by over 70 percent while increasing hands-on experience within a training environment.

The bottom line is that you should invest in reusable content that can stand alone after the consultants have rolled off the project.

HELPFUL HINT 8: INVEST IN CUSTOMIZED CONTENT

There are numerous COTS learning products on the market that provide excellent generalized content about ERP. Although much time and effort have gone into creating these products, remember that each ERP implementation is unique and may require customized training content. Do not waste project training dollars and end users' time with e-learning or course content unless it can be cost-effectively tailored to meet your training needs.

This is not to say that COTS learning products cannot provide value to a project. In some cases, these products can meet your specific needs or reduce the upfront development costs of template and prototype design. If you are going to purchase a COTS product, do so only after your training lead has provided you with a clearly defined return on investment (ROI) assessment.

Should your assessment indicate that customized training content is most appropriate for your ERP system, the cost of customized content can be substantially reduced through the proper use of accelerated documentation and web development tools (refer to Helpful Hint 5).

Remember that every ERP implementation is unique. Therefore, it stands to reason that it will be most successful with customized training content. Avoid the pitfall of creating a disgruntled end user population by delivering content that is specific and familiar to your end user population.

HELPFUL HINT 9: GAIN MIDLEVEL MANAGEMENT BUY-IN

Much of the success of an ERP implementation relies on the buy-in of midlevel management. This gets back to the thought that a tool is only as good as how it is being used. Management can negate the success of an ERP implementation by allowing workarounds even if the system is correctly configured and the end user population effectively trained. To gain midlevel management buy-in, you must instill a sense of ownership prior to end user training enrollment.

Midlevel managers are critical ERP project stakeholders because they influence much of your end user population and hold key process information. An effective tool to capture both their organizational process knowledge and sponsorship is to involve them in process connect sessions. The role of a process connect session is to provide management with insight as to how the system will impact today's processes once implemented. Management can provide valuable insight to process streamlining or why a certain process is currently in place. This knowledge sharing builds organizational knowledge of and critical support for the new system while providing the required insight for the project into the organization's needs.

HELPFUL HINT 10: PREPARE END USERS FOR TRAINING DELIVERY

Many ERP projects fail to properly prepare end users for training delivery. Preparation needs to start with a communications plan that slowly builds the hype for go-live. Project newsletters and emails are good support communications, but often go unread. Proper preparation requires the top – down communications approach that starts with the head of the organization. End users must understand why the organization is investing a significant portion of the budget and "placing on loan" key resources. End users deserve to know what the business need truly is and why their support is crucial to the business' success.

As discussed in Helpful Hint 9, midlevel managements' buy-in is critical for a successful system go-live because of their influence over the end user population. Use these managers as your primary communications medium to your end user population. Support their communications with project newsletters and emails to help ready the organization for training. Incorporate periodic end user surveys to ensure that the organization is receiving the correct messages at the right levels. These surveys also help validate your end user population, providing critical role and curricula insight.

The bottom line — you should not think that because you are sending out communications that those communications are being received and understood. Start preparing your end users for training early through effective, midlevel management communications.

WRAP UP

All ERP implementations are fraught with risk and face many challenges from planning through execution. Many risks can be mitigated through proper alignment and interaction among the various project teams that make up your overall project's DNA. Use SMEs as catalysts to bridge process gaps for cross-team tasks. This, along with midlevel management involvement, fosters the knowledge transfer that is crucial to process, role, and configuration stability. This stability reduces training development costs and helps produce a higher quality end product.

Execute for success by getting the right people on board and initiating your training program early. Most important, invest in a lifecycle training program that can stand on its own after the consultants have rolled off the project.

ABOUT KILDA GROUP

Kilda Group, located in Annapolis, Maryland, is a woman-owned small business that specializes in consulting and training services for business modernization efforts within the federal sector. To learn more, please visit our website at www.KildaGroup.com.