



## **Pitfalls and areas of excellence during a training system implementation initiative**

**A White Paper**

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## 1. Background

This paper refers to well-known Southern African company with an international footprint, hereafter referred to as BAS<sup>1</sup>

The paper aims to highlight the pitfalls and areas of excellence during a training material development initiative. The aim of this initiative was to create a support structure that would drive and manage the training delivery team.

## 2. Introduction

A briefing meeting was held during the first half of 2010 between the head of the specific division within BAS and the contracted Consultancy firm, in this instance Bizmod Consulting.

It was agreed that a full-time resource within BAS (hereafter referred to as Mrs Robinson

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<sup>1</sup> BAS is a fictitious name chosen for the company to protect the privacy and integrity of all partners.

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<sup>2</sup>)

would be available to assist with the materialisation of the agreed deliverables. The initial understanding was that this full-time resource would have to be coached by Bizmod's team to fulfil the training role in an operational capacity once the agreed deliverables were put into place.

### **2.1. The responsibilities of the Bizmod training team**

The Bizmod team was responsible for the documentation of the training material and the subsequent delivery of the training to the Super Users community during a weeklong conference mid 2010.

This team also had to align its efforts with the provision of a working platform with all Super Users where issues need to be discussed, and a standard way of working and operating needs to be formulated which at the same time assist the Super Users in learning how to use the developed training tools.

### **2.2. The training approach being followed**

The training approach included formal training that aimed to capture the valuable experience and knowledge that resided with both the internal team and consultants that have worked on the project.

Both the Super Users and End Users groups received a reference – and user guide that would enable them to use the training tools. This would ultimately ensure that the knowledge obtained during this training stayed in the organisation, even after some of the trained individuals have left BAS.

The training material consisted of the following documentation:

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<sup>2</sup> Mrs Robinson is a fictitious name that is used to protect the privacy of all individuals within both Bizmod and BAS.

- **End User Manual** that documents the process manual and system steps for each of the identified modules at a procedural level.
- **Slide Presentation**, which trainers used during their training session. Due to the demonstrative and practical nature of the actual training sessions, these presentations are extremely lightweight and only provided a framework to the trainer and the participants.
- **Competency Assessment**. BAS opted not to have assessments developed.
- **Competency Answer Sheet**. As a result of the above, no answer sheets were developed as no assessments were to be conducted.

### 2.3. In-scope project deliverables

- Requirements gathering of the content and customization of the layout and content to be used during a workshop aimed at up-skilling the training team on how to develop training material.
- A “**How to Write Training Material Workshop**”. This workshop was run by Bizmod and attended by the BAS project team. The workshop covered the general principles on writing training material, assessments and the proposed roles and responsibilities of the BAS’s project role players.
- **Quality Check** of training material and feedback to training material developers. The scope included the review and formatting of 5 modules to ensure a professional look and alignment with the training format and design. The 5 modules were then amalgamated to compile one user guide.
- **Change Readiness Assessment**. A formal change readiness assessment was conducted to gauge the status, expectations, skills levels and needs of the Super User community. The report was circulated to MDs, FDs the Super Users and the project team to create awareness.

- **Training Group Communication.** Several communications in the form of formal newsletters was sent to the training team. The aim of the communication is to reiterate deadlines, deliverables and to provide information for the team need in order to complete their work for this initiative. *On request of the BAS Project Manager, Bizmod's assistance was required with the development of the first IT newsletter. This set of work was completed but does not form part of the formal scope of works.*
- **Super User Group Communication.** Several communications, in the form of formal newsletters, reminders, questionnaires, etc. was sent to the Super User community. Because of the geographical disbursement and the results of the change readiness assessment it was decided to clearly communicate all relevant information to the super user group to ensure that they felt included and had all the information they needed. Important deadlines and timeframes were also communicated through the newsletter.
- **Coaching and Mentoring.** A big portion of time and effort was spent on sharing knowledge and information with the identified resource, Mrs Robinson. The aim was to ensure that she learned as much as possible to enable her to run and manage these types of initiatives on her own in future.

#### **2.4. Out-of-scope project deliverables**

The following deliverables were executed as a value added service and did not form part of the agreed scope of works. However, it is important to note that some of the deliverables mentioned were essential to ensure the success of the training initiative.

- **Budget and Forecasting Processes.** Users often reject new systems or tools because they don't understand how the technology 'fits' into their world. To ensure that both Super- and End Users had a good understanding of here the training tool 'fitted' in both the Budget and Forecasting processes were mapped.
- **Roles and Responsibilities of the BAS project team and relevant role players.** Intended only to be an example of how important it is to clearly clarify the roles and

responsibilities of the various role-players during the initiation of the broader project. It is however very important to realise that it is not best practice for an outside consultant to dictate the actual roles and responsibilities during a project. This responsibility should always remain the responsibility of the organisation's assigned Project Manager, Sponsor or a designated project team member.

- **Help Desk Analysis.** Based on the feedback received from the Super Users during the change readiness assessment, an analysis of the help desk was done. This analysis aimed to gain an understanding of what had happened historically during the previous support period. This information was also used to draft the proposed Help Desk Procedure to be implemented and guided by the project team.
- **Help Desk Process and Procedures.** The To-Be and improved Help Desk process and procedures to the Super Users during the training conference. A Help Desk process with procedural notes were drafted and circulated to all the relevant stakeholders. It is however critically important that such a deliverable needs to be operationalised and customised to ensure the successful implementation of such an initiative as the Help Desk as the project teams' success will constantly be judged on their ability to provide ongoing support towards their super users.

## **2.5. Project documentation**

All relevant documentation has been handed to Mrs Robinson in an electronic and manual format and is stored in an agreed central repository. A copy of the final report was also given to the BAS project manager and sponsor.

## **3. Lessons learnt and proposed solutions**

### **3.1. Project Manager involvement**

The BAS project manager has many other commitments and the actual contact between him and Bizmod was limited to less than 2 hours throughout the entire project. The success of any project depends on the visible sponsorship and commitment of the

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project manager and sponsor. Without this support no project can be as successful as initially intended.

- **Lessons learnt and recommended changes**

The assigned project manager may realise that he/she may not be able to be actively involved and supportive during the duration of the project. It is therefore suggested that the roles and responsibilities of all team members are clearly defined and put in place at the commencement of the actual project.

### **3.2. Internal role clarification**

It was evident that there was a very strained relationship between certain members of the project team. Unfortunately this had a negative impact on the achievement of the overall deliverables of the project. Linking this to the first lesson plus failure to define clear roles and responsibilities at the onset of the project, the result was a lack of co-operation from certain team members who found the overall project extremely invasive. This has further resulted in these team members being deconstructive and ultimately derailing the overall goals of the initiatives. These problems could have been stopped in their tracks if the project manager had been actively involved and available throughout the entire project. This process resulted in Bizmod having to take control of the deliverables that were not getting done by the BAS project team.

- **Lessons learnt and recommended changes**

Any project team could have huge potential in achieving success with properly defined role clarification at the onset of the project. With this in place the entire team would know exactly what they are responsible for. It will result in less friction between team members and would ultimately mean that the outside consultants would be able to stick to their in-scope deliverables and not getting involved in the internal politics of the internal team.



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### **3.3. Workload**

The majority of the training team indicated that they were overwhelmed by the allocated workload. The additional strains of daily reporting, development and general administration impacted on the overall delivery of the training material within the given timeframes. Although the project team will deliver on the project it may be to the detriment of the quality of work which in return may affect the ROI.

- **Lessons learnt and recommended changes**

All relevant team members and their supervisors need to have a clear understanding of the impact of the additional workload of this project. The combination of long working hours and the stress of achieving the deliverables on time ultimately affect the organisation. Once this is clearly understood a joint commitment needs to be made to tackle the issues head on.

Possible solutions could be to involve employees at all levels. By spreading the workload over the duration of the project the overall quality of work could have improved, and a more balanced work-life environment could have been created.

### **3.4. Timelines and the development process**

Due to the very tight timelines many of the training deliverables were executed at the same time and only certain portions of the data was tested. This was due to a number of reasons ranging again from internal issues to technical issues and waiting for a server that only arrived a day before the training conference.

- **Lessons learnt and recommended changes**

Trainers do not feel confident when they don't know what to expect and it can create a situation where End Users and Super Users start to question the ability of the programme if they are exposed to a system that is not well tested and debugged.

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Timeline constraints are a reality most projects have to contend with. However, the impact on an inexperienced team, who are learning as they go, can be significant. There is an old project saying that says:

*“There's never enough time to do it right first time but there's always enough time to go back and do it again”.*

Significant financial and time investments are made during projects and often a clearer understanding of the time needed to complete the deliverables will alleviate the amount of rework required.

#### **4. Post implementation recommendations**

##### **4.1. Embedding and retaining any knowledge transfer.**

Ensuring that the value created by the external consultants is not lost after their departure is a crucial part of the project and should be a continuous improvement objective. The knowledge, analysis and data generated during engagements between the external consultants and the internal project team **have** to be integrated into the organisation.

**Taking ownership of the data** and **ensuring that there is capacity** for the knowledge transfer from the external consultants to the business has the potential to create just as much value for your organisation as the initial consultants' engagement. In order to do so, you need to address each of the three core issues that typically impede long-term embedding and capacitating of your resources:

- **Short-term focus.** Don't let the pressures of short-term results displace your focus on the long-term needs of your organisation. Make sure that the original documented goals for your outsourcing initiative clearly include long-term

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considerations for knowledge transfer, training, intelligence repositories and the like.

- **Lack of a plan with goals and metrics.** Know, plan and communicate what you need to get out of the engagement up front and ensure that you receive regular feedback and information.
- **Inadequate use of enabling technology.** Select a technology platform that can provide a full range of process, repository and reporting capabilities, in addition to the more execution-focused activities in production, planning and procurement.
- **Above all, use it.** Make sure your people are trained, expectations are set around compliance, and you are receiving feedback on usage.

#### **4.2. Measuring the success of the training initiative.**

The approved scope of works only included the development of the training material. In line with the above mentioned guidelines, it is recommended that the business invest some post implementation time to assess and measure the success and impact of the training initiative.

### **5. Conclusion**

To ensure you measure the reaction and satisfaction level of the entire user community, a Post-Implementation Satisfaction Survey should be conducted and circulated to all involved.

To ensure skill transfer occurred during training, trainees should also complete a competency test. A formal Help Desk procedure should be implemented where potential knowledge or skills gaps can be identified using the information obtained in the competency test.

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Initial user resistance is a normal occurrence in any new system training event. However, a good training intervention, with motivated and skilled trainers, coupled with good post go-life support will ensure that the resistance is addressed. It will also ensure that End-Users do not revert back to the 'old way of doing things'.

And never forget that any project team could have huge potential in achieving success with properly defined role clarification in place right at the onset of the project. With this in place the entire team would know exactly what they are responsible for and it will result in less friction between team members and ultimately meant that the outside consultants would be able to stick to their in-scope deliverables and not getting involved in the internal politics of the internal team.

***Appendix A – Authors***

Add a list of the primary Bizmod author(s) and contributors to this white paper