

E.J.'s Journal

Adventures in Technology

This is part 11 of an ongoing series.

BY E. J. SIWEK, C M P

With all project plans involving software integration, training is a necessary investment. When we initially defined the scope of the project, we left open the development of training materials and expense forecasts. We did this because there was so much work and time before this element of the project that it wasn't considered part of the critical path in launching the application. But we didn't totally ignore it. The project plan allowed for approximately 15 days for this part.

As we moved through the development of the application, now more than 11 months in the making, four training challenges became apparent: who would do the training, what materials they would use, who would be trained and how much we would need to spend on training.

Early on, the director of information technology and I approached the president with a modified training plan. Our intent was to identify six "super users" who would be trained in all aspects of the system and who, in turn, would be groomed as future trainers for their respective work units. From our positions, this approach made sense. The president didn't like the plan because it placed staff and managers at odds because some of the super users would need to train managers. Ultimately, it was decided that members of the customer relations team would train them-

The lesson learned is that an investment in training is vital to a smooth launch.

selves, and the materials they developed would be shared throughout the organization. Four members of this team were assigned the responsibility of developing training materials and conducting training for a company-wide rollout. The director of human resources was assigned the job of providing resources to help the special training team manage its new responsibilities. On one hand, a direct benefit was that we saved budget dollars by taking over this part of the project. Additionally, by involving human resources, we were assured that a training module would be developed and maintained for new employee orientations.

All of this sounds good on paper. In reality, no one in the company had an in-depth understanding of the total power of the system. While we were trained on system administration, no one received training on the process flow of the system. The result was that our approach to training was flawed with procedural questions regarding the order in which data should be entered and the affect of data changes on the system. Has this delayed us? No. Has this hindered

us? Yes. It took valuable staff time to document and revise the overall processes for training purposes.

Not all of the issues involving training have been flawed. In reality, we are the best people to design and implement a training process. First, we do have an excellent development team skilled in producing world-class training materials. After all, it is one of our core business strengths.

The other component that had to be factored into the training area was the degree of the customization we have done in OverQuota®. Clearly, the OverQuota® system we have defined and developed goes far beyond the core functionality of this sales automation application. We not only customized the system but we also served as the head development arm earlier in the plan than originally anticipated. The result was that we knew our system better than others involved at the project management level. Nevertheless, biting off the training portion is a major project and one not to be taken lightly.

What would I have done differently? I would have insisted on two things. First, I still advocate having a group of super users who are thoroughly trained about all aspects of the system. Having knowledge in areas outside your normal job function is beneficial in that you develop a deeper understanding of how data is used or intended to be used throughout the system. Knowing how other user groups will use the data helps you better understand where a process moves from one function to the next as well as how core fields are used from one table or report to the next. For instance, should I put a phone number in the fax number field or identify the Web site as an e-mail address? I know

this sounds strange, but individuals have different approaches to entering data.

And, while training helps to some degree, cross-functional knowledge also helps.

Additionally, I would have insisted that we freeze work on preparing training materials until all development on the system was completed and tested. As noted earlier, we developed and tested on parallel tracks. In the end, when certain aspects of the development were reviewed, it was clear that if we had worked closer to the inherent system design we would have been better off in the long run. The result was that training had to be re-worked in affected areas.

The lesson learned is that an investment in training is vital to a smooth launch. It is part of the budget that requires careful scrutiny. Budget is affected in both dollars and time resources.

Next month, we review the progress we have made over the past several months and see what lies ahead as we wrap up our system integration efforts. ▲



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