Manufacturer implements training strategy to increase user adoption of new ERP system.

P A N O R A M A
C O N S U L T I N G   G R O U P

CLIENT OVERVIEW

- Uses environmentally sustainable practices to produce approximately 650,000 tons of chlorine-free, bleach kraft pulp annually

- Generates approximately $155 million in annual revenue

- Has approximately 500 employees across all ts locations

EXPECTED BENEFITS OF ERP TRAINING PLAN

- Core team and SMEs equipped to facilitate end-user training

- End-users have in-depth knowledge of how to properly use enterprise systems

- Core team has clear understanding of follow-up training needs after go-live

Training benefits in general:

- Improved employee performance

- Faster onboarding

- Improved retention

- Increased return on investment

- Formalizing the organization's training

- Strengthening the company's culture

PROJECT OVERVIEW

When the client initiated the ERP project, it was recognized as a business-led, transformation initiative, as opposed to an IT project. The objective of this project was to implement a new ERP solution, along with business process changes.

The project is still in progress, but the client plans to adopt proven, industry-leading business processes and best practices in most areas to avoid costly customizations.

Once fully implemented, the process changes will:
• Fully support the client in achieving current and future business goals
• Reduce the risk associated with continued reliance on outdated and heavily customized applications and platforms

The following phases have been completed, so far:
• Phase 1 – Requirements gathering and identification of software vendors
• Phase 2 – Software selection
• Phase 3 – Execution of pre-implementation projects

Phase 4 will involve the implementation of SAP software to support the client's business requirements and the retirement of targeted legacy systems.

CLIENT CHALLENGES

The client was in a situation where virtually no one on the team had ever undertaken an ERP project of this size and scope.

As the company grew, legacy systems were added over time in an ad-hoc fashion.

In addition, processes were not documented or updated across all departments, and there was a heavy reliance on multiple spreadsheets. This resulted in duplication of data and no single source of truth for operational and financial data.

Further, training on new processes and systems was largely nonexistent. Users were self-taught and relied on assistance from the IT help desk on the day of go-live and beyond.

This was the case because the client did not have a formal training department and lacked any institutional knowledge on how to train for a project this large.

Needless to say, adoption and usage of the new systems was poor, and team members were unable to use and enjoy all the functionality and benefits.

PANORAMA'S ROLE

As part of Panorama's engagement for organizational change management and training support, we developed a comprehensive training strategy. This strategy provided a consolidated approach to developing an execution-level training plan.

The plan included the following elements:
- Training approach across functional teams and departments, including cross-functional needs
- Roles and responsibilities to execute the training
- Approach for training development, implementation, and evaluation
- Post-go-live adjustments, refresher courses, and updates to processes

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Rick Platz, Senior Consultant
Panorama Consulting Group

WE ADVISED THE CLIENT ON THE NEED FOR A COMPREHENSIVE TRAINING STRATEGY AND PLAN. FEEDBACK FROM OUR INITIAL READINESS ASSESSMENT INDICATED THIS WAS AN AREA OF GREAT CONCERN WITH THE NEW SYSTEM BECAUSE OF PAST FAILURES.

PANORAMA'S ROLE CONTINUED

After the adoption of the training strategy, Panorama led the client through the development of the training plan. Activities included:
- Conducting multiple Change Impact sessions with functional area leaders and SMEs to determine process changes as well as training and communication needs
- Conducting comprehensive training workshops on how to use "build content" in the ERP provider's LMS system with all key stakeholders
- Working with the client core team and SMEs to develop curriculum lists for each area
- Soliciting feedback from knowledge transfer and Sprint sessions to improve future training for the core team and SMEs
- Working with the internal communications team to build out training support collateral and materials

We will soon be conducting post go-live assessments to understand "what's working and what's not," which will inform follow-up training and communication needs.