

Case Study – : System implementation: Training intervention

The Client

For SaveTech Africa, a major player in the player in the South African, pump manufacturing industry, it has been a very challenging three years...

The recent world economic crisis impacted their client base that consists of mostly the mining industry, severely. The impact on their clients has ripped through to SaveTech and presents itself as a sharp drop in SaveTech pump and spare orders.

To compound matters SaveTech has also gone through a major merger and acquisition that saw them becoming one with their lifetime rival and competitor, Arlington Engineering. Needless to say that these two companies thought of themselves as very different and distinct entities, each with their own and unique way of doing and thinking about things.

SaveTech International has a global footprint and the merger between SaveTech Africa and Arlington Engineering created ambitious expectation. These expectations and related deliverables were defined, scoped and communicated in an elaborate Blueprint document. The blueprint was compiled by the 'new' head office, situated in Dubai.

Unfortunately, the blueprint was never well communicated to the staff of SaveTech and Arlington Engineering, now jointly known as SaveTech. The lack of proper and clear communication creates and fuels fears and rumors of a major restructure and retrenchments amongst the more than 600 SaveTech staff..

This in turn lead to a sudden increase in the staff turnover rate, resulting in the loss of scarce and valuable resources.

The Project

A year after the merger, SaveTech and Arlington are still working on two different systems, and our project is the result of the strategic decision to improve the flow of data and workflow between the two orginasion, and the various branches, throughout South Africa, by implementing an upgraded version of the ERP system, ResPlan, currently used by SaveTech.

SaveTech have been using an older version of ResPlan for the past 13 years and although they know the system, the upgrade will mean additional and even different functionality, configuration and setup.

The decision to implement the latest version of ResPlan is communicated to SaveTech at the end of March 2009. The news comes via a memo, emailed by the Group Head of Operations, located in Dubai. The memo stipulate the Go-Live date as 4 January 2010.

However, the go-ahead is only given three months later when the required Capex is finally signed off at the end of July 2009. A mere 5 months are left to plan and execute the upgraded version of ResPlan across the South African, SaveTech operations.

Bizmod is approached at the end of August and our Training Proposal is accepted. I arrive on site on 1 September 2009 and together with the ResPlan consultants and the selected project team we start working.

We are specifically tasked with planning, managing and delivering the training initiative for the systems implementation and I take the role of Change Manager on site. However, change management is a swear word and to avoid complications and unnecessary confrontations I refer to myself as a consultant.

Deadline for Training Initiative

The deadline for the training initiative is 30 November 2009. By this date the following training deliverables have to be completed:

- Definition of training process.
- Educating the project team (especially the super and key users) on how to write training material, so that they can develop the training material.
- Development, verification, quality assurance and sign off by the relevant Process Owners of all training material. The training material consisted of:
 - **User Manual** for each of the 40 identified modules. This user manual will describe 'how' to complete a process. It will be detailed enough to ensure the user can understand that process end to end using both the necessary manual and automated steps.
 - **Slide Presentation**. This presentation will be used during the end-user training session as a guide for both the trainer and the trainees.
 - **Competency Assessment Question & Answer Sheet**. For each of the identified courses and modules the end-user attend they will have to complete and pass a competency assessment. The project team is responsible for the development of this competency question and answer sheet.

It is important to note that the assessment had both a theoretical and practical assessment section. This was to ensure that end users understood the necessary concepts and were able to do the most important functions by demonstrating the procedure on a training version of the ResPlan system.

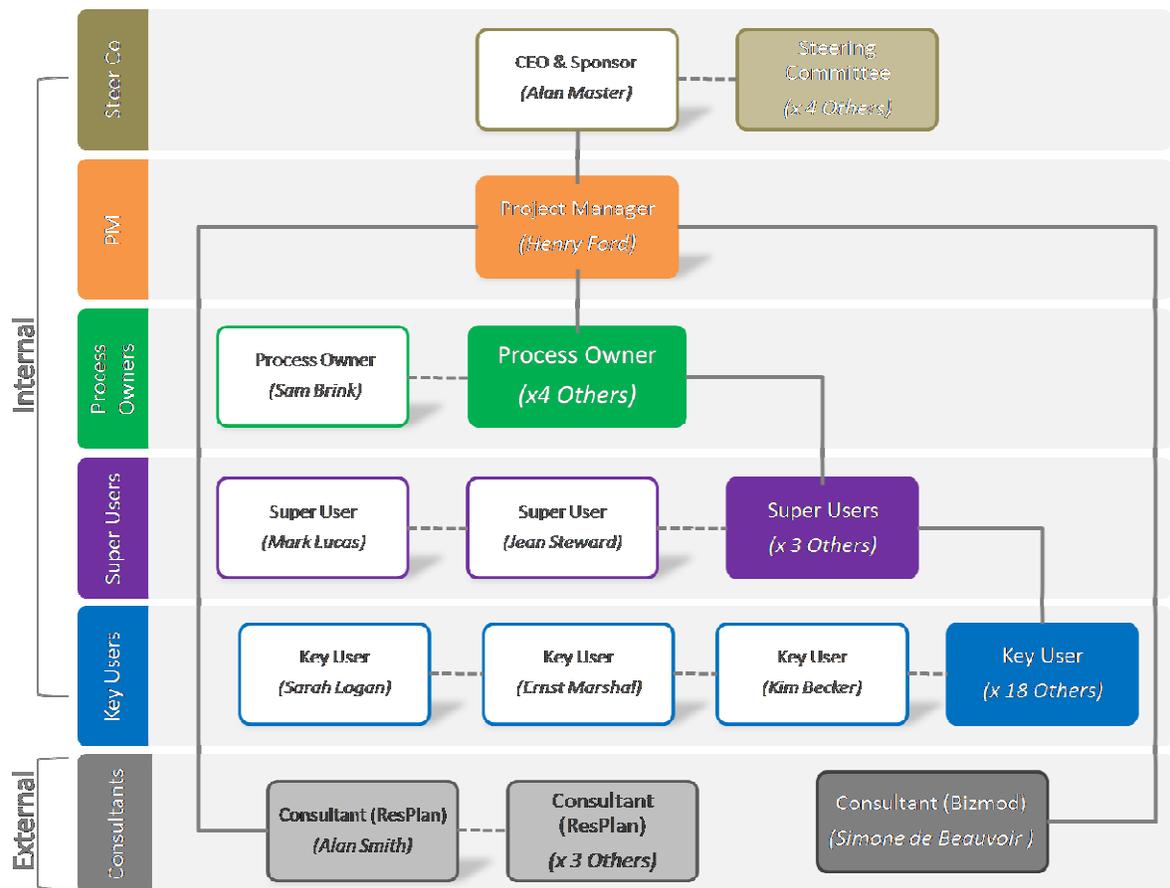
- Train the trainers to ensure they are ready to train the end users by 1 November 2009.
- Conduct end user training and report the results by 1 December 2009.

That means that we have just 2 months to complete all the deliverables.

The Project Team

With more than 600 people that will be effected by the implementation of ResPlan, a big project team is established to help drive and deliver the project on time, in scope and in budget.

The project team consists of both external and internal resources. The internal resources come from both the 'old' Arlington and SaveTech Africa head offices, both situated in Johannesburg.



The Internal Team

The Project Sponsor/CEO

Alan Master became the CEO six months ago and replaced the merger CEO, Kevin Leo, who returned to SaveTech in Sydney, Australia. Alan was the Financial Director of Arlington Engineering and is not well known by both the old Arlington Engineering or the SaveTech Africa employees. He is seen as the man who sits in the corner office, at the top of the site...The CEO does not attend any of the team meetings and only the internal Project Manager is allowed to attend the Steering Committee meetings held each Monday afternoon. I never see the CEO/Sponsor once during the entire project. He is not a man of many words and when asked to prepare a motivational piece for the Project's newsletter, that is circulated to the end-users and project team, he writes: "don't stuff it up".

The Project Manager

The **Project Manager, Henry Ford** is part of the 'new blood' and only joined SaveTech six months ago. He comes from a major paper manufacturing concern and has a lot of project experience. Unfortunately, he does not know all the employees and have never even met the Arlington Engineering employees. The internal project team is thus selected by the Process Owners of the business.

The Process Owners

The process owners are the departmental managers of organisation and all members of the 'old' Arlington Engineering.

Sam Brink, is one of the Process Owners and continually express his concern about how the project is going to impact the key users in his department's ability to attend to their day-to-day roles and responsibilities. Sam is a very strict manager and those who work for him does not like to get on his bad side.

The Super Users

The Super Users all come from the 'old' SaveTech Africa head office, as they know and understand the system best at this point. The super users will be responsible for a great deal during the project, including showing the key users the way and sharing their knowledge about the system with the rest of the project team.

Mark Lucas, an Sales Manager, has been with SaveTech Africa for more than 33 years and does not feel very positive about the project. He is of the opinion that 'management' does not have a clue and is of the opinion that these sort of projects are always a waste of time and money. He believes in knowing your job and not relying on a computer to do it for you. Mark also makes it clear that '*he had to learn the hard way*' and does not understand why we have to waste time on doing manuals and training.

Jean Steward, a Warehouse Manager, on the other hand feels very positive about the project and the role it will play in bringing Arlington Engineering and SaveTech Africa closer. He has been with SaveTech Africa for 13 years and feels that technology plays a central role in streamlining the organisation and delivering a better service to the customer.

The Key Users

There is a total of 21 key users, of which 14 come from Arlington Engineering and 7 from SaveTech Africa. The key users don't know each other well and some have only spoken on the phone a couple of times, before joining the project. The Key Users will be responsible for delivering learning and testing the new system, developing the training material and ultimately training and supporting the end-users.

The key users will also still be responsible for their normal day-to-day duties in the organisation. The project plan states that their involvement will increase as the project nears the go-live date.

Sarah Logan, has been with Arlington Engineer for 3 years but she tells me that she does not want to be part of the project. She believes that her manager, Sam Brink, is trying to get rid of her and will use her involvement in the project to make sure she gets fired. She has already received two written warnings from Sam, for not doing her work to the standard that Sam would like it. She feels she is being victimized and that Sam gives her work that is outside of her KPI's. She tells me that is urgently looking for other work but she is willing to help as much as she can with the project.

Ernst Marshal has been with SaveTech Africa for 11 years and is an Industrial Engineer. He is worried about the possible overtime and his knowledge of the system and projects. He is a soft spoken and quite individual.

Kim Becker has been with Arlington Engineering for five years. She is bright and very excited to be part of the project. She works in the Demand Management department as an administrator. This is her first project and she is eager to show what she can do.

The External Project Team

The Consultants

ResPlan has 4 consultants on the project that are responsible for the setup testing and implementation of the new version of ResPlan.

Alan Smith has a wealth of knowledge when it comes to ResPlan and he is a patient and organised man. The project team leans on him very heavily during the entire project. Unfortunately, Alan also has another client that recently implemented Resplan and he is still providing some onsite support there once a week.

And then there is me, Simone from Bizmod, responsible for the planning, managing and delivering the training initiative.

Ready, Steady... GO !

When I arrive on site and the project has been in full swing for month.

I kick off my engagement with an introduction meeting that includes the entire project team and inform them team that will need them to complete a questionnaire for me so I can do a Change Readiness Assessment. The aim of the assessment is to gauge the status, expectations, skills levels and needs of the internal project team. The report was circulated to the Steering Committee.

3 days later I have everyone's responses and the results of the assessment is astounding. It shows that the internal project team has more than a 150 years of experience (with regards to their industry) between them and the average years service is a whopping 7 years. I know they know they know how to build a pump, no doubt.

I assess the input to determine the current level of skills and training experience and knowledge of the project team. More than 65% of the team indicated that they have never been involved with either developing or delivering training material. Less than 60% of the project team feel confident using Microsoft Word and PowerPoint (and they will be using these packages to develop the training material).

Most importantly the majority of the project team come from the old Arlington Engineering site and has no understanding or experience of the ResPlan system. The assessment leaves no doubt that we are going to have to manage the deliverables and project team very closely if we want to ensure a successful outcome that is on time, of good quality and within the provided budget.

We start to develop the training material and it becomes clear very quickly that there is not enough time for the key and super users to learn the in-and-outs of the new system, test the system and processes, develop and review all the training material.

Questions

1. How would you go about scheduling and managing the project team to ensure that the training deliverables are developed and delivered on time, at a good standard and in budget?
2. How would you manage the relevant stakeholders that impact and are impacted by the project?
3. Which areas can you expect to encounter problems in?
4. What would some mitigating actions be that you can take before the problems occur?
5. Which workstreams would you identify when planning your work on the project?
6. Who do you need to work with closely to assure success of your deliverables?