

Training for ProM Business Systems Users

Learning Strategy Proposal v1

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May 5, 2010

Requirements

Goal

- ALU-wide Migration from ISIS to Blue Planet Systems as part of Company's large 2010 Business transformation and Reorganization initiative

Objectives of Critical Path Requirements:

- Train users to use new Blue Planet Business systems
- Use methods appropriate to train large groups of users in Go-live
- Improve user training time period in BP compared to current training time in ISIS
- Improve performance of users on BP systems as compared to ISIS
- Establish support levels for Help
- Complete training of all users in ALU Transformation time period for ANZ between May 2010 and September 2010

Scope Definition

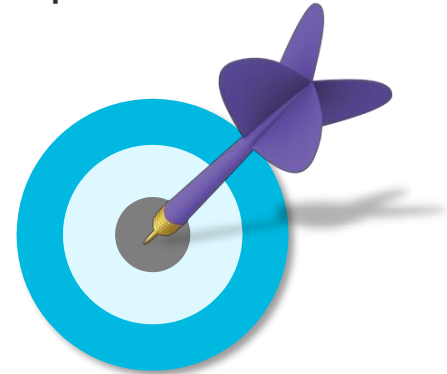
Scope of Training in First Wave

- Training only for current users of ISIS in AU, NZ, and some regional Service Centers in Melbourne and Shanghai, within the functional areas of
 - ❑ Finance
 - ❑ Supply Chain
 - ❑ Procurement
- No training required currently on any of the partner systems (eg. SRM, Lawson) other than Alliance (2.2/2.3 for BIT and 3.0/3.1 for final go-live)
- No training required for Line Managers, Project Managers, Department Managers in BIT However, Training required for these users during UAT and Go-live

Functional Areas Covered

This document is the first version of learning strategy for work groups in the areas of

- ☐ Finance
- ☐ Procurement
- ☐ Supply Chain



A Quick View of Analysis Activities Conducted by LC

Purpose of analysis activities by the LC was to understand and/or determine

- Who
 - ☐ are the target audiences to be trained?
 - ☐ are going to be the trainers?
- What
 - ☐ systems are going to be used? What existing materials are available?
 - ☐ training materials and mode of delivery should LC recommend?
- Why
 - ☐ Are we training each group of users, what do they need to achieve?
- When
 - ☐ are the dates of training and testing?
- Where
 - ☐ will training take place and other logistics?
- How
 - ☐ best to gather requirements and gaps from each group and analyze it

The detailed LC activities that reflect the above are present in - ProMTrain_LC activities.doc and Training Gap Analysis BP.xls

Assumptions of Prior Knowledge

All the key users (trainees) will be assumed to have

- A thorough knowledge of their functional areas such as Finance, OM or Procurement
- A very good knowledge of using their current system, ISIS
- A good understanding of what the needed outcomes are
- No knowledge on the use of the new system, Blue Planet, to achieve those outcomes

The Finance Functional Area

AU/NZ Finance Workgroups

For the **Local AU and NZ Finance Teams**, the users from Finance areas and workgroups within that would need training were determined to be

- Accounting
 - ☐ Project Financial Management
 - ☐ Management Reporting
 - ☐ Balance sheet/HFM reporting
 - ☐ Financial Systems Management/Reporting
 - ☐ Month-end/HFM reporting/Statutory Accounts
 - ☐ BD/BU Management Reporting
- Controlling
 - ☐ Project Financial Management
 - ☐ Management Reporting
 - ☐ Balance sheet/HFM reporting
 - ☐ Financial Systems Management/Reporting
 - ☐ Month-end/HFM reporting/Statutory Accounts
 - ☐ BD/BU Management Reporting
- Projects
 - ☐ Project Financial Management
 - ☐ Management Reporting
 - ☐ Financial Systems Management/Reporting

Total number of key
users identified in
Finance:
45 in AU and 26 in NZ

AASSC China Finance Workgroups

From the **AASSC Finance Team in Shanghai**, the users from Finance workgroups that would need training were determined to be

- Bank Accounting and Accounts Receivable
- Accounts Payable
- Assets
- General Ledger and Costing
- Employee Expenses
- Manager of SSC

Total number of key users identified: 6

Impact of Change for Finance Users

Change from ISIS to Blue Planet and ALU reorg together will cause an impact

- may be changed roles and functions (for some personnel)
- how to navigate around the new BP system r the tasks they do (for all personnel)

Example 1: Currently forecasting on projects is done by Project Managers but after BP comes in, it will be done by a Finance person in BP.

Example 2: Project reporting is not done in ANZ and so they are not used to project structures. Now they have to learn reporting

Gap Analysis for ANZ Finance Teams

Based on Prior Knowledge of users, their Functional Areas and Expected Impact, the LC (Learning Consultant) and SME (Subject Matter Expert) together identified

- Required Learning Objectives in the realm of Finance

Topics for training

- What lowest common denominator knowledge do users already have and what is new
- What materials exist and what training needs to be developed

Functional Areas	Existing Knowledge	Gaps
MM and FI Workflow	Advanced	Learning to use BP tool and the workflow
Controlling and Reporting	Advanced	Same as above
Assets Accounting	Advanced	Same as above
General Ledger and Month to Month Accounting	Advanced	Same as above
Business Warehouse Accounting	Advanced	Same as above
Business Warehouse Controlling	Advanced	Same as above
Internal Orders	Advanced	Same as above
Project Financial Reporting	Report reading only	Report Generation
Project Forecasting	No knowledge	All knowledge and process

This table shows users having advanced knowledge as that is the current level and what they need is only to learn the Blue Planet system. We also offer a solution to newer employees.

All the below existing courses provide Basic concepts followed by ISIS System usage

- | | |
|---|-------------------------|
| • ISIS Module MM and FI workflow | 1 day CRT |
| • ISIS Module CO (Controlling) including Reporting BR 12 & BR 18 | 2 day CRT |
| • ISIS Module AA (Assets Accounting) | 0.5 day CRT |
| • ISIS Module GL (General Ledger) including MEC (month-end closing) | 1 day CRT |
| • ISIS (Business Warehouse) Accounting | 1 day CRT |
| • ISIS (Business Warehouse) Controlling | 1 day CRT |
| | |
| • ERP1000A Internal Orders | 0.5 day CRT or 3 hr VLT |
| • EPM S2 Project Financial Reporting (R1+R2) | 8 hr WBT |
| • BW Super User Training (need only high level) | Current is 40 hrs CRT |
| | |
| • ERP7000 BW End User Reporting course | 1 day CRT or VLT |

(CRT is Class Room Training that is Face to Face with instructor and VLT is Virtual Training with a remote instructor. WBT is Web Based training)



Key Drivers for Recommendations by LC are:

- Bridging knowledge Gaps
 - Created content in partnership with SME and Managers
- Reducing Training Time and Cost
 - Changed mode of training from purely CRT to a mode where the trainer does not always have to travel to conduct classes around the globe. Also, created reusable WBTs where the fundamental concepts don't change much and can be used long term and so for new users. Functional vs Fancy e-learning is completely accepted by the client and users.
- Increasing effectiveness of Training
 - Company Specific tasks recreated in training, Establishing Floor Expert partnership for Help, Increasing the Context for Learning thereby making it relevant and engaging
- Complete training of all users in ALU Transformation time period for ANZ between May 2010 and September 2010



Course Recommendations for ANZ

- | | |
|---|--------------------|
| • MM and FI workflow in ALU | 2 h WBT + 1 hr FE* |
| • CO (Controlling) including Reporting in ALU | 2 h WBT +2 hr FE |
| • General Ledger and MEC (month-end closing) in ALU | 2 h WBT + 2 h FE |
| • BW (Business Warehouse) Controlling and in ALU | 1 hour |

* Supplement each of the above courses with groups of 5 to 6 people assigned a floor expert (FE) in person, not virtual - for hands on training exercises. Recommended that 2 to 3 tasks be given to the student. The floor expert's help is sought when stuck on a step or if there is any concept understanding/clarification is required.



Course Recommendations for ANZ

Following are the recommended courses with an instructor (CRT or VLT). As you will observe, most of them build upon foundational knowledge gained in the WBT. If you are an advanced user, you can skip the WBT and just take the relevant courses below based on your role.

New

- BP Module MM and FI workflow 3 hour CRT with lab
- BP Module CO (Controlling) including Reporting 4 to 6 hr day VLT with lab
- BP Module AA (Assets Accounting) 0.5 day VLT
- BP Module GL (General Ledger) including MEC (month-end closing) 2 hours CRT
- BW (Business Warehouse) Accounting 1 day CRT
- BW (Business Warehouse) Controlling 0.5 day VLT

From ALU LMS

- ERP1000A Internal Orders Location dependent 0.5 day CRT or VLT
- EPM S2 Project Financial Reporting (R1+R2) VLT Use 8 hr WBT only as an aid
- BW Super User Training (need only high level) Current is 40 hrs 2 days VLT
- ERP7000 BW End User Reporting course 1 day CRT or VLT



Courses Identified for AASSC, China

The following courses were identified as most relevant for the AASSC. Team China requests ALL CRT due to language related issues:

	CRT
• BP Module AA (Assets Accounting)	6 hrs
• Bank Accounting & Accounts Receivable	6 hrs
• Accounts Payable	6 hrs
• BP Module GL (General Ledger) including MEC (month-end closing)	1 day

Total about 4 days

These courses and number of users for them needs to be confirmed by Slav.

Courses Preferred as Instructor led classroom or Remote



- BP Module MM and FI workflow 3 h CRT+ l ab
- BP Module GL (General Ledger) including MEC (month-end closing) 2 h CRT
- BW (Business Warehouse) Accounting 1 day CRT
Only if there are pracs. Otherwise ok as virtual
- EPM S2 Project Financial Reporting (R1+R2) 1 day VLT+WBT

Since this is a web-based course but preferred Face-to-face, the LC recommendation would be to let people take it on 2 half days, and hold a discussion forum AFTER, within themselves and the SME present for 2 hours in a room. Or have a instructor present the course partly but also use the WBT where they can in the classroom.

All other courses on previous page are considered ok as VLT or CRT.



Courses and Trainees

		# Participants		
	AU	NZ	AASSC	
CRT				
• BP Module MM and FI workflow	9	4		
• BBP Module GL (General Ledger) including MEC (month-end closing)	9	4		6
• BW (Business Warehouse) Accounting (if labs exist)	9	4		
• Bank Accounting & Accounts Receivable				1
• Accounts Payable				1
VLT				
• BP Module CO (Controlling) including Reporting	8	4		
• BP Module AA (Assets Accounting)	2	4		1
• BW (Business Warehouse) Controlling	9	4		
CRT if instructor available on location. Otherwise, VLT				
• ERP1000A Internal Orders	5	4		
• ERP7000 BW End User Reporting course	9	4		
• EPM S2 Project Financial Reporting (R1+R2)	20	11		
• BW Super User Training	5	4		

Same people take multiple courses and they are not mutually exclusive.



Changes in Training Time and Other Benefits



Course	ISIS	Blue Planet	Change	Other Benefits
BP Module MM and FI workflow	1 day CRT	2 h WBT + 1 h FE + 3 h CRT w/lab	Same time but other benefits	Quicker learn w/context, work with expert, retention
BP Module GL including MEC	1 day CRT	2 h WBT + 2 h FE + 2 h CRT	Same time but other benefits	Quicker learn w/context, work with expert, retention
BW Accounting	1 day CRT	1 day CRT	No change	
Acc Receivables	1 day CRT	1 day CRT China	No change	
Acc Payables	1 day CRT	1 day CRT China	No change	
BP Mod CO and reporting	2 day CRT	2 h WBT + 2 h FE + 1 day VLT w/lab	Same time but other benefits	Quicker learn w/context, work with expert, retention
BP Mod AA	0.5 day CRT	0.5 day VLT	CRT to VLT	Virtual instructor was determined fine. No T&A cost
BW CO	1 day CRT	1 h WBT + 0.5 day VLT	Reduced by half day	
ERP1000A Internal Orders	0.5 day CRT or VLT	0.5 day CRT or VLT	No change	
ERP7000 BW End User Reporting	1 day CRT or VLT	1 day CRT or VLT	No change	
EPM S2 Project Financial Reporting	8 hour WBT	1 day VLT w/WBT	Same time but other benefits	8 hour WBT is ok if spread over time but it was not. So an instructor is ESSENTIAL.
BW Super User Training	5 days CRT	2 day VLT	Major reduction	<u>Content was found too deep and unnecessary, as per SMEs</u>

Considerations for Scheduling

Scheduling - Program Management

- Every person nominated from NZ will take every course that has been recommended on the last pages.
- Finance prefers courses in a maximum of 3 hour slots.
- They think there needs to be some upfront training followed by practical examples for the team to work through.

Delivery Mode Recommendations by LC

- While people may individually dial in to the virtual class, LC thinks it may be more beneficial for the participants in one geographic location to group into a room with each one on his/her laptop, to enable more engagement, interest and interaction.
- LC recommends 1 hour discussion and Q & A period after every class. LC can listen in on this. Also allow an extra 30 minute session so LC can collect verbal feedback regarding improvements, customizations etc. Will be of use for UAT and go-live.

The Order Management Functional Area



Objectives for Order Management Training



Objectives

- Change of process from Manual form filling and feeding into the ISIS system to an automated process from start to finish using Blue Planet
- Once on BP , ensure training increases ‘number of orders processed per hour’ to the desired rate in a span of 3 weeks
- Provide readily available phone or in-person support during training period when users are trying out the system to learn order processing

Current vs Desired State

Each order takes 2 to 3 days for E2E processing due to manual entry, flow to different points and needing to be printed, signed and scanned. Each day on an average 5 to 10 orders may be initiated.

With Alliance and Blue Planet, the order entry is electronic and seamlessly flows from one point to another, needing no printouts or scans, and accepting electronic signatures. Printed at the end. E2E on a single order will take 3 to 4 hours.



ANZ OM Topics

- Alliance 2.3
 - OV (Order View) and
 - OE (Order Entry - how different orders such as Wireline, Wireless and Optics orders, are prepared and handled
- How does the order flow into BP (SAP).
 - Simple and Complex Order categories
 - BP functions (Financial validation changing status from s10 to s40, Tech& Exec Box)
- How does the order flow out of SAP BP
 - Treating POs (Purchase Orders)
 - Treating IPOs (Interhouse Purchase Order)
- GR/GI (Goods receipt and Goods Issue)
- Invoices
- BW reporting covering SD (sales order), LE (logistics execution) and OE (order entry)

ISIS vs BP Changes in Training Time and Other Benefits

Course	Blue Planet	Audience	Notes
Alliance 2.3 Overview and Features	2 hour WBT	CAT, BOT and CM, LOM, PFC, Engg and Sales in ANZ	
Order Entry, Order Flow and Output with Simple Orders	0.5 day WBT	CAT, BOT and CM, LOM, PFC, Engg and Sales ANZ	
Complex Order processing	1 day CRT	LAM, COM, PFC in ANZ	
Billing Plan Management	2 hour VLT	LAM, COM in ANZ	
Goods Received and Goods Issued	1 hour WBT	LAM, COM, PFC in ANZ	
BW Reporting	0.5 day CRT	LAM, COM, PFC in ANZ	
PrOM Centralized Order Management End-to-End Training on Alliance and Blue Planet	5 days CRT	Customer Order Managers in Bangkok, Thailand	They want CRT in this location due to labs and exercises coupled with language differences



Picking Trainers and Key Users

Possible Sources for trainers

- Using the European trainers who were involved in Saudi deployment
- Using trainers from USA (D. Levi's group)
- Using SMEs like Martha with expertise on BP and Finance subject areas
- Also use the trainers who were part of BIT





Training Evaluation

- Level 1: Immediate feedback (Reaction to trainer and content)
- Level 2: Feedback about 3 to 4 week after training to measure Learning against the set objectives
- Level 3: 3-month Participant and Manager feedback



Summary of Average Order Initiation Rates by a LAM or OAM :

In Week 1, two orders were initiated in half a day

In Week 3, four orders were initiated in half a day

Desired rate was five orders in 3 weeks

This objective was achieved in week 4 and was completely accepted by the internal client organization. Feedback Summaries, both qualitative and quantitative, were provided to the client.





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