



Shared Lessons from a "Seasoned" CIO in implementing an ERP system.

Lesson 3 of 5 - Train everyone that has to touch the system on concepts as well as functionality

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Regardless of what your company's annual revenue and profits may be, an ERP system can help improve both of these critical business drivers. However, ERP implementations are often marred with cost and schedule overruns. In most cases Value Added Resellers who are very familiar with the technology ignore the importance of the business processes and peoples' resistance to change. In these series of articles we will outline five critical elements to ensure your ERP implementation is successful and that it provides the efficiencies promised. Interestingly, none of these elements have much to do with the technology, but are directly tied to the information needed by your company to run its business efficiently and to make solid decisions. A bad ERP implementation can paralyze the company.

In our previous issue we covered:

Lesson 1 of 5 - Fitting the ERP Implementation Process to the Company. [Read more.](#)

Lesson 2 of 5 - Who should do implementation management and why it is critical to success. [Read more.](#)

Lesson 3 - Train everyone who has to touch the system on concepts as well as functionality.

In this issue we will discuss the importance of training in order to ensure the solution meets all the expected goals and objectives after the system has been implemented. Before the installation goes live it is important to ensure every single end-user is not only trained on the system's functions, but that they also understand what an ERP system is, its scope, and how it automates the company's business process flows.

How the environment usually looks – Typical implementations involve companies who do not have enough staff time to dedicate to proper training. Because of limited resources most companies decide to implement a “Train the Trainer” philosophy as part of their implementation and then depend on their super-users to train fellow users in their respective department.

This common approach unfortunately causes the following issues:

- 1) Not everyone knows what an ERP system is or how it works in the context of your company, therefore:
 - a. They do not understand the importance/implications of their individual transaction processing actions to the rest of the organization and process flows, both upstream and downstream, and
 - b. They have expectations of the Software being able to do things that an ERP is not generally designed to do (i.e. document control and change management).

- 2) Different departments end up with varying levels of training and understanding. This is due to the fact that the super-users:
 - a. Have varying levels of understanding themselves,
 - b. Have varying styles and disciplines (some may provide training verbally and some might create detailed training documents), and
 - c. Have different levels of dedication and available time; most do not spend enough time on this activity.

What the environment should look like – One should create an environment where all users have the same level of training delivered to them, both from a functional and conceptual perspective. The appropriate time and budget needs to be considered up front in order to ensure that detailed training can be delivered in a timely manner to every end user. Here is what that looked like during the execution of a successful system implementation:

- 1) We spent time at the beginning of the upgrade and then again before going live delivering training throughout the entire organization. We reminded them of the general functionality of an ERP system, how their actions were not isolated, and how certain actions could adversely impact the rest of the organization. This training was reinforced

at some interface areas that had historically caused problems. For example, one critical interface is between Engineering and Purchasing. Cross-functional system and business process sessions were held to ensure everyone understood how one's changes affected the others on a daily basis. During these sessions decisions were made to change business process to accommodate the needs of the software. These sessions also helped us to identify where supplemental software applications might be required to support the business needs of an organization unit.

- 2) System user guides and training materials were written and distributed to the end-users in advance of training sessions. These materials were reviewed and approved in advance by the department heads.

- 3) We trained all end-users in their respective area, and in a number of cases, we invited members of other organizational units to join the sessions in order to gain a cross-functional perspective. This worked very well, was very favorably received and produced positive and measurable results.

In future series of this article we will outline two other elements to help ensure maximum efficiency is gained from your major investment in ERP software.