

## People & Performance Solutions™ Prepares the Employees of a Major Retail Company with Skills and Knowledge to Handle a New Business Transformation

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### Executive Summary

People & Performance Solutions has teamed up with a number of companies to prepare their employees with the knowledge and skills required for changes accompanying an Enterprise Resource Planning (ERP) implementation. One of People & Performance Solution's most recent projects was working with a major retail company to prepare their people for a new ERP system.

### The Challenge

The retail company was implementing an ERP as a result of a strategy to improve productivity, increase availability of product, reduce cost, standardize processes and remain competitive in their market. The company's goal was not only to implement an ERP, but also to ensure that the employees in their current pre-ERP roles could successfully transition to their new ERP roles. With any major ERP implementation, making the transition to the new ERP roles would not be a simple task. The company was faced with critical changes and challenges in retooling their employees with the skills, knowledge and abilities to successfully perform in their new roles. At

the beginning of the ERP project, the company was led to believe that the ERP system would be intuitive to the employees. Unfortunately, this was not the case and the employees needed new skills in order to work with the integrated online application. The knowledge of old processes and individual optimization would be obsolete as the ERP forced new standardized processes and would expose the users to an integrated database of information. To take full advantage of an integrated application, abilities that were not required pre-ERP, would become crucial with the ERP – analysis, and abilities that made someone successful in the pre-ERP, would not be as critical – tactics.

The challenge the retail company faced was to prepare the employees with the proper skills, knowledge and abilities to be ready on the first day the ERP switch was turned live.

### Analyze the Challenge

For this company's ERP business transformation, People & Performance Solutions applied their change management methodology to analyze the challenge. Using their integrated approach, People & Performance Solutions did not solely focus

on education and training during the analysis, but rather they looked at the business transformation from the perspective of change management with education and training as one of the levers in the change process. To initiate the change, the complete change management analysis was completed using the People & Performance Solutions' change management first step – Analyze. The model addressed the following areas:

- **Stakeholders** (The employees who are impacted) – Prior to any change activities, it was crucial to complete a comprehensive stakeholder analysis. By determining who and to what degree each stakeholder would be impacted helped to tailor the education and training activities. This was especially necessary for this retail client where there was a significant difference between the management, the retail stores and delivery employees. In this case, there were geographical as well as educational challenges.
- **Process** (What) - In conjunction with the stakeholder analysis, it was imperative to determine the business processes that were changing as a result of the business transformation. For a retail client, this meant that the process impacts were not only on the employees, but also there were processes that impacted the customers and vendors.
- **Timing** (When) – To make it effective, the education and training component must be sequenced within the overall change plan. As part of the understanding and most of the skills building components of the change plan, the education and training needed to be sequenced after earlier awareness and certain understanding activities.
- **Location** (Where) – This specific retail company has a wide geographical distribution of stakeholders. Thus, this required a means of reaching multiple users, at multiple locations in different time zones and shifts. To do this effectively, it required looking at the current education and training infrastructure of training facilities, training managements systems and training deployment. The following questions had to be answered: what are the locations of the classrooms within the organization, both at headquarters and in the field; are there enough available computers that would support the application; and was there any training infrastructure requirements, i.e. LMS, Web-based training, etc.
- **Training Methods** (How) - After completing the analysis of the stakeholders, processes, timing, and logistics, the proper training approach could be applied. The delivery approach would vary,

based on the factors of stakeholder group and processes.

## The Solution

People & Performance Solutions was engaged by the retail company to ensure that their people impacted by the business transformation would be successful upon go live. In order to prepare the stakeholders for the education and training lever of the change process, People & Performance Solutions designed a client specific education and training program that was integrated with the overall change management strategy and also integrated with the business process and technology strategy. The successful solution, based on the analysis comprised of these components: Content, Learning Infrastructure, Delivery Plan, Evaluation, and Sustain.

**Content** –As the retail company redesigned their business processes to be integrated with a major ERP application, it was determined that the best solution was to develop content as process-based rather than a role-based. Regardless of how the content would be delivered or to whom, it was critical to design and develop the content based on the process at the lowest level of the process. In this case, it was the process of a transaction, regardless if the

transaction was conducted manually or in the application. This meant that from a training perspective, the content was developed at a topic level – tied to one learning objective. This process of content development allows multiple uses by multiple stakeholder groups. Also known as reusable content. For the retail company, their organization had different stakeholders in various locations that needed education and training on the same process component. Rather than developing a learning topic for each role, the same topic was reused by multiple stakeholder groups.

**Learning Infrastructure** – The stakeholders were distributed in multiple time zones, in multiple locations that included regional offices as well as their local sites. In order to provide education and training most effectively and efficiently, and to reduce overall training delivery costs as well as not have to recruit an army of trainers, the retail company made the investment to develop a blended learning solution. Though the initial cost to build the infrastructure seemed overwhelming, the cost was significantly lower than what the overall training delivery program would have been if the company

delivered the program only as an instructor led training. The blended learning solution included a learning management system for managing the learning program as well as for deploying learning content and a learning e-collaboration tool to train multiple users at multiple sites synchronously.

**Delivery Plan (timing, learning plans, train-the-trainer)** – With the content designed and developed and the learning infrastructure for deploying the training program created, a delivery plan was developed. This plan included the learning plans for each stakeholder group. The plan outlined the content and the delivery approach, i.e. would the approach be instructor led in a classroom or over the internet as a self paced web-based training. The training plans were designed to be role-based. This meant that the role-based training matches the learning content with the stakeholder group. The role-based training plans sequenced the topic by role and scheduled the delivery per stakeholder. The training program was also communicated through the change planning process for each stakeholder group.

**Evaluation** – The education and training evaluation plan was developed in the overall change management evaluation plan to evaluate the stakeholders at each stage of the change plan. The education and training part of the evaluation was more objective. With the web-based training, there were questions and tests that a stakeholder was required to successfully pass in order to proceed in the training program. However, for the classroom training, there was a combination of objective and subjective evaluation processes administered and monitored by the trainers. The stakeholder needed to successfully pass all of the topics in the course to show completion of the training program. If they did not successfully complete the training program, it was the client's decision to either tutor the employee or decide that they may need to reassign the individual to different task.

**Sustain** – The business transformation created new processes and technologies. To be successful post “go-live” they instituted a process for ongoing training and maintenance of the training content. Through a network of Super Users in each of the process areas and with a role based

curriculum, people new to the position would receive the appropriate training either web-based, on-line or from the Super User.

## Summary

Developing an education and training plan for a business transformation needs to be integrated in the context of the overall change management plan. If it is not, organizations can encounter setbacks in reaping rewards from a business transformation. Thus, it is pertinent that education and training be one of the eight change management levers that are integrated with the analysis of the

stakeholders and the organization in the change management methodology. This allows the solution, based on the analysis, to be customized for the client. Since each client differs in size, locations, stakeholder groups and skill sets in their stakeholder groups, it is very difficult to apply a cookie cutter solution for education and training plans for any business transformation. As a result, it was the education and training program integrated within the change management program developed by People & Performance Solutions that led this major retail company to a successfully implementation and continued success of their business transformation.

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People & Performance Solutions is the partner of choice for preparing people to manage change. With years of change management expertise in complete life-cycle project management and implementation, People & Performance Solutions is enabling companies worldwide to unlock the potential of their people and expediently achieve benefits.

For more information on People & Performance Solutions Change Management Program, including our Learning Services and Organization Design & Transition Services, visit our web site at [www.people-performancesolutions.com](http://www.people-performancesolutions.com).

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