

PERFORMANCE

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New System Implementation: Keys to Success

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It seems that no sooner are we comfortable with a system than we find ourselves faced with the challenge of implementing a new one. New system implementation has become a frequently recurring necessity. It is the means by which organizations survive and thrive by updating their tools and technologies to keep pace with emerging business requirements. Learning and performance specialists are often required to develop training to prepare personnel for these new systems. Based on HSA's extensive experience, this article shares some insights on how to ensure your efforts are effective.

First, let's define "new system." This is generally a technology-based system, significantly different from whatever is currently being used, and requires employees to perform either new tasks or old ones differently. Increasingly, new system implementation refers

to the replacement of a technology-based system with a more advanced one. Implementation may be limited to one department or can be enterprise-wide. Frequently, there are accompanying changes in business processes, reflecting deeper, systemic

requiring a different model of job task performance (perhaps triggered by job streamlining or an organizational merger).

This article highlights some areas to focus on in your training development methodology should a new systems implementation appear on your agenda. It includes consideration of factors outside of training's traditional purview.

Analysis

Address the requirements of all potential system users whose levels of interaction with the system may differ widely (e.g., daily users, infrequent users, managers who generate and/or access reports, system administrators).

Learner Analysis

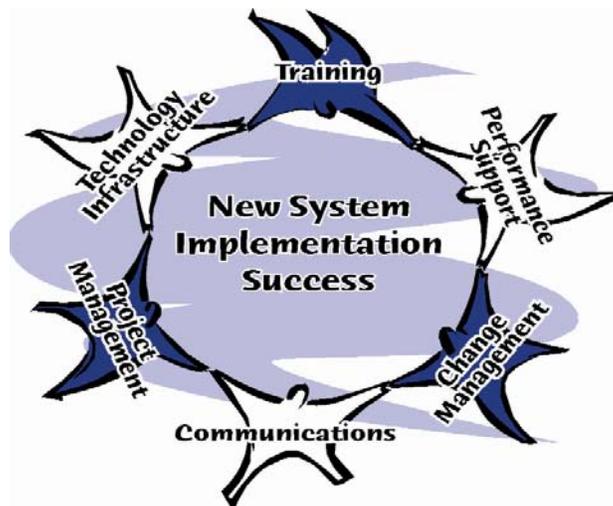
Determine what attitudes learners have towards the new system:

- What impact do they perceive it will have on them and their jobs?
- What pre-conceived notions do learners have based on their own experience and what they have heard from others?

If there is resistance to change, these responses will help you assess its magnitude.

Context Analysis

Ascertain how training is to be used: for a one-time new implementation blitz; for ongoing



levels of organizational change.

"New system," however, doesn't always mean a new technology application. It could refer to an updated set of rules (e.g., change in mandatory requirements for the railways), a re-distribution of manual or automated tasks based on revised business processes (e.g., introduction of ISO standards) or other innovations

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training, new hire training or both. This will influence your design decisions. Inventory all available communication vehicles to coordinate their use for your purposes in raising awareness.

Determine expectations related to performance support: what types of support are currently available to maintain similar types of tasks?

If there is a technology component in your proposed training delivery strategy (e.g., e-learning), conduct a technology analysis. Document the technology infrastructure, delivery environment and relevant policies (e.g., restrictions related to security, plug-ins).

Task Analysis

Clearly differentiate "knowing about" the system from being able to execute required job tasks using the system. For each position affected by the new system, generate a detailed list of tasks that answer the question: "What must the target group be able to do to perform the job?" You may have to brainstorm such a list with "expert" performers who possess mental models of requirements.

Refer to documentation describing changes in business processes, work flows and roles. Determine relationships among these and associated tasks. Focus on the job tasks, not the technology content. The list of tasks you create will form the basis for learning objectives that will guarantee a performance-based, learner-focused approach to instruction. Share the completed task analysis with key stakeholders. They often find it an invaluable tool for visualizing all that new system users must master.

Design

Design instruction based on the task analysis. Include:

- Commands/features/functions that meet task analysis requirements.
- Entertaining scenarios that

reflect real job situations.

- Exercises that reinforce necessary job skills.
- Training materials that direct learner attention to software documentation for required technical information.

As the learners' advocate, your responsibility is to address the learning needs of the target audience. Avoid technical overload. Adopt a minimalist approach in designing materials.

Blended Solution

Apply a blended learning delivery approach that allows you to effectively integrate live training, Web-based training, print-based self-study and performance support (both print-based and on-line job aids) as appropriate. Determine the most suitable mixture for your organization that facilitates learning transfer and job performance support.

Change Management

Decide how best to deal with change management issues. If ignored, normal anxieties can become major obstacles. Help allay learner concerns by working with the client team to determine the most appropriate communication strategies prior to, during and following training.

Within the instructional environment:

- Help learners to construct a clear picture of how their tasks fit into the overall organizational picture.
- Give learners the "whys" - the rationale - for change.
- Provide a forum for learners to express their concerns and ask questions.

A key strategy for the actual work environment is to prepare management to deal with new user issues. Another is to create "champions" or "super users" to provide support, coaching and encouragement to new users as the system goes live.

Development Phase

Early in the project, establish a partnership with the technical team (IT). Conduct a project launch meeting with them to:

- Provide an overview of the training

development process.

- Sell the benefits of your involvement and show value-add.
- Demonstrate the advantage of your involvement in technical team activities (e.g., user acceptance testing) as well as technical team participation in your activities (e.g., review of instructional materials).

If you have to develop training concurrently with the system itself, establish a process to inform you of system changes:

- Meet with the technical team regularly.
- Place yourself on the circulation list for system updates/revisions.
- Link yourself to any software tracking tools that capture system changes.

Schedule your efforts carefully and align these with the overall systems project timetable. Work forward from the most to least stable content elements. Create a development matrix as part of your training development plan. Coordinate creation of user guides and job aids with training development tasks.

Implementation

Construct a training roll-out schedule based on realistic dates for the completion of training development. Obtain an accurate estimate of how many priority users require instruction prior to the "go live" date. Then, obtain numbers for less critical users. All this will facilitate the staging of training delivery.

If there is any lag time between training delivery and the "go live" date, develop a strategy to maintain newly acquired competencies (e.g., periodic practice sessions).

Evaluation

From the beginning, create an evaluation plan to document, with data, the contribution of your efforts. This is especially critical to demonstrate to management the value of investing in such initiatives. Create mechanisms to collect and track meaningful data.

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New System Implementation: Case Studies

Prudential Real Estate and Relocation Services

The Challenge:

Prudential Real Estate and Relocation Services, a Prudential Financial company, recently consolidated many of its operations in a new geographical location for their national and international relocation services. For a timely start-up, Prudential Real Estate and Relocation Services needed to reduce the six-month training period normally required for new employees to become operational. At the same time, the organization was undergoing standardization of policies and implementation of new systems and processes in an effort to achieve ISO certification. Training had to support the resulting new systems, business processes and workflows. The business need was for nearly 900 new employees across a variety of positions to become productive, with a projected rate of 50/month.

The Response:

HSA guided the training development effort and jointly with Prudential Real Estate and Relocation Services created curricula for the re-designed positions, incorporating a blended learning approach. The comprehensive solution included an integration of: e-learning for basic job tasks mostly linked to electronic systems use; live group-based instruction and print self-instruction on task variations, business and interpersonal skills; classroom instruction for systems practice; structured job observation; structured on-the-job training; continuous diagnostic; performance support.

The Result:

Prudential Real Estate and Relocation Services was successful in reducing training time from the traditional six months to five weeks. Trainees were able to become quickly operational for the company. Full implementation was accelerated by three months. Managers considered the trainees to be trained and confident in the use of new systems and application of business processes with new ISO based standards.

Imperial Oil

The Challenge:

Imperial Oil required a new "back-office" system for convenience stores which would introduce a new method of managing inventory. Potential benefits were clear: improved inventory management, increased site productivity and increased sales. There was, however, the possibility that some prospective users could perceive it as more time-consuming, requiring additional work in the office and allowing less time with their customers.

The Response:

HSA developed classroom training for sales associates that emphasized hands-on experience, including guided practice and feedback. Training for managers provided an overview of the system and tasks unique to their job. HSA also created comprehensive performance support tools, including Quick Reference Guides tailored to the requirements of each group.

Imperial Oil ensured a strong change management component as part of the overall solution. Prior to system launch, field communications, such as articles in the internal newsletter, highlighted benefits of the new system. Associates received detailed written information on system requirements and participated in group and individual meetings which focused on issues and concerns. Training sessions encouraged sales associates to voice concerns and ask questions. Both trainers and managers were prepared in how to reinforce the benefits of the new system and respond to issues.

The Result:

Imperial Oil required a comprehensive set of evaluation mechanisms to monitor the success of their initiative. One key measurement included task observation by managers 60 days after training. Managers use a checklist to assess the sales associate's ability to perform the technical tasks required to operate the system. To date, early findings indicate positive results. Performance checklist data reveal that 95-100 percent of tasks are being performed independently with no error and without hesitation. These tasks include site set-up and daily and on-going tasks.

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Project Management

Determine with your client team at project start how to deal with delays (e.g., stop-starts, client delays in approvals) and rework due to system changes. Systems projects are fraught with such challenges. Plan ahead for their occurrence.

Also, agree on how to handle project scope changes due to additional requirements being

uncovered during the analysis phase or unanticipated system modifications. Inform the client team immediately when these occur (include time and budget implications). Demonstrate flexibility with respect to changes.

Conclusion

New system implementation is immensely challenging. It is an occasion for novelty and technological complexity to mix with human anxieties and resistances. While highly demanding, it can also be a proving

ground from which true learning and performance support heroes emerge. This article has provided you with additional arms to achieve new system implementation success. 

One of HSA's core competencies is developing training on new systems. The case studies on page 3 are real world examples of new systems HSA successfully implemented with clients.

Out & About



Recipients of ISPI's Award of Excellence for Outstanding Performance Aid, Dallas, TX. From left to right: Louise Leone and Robert Sakala of Imperial Oil and Gina Walker of HSA.



Meloche Monnex business analysts at an HSA instructional design seminar in Knowlton, QC.



Participants at Harold Stolovitch's Front-End Analysis Workshop in Renton, WA.



Harold Stolovitch (far right) and Erica Keeps (second from left) with book purchasers at the launch of their new book, *Telling Ain't Training*, at the International ASTD Conference in New Orleans, LA.

