

On the right track

Cost-effective planning for internal finance system training



Not for Profit

Don't Forget the Training

Training end-users on a new finance or ERP system is as critical as the implementation itself. Using in-house talent can be a very efficient way of doing that but only if your trainers have the right resources and skills from the start.

Optimum has developed a modular Trainer Readiness programme to help ensure you are on the right track when starting the journey with your internal training programme. Our programme will equip in-house trainers with the knowledge and skills needed to design and deliver customised, role-based courses and materials. Just as importantly, we highlight how to avoid the common pitfalls. This cost effective four-part programme covers the entire process and provides trainers with essential detailed guidance, tips and templates, in any combination of modules:

1 Training Scope

Optimum will identify the training events and materials required

5 Days

The first step to develop a suitable training programme is to scope the work involved and create a clear training plan. Optimum will conduct meetings with subject matter experts to understand the audience and

how they will interact with the system. The knowledge gained in these meetings will then form the basis of a report which will define the training requirements. At its core are a set of bespoke course outlines with

detailed content, session durations and recommendations on the right support materials. It will also provide a guide to the number of development days each session may require to help guide the planning.

2 Trainer Readiness

How to develop training materials and deliver classroom training

5 Days

This comprehensive five day programme creates your internal training team and gives them a cohesive approach and sense of purpose. It's delivered in two parts.

to produce end-user friendly materials. You will also be provided with a suite of Microsoft Office templates, using your branding, to use in the development of all the materials.

The second part is a two-day 'training skills' course covering topics such as presentation skills, using training aids, questioning techniques, learning styles, managing delegates, body language, course structure and coaching skills. It also shows new trainers how to navigate and use the structured training materials.

A three-day 'materials development' course will show your handpicked team how to develop customised course materials such as lesson plans, exercises, reference guides and quick cards. Attendees will learn how

We will introduce the concept of role based training and demonstrate ways to include business processes and workflows into training.

320+

ERP & finance system projects

20+

different ERP & finance systems

300k+

end-users trained

42

countries trained in

10+

not for profit clients

200+

Unit4 Business World (Agresso) projects

3 Developing eLearning

How to script and storyboard eLearning and video tutorials

2 Days

In addition to the standard materials development, you may want to create online learning for users to access on-demand at their desks. This workshop will show your training team how to script eLearning and video tutorials.

It covers tips and tricks on how and when to develop interactive eLearning and passive videos. This workshop will ensure consistency in your online learning programme regardless of how many super users are developing online content.

Note: this workshop does not address training in eLearning/video software programmes as these will differ per organisation. Advice can be given on appropriate tools depending upon the requirement.

4 Training Administration

How to set up and manage the logistics and scheduling of your programme

1 Day

Creating the training plan and schedule can be very complex and contain some unfamiliar elements. This workshop provides advice and guidance on overseeing the logistics and scheduling of your training programme.

Considerations such as room and class sizes, scheduling your super users, training environment(s), when to refresh/rollback the environment and the optimum time to send out delegate invites is discussed.

Sample Excel templates are also provided for scheduling your training programme along with when to refresh/rollback.

You'll love working with us

But don't just take our word for it...



Institute of Cancer Research (ICR)
Unit4 Business World (Agresso) ERP

Optimum designed and developed end-user training for three areas following the implementation of the HR module at ICR. Following a short knowledge transfer period, ICR wanted to cascade down their own end-user training, so Optimum developed trainer packs and detailed reference guides which are now being widely used. To give additional support, Optimum designed and delivered short courses on Agresso Smart Client functionality and an introduction to the HR module.



The Salvation Army
Bespoke Resident Billing System

The Salvation Army recently introduced a new resident billing system into their 80+ Social Centres to integrate with their finance system and replace legacy software. The logistical challenges of delivering training across the UK & Ireland meant that eLearning was selected, a first for the company. Optimum then designed and developed the eLearning modules which were made available one month prior to go-live along with a test system for end-users to practice on.



National Trust
Unit4 Business World (Agresso) ERP

National Trust, the UK conservation charity, selected Optimum to design and deliver a cost-effective end-user training programme. This blended learning solution encompassed a wide range of tailored, role-based training courses for more than 5,000 end-users who will be using the Unit4 Business World ERP system, plus comprehensive supporting training materials including reference guides, quick cards and eLearning.

“ I'm very satisfied with the user training and the quality of the documentation. Going forward it's going to be very valuable to have proper, structured, repeatable training to use as a refresher and for new staff. ”
Ian Nicholson,
Interim Corporate Applications and Projects Manager

“ Our trainers benefited a lot from picking up on Optimum's system user training skills and their materials. Having Optimum to pass on their knowledge definitely gave the whole process extra credibility. ”
Michael Page, Procurement Systems Manager

“ National Trust aimed to further improve its efficiency through its implementation of Unit4 Agresso and completely understood that training staff how to use the system properly was key in achieving that goal. ”
Joanne Harrison
Optimum Sales Director



Victim Support
Unit4 Business World (Agresso) ERP

Optimum designed and delivered tailored, role-based training courses for Victim Support's finance and HR managers on its integrated ERP system. The project included developing a complete set of supporting documentation, including a reference guide for end-users. The system implementation was part of a merger of 80 separate charities into a single national organisation, which also meant incorporating a new set of business processes within the training materials.



Save the Children
Unit4 Business World (Agresso) ERP

When Save the Children, the world's leading independent organisation for children, set up a new entity, Save the Children International, they faced the major training challenge of implementing their new ERP system to 1,000+ end-users across 55 countries and so turned to Optimum.

Save the Children recognised early on that to be effective, it needed a bespoke and flexible training programme that was designed specifically for a wide range of users in their day-to-day roles. The courses would need to be adapted to meet the financial and tax reporting regulations of the individual countries as well as to fit different cultures and languages.

Optimum initially carried out a detailed training needs analysis and then designed 13 different role-based courses and wrote all of the corresponding training materials. Following this, a lack of internal resource then required Optimum trainers to deliver courses in the UK, Pakistan, Sri Lanka, Iraq, Bangladesh, Nepal, Kenya and Ethiopia.

Finally, Optimum then helped establish an internal training team before assisting the new Save the Children International staff with post go-live floor-walking support.

“ Trying to go live with standard training on the new system would have been disastrous, whereas Optimum picked up specifically on our system configuration and our business practices and designed the user training to fit. ”
Peter Lay,
Systems Project Consultant

“ Optimum are a pleasure to work with. They're approachable, flexible and responsive. They communicate very openly and in my experience they always have the client's long term interests at heart. ”
Richard Blundell,
Global IT Programme Director

The materials have been updated regularly and are standing the test of time. It's a huge bonus that we can continue to use and update the reference guides ourselves in order to deliver 'business as usual' training. ”
Richard Blundell,
Global IT Programme Director

Our system experience

Here are just a few of the systems we've worked with...



“IT is **90%** about people, process, culture and politics and **10% about IT.** Misunderstand that & you are heading for **FAILURE.**”

- ERP Experts Online Forum

“During business transformation projects, the majority of the investment goes into the implementation of **new technology.** **PEOPLE** are often an afterthought and allocated the fewest resources. **THIS IS A BIG MISTAKE.**”

- The Training Journal Magazine

Proven track record

Optimum is a specialist IT training consultancy with more than 12 years experience of supporting the implementation of a wide range of finance and ERP systems on a global scale. Our expertise, working with organisations right across the not for profit sector, means we can give your trainers a unique and invaluable insight into how to create and run highly effective end-user focused training programmes.

Talk to us today, it costs less than you think to ensure your trainers are ready.

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