

# On the right track

Cost-effective planning for internal finance system training



Public Services

**Optimum**  
the IT training consultancy

# 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

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.

5 Days

## 2 Trainer Readiness

How to develop training materials and deliver classroom training

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.

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

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.

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

5 Days

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.

## 3 Developing eLearning

How to script and storyboard eLearning and video tutorials

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.

2 Days

## 4 Training Administration

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

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.

1 Day

320+ 20+ 300k+

ERP & finance system projects

different ERP & finance systems

42 60+ 200+

countries trained in

public services clients

Unit4 Business World (Agresso) projects

*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.*

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...



Stockton-on-Tees Borough Council  
Unit4 Business World (Agresso) ERP

Optimum trained 750 Stockton-on-Tees Borough Council employees to use a new version of its Unit4 Agresso ERP system as part of a move to a new shared system with neighbouring Darlington Borough Council. The upgrade training introduced wide-ranging new business processes as well as new functionality to Stockton's team via user group specific classroom and eLearning courses as well as reference guides and quick cards for quick procedures.



Newcastle City Council  
Advanced Business Solutions Procurement & Sourcing

Newcastle City Council turned to Optimum to design and deliver end-user training on its upgraded procurement system in a bid to further increase efficiency. It was the first time that the authority had given structured, formal training to a core pool of 400 staff who use the system. This involved designing, developing and delivering a series of role-based, user-focused courses, as well as a complete set of training documentation including quick cards.



Chichester District Council  
Civica Financials

Chichester District Council selected Civica Financials as their new financial management system, rolling out to approximately 500 end-users. Optimum was selected to develop and deliver role based training courses for Purchasing and Budget Managers within the business. A series of processes which touched upon two Civica Financials modules, Financials Web and Purchasing, were incorporated into the courses.

**“** Using Optimum has freed up resources within our Agresso development team so that we can concentrate on improving the system for users.  
Steve Vasey, System and Business Development 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

**“** The feedback on course content, the delivery and the Optimum Training Consultant has all been good or excellent. We are very happy with the training provided and will look to use Optimum again in the future.  
Helen Belenger, Accountancy Services Manager



Ipswich Borough Council  
Unit4 Business World (Agresso) ERP

Having chosen to upgrade its ERP system, Ipswich Borough Council selected Optimum to handle the super user training for the latest go-live, having struggled with completing this in-house during the initial implementation. Optimum therefore completed Trainer Readiness sessions with the chosen super users, as well as providing the end-users with refresher training and reworking the training materials used throughout.



NHS Institute for Innovation and Improvement (NHSI)  
Unit4 Business World (Agresso) ERP

Having chosen to design completely new business processes and introduce a new ERP system around them, all within three months, the NHSI recognised that the new system itself wasn't the solution to working more efficiently, it was how the staff used it that mattered. Optimum designed, developed and delivered role-based courses for all 360 users of the new system as well as creating a range of back-at-desk quick card and reference guide materials.



Southampton City Council  
Unit4 Business World (Agresso) ERP

Optimum helped to design and deliver Unit4 Business World (Agresso) ERP system training for the 1,300 staff at Southampton City Council. The project, based around a major upgrade of the system, involved working closely with the authorities in-house training team. Having already designed courses and reference guides, Optimum were invited back for the production of further training deliverables including eLearning, quick cards & lesson plans.

**“** Optimum added a lot of value. They gave us some excellent guidance at the beginning and the users rated them very highly on the quality of the training.  
Adrian Powell,  
Project Manager

**“** NHSI set some very tough standards but Optimum tailored the training to mirror their processes and language, making it as user friendly as possible. The training delivery was very professional and the feedback extremely positive.  
Eleanor Dennehy,  
Lead Logica Consultant

**“** Quite simply we couldn't have done it without Optimum. We approached them because our training resources were already under pressure and we had a lot of users who needed to be up to speed.  
Lorraine Chaffin,  
Principal Accountant

## Plus many more



## 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 public 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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