

Training for a global engineering and project consultancy

Microsoft Dynamics AX 2009 & AX 2012



Amec Foster Wheeler designs, delivers and maintains strategic and complex assets for some of the world's leading organisations in the global energy and related sectors.

Operating in over 50 countries, the group provides a range of services including consultancy, engineering, project management, operations and construction, project delivery and specialised power equipment. Its main markets are the oil and gas, clean energy, environment and infrastructure and mining industries worldwide, with customers ranging from BP, Shell, ExxonMobil and EDF to the U.S. Department of Homeland Security. The company chose to implement the Microsoft Dynamics AX 2012 ERP system.

Optimum's brief was to create an entire end-user training template with a full suite of supporting materials which could be utilised as Microsoft Dynamics AX was rolled out. This task involved designing and developing a range of bespoke, job specific end-user training courses and detailed documentation for each element of the finance, project and HR suites.

Optimum carried out an initial detailed training needs analysis and then drew up the critical training plan, identifying the different user roles, who should be trained and in what, along with the content, duration, support materials and logistics for each training session.

Project Overview

- New implementation of Microsoft Dynamics AX 2009 following by upgrade to Microsoft Dynamics AX 2012.
- 350 end-users received classroom delivery with a further 1500 users eLearning modules.
- Support provided for various locations, starting with the UK and adapting working hours to suit the respective locations.
- Modules included finance, HR, projects and operations.

Methods Used



RapidScope®
Planning & designing your training



Reference Guides
Comprehensive end-user manuals



Trainer Packs
Lesson plans for consistent delivery



Presentations
Demonstrations to large groups



Online Solutions
Various web-based learning options



Quick Cards
Double-sided simple process cards



eLearning
Interactive, passive & concept modules



Skill the Trainer
Prepare internal team for delivery



Classroom Delivery
Hands-on training sessions



Go-Live Support
On-site floor walking & hypercare

A total of 350 staff underwent classroom training in ten locations across the UK with 1,500 using the online tools.

Lesson plans and exercises were written for each of the 15 role-based courses. The training covered a large number of topics; eight different modules were created for the project accounting and management suite alone.

Optimum produced a series of quick cards to give light users a simple guide to common, key processes while detailed reference guides provided core users with step-by-step instructions on more complex processes and set out exactly how the system should be used.

Amec Foster Wheeler then nominated a team of business leads from within its UK organisation who would actually deliver the majority of the user training to their peer groups.

Most of the team was new to training and an essential part of Optimum's brief was to equip them with the knowledge, the soft skills and the confidence to deliver the training successfully. A series of handover days was scheduled followed by three 'skill the trainer' courses.

Optimum designed the training around a range of delivery methods depending on the workstream. These included classroom training for large groups, at desk sessions for smaller teams plus some one-to-one help where required. In addition, Optimum wrote and recorded eLearning scripts and videos, hosted on Amec Foster Wheeler's learning management system, to guide remote users through a series of exercises.

A total of 350 staff underwent classroom training in ten locations across the UK with 1,500 using the online tools.

The global energy assets group, Amec Foster Wheeler, has re-engaged the IT training specialist, Optimum, to update its training materials for the rollout of Microsoft Dynamics AX 2012 to its US and Canadian operations.

It follows Optimum's creation of a range of bespoke, job specific end user training courses, with a complete set of supporting materials, for the UK implementation in 2015.

The consultancy's brief for phase two was to adapt the UK reference guides and manuals to reflect the different system settings required by the North American and Canadian markets. The companies there are also using different elements of the system's functionality in different ways from the UK configuration, so new sections were added to fully localise the training materials. Optimum also rewrote all the trainer packs and lesson plans using the US data sets to provide the trainers with relevant, structured documentation and to ensure consistency of delivery.

All the work behind the adaptations, including the knowledge transfer, was done remotely from the UK using Skype for Business. The four way conversations covered three time zones so the Optimum consultants extended their working day to fit the 5 - 8 hour time differences.



Optimum Technology Transfer Ltd

Saxon House, 48 Southwark Street
London, SE1 1UN, UK

UK +44 (0)20 7234 0380

US +1 877 406 6078

www.optimum.co.uk

info@optimum.co.uk