

Training the UK's largest conservation charity

Unit4 Business World (Agresso) ERP



National
Trust

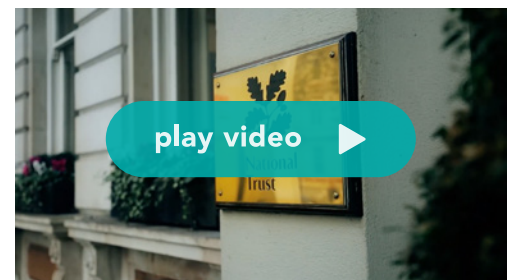
As part of their Systems Simplifications Programme, the National Trust has updated their finance system by implementing Unit4 Business World (Agresso) ERP system.

With an impressive case study portfolio of training this system, Optimum was chosen to design and deliver a cost-effective end-user training programme to more than 5,000 staff.

Founded in 1895, with the aim of saving Britain's heritage and open spaces for everyone to enjoy, the National Trust has over 300 properties and 700 miles of coastline across England, Wales and Northern Ireland.

With a busy workforce, the success of the whole programme depended upon people being able to use these new systems well. "We wanted the trainers to feel like they were part of the organisation, not a third party that had come in just to do training," says Caroline Gray, Communication & Training Manager for the trust.

"I really clicked with Optimum when I met them," she continues. "The things I liked about them were their customer service ethos, the ability to scale up as and when we needed them to, and their ability to deliver on a scale that was needed."



Project Scope

- New implementation of Unit4 Business World Milestone 5 (formerly Agresso).
- Training modules included Procurement, Finance, Projects, Reporting and Administration.
- Training delivered to over 6000 end users across numerous UK sites.
- Continued training partnership for Booking Bug system following U4BW rollout.

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 modules
& passive videos



Skill the Trainer
Prepare internal
team for delivery



Classroom Delivery
Hands-on training
sessions



Go-Live Support
Onsite floor-walking
and hypercare

“What you’ll get from Optimum will be three things; a professional approach, great customer service and an amazing can-do attitude, and that’s what will get you over the line.”

Caroline Gray Training communication manager

The programme included the development of a blended learning solution containing tailored, role-based training courses and comprehensive supporting materials for Unit4 Business World (Agresso) Desktop and Web.

“Optimum produced a wide range of training materials for us at the National Trust from quick cards, to reference manuals and eLearning,” says Caroline. “The most popular, by far, were the quick cards. These are one-page task-focused guides that people can just pick up and use when they need to complete a task.”

Optimum’s flexible working arrangements were greatly utilised by the trust. When needed, Optimum was able to reschedule training sessions at the last minute to accommodate changing priorities.

“We had really successful classroom delivery working with Optimum. They were really flexible. Due to the geographical nature of the organisation, we asked them to travel to all four corners of the UK!”

“Optimum was really flexible towards our training needs. Inevitably, in these sorts of programmes, dates can slip and if I were to go back to Optimum and tell them ‘Sorry, this milestone has slipped and has now moved by 3 months’ they were fine. They just dealt with it...and it worked really well.”

There three key workstreams that were impacted by the deployment were Finance, Procurement Projects.

A year later the training materials are still a trusted go-to for the business. For ease of access, the trust makes them available on their intranet for both new starters, or as reminders for experienced employees.

“We’re one year on and our training materials are still being used. They are all available on the intranet; and any new starters who come along are able to pick up the quick reference guides, look at our e-Learning, and just get started with Agresso – it’s really simple!

“I’d recommend Optimum to any organisation who wants to roll-out a big ERP system. What you will get from them will be three things:

- A professional approach
- Great customer service
- An amazing can-do attitude

And that is what will get you over the line.”



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