

Maximising User Performance: Automating Training and Support



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Preface

Maximising user performance: Automating software training and support is an Economist Intelligence Unit report sponsored by SAP. The Economist Intelligence Unit bears sole responsibility for this report. The Economist Intelligence Unit's editorial team conducted the interviews and wrote the report. The findings and views expressed in this report do not necessarily reflect the views of the sponsor. Bill Millar was the author of the report and Rama Ramaswami was the editor. Richard Zoehrer was responsible for layout and design. Our thanks are due to all the interviewees for their time and insights.

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Automating Training and Support

Most companies have to struggle long and hard to obtain approval to install a whole new raft of business software and related applications. So when the new programs are finally up and running, there is a strong temptation

to just sit back and heave a sigh of relief. But in reality, the process of value creation is just beginning. The true payoff of the applications begins when user training establishes the final and probably

most critical link: that between human and machine. Automating user training and support offers a host of benefits, from higher quality to shorter time-to-competence to lower total cost of ownership.

One of the biggest challenges for companies installing new software and related processes is preparing internal user communities to use it. In fact, end-user training—preparing training manuals and reference guides, conducting the training, and providing ongoing support—“is critical to getting the value out of a software investment,” says Tina Nocco, technical training manager at GATX Corp., a Chicago-based

global lease financing and related services company.

For this reason, says Ms Nocco, her company recently invested in a software package designed to help managers automate many of the processes and procedures associated with user training. While GATX has been using the application for only a few months, the functionality tested so far has demonstrated excellent results.

Documenting business procedures

Currently, GATX is in the midst of implementing SAP’s Customer Relationship Management. While Ms. Nocco believes this software will prove effective in improving business processes, she acknowledges that like many instances of enterprise software, things are not always intuitive, “and it will be challenging to learn.”

Consequently, in addition to the SAP enterprise software, GATX purchased a performance support solution that includes training documentation software package. Known as SAP Productivity Pak (also known as uPerform™ by RWD, which is in use at GATX), the software equips the company with a sophisticated workbench. For example, says Ms Nocco, as part of its software implementation, the company will need to document its business process procedures (BPPs). “Part of the implementation





process is to gather your requirements for the software and then configure your solution.” Here, SAP Productivity Pak by RWD allows for the recording of transactions and serves as a repository of the BPPs—a readily accessible reference guide.

In addition, says Ms Nocco, GATX obtains “a large number of automated capabilities that are very useful for training and support.” For example, the training software enables the firm to develop what is referred to as a work instruction, which, says Ms. Nocco, “is a step-by- step ‘how-to’ guide for inputting a specific transaction into the SAP system.”

Essentially, GATX’s internal experts in the use of third-party software, referred to as “developers” and/or “authors” in the SAP Productivity Pak by RWD environment, simply turn on the “Record”

SAP Productivity Pak by RWD allows for the recording of transactions and serves as a repository of the business process procedures.

function and then keyboard their way through a given transaction. What the system does, says Ms Nocco, “is capture the keystrokes in a file that end-users can play back and follow step by step.” She adds that authors can even “create and record a voice-over if they like,” thus enhancing the value of the simulation.

From then on, if end-users need to perform a given

CASE STUDY Tapping the Value of User Communities

THERE HAS BEEN a big change in the last few years in companies’ approach to user preparation. According to Nina Simosko, chief operating officer for SAP Global Education, “Companies used to assume that their official subject matter experts were the sole source for all training content, and all that content needed to be pushed to the end-users.” Today, however, she says, “we’ve realised two very important points: (1) that in a world rapidly dominated by user-generated content, it is the users themselves that have become a rich source of know-how, and (2) that a very large percentage of what people learn at

work is learned through informal channels.” Tina Nocco, technical training manager at the lease financing and related services company GATX Corp., agrees, and describes the related capabilities of the SAP training software as a potential source of significant value. “The system performs at a higher level of sophistication in that it enables us to create user communities,” Ms Nocco says. So there are not only end-users of the systems and authors of work instructions, but

also “approvers who do a final review of the transaction and then publish the work instructions for all to see.”

Within this hierarchy, the software enables authors to collaborate with other authors, end-users and approvers—and vice versa.

What happens, says Ms Nocco, “is that everyone can communicate, critique, question, and if it works as expected, information will flow in both directions and that will create a higher quality and a faster, better overall implementation.”





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Cushing Anderson, IDC analyst

transaction, “they can do a search for the transaction they want, say, a specialised lease transaction, and then receive a step-by-step walk-through of what they need to do,” says Ms Nocco. “We will also implement context-sensitive help available through SAP Productivity Pak by RWD. While using the SAP system, the user will simply depress a ‘GATX Help’ button which will ‘call up’ the work instruction for that transaction.”

But the system has even more capabilities and advantages. On a basic level, in addition to providing

organised documentation of procedures, it creates screen shots that can be used in Microsoft PowerPoint presentations during live user training.

Providing ongoing support

Achieving competency among the first set of end-users is by no means the end of the road. Companies also face the ongoing challenges of sustaining and even increasing user proficiency. For example, a recent study by the market research firm IDC discusses what the company refers to as “knowledge leakage,” or the idea that beyond ordinary employee attrition, even the knowledge of those who have been trained to use a particular enterprise software package over time slowly deteriorates. According to IDC analyst Cushing Anderson, “you have to pay attention to training, you have to think about training continuously, or the value of your technology investment just erodes.”

SAP’s Nina Simosko, chief operating officer for SAP Global Education, is in complete agreement with IDC’s findings. “Our customers continuously deal with

CASE STUDY IDC’s Four Rules for User Training

ACCORDING to IDC analyst Cushing Anderson, when it comes to user training, most companies “don’t do as much as they should, and it’s draining the return on their (technology) investment.”

The way things typically work, says Anderson, is that whether a company is implementing a totally new environment or merely upgrading existing software, “you see a flurry of training activity and then from there, next to nothing.” So what was at first a priority for the organisation, learning the new software, becomes an af-

terthought. As a result, says Anderson, the moment the training team leaves, “knowledge leakage” begins.

For example, if the software or even a subset of the software is not regularly used, says Anderson, “people begin to forget what they’ve learned, or forget to apply what they’ve learned and then develop sloppy habits.” In addition, he says, “people get promoted and take their skills and knowledge with them while new hires who know less are expected to fend for themselves—learn on the job.” So over time

the organisation as a whole, says Anderson, “loses its knowledge—it gets more stupid.” That, in turns, leads to errors and inefficiency. As Anderson puts it, “Companies shoot their ROI in the foot.”

STOPPING THE LEAKAGE According to Anderson, there are four steps companies should consider for reducing this knowledge leakage. They include:

Train everyone. Whether they are completely new hires or new team members transferring from another department,



challenges such as workforce turnover, skills decay and a host of other organisational occurrences,” Ms Simosko says. These events, she maintains, can significantly reduce initial return on investment (as new capabilities are not fully realised) and increase the ongoing cost of ownership (as mistakes and other negative events increase in frequency). Consequently, says Ms Simosko, “training is a process, not an event. We’ve come to understand that ongoing user support is equally as important as initial user preparation.”

None of this is lost on GATX. Ms Nocco explains, “We absolutely understand the importance of user training as an ongoing effort. That’s one of the areas where we’re optimistic that the training components of SAP Productivity Pak by RWD software will be very helpful. It will be incredibly valuable to have user support in the form of simulations available whenever they’re needed.”

But in addition, says Ms Nocco, there are other potential uses for the software that could aid in regular support after software implementation. For example, a possible application is to use the software to conduct

periodic user testing. “We understand that’s another capability we can access, and it would be very valuable for determining proficiency and evaluating where additional training might be necessary.”

Lower costs, higher quality

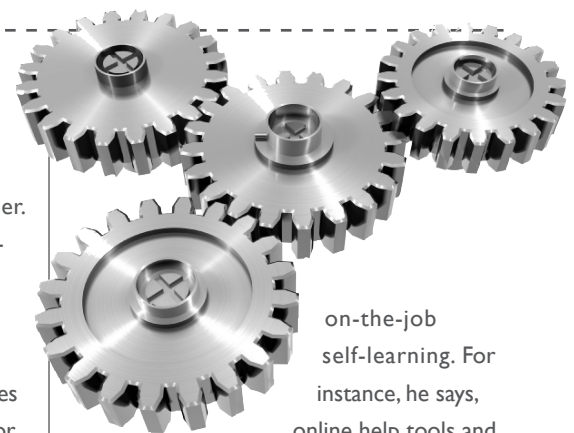
According to Ms Nocco, GATX’s decision to purchase and implement the SAP Productivity Pak by RWD software was nearly a no-brainer. “There are just so many potential benefits,” she explains. “You reduce the time needed to document the software and then prepare for and develop user training. The training itself is better because these simulations are so useful and easy to follow. Then you have reduced the cost of maintenance because the ability to update user manuals is easier than previous methods. You have automated a lot of your support—because if people need help it’s already on their screen through context-sensitive help. So we’re improving the quality of the training and support experience while reducing the costs.”

all software users should be formally and fully trained on the systems they will be using. Even if they have some familiarity with the system, cautions Anderson, “don’t assume that they’re going to know what to do or that they’ll be able to pick things up on their own.”

Train practically. The old paradigm, says Anderson, is an instructor at a whiteboard telling you what you will need to do. The new paradigm, he says, “is simulation-based—using the actual software to capture examples of actual transactions that you will be doing in your work.”

Train consistently. A big advantage of simulation-based training is that everyone learns in the same manner. “If they’re using the software,” says Anderson, “it’s less likely that people will be developing their own ways of doing things. They’ll learn the best ways.”

Train continuously. Finally, companies should commit to continuous training. For example, says Anderson, “you might have regular review sessions or maybe conduct skills testing.” It is better still if the simulation can be configured to help end-users live in an environment of continuous,



on-the-job self-learning. For instance, he says, online help tools and simulations can assist users as they are working. “If I learn something while I’m doing the work, that’s the most effective learning, and it’s less likely I’ll need that help in the future.”

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LONDON

26 Red Lion Square
London
WC1R 4HQ
United Kingdom
Tel: (44.20) 7576 8000
Fax: (44.20) 7576 8476
E-mail: london@eiu.com

NEW YORK

111 West 57th Street
New York
NY 10019
United States
Tel: (1.212) 554 0600
Fax: (1.212) 586 1181/2
E-mail: newyork@eiu.com

HONG KONG

60/F, Central Plaza
18 Harbour Road
Wanchai
Hong Kong
Tel: (852) 2585 3888
Fax: (852) 2802 7638
E-mail: hongkong@eiu.com