



Case study

A proven path to training success

This global fire-protection company has earned a reputation for providing customers with maintenance and service of the highest quality. In this mid-size company's 75-year existence, they built their business organically through natural growth, marketing, and geographic expansion, as well as through numerous acquisitions of smaller fire-protection companies. They recently hired a new chief information officer to replace the CIO who retired after 15 years in the job. The new CIO had extensive experience working with Microsoft and SaaS products. The CIO's immediate focus was to consolidate and modernize the applications that employees were using to conduct their business.

In the training plan, the company included a mix of high-level and detailed training objectives. The high-level objectives included these goals:

- To not allow access to the live system without a solid training program
- To prepare a core team of trainers to help support the initiative
- To continue receiving feedback and improving the training approach
- To develop the training materials early and schedule classes early
- To prepare all application users to efficiently use the application (Dynamics 365 Finance and Dynamics 365 Supply Chain Management or Dynamics 365 Customer Engagement), as well as address any key business process changes required in their job function

Specific objectives were centered on business processes like Prospect to cash—for example, “All sales team members should be able to execute the standard Prospect to cash flow on their own.” Their specific training objectives, listed here, helped support business goals for the application:

- Increase sales by 10 percent year over year
- Improve productivity by 25 percent by measuring Work Order completion time
- Increase user satisfaction (covered in annual poll) by 10 percent and user competency (measured by metrics within the application) by 15 percent within the accounting business department

The team understood that for training to be successful and for meaningful user adoption to be achieved, they needed to begin planning early and set up a strong team to support it.

The team benefited from using a change-impact assessment matrix to understand the changed business areas, topics, and user groups impacted. The matrix helped them prepare and prioritize training sessions.

The company had experience developing and conducting trainings for previous projects. They knew they wanted to incorporate a variety of learning modalities—written documentation, videos, hands-on learning, and multiple training labs using real and recognizable data.

Their legacy application infrastructure was a reflection of the way business had grown. The back-office system ran on an on-premises application that had been in use since 1990. Front-office users (salespeople and field dispatchers), as well as field technicians, did not employ any application; they were still using pen-and-paper-based methods. Due to the number of acquisitions they had made over the years, these methods varied—sometimes by business unit, sometimes by other organizational structure—and there was no overarching governance model consolidating these different methods.

As a result, employees that were in identical roles used different methods to accomplish their day-to-day work. This discrepancy in job

execution versus job role could be attributed to the fact that many of them joined the organization via acquisition and had never been required to change. It was necessary to capture all “as is” processes and assess the impacts of moving to the new application, from a technical perspective and from a business process change perspective.

Given the numerous challenges of supporting a wide variety of applications for all users, the company made use of the BPM, task guide, and custom guided help features for content development and user training. Having all business processes documented on one platform gave the organization a single source of truth. Task guides not only provided consistency to all the business processes in use across the different departments, but they also made the employee orientation and training a much smoother experience. Task guides were also embedded in the product help experience to provide a 24/7 interactive help experience.

By clearly defining all these processes, as well as the group of users to be trained, they were set up for success. Its subsequent training delivery was a smooth process that included all user persona business processes.

Because of the evolving nature of Dynamics 365 applications and organizations, as well as the fact that the project was being rolled out in multiple phases, the company developed an ongoing training process by which training was executed, reviewed, and updated as a cycle.

Formal feedback was recorded after the trainings and Microsoft Teams channels were created for employees to continue providing feedback to the team. Users were encouraged to share knowledge, ask questions, and suggest improvements to the training materials. The team was also able to collect feedback and create metrics using help desk tickets, which helped them identify areas of the application that users found particularly challenging.

The organization determined that mobile Field Service technicians were logging more tickets than other application users. By learning the types of tickets being created by their technicians, trainers were able to pinpoint a specific area of the Work Order process that needed to be

made clearer during training. Adjustments were made to the training material, too.

The objective “To not allow access to the live system without a solid training program” was a difficult objective to meet in the initial days, but the company learned over time that making sure every user received adequate training drove a significant reduction in business process issues for the company.

In the first few months, an evaluation of key KPIs showed that the organization was on track to meet all the detailed objectives set by the team.