**(Company Name Here) Training Strategy**

(Company Name Here) (project name here) project

Prepared for **(Company Name Here)**

Sign-off section

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1. Document Introduction

The purpose of this document is to establish an understanding of the approach taken to training as part of the (project name here) project. This document will therefore introduce the strategy for training in the (project name here) project and will detail the types of training for each different groups of end users and administrators of the (project name here) system.

Based on this document, a more detailed training plan will be created. The detailed training plan will at minimum include the following details which are not captured in this document:

* Detailed schedule with names, dates, attendee numbers, location details, programs, etc.
* Contact list (full details) of all organization parts and specific people who are required to ensure the training is a success. This can include i.e. helpdesk, it department resources, building (access) management, facilities, canteen/restaurant, etc.
* Pre requisites for the trainings
* Feedback method and processing of the feedback

1. Summary

The Training Strategy for the (project name here) project aims to secure optimum use of the (project name here) solution after Go-Live. The most important aspect of this is for the end-users to be able to use the solution in the most effective way.

Having the right Training Strategy and plan in place ensures that the training and related knowledge transfer help secure the successful and efficient use of (project name here) after Go-Live. It therewith is an important factor for the success of the project.

This document focuses on the right training for each of the different users groups of the (project name here) solution. By tailoring the trainings to the specific needs of these different groups, the success rate of the training will increase; (Company Name Here)’ s end-users will get the best out of the system and have a great experience using it.

The (project name here) training program will be conducted during the Deployment Phase of the project. The training will focus on the (project name here) End-Users and the System Administrators.

The goal of these training sessions will be to get the participating users to understand and effectively operate the functions they will be responsible for within the (project name here) solution and to allow them to be as efficient as possible with their new work tool; (project name here).

The End-User training sessions will be held immediately after the UAT (User Acceptance Testing) has been completed and signed-off.

The end-user training will be provided by the (Company Name Here) (project name here) Competence Center people and the (project name here) key-users. The Microsoft Consultants will help prepare these resources to provide the trainings through the “train-the-trainer” concept.

Through the (project name here) project, the project team will create a “Global Core (project name here)” solution. This Global Core Solution targets to support all business processes (within the scope of the project) across the different country entities of (Company Name Here).

Standardization and Harmonization of processes across the (Company Name Here) Globe will help to ensure that this Global Core (project name here) solution can be used with only minimal local adjustments for each country.

The training for the end-users will be created in sync with the above concept of a Global Core Solution. As however there is no “Global Core (Company Name Here) Entity”, the actual end-user training will always be a locally tailored version of the Global Core (project name here) training.

The required “localization” for each separate country entity will determine the “localization of the training (materials)” as well.

1. Objectives

The objective of the (project name here) training is to ensure that all end-users of the application will be able use the (project name here) solution in such a way that they can gain maximum benefit from the solution supporting their business process and daily tasks. When that goal is established it will help to gain maximum user satisfaction and acceptance of the (project name here) system.

Only if all end-users will be able to gain maximum benefit of the (project name here) solution will the solution itself be able to deliver the targeted benefits to the (Company Name Here) organization at large. The training therewith is a vital and majorly important part of the (project name here) project and shall be treated as such.

This document aims to provide insight in what training will be provided as part of the (project name here) project and how this training will be organized in order to achieve the above benefits to (Company Name Here).

* 1. Target groups

In order to ensure that the training objectives are met, the (project name here) solution training will target the following groups:

* End-users of the system in the local countries, largely devided into the following business process oriented groups:
  + Sales and Marketing
    - Sales
    - Planning
    - Marketing
    - Retail
  + Order to Delivery
    - Warehouse Management
    - Transportation Management
    - Production and Quality
    - Supply Chain Planning/Management
    - Plant Maintenance
  + Procurement
    - Procurement
    - Service
  + Finance
    - General (Ledger) Accounting
    - Accounts Payable
    - Accounts Receivable
    - Fixed Assets
* The (project name here) Solution System Administrators
* Business Intelligence Users
* Master Data Management Developers/Administrators/Users
  1. Strategy subjects

The objective of this training strategy is to identify:

* (project name here) (Microsoft Dynamics AX 2012 R3) training approach for (Company Name Here) end-users
  + Train-the-trainer concept
  + Localization of the training
* Training Materials
  + User Manuals
  + Supporting PowerPoint Decks
  + Videos
  + Self training
* Training Facilities
  + Locations
  + Stystems
  + Workstations
  + Overhead projectors/White Boards/Flipovers/etc.
* Trainers
* End-Users/participants
* Different trainings
  + Areas to be covered within each of the trainings
  + Groups to target for each of the trainings
  + Trainers identified to deliver the trainings

1. Training Approach

In order to ensure maximum success of the training, the most efficient and effective training method has been chosen for the end-users of (project name here); instructor led, hands-on, classroom training.

This training method, compared to for instance on-line training or book/computer based self-study has been evaluated to be most efficient. It allows the trainee to gain an optimum of knowledge in a relatively short period in time. The fact that the trainer is in the room, available to answer any questions and to provide hands-on assistance and guidance with the course activities helps the trainee to be much more efficient and helps to prepare the (Company Name Here) end-users in the most beneficial way. Trainees do not unnecessarily have to spend time in figuring out things in the system or training material they do not instantly understand; they can just ask the trainer or one of the other attendants in the session.

The fact that the session is pre booked, includes other people, is neatly structured, moves forward, etc., ensures that the attendees will go through all materials in a short time frame; an optimum time investment.

To ensure maximum match between what the trainee is to learn in order to use the system in the best and most efficient way and what is covered in the training, different training sessions, each with a custom tailed curriculum will be organized. People of the same background and with the same training requirements will be combined into sessions which are geared towards just them. Being exposed to subjects, processes or parts of the system which are less relevant to some is therewith avoided as much as possible given the specifics of the total population which is to be trained and the optimum number of different sessions.

Because all materials will be available after the training has finished, trainees can continue their familiarization of the system by training themselves using these materials. An environment will be created specifically for that goal so that people will not have to be afraid of creating dirty data in the production environment while trying different things within the application.

* 1. Training Methods
     1. Presentation

PowerPoint Presentations will be created to provide overviews of the business process, Microsoft Dynamics AX specific terminology and general usage of the application, in support of the training.

* + 1. Hands-on Training

Hands-on Training will be part of the training sessions. It will be combined with instructor led overviews, explanations and demonstrations of the system and its functionality. It will allow the trainees to practice what they have been shown in order for it to “stick” much better. Learning by doing has proven to be a great way of learning to use systems like (project name here).

The hands-on training will allow users to familiarize themselves with navigation techniques, and core functions of the application by interacting with (project name here).

* + 1. Training Material

Next to the PowerPoint deck, system user manuals will be used during the training. Next to that, videos of “how to perform a certain process within Microsoft Dynamics” will be available as well. The combination of User Manuals, PowerPoint Decks, Videos and real life demo and instruction has proven to be a very effective way of training people in Microsoft Dynamics AX.

As stated above, all materials will be available after the training as well, allowing for the trainees to keep themselves trained continuously through self (re)training.

* 1. Training sessions

The following sections details each of the different training sessions which are part of the (project name here) training curriculum.

The following user groups will be targeted as part of the end-user training for the (project name here) project:

|  |  |
| --- | --- |
| User Group | Business Team |
| Executives (Required? How will they use (project name here)?)  Executives will mainly use (project name here) for information and or approval purposes and only for a limited scope of the application.  Most of the information they will consume through the Business Intelligence facilities instead of directly from the (project name here) system. | Executives |
| Managers (Required? How will they use (project name here)?)  Managers can have largely three reasons to use (project name here):   1. Being part of a process and having to perform actions within that process. This is more or less equal to what an end-user does 2. Being part of an approval workflow and having to approve/reject only. This might be equal to what Executives might do (see above) 3. Monitoring (activities of) the people within their teams within (project name here). This might be partly equal to the Business Intelligence requirements that Executives might have | People/line managers  Business Process Owners |
| (Process) End-Users  This group consists of those (Company Name Here) people who will be using (project name here) actively in support of their business process. Some will use (project name here) only, while others will use it in combination with other applications.  These users need to have the in-depth understanding of the application, its workings and its options.  If users are working across multiple teams, then they might need to visit more than one end-user training session. | Sales and Marketing   * Sales * Planning * Marketing * Retail |
|  | Order to Delivery   * Warehouse Management * Transportation Management * Production and Quality * Supply Chain Planning/Management * Plant Maintenance |
|  | Procurement   * Procurement * Service |
|  | Finance   * General (Ledger) Accounting * Accounts Payable * Accounts Receivable * Fixed Assets |
|  |  |
| Information Users  This group consist of those (Company Name Here) users that consume information which comes available through (project name here).  These users will use to consume the information required using the (project name here) User Interface; Microsoft Dynamics AX screens both work for entering and representing data/information.  The training for this group will focus on that part specifically. For any information requirements that this group has that will be fulfilled using Business Intelligence or standard Microsoft Dynamics AX reporting, they will attend one of the trainings specifically for that. | Sales and Marketing  Order to Delivery  Procurement  Finance |
|  |  |
|  |  |
| Business Intelligence Users  The training for the Business Intelligence users will focus on the Business Intelligence tools; not so much on (project name here). | Business Intelligence Developers  The Business Intelligence Developers will be trained in the use of the Business Intelligence tools for gathering data and creating meaningful information from that data.  It will include gathering data from (different) sources, combining and structuring the data into usable data collections and creation of ready to consume “reports” for other users. |
|  | Business Intelligence users  The Business Intelligence Users will be trained in the use of the structured and pre-defined/re-pared data “cubes” for creating their own tailed insight that information (creating personalized reports out of predefined data cubes) |
|  | Reporting users  Reporting users will be trained in consuming predefined and prepared information presented in a more or less fixed way; reports.  These reports can both be reports which are available within (project name here) and reports which have been predefined and prepared for them within the Business Intelligence tool.  The training will focus on finding the right reports and the actual use of these reports. |
|  |  |
| System Administrators  System Administrators are those people who will maintain the (project name here) system both from an infrastructure point of view as from an application point of view.  System administration tasks are typically divided into more “technical” and more “functional” tasks. Technical tasks could be for instance maintaining indexes within the SQL database and inspecting and cleaning of system log files. Functional tasks will for instance be maintenance of users and user roles and maintenance of certain configuration within the application.  Although some (Company Name Here) resources will (be able to) perform both tasks, typically these tasks are performed by different people.  The more technical people could be part of the IT organization, while the functional ones will typically be part of the (project name here) Competence Center. | Technical System Administrators |
|  | Functional System Administrators |

The above table needs to be updated in accordance with the roles and responsibilities matrix which will be created as part of the Design Phase.

* + 1. Example training set-up

The below is an example of the set-up for a training (in this case for the executives). For each separate training identified, an overview like this will be created as part of the detailed training plan(s).

|  |  |
| --- | --- |
| Training Course | (Company Name Here) Executives Training |
| Course Description | In this training, the Executives will be trained in the understanding of the Business scenarios and Processes and more specifically in Reporting and Dashboards. |
| Format | Instructor-led (classroom) |
| Target Audience | * (Company Name Here) Executives |
| Language | English |
| Pre-requisites | * Before attending this course, students must have:   + Microsoft Office skills   + Microsoft Windows basic skills |
| Course Skills | * After completing this course, students will be able to:   + Consume and manipulate Reports   + Create and manage Dashboards   + Generate Reports, view KPIs and Dashboards   + Drill down in Dashboards |
| Location | Helsinki |
| Duration | 1 days |
| Total Training Hours | 8 hours |
| Total hours per day | 8 hours |
| Class Capacity | 10 |
| Training material | Solution User guide, Dynamics AX user guide, video and PowerPoint |

* + 1. Materials and Resources

A course agenda and training material will be provided for all of the training participants.

The course agenda will provide a detailed overview of the topics that will be covered in each of the sessions. This will help the trainees to understand upfront if the training fits their profile and will fulfil their (project name here) training needs. For some resources it might be required to attend multiple trainings, although the training set-up will aim to avoid that as much as possible.

The agenda will also help to understand the time investment required for participating in the training.

In the training sessions, the trainers will make use of 4 main training tools:

1. **PowerPoint slide deck**

The PowerPoint slide deck will be used for the generic training information. It will therefore include the agenda, the location, the duration, the details of the trainer and the rules of the training itself (i.e. switch off phones, no browsing the internet, coffee, tea, lunch and nature breaks, etc.).

The PowerPoint desk will also include content specific information like the Business Process Flows (could also be a link to these flows in Microsoft Visio), (project name here) concepts (specific to the subjects of the training), user and roles overviews etc.

The “labs”/exercises which the trainees are supposed to perform in the system (hands-on) will also be included in the PowerPoint. It will be shown on the overhead projector for constant referencing by the trainees while doing their hands-on exercises, so they only have to have their manual and (project name here) application open on their workstation.

The PowerPoint will be used for supporting the training; structuring it and as a place holder for additional or more general information.

1. **(project name here) User Manuals**

The User Manuals which will be created as part of the implementation project and will be used as the base material for the training. No separate training materials will be created. The (project name here) User Manuals will be based on the Standard Microsoft Dynamics AX User Manuals and will be tweaked to reflect the (Company Name Here) specific configuration of Microsoft Dynamics AX.

During the training, the trainer will guide the trainees through the sections of the User Manuals which apply to the training. Some parts of the User Manuals might not apply to a certain training. The training therefore will NOT be structure in-line with the User Manual, it will be structured in view of the best training experience, using the relevant parts of the User Manuals.

The User Manuals will not be printed for the users, but will be made available in electronic format. This not only helps to save paper and the time for printing, it will also allow for last minute updates/changes to the User Manuals, i.e. based on feedback from a previous training session.

1. **Process Videos**

In the (project name here) project, the project team will use the Microsoft Dynamics AX Life Cycle Services tool. This tool works in combination with the Microsoft Dynamics AX implementation methodology Sure Step and helps to structure the activities and “gather” all application related artefacts in one easy accessible place. LCS will for instance contain all the Business Process Flow Diagrams (Visio) and also video files of how these processes flow through the (project name here) application (how (project name here) is used to support that process).

These videos will be used during the training to demo the Business Process flows within the (project name here) application. They will be combined with real life demos (the trainer using the actual (project name here) system) in the training.

The videos will also be used by the trainees as refreshers after the training (self re-training).

1. **(project name here) application**

The main tool that will be used during the training is of course the (project name here) system itself. A training environment will be created which will be used for the training solely. This environment will have to be managed tightly and supported sufficiently because of the fact that as a result of the hands-on exercises the environment will be “polluted” rapidly. Daily refreshes of the environment might therefore be required.

All training materials, agendas, etc. will be stored and maintained on the (project name here) SharePoint site for easy access and reference to both the trainers and the trainees.

* + 1. Training Facilities

In order to successfully complete the trainings, the following needs to be made available to the training team:

1. A Training Room per session with 10 seats available inclusive of fully functioning workstations, plus a separate workstation for the Trainer and his/her assistances
2. Ideally 2 screens are connected to each workstation. 1 for displaying the User Manual and 1 for the (project name here) application
3. All workstations will need to be setup to meet the (project name here) hardware, software and operating system requirements prior to training
4. The training has to be scheduled accordingly so that each user will have a PC to train on. The value of the training decreases cdonsiderably when some of the trainees are not able to perform the hands-on exercises
5. Each user will have to be granted the necessary **system access credentials and permissions** configured setup prior to the training session the user is participating in. This can be either the user itself or through the use of “training” users (users are like Trainee 1, Trainee 2, etc. in the system)
6. The training workstations are required to be connected to the (project name here) training environment in order to enable users to access the system while attending the training session
7. Projector, Flip Chart, and Marker pens will need to be available in the training/classroom
   * 1. Localization of the training

The (project name here) system will be developed through the “Global Core” concept. This means that the (Company Name Here) specific configuration of the Microsoft Dynamics AX application needs to (as much as possible) fit the Global (Company Name Here) organization. In other words, it must, with one standardized set-up support the in-scope business processes in the different countries in which (Company Name Here) operates.

The fact that local legal and statutory requirements do differ from country to country and that some key business processes might be very specific to a local (Company Name Here) entity (i.e. because of certain customer requirements) means the local implementation of the Global (project name here) Core solution will be slightly different for each country.

This means that the training and training materials need to be adjusted in sync with these local differences.

In some countries it might also be required to have all, or a part of the training provided in the local language in order to ensure maximum benefit from the training and therewith maximum benefit from the (project name here) system.

In the local roll-outs the training is a major part and needs to be treated that way. Training requirements and possibilities need to be assessed PRIOR to the start of the actual country specific roll-out in order to ensure that the team has ample time to prepare for delivering a high quality training. A local resource should always be included in the training and therewith make the success of the training a shared responsibility between the (project name here) Competence Center and the local entity. This ensures that ample resources will be made available to ensure success of the (project name here) training in the local entity.

1. Knowledge Transfer

Knowledge Transfer, or Knowledge Sharing is a critical aspect of the (project name here) project. Adequate knowledge transfer is crucial not only to the success of the implementation, but also for the user’s satisfaction with the new solution. Consultants need to gain as much as possible understanding of (Company Name Here) and its Business Processes in order to ensure the best suited configuration of Microsoft Dynamics AX. (Company Name Here) people need to gain as much as possible insight in the workings of the Microsoft Dynamics AX system to allow them to get the best out of it and to make changes to it as required going forward.

Informal knowledge transfer is defined as (Company Name Here)’s staff working alongside Microsoft staff, participating in Workshops, meetings and other forms of structured and unstructured exchange of information (knowledge sharing). Informal knowledge transfer will be a natural part of the project because of the way it is approached using Sure Step Evolved in combination with Microsoft Dynamics AX Life Cycle Services (LCS). Both Sure Step Evolved and LCS are structured such a high level of interaction between the (Company Name Here) organization and the implementation consultants happens automatically.

For the (project name here) project, the knowledge transfer has also been partly formalized through the “train-the-trainer” and the “Competence Center” concepts. Both concepts are solely focused on knowledge transfer, in this case mainly from the Microsoft Consultants to the (Company Name Here) resources.

* 1. Train-the-trainer

The set-up of the (project name here) project is such that the (Company Name Here) people will train the End-Users. These (Company Name Here) (project name here) trainers will be the people from the (project name here) Competence Center together with the Key-Users of the (project name here) system. In order to ensure that these people are ready to train the End-Users, they themselves will be trained by the Microsoft Consultants both in the Microsoft Dynamics AX application and its specific (Company Name Here) configuration and in how to train the End-Users.

The Consultants will not only instruct the (Company Name Here) (project name here) trainers in how to provide the training, they will also guide them in the process of preparing for the training. This will range from advice on the contents and layout of the PowerPoint presentations to the set-up of the system for user hand-on training.

The Project Managers will work in close cooperation with the Training Manager to ensure that the train-the-trainer concept is executed in a correct, structured and planned manner.

* 1. Competence Center

The main goal of the knowledge transfer from the Microsoft Consultants to the (Company Name Here) people is to enable them to operate, maintain, support, configure and modify (project name here). (Company Name Here) has set-up the (project name here) Competence Center to group/consolidate this knowledge and skills required to perform these tasks.

The (project name here) Competence Center will be main target for the knowledge transfer from the Microsoft Consultants to the (Company Name Here) organization and will become the main source of (project name here) related knowledge to the (Company Name Here) global organization over the life cycle of the (project name here) project.

The transfer of knowledge from the Microsoft Consultants to the (project name here) Competence Center will aim to enable (Company Name Here) provide support to the organization when using (project name here) and to perform the bigger part of the local country roll-outs by itself, which considerably reduced support/involvement from external resources (Consultants).

Through the knowledge transfer, the (project name here) Competence Center people will gain specific knowledge to be able to both train the End-Users (see above) and to perform the roll-out of the Global Core (project name here) solution to the local (Company Name Here) countries. Although a component of gaining the knowledge will be based on the standard, non (Company Name Here) specific Microsoft Dynamics AX system, the bigger part will be focused on the (Company Name Here) specific implementation of Microsoft Dynamics AX; (project name here). The Competence Center people will become the (project name here) experts, not Microsoft Dynamics AX general experts.

The Competence Centre will also be involved in the operational support of (project name here). That should however always be in assistance to an actual support organization because the task of support will conflict with the task of rolling out (project name here) across the (Company Name Here) globe. The more entities are live on the (project name here) system, the more support will be required.