

Training delivered to UK-based life insurance and investments firm

Advanced ERP

FriendsLife

Ensuring that employees are ready for change when introducing a new business system or process can be challenging for any organisation. When the company is also going through a major reorganisation and merging several divisions of their business, requiring user training programmes to be rolled out across a large and disparate user population, the demands on the internal training team resources will be even greater.

This is the situation that Friends Life faced when they decided to update their invoice handling process to integrate with their finance system and improve the approval workflow. The project required that the user training programme would initially focus on Friends Provident users, with the intention to then roll this out to further Friends Life acquisitions: AXA Sunlife and BHA.

The Finance Systems project team at Friends Life opted to use an external training consultancy after reviewing the number of users to be trained and determining that the in-house training resources would struggle to handle the training requirements. Around 300 users would initially require training and the roles included analysts, first time users, senior executives and directors, so the skill levels and seniority varied.

Project Scope

- Implementation of Advanced ERP system.
- Initially focussed on Friends Provident users, with the AXA Sunlife and BHA users to follow.
- Although predominantly eLearning, various training materials were created for each user group.

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

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Stephen Robinson Project manager

Optimum, the IT training consultancy, was chosen to provide a training solution based on the recommendation of Friends Life financial software supplier, Advanced Business Solutions.

The project kicked off with an initial telephone conference call to discuss the training requirements and understand the challenges that the users faced. Friends Life project manager, Stephen Robinson, also created a PowerPoint presentation to help explain the required processes. An important objective was that the terminology used in the training was generic so it would be appropriate across the whole business. Optimum then proposed some possible approaches and a final training solution was agreed, which included the creation of a training presentation and an eLearning package.

The presentation would be delivered to the Accounts admin users who would then roll this out to other users. Optimum also created an eLearning package consisting of three modules which would be available to users via a hyperlink on the company intranet. To ensure that the content could easily be shared by other users, the eLearning would also be accessible as a PDF download in a secure format via Adobe Captivate so that it still included all the animation.

Will James, head of finance systems at Friends Life comments: “The advantages of working with a specialist training consultancy in creating the eLearning was that they challenged our approach at times and made us think about our user training earlier in the project.”

Optimum was able to demonstrate the end-to-end eLearning process so the project team could check that the content was correct before it was finally developed. Finally, supporting documentation was provided to ensure that they had the knowledge to continue to update and develop the eLearning content.

Stephen Robinson, project manager, explains: “Using Optimum to create the content of the training materials allowed me to focus on the rest of the project. The presentation style and content was very professional and I just needed to review the content, which was much less time consuming”.

He concludes: “We would definitely consider using this approach with support from Optimum for future projects”.



Optimum Technology Transfer Ltd
Saxon House, 48 Southwark Street
London SE1 1UN

UK +44 (0)20 7776 9876
US +1 877 406 6078

www.optimum.co.uk
info@optimum.co.uk