

# Case Study

## Transformation Programme (CTP)

### Project Overview

Appointed as Transformation Training Partner to support the roll out of multiple projects across all Global offices including:-

- COS** - Client & Object System – **Seibel 8.1 CRM Upgrade**
- FMI /COA** - Financial Management Information and Client Operations and Accounting – **JD Edwards 9.1 deployment and upgrade**
- BI** - Business Insight – **Hyperion Reporting**
- T&E** - Travel & Entertainment - Deployment and support of new **Workday Global HR solution**

### Project Objectives:

To design and deliver a Global Training Strategy that is fully integrated with the core Transformation Programme objectives (outlined above) and is fully inclusive of both key Client Stakeholder and Systems Integrator requirements.

Training solution has been scoped to enhance business performance in the following key areas:

- Improve the client experience regardless of location
- Provide staff with the tools and information that enable them to do their job more effectively and efficiently
- Improve the availability, quality, consistency, and timeliness of data to enhance decision making, client service and growth
- Ensure the implementation of globally consistent processes and procedures to improve organisational effectiveness

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## Project Solutions

We identified five main areas of training support:

- Design and develop all workstream training collateral including, curriculum, eLearning and eMarketing material
- Conduct train-the-trainer and support desk training
- Establish Super User Training program for go live training support and post project/BAU transition training
- Establish business focus groups to provide input and to review training collateral
- Assemble a team of highly competent trainers who can learn and train the full end to end system for each workstream.

## Snapshot of Project:

### **Client**

- World's largest Auction House

### **Project**

- Global rollout of a Transformation Program (CTP) to 2,500 staff, across multiple workstreams

### **Solution**

- Developing a Global training strategy, curriculum, e-learning and eMarketing material
- Executing this strategy in conjunction with the Client's internal Project team and System Integrator
- Conduct Train-the-Trainer and support desk training
- Execute training pilots and capture pilot feedback
- Conducting deployment of the CTP initiative through local office training sessions.
- Provide Floorwalking support to augment the client's internal support capabilities.
- The implementation of new processes and firm-wide policies to ensure core project objectives are achieved.
- Smooth transition of knowledge with a strong understanding of best practise.
- A combination of e-learning, instructor led and virtual training sessions to comply with a fully blended solution
- Key change process messages are communicated during training.
- Sustainable transition to BAU training and support