PeopleSoft 9.2
Implementation Training
Best Practices

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Agenda

• About SpearMC and Your Presenters
• ERP Training Best Practices
• PeopleSoft ERP Training Example
• Resources and Getting Started
Your Presenter

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- 9 year PeopleSoft Financials Veteran
- MBA and Former CPA
- Thought Leader and Frequent presenter at Regional and National Oracle Conferences
Your Presenter

Marion Engelke
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- 13 Years – Program Management Experience
- PeopleSoft Training Coordination & Management since joining SpearMC in 2012
- MBA (Change & Leadership in Human Systems)
About SpearMC

Founded in 2004, SpearMC is a technology and professional services firm specializing in

- PeopleSoft FSCM, HCM and PeopleTools
- Maximo EAM
- Primavera Unifier
- Hyperion and Oracle BI
- NetSuite
- Applications Training
- Technology and Business Consulting
- Program and Project Management
- Business Transformation
About SpearMC

Offices in Chicago, Denver, Oklahoma City, Phoenix, Seattle, San Francisco, Los Angeles

- We focus on local market delivery and capability development in line with industry focus areas unique to the regions we serve.

- Our local and well-connected network of top-tier business analysts, technical leads, developers and project managers keep travel cost to a minimum.
About SpearMC

Each member of our Leadership Team leverages over 20 years of experience in Technology, Financial and Business Transformation.
Industry focus areas include:

- Energy/Oil-Gas
- Utilities
- Healthcare
- Government
- Technology
- Consumer Products
- Financial Services
- Higher Education
About SpearMC

Oracle Gold Partner since 2008:

- Gold Level Partner
- PeopleSoft Specialization
- Applications Reseller
- Hardware Reseller
Training Best Practices
I'm back from training.

I got a big binder.

The training is already forgotten, but the binder will last forever.

A living monument to temporary knowledge!

I'll put it in my cubicle with the others.

Speaking of my cubicle, which direction is it?

Okay, thanks.

That information should be in a binder.

Did he approve funding for our project?

Not yet. Step one was to free up funds from the training budget.
ERP Training Pyramid of Success

“If I am through learning, I am through”
- John Wooden

Assessment
Exercise
Materials
Planning
Planning

**Training Cadence**
- Availability of Resources
- Transition Timing
- Smaller Segmented Wins

**Know Your Audience**
- Departmental Needs
- Participant Demographics
- Participant Skill and Seniority
- Adult Learning
Adult Learning

- Self Direction
- Results Oriented
- Closed Minded
- Motivations
- More Experience
- Conflicting Demands
- High Expectations
Materials

- Applications
- Business Process
- Department Goals

Medium
- 7 types of intelligence
- Environments
- User Guides
- Assessments

Exercises
- Hands On
- Engagement
- Simulate Reality
Exercise

COPY

Engage
Share
Practice
Assess
Perform

PeopleSoft

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Assessment

Baseline → Assessment → Rewards
Financials Re-implementation Project

Start of Design Phase: Training for Functional Project Team

Objectives:

- Standardize & streamline business processes through workflow and leveraging delivered PeopleSoft functionality
- Knowledge of business processes and software design provides foundation for industry standard processes
Case Study

Challenges

- Time and budget constraints
- Content relevant to the City
- Availability of staff
- Change management

Solution: SpearMC Training Experts

- Created custom training plan
- Designed accelerated onsite training sessions
- Interactive, hands-on delivery
- Highlighted value and efficiencies of new software
Case Study

Results: Expert-level training

- Exceptional value
  - Onsite delivery saved time & employee travel expenses
- Content tailored to City’s needs
- Functional Project Team can effectively
  - Apply business process design
  - Understand new PeopleSoft 9.2 functionality
  - Promote adoption of changes
ERP Training is an investment – what’s the ROI?

Within 2 months, SpearMC delivered 29 days or 232 hours of training for 12 PeopleSoft modules and a total of 43 participants

- 43 employees are 10% more efficient in their use of time
- Each saves 4 hours/week = 172 hours
- @$35/hr = $6,020/week or $24,080/month of savings
Available Resources

• Self Guided Training
• SpearMC Onsite Trainers
• SpearMC Remote Trainers
A library of training material on Financials and HR is available at http://spearmc.com/peoplesoft-training-store/
Custom Tailored Training

- In person presentation of custom training courses designed to optimize ROI and minimize transition time

Maximum interaction and retention

- Increased discussion and involvement with colleagues and trainers
- Seamless transition between delivery and content mediums
- Team Building opportunities improving adoption
Custom Tailored Training (with remote system access)

- Virtual presentation of custom training courses designed to optimize ROI and minimize transition time

Maximum attendance for dispersed teams

- Improved global consistency of message and training content
- Reduced cost of both delivery and attendance

Minimal business interruption

- Improved iterative frequency approach to training
Easter Egg!

$129 Training Gift Card