

# Successful Digital Transformation with Microsoft Dynamics:

## Six Lessons for Training a Workforce

When it comes time to implement a new Microsoft Dynamics solution or upgrade an existing deployment, many organizations get the process wrong. In increasingly digitally transformed industries around the world, the insights afforded by a CRM-ERP system are often the difference between business success and failure in the market. Yet, depending on the study, as many as half of ERP and CRM projects are considered less than successful in terms of cost, disruption, or project duration.

One key reason for this alarming rate of failure is often inadequate user adoption and training initiatives. In fact, in one study Forrester implicated problems with user adoption as the root of nearly a quarter of implementation problems. Without extensive and interactive training, users won't be able to use a Dynamics solution effectively and may continue with older manual processes or underutilize the software's potential. In the most concerning examples, underprepared users can cause a disruption in operations, driving up costs or even damaging the accuracy of enterprise data.

Even in the age of SaaS, too many companies subscribe to misconceptions or outright myths about implementing a CRM or ERP system. One of the most damaging – and common – of those is that user's training can be cobbled together after the deployment with old-fashioned software training methods. Whether for major international enterprises or small teams, the traditional model simply isn't practical or effective. Legacy training providers lack the responsiveness, particularly for widely distributed or multilingual teams. When they do agree to a contract, these firms typically charge astronomical fees for training of varying quality.

By understanding common training pitfalls and more innovative approaches now available, organizations can adapt in ways that improve user adoption and allow for just-in-time delivery. With a scalable software-based training system and the right approach, both single site and global multi-language implementations can succeed, ensuring full utilization of Dynamics and boosting your business outcome.

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# Lesson 1: Project Management



Project Management

Even with tried and true systems like Dynamics NAV, AX and CRM or the next-generation Dynamics 365 application portfolio, an implementation or upgrade is often a grueling process. For project managers, concerns like misaligned back-office systems or delivering business critical customizations typically outshine needs like training.

As an implementation wraps up, time and budget have often nearly run out, leaving little opportunity for a full traditional training package. Although they are accustomed to desperate, last second calls, many training providers simply don't have enough trainers on staff to offer ma-

terials and courses right away. For companies spanning diverse geographies, training firms may lack distributed personnel or sufficient ability to offer multilingual course material.

## These firms either turn down requests or charge high prices for ineffective training

Faced with this situation, project managers feel that they have few directions to turn for a solution, contending with project failure or massive cost overruns and a delayed launch.

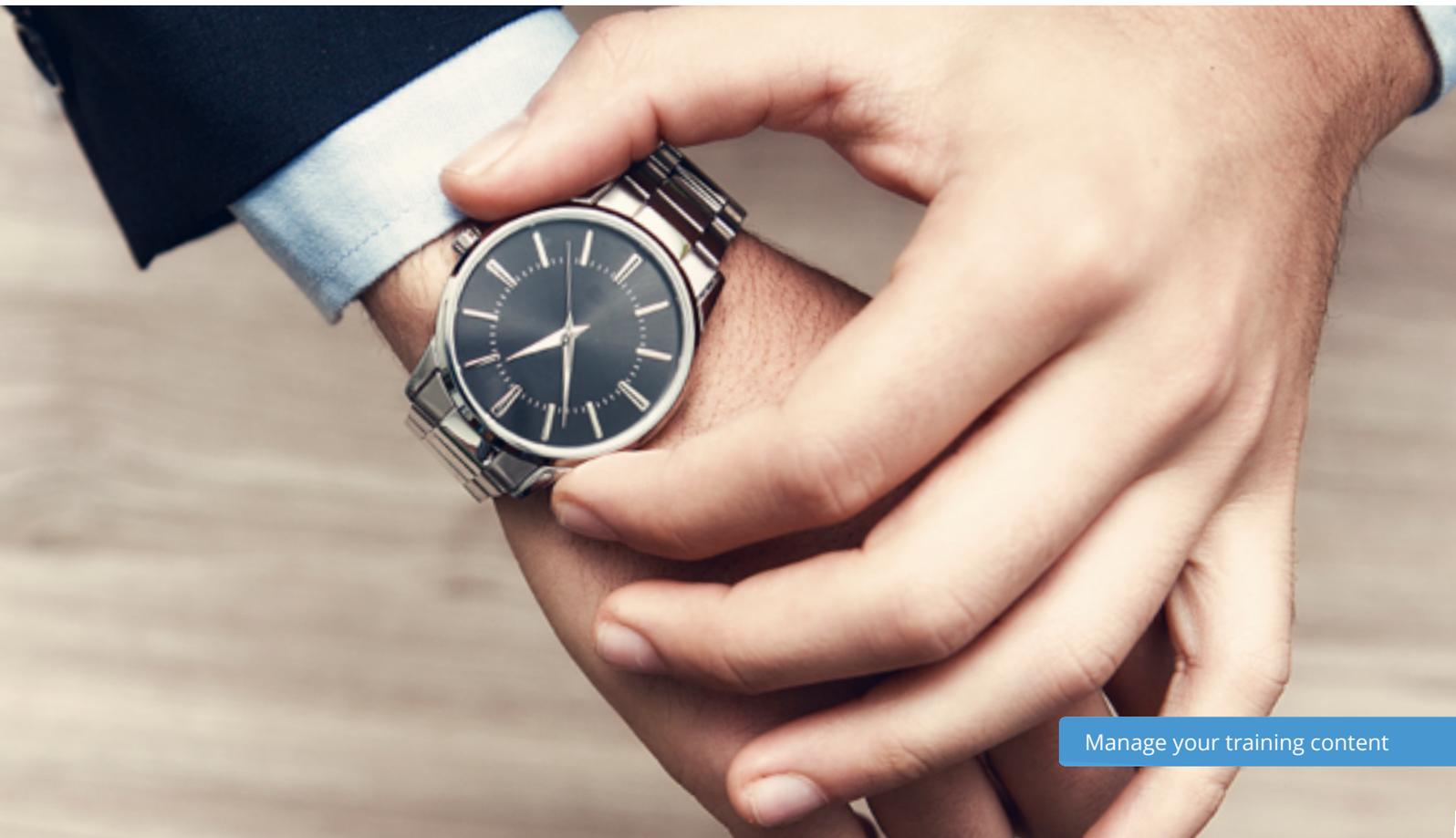
## Lesson 2: Manage your training content

Poor management of business application documentation, especially training materials, and particularly with customizations that may be unique to the organization, is a common mistake that can slow user adoption and hurt overall *ROI*. At the end of the implementation, failure to disseminate the right content to the right users can leave some in the dark, with different divisions of the business potentially out of sync.

At times, documentation is also too static to properly relay information

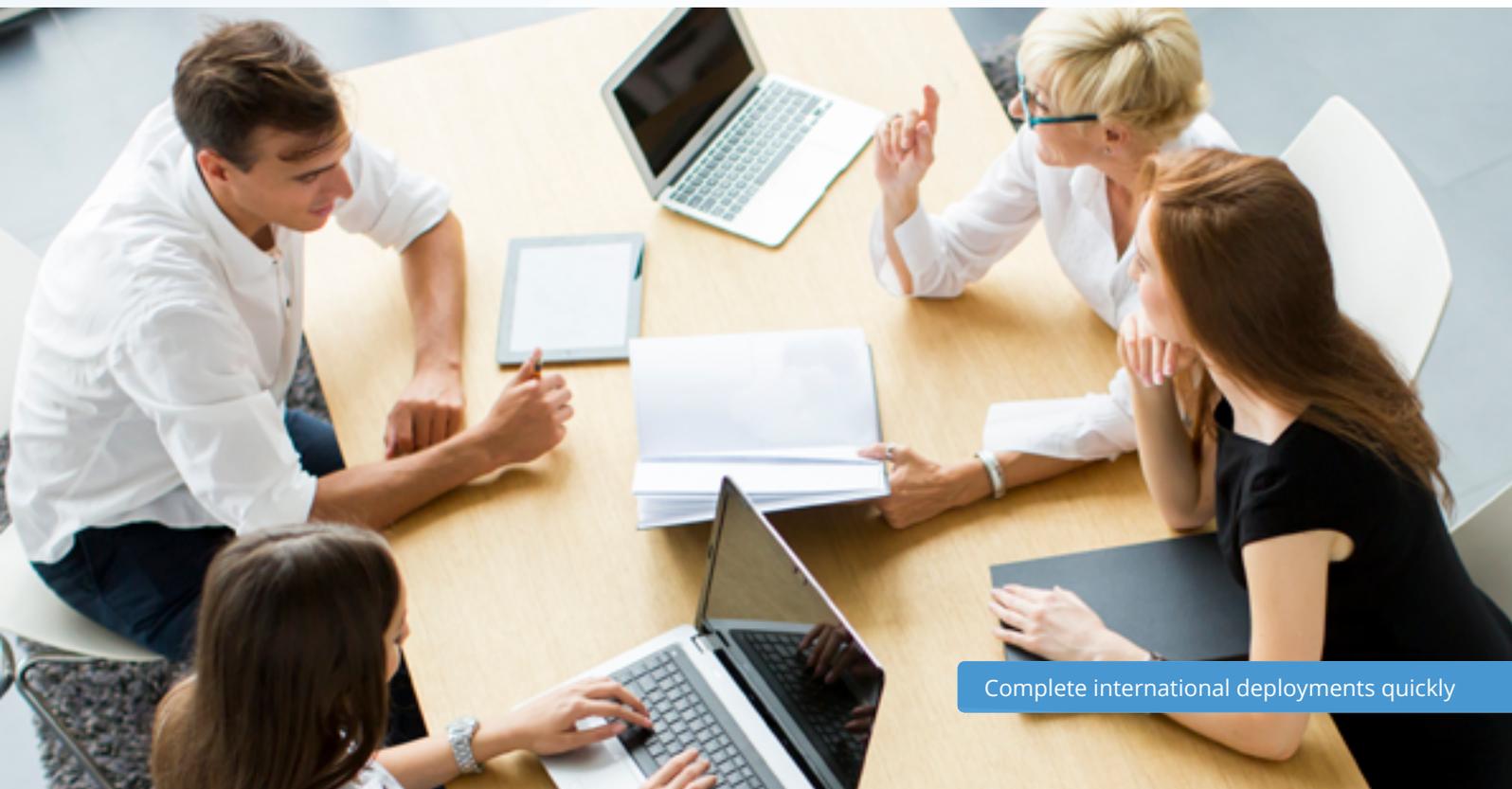
Dense text documents or long videos put the onus on end users to carve out time from their regular tasks to make sense of new processes.

Above all, poor content management can result in documentation that quickly goes out of date as the solution evolves with each successive upgrade. Particularly as many organizations adopt *Dynamics 365* apps with their update cadence every six months, the risks out of out-dated documentation are ever present.



Manage your training content

# Lesson 3: Complete international deployments quickly



Complete international deployments quickly

The modern revolution in international commerce means that many organizations have teams across the globe, working and communicating in different languages. Finding an efficient approach training users across locales means avoid the costs of traditional translation projects and the associated risk of mistranslation of documentation by non-technical linguists.

Language translation is sometimes thought of as a non-standard process. Although translations may not all be perfectly aligned, having access to standard pre-translated content

specific to your applications can make the process of international user training highly repeatable, with little room for misunderstanding. Customizations and third-party add-ons sometimes play a pivotal role, but commonly the bulk of users rely on out of the box functions. Getting the most out of these features can help to further streamline and standardize the language translation process for training materials.

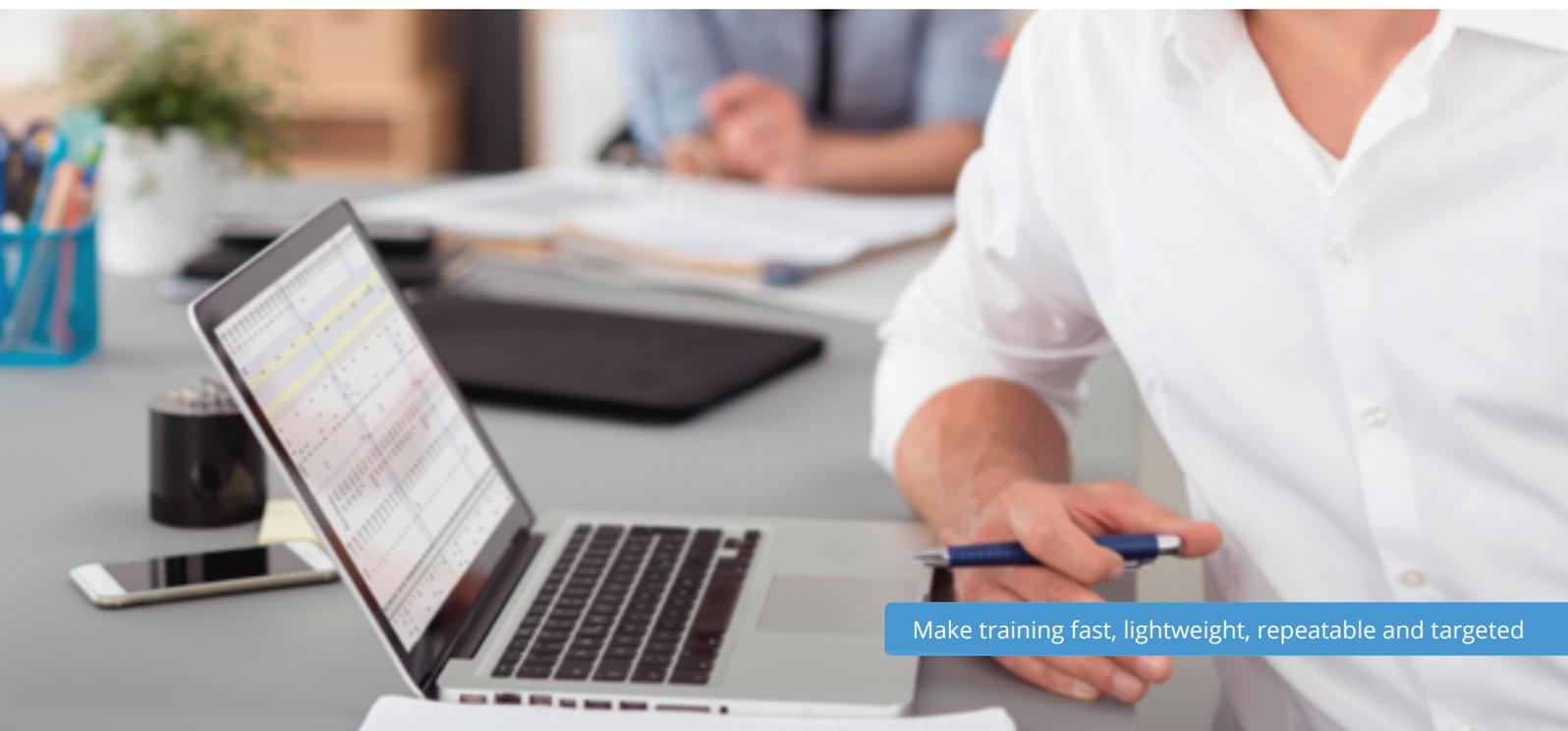
# Lesson 4: Make training fast, lightweight, repeatable and targeted

Reams of documentation, long videos, or classroom-style in-person training do not transmit information as effectively as fast and engaging digital material. Maintaining consistent messages for users around the world saves time and makes training repeatable for new hires or veteran-employees retooling for an upgrade. But consistency is difficult in a traditional model, and digital material is only efficient if it is developed and delivered via a repeatable platform.

Companies sometimes make the mistake of encouraging users to “play around” with a new system, with the idea that, if left to their own devices, they will figure out how the Dynamics environment is supposed to be used. In practice, only a few users such as in-house Dynamics experts, project managers, or those

being asked to test a new functionality should ever be allowed into the real testing and staging environments. Why? Large volumes of inexperienced users can easily wreak havoc, deleting key data, ruining tests, disrupting customizations or accidentally eliminating entire database structures.

Not all users need the same training. A field service employee has an entirely different role and usage pattern than a salesperson. Offering training targeted to their role and responsibilities will ensure maximum effectiveness. Targeting can even include disseminating mobile training content for field workers who would otherwise waste time—at great expense to the company—travelling back to a main office.



Make training fast, lightweight, repeatable and targeted

# Lesson 5: Redefine help desk productivity



Redefine help desk productivity

Besides the project managers tasked with a Dynamics implementation, no part of the organization feels the pressure of making a solution work more than the IT help desk. In some cases, help desk teams are deluged with dozens or even hundreds of support tickets a day. The influx of tickets can be especially overwhelming in the immediate aftermath of an implementation if users don't have the proper training to resolve the most common issues on their own.

Giving help desks a better way to both capture and manage support information can offer opportunities to separate common issues of understanding from underlying software problems. These insights should be applied to creating easily accessible help documentation or setting up areas for additional focus in training materials.

Answering end user questions, properly sorting incoming requests and reducing the help desk burden are all closely related goals. Companies can adopt more self-service options in the form of in-app virtual assistants. A system like this could ask the end user a series of questions, identifying keywords and directing to documentation or properly ascertaining the nature of the question to escalate to a help desk expert. A virtual assistant could even be branded with a company mascot to foster organizational pride.

Dynamics has always been linked with other systems, but Microsoft is continuing to redefine it as a connected platform. Help desks will need to be able to capture support knowledge across many different apps and apply it to their documentation.

# Lesson 6: Leave a lasting impression

The training collateral established in the implementation phase will have a lasting impact on the organization. It will be used when training new employees and for supporting the general changes in the workforce. However due to extreme cost, the training collateral is rarely kept current with the processes, changes in underlying business system and the training collateral will devalue fast. When planning and creating the initial content, be aware that it has a lasting impact on the organizational training.

ClickLearn actually supports a very low cost approach to keeping the collateral current.



Leave a lasting impression

# Taking a next-generation approach to training CRM-ERP users for Dynamics

Around the world, organizations face the fraught process of implementing and upgrading Microsoft Dynamics to meet their digital transformation goals. The lynchpin of the process and the key to avoiding a failed implementation is rapid and effective end user adoption. This can only be achieved through a successful training program that incorporates next-generation learning technology to avoid the high costs of traditional training providers.

Taking a robust digital training approach depends on keeping documentation up to date and making it standard, portable, and targeted to workers speaking different languages. When properly implemented, this approach maximizes use of Dynamics systems and alleviates burdens on project managers and help desk teams by closing gaps in understanding. Digital transformation at an organizational level starts with a digitally transformed approach to Dynamics training.

## About ClickLearn

ClickLearn automates the creation, maintenance, and upgrade of work instructions in Microsoft Dynamics ERP and CRM applications and other enterprise software to generate work instructions in all required languages. A single click produces Word, PDF, and PowerPoint formats plus three levels of training videos, and a virtual assistant that guides users through the work instructions inside their Dynamics solution via an embedded Learning portal.

