# Best Practices for Successful Workday End-User Training

Successful training is critical to achieving the promise of a Workday implementation. Flawlessly implemented software is an enabler to achieving the promise. However, people's ability to use the software on day one can either drive or derail the promise quickly and reflect poorly on even the best implemented software.

Three elements make enterprise software training unique:

- The first is **urgency**. Enterprise systems typically require significant configuration.
- The second element that makes enterprise system training unique is the **scale**. These implementations typically impact a large number of users and do so in a significantly interconnected way.
- The third element that makes enterprise system implementations unique is large scale **change**. Change in business processes, change in user interfaces, change in procedures.
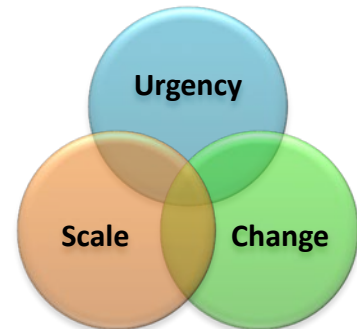
So how do organizations successfully deal with urgent, widespread, and important business process changes while still achieving the promise of Workday?

The best practices described here should help you approach a Workday training initiative with a better idea of what must be done to enable the success envisioned when the project was chartered.

The Premise

The focus of a successful training effort must always be performance. A performance-based approach accounts for the critical day-one tasks and provides the training and tools necessary to achieve that level of performance. What the users can do is much more important than what they know. This premise is foundational to the best practices for enterprise systems training.
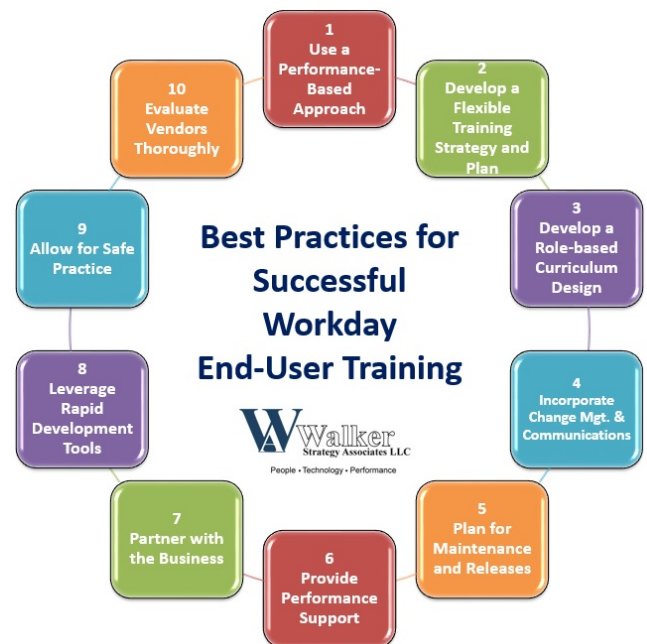
☐   1- Use a Performance-Based Approach

Performance-based training is developed around audience-specific performance objectives and the characteristics of each task to be performed.

☐   2 – Develop a Flexible Training Strategy and Plan

Murphy's Law is proven on many enterprise software implementations. These are large projects with many moving parts and provide ample opportunities to readjust even the most well-defined project plan. So it is critical that the training strategy be developed based on the lessons learned in previous implementations and the company's unique implementation and audience characteristics.

☐   3 – Develop a Role-based Curriculum Design

The key to optimizing training time for a user is to provide just the training he/she needs to perform the tasks related to their job. To effectively group tasks into a modular structure that can be used to train users, modules are best designed based on affected roles and similar tasks.

☐   4 – Incorporate Change Management and Communications

Multiple studies have shown that two of the major reasons enterprise implementations fail is poor change management and poor end-user training. Unfortunately, companies seem to believe that this is something that "only happens to others." It is not. A poor change management strategy can lead to disaster.

☐   5 – Plan for Maintenance and New Releases

Unlike many legacy or custom-built systems, an advantage of Workday is that it is continually updated with new releases every six months (whether you want it or not). This advantage also creates challenges for end users. These challenges include and how inform and train users on functionality changes.

☐   6 – Provide Performance Support

The idea that a person can remember everything required to do their job is obsolete. The solution is to provide end users with performance support mechanisms to provide guidance for tasks which do not require instantaneous recall. Examples of performance support mechanisms that greatly enhance performance include online procedures and tutorials, online simulations, quick references, and other readily available tools to give end users information that they need at the moment that they need it.

☐   7 – Partner with the Business

Successful Workday training depends upon acceptance and support by many parts of the enterprise. HR, Business units, IT, and SMEs all play a role in success. In order for training to be successful, the training team must coordinate effectively with the project team and these other parts of the enterprise.

☐   8 – Leverage Rapid Development Tools

A challenge in developing Workday training is that the configuration effort takes place in parallel with the training development effort. In short, the story is changing while you are writing the book. Technology now allows training developers to create Job Aids (procedures) simply by performing a business process. What used to take days could be done in hours, and more accurately. It is now easy to develop online procedures that are available to end users directly from within Workday. This context-sensitive help, available directly at the point of need greatly enhances the users' ability to perform and provides critical performance support.

☐   9 – Allow for Safe Practice

The critical nature of some business processes makes it important for certain tasks to be practiced. Realistic practice exposes end users to Workday and allows them to make mistakes as they learn. Typically, practice is a component of both Instructor-Led Training (ILT) and self-paced training. Practice must be realistic, yet it cannot be done in the production tenant because actions there have real effects on the business.

☐   10 – Evaluate Vendors Thoroughly

The urgency of a Workday implementation often puts companies in an unusual position with respect to end-user training. Some companies realize, in the midst of the implementation, that their implementation partner is not responsible for training and that they urgently need to find a solution. Others recognize the

need early, but may not want to use the same company for end user training that they are using for their implementation. There are many Integrators that have deep learning skills and do a great job with training and change management. However, this is not always the case. Some larger firms have robust change management practices, but do not emphasize the training aspects of an implementation as strongly. The challenge is that they all tell a similar story and it sounds pretty good. How can you tell the difference? You must look closely at not only what they offer, but what you need. Take the time to map out your specific requirements in detail and incorporate the best practices described here. Pay close attention to their direct experience with end-user training and change management.

Summary

Hopefully the best practices described here will help you think through your Workday training initiative and help you achieve success. They have been derived from years of lessons learned and are designed to prevent mistakes that have been made too frequently by others. Applying these practices to your Workday training initiative should help you move from uncertainty toward a planned approach for success. Assessing your progress against these best practices can also allow you to determine the "health" of your ERP training initiative and make appropriate adjustments. The figure illustrates the high level overview from a best practice assessment. The assessment of the initiative against each best practice is represented as green, yellow, or red in the respective "slice" of the target and the overall assessment is represented in the bull's-eye.

ERP Training – Best Practice Assessment

About the Author

Gary Walker has spent more than twenty years working in human performance and learning, most in support of global ERP implementations with the last four years supporting Workday. He founded Walker Strategy Associates in 2011 with a desire to bring his years of experience to the Workday arena, where he saw a need for more effective end-user training. He believes that technology is only as powerful as the performers using it. As a former naval aviator, Gary understands the importance of time-critical training and being able to perform competently. For more information, including resources and tools for assessing and applying the best practices described here, visit www.walkerstrategy.com or contact Gary directly at gary@walkerstrategy.com.