



Maximo P2P Process Change Management Project Case Study

Electra Learning

electralearning.com

info@electralearning.com

The Project

Goals and objectives

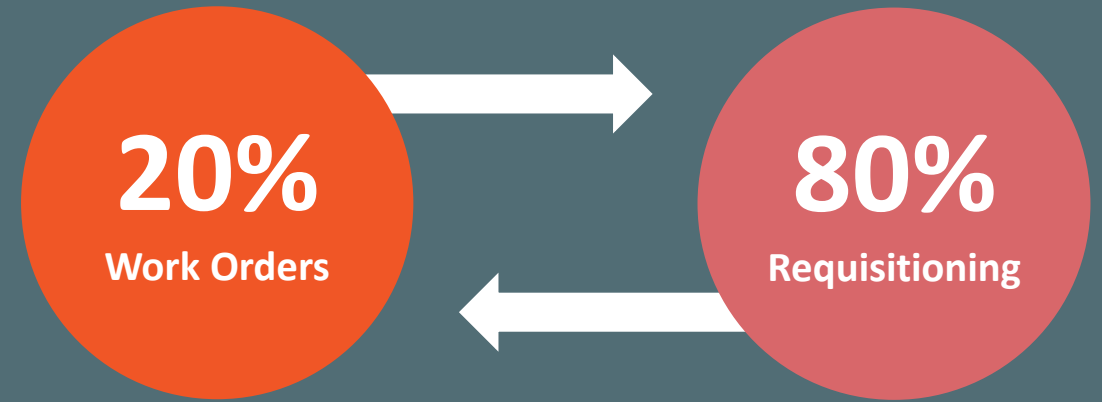
We needed to engage the workforce and embed sustainable behaviours to ensure we get the Purchase to Pay (P2P) process “the right thing, first time”. “At the moment we are using 20% Work Orders, 80% Requisitioning and we want to switch that around”

P2P Reps were asked to volunteer or were nominated by Managers. These were identified as being the best placed to support their teams in following the process correctly.

Objectives

After initial discussions and a discovery workshop, we agreed that the scope was to include:

- Reinforcing the P2P process in the business
- Onboarding the P2P Reps
- Scenario Based Interactive Requisition Training
- Supporting Material for P2P Reps
- Guides for the users within the business



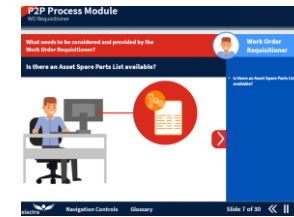
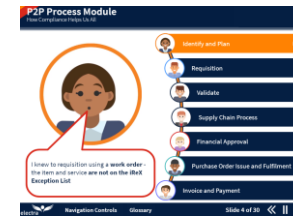
The Solution

What we delivered

eLearning Modules

2
eLearning Modules
developed

P2P Induction eLearning included information about why compliance to the P2P process is important, the high-level P2P workflow and the roles people play at each step and where to find help



7
Characters created
for the talking
heads videos

P2P Process eLearning containing examples of compliance and accountability for each role in the P2P process, the 7 steps to the 'right thing, first time' and end of course assessment



We also created custom talking head videos to talk through how to be compliant to the process.

The Solution

What we delivered

P2P Rep Training

Electra developed and delivered training to support the individuals in their Rep role, which comprised:

- **Train the Coach** session to provide the Reps with the coaching skills needed to support them in their role
- Deep dive into the P2P process
- Enhance understanding of the P2P process **Roles & Responsibilities**
- Followed up with a **Coach Support Pack** with checklists and training materials



Challenges

The project started early in the year before COVID-19. The initial idea was for the Rep training to be classroom based and highly interactive. We managed to turn the content and activities around to work interactively using online tools and delivering via MS Teams.



eLearning used as a pre-requisite for the training



Developed a Coach Support Pack to support the coaches in their new role



Adapted our materials to work interactively using online tools and delivering via MS Teams

The Solution

What we delivered

Requisition Training

Electra developed and delivered a virtual course for Requisitioners, which comprised:

- Support for **P2P Process compliance** including the 7 steps and workflows
- Enhance understanding of the P2P process Roles & Responsibilities
- Interactive, real-life scenarios for **hands-on practice** in Maximo
- Suite of **User Support Materials** available electronically from the Hub



Feedback on Virtual Delivery

“The course was well presented and easy to follow. Trainer did a great job considering the constraints of everyone working from home and kept everyone involved and a good level of interaction was maintained”.



eLearning used as a pre-requisite for the training

Creation of a suite of 8 Quick Reference Cards (QRCs) and a User Guide



Interactive instructor-led virtual training course

One of the best courses I've done very informative and good paced and well presented.



Enjoyed the training and was professionally presented and flexible to adapt to the team's needs.



The Results

What was the feedback

- Good course didn't feel too long as we were kept on our toes with the questions and review sections which kept you fully engaged.
- I learned some good techniques for coaching.
- Very well delivered. I actually enjoyed it and am looking forward to putting the process into action.
- Excellently presented, adequate opportunities for everyone to interact, everyone's voice was heard, material was easy to follow and learn from.

Delegates felt the courses were **interesting** and had a good level of **interaction**. All delegates were very positive about the trainers themselves. Feedback confirmed that the Reps felt **supported** in their role, *"training was very informative and certainly will provide the right tools for me as a Rep"*.

From a training perspective, it supports the conclusion that the course was **well balanced** for content, gave delegates time and opportunity to ask questions and interact.

Trainer was excellent,
especially with it being
online.



Trainer was very patient with
everyone, spoke clearly and
took us through it all. Everyone
is at different levels and the
trainer understood this.



The Results

What was the feedback

- How would you rate the trainer's delivery?
- How would you rate your training experience overall?



5.79 Average Rating



5.57 Average Rating

98%
Yes

The session delivered the information I expected to receive

100%
Yes

The content of the learning materials is well-organised and easy to follow

98%
Yes

I gained new knowledge that I will be able to practice and apply in my work life

100%
Yes

The pace of the course was appropriate to the content and attendees

96%
Yes

It was easy for me to get actively involved in the session



Maximo P2P Process Change Management Project Case Study

Electra Learning

electralearning.com

info@electralearning.com