



Challenges and Opportunities of Delivering Maximo Training in 2020

Research Findings Report

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Electra Learning



Due to changing technologies in learning, Electra Learning conducted research to understand the perception of training delivery methods, specifically around Maximo implementations and upgrades. We asked our community for their opinions on the value of eLearning vs instructor-led delivery and whether there was a preference for outsourcing training over providing training in-house.



This research was conducted pre COVID-19 and the findings will be of interest to organisations looking to optimise value from Maximo through virtual and online methods going forward.

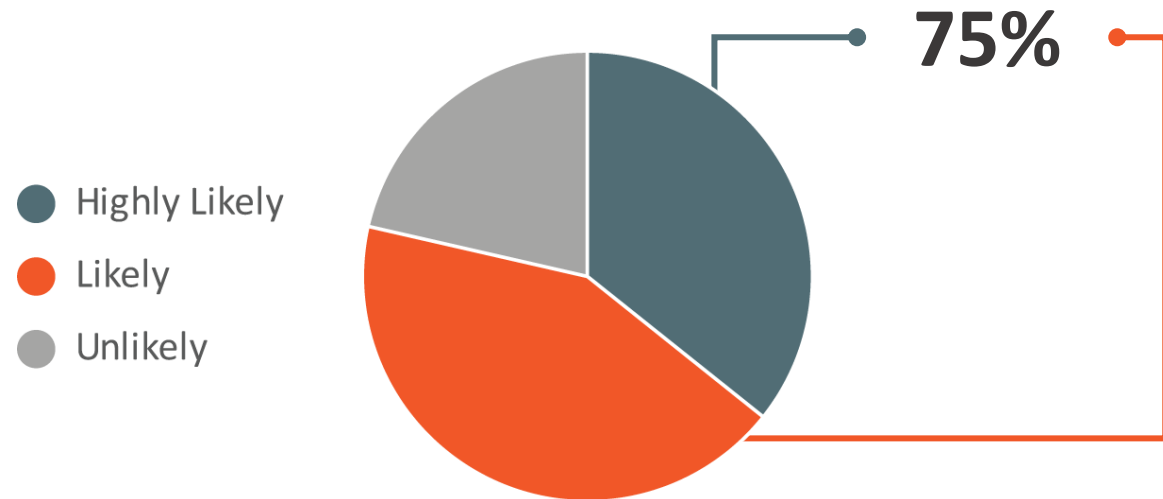
This report is written for the Maximo community with the help of its people. The report examines your responses and draws on industry research as well as Electra's recommendations on best practice, based on our 10+ years' experience with delivering Maximo training programmes.





We received responses from across O&G, Manufacturing, Transportation, with the majority being from O&G.

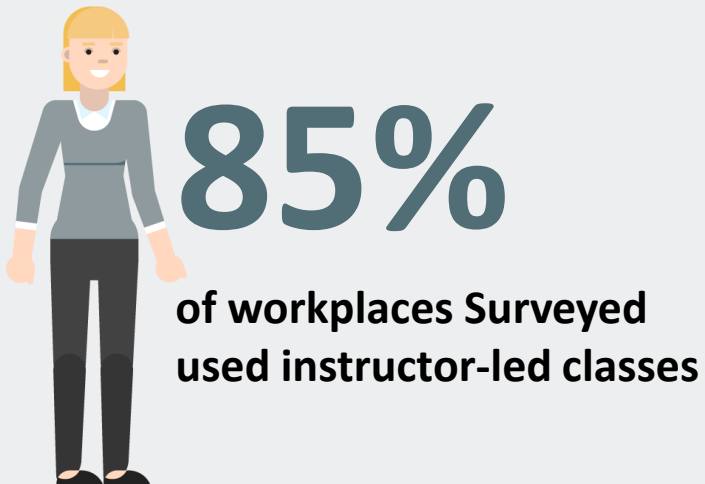
Finding No 1: We asked participants how likely they were to upgrade or implement IBM Maximo within the next 24 months - **75%** responded that this was **likely** or **highly likely**, therefore, this report will provide strong baseline evidence for decision making on your training approach.



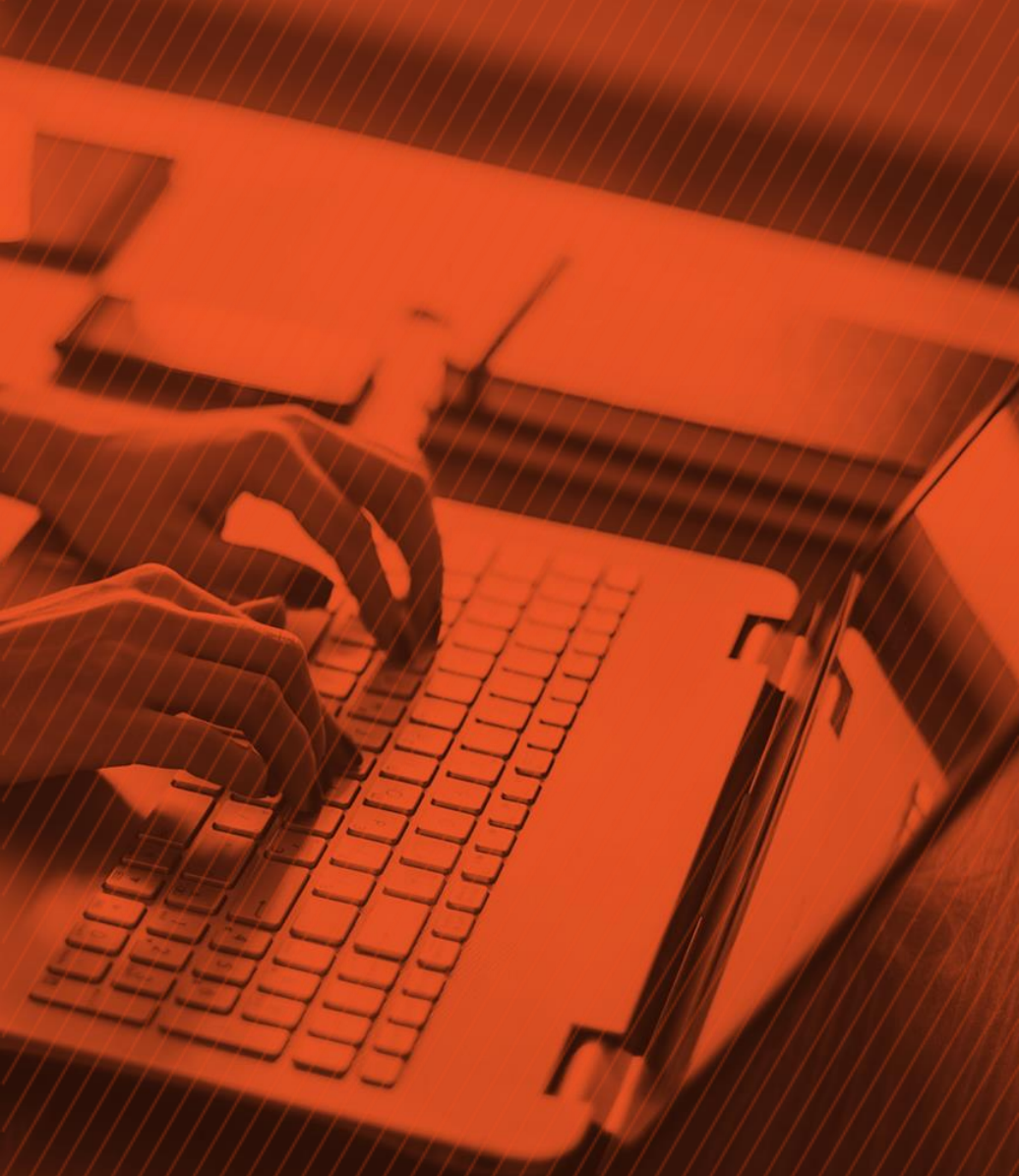


Over the past 10 years, IT learning has changed significantly. From classroom-based training with users spending days in front of screens, to the norm now shifting to shorter, interactive instructor-led courses (face to face or virtually), supported with eLearning and social learning.

Finding No 2: We asked participants if they are considering deploying eLearning as an option for Maximo training delivery, with **the majority** responding that yes, they are considering this or that they would possibly consider it. 15% of participants would not consider it.



The 2018 LinkedIn Workplace Learning Report² indicates that face to face learning is still most prominent in workplaces with **85%** using instructor-led classes. So even though our findings show a desire to move towards eLearning, the reality is that training is still predominately instructor-led whether it be in a classroom or virtual. Virtual being the most likely in our current circumstances.



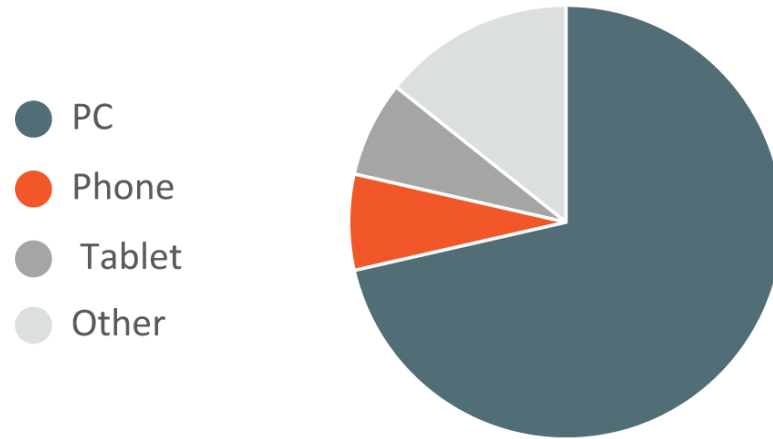
Electra often employ the **flipped classroom**³ approach, where delegates will undertake online learning activities prior to an instructor-led course. The theory or process is covered online, and the practical, activity-based learning takes place in the classroom. This is an ideal learning blend to deliver training for systems such as Maximo.



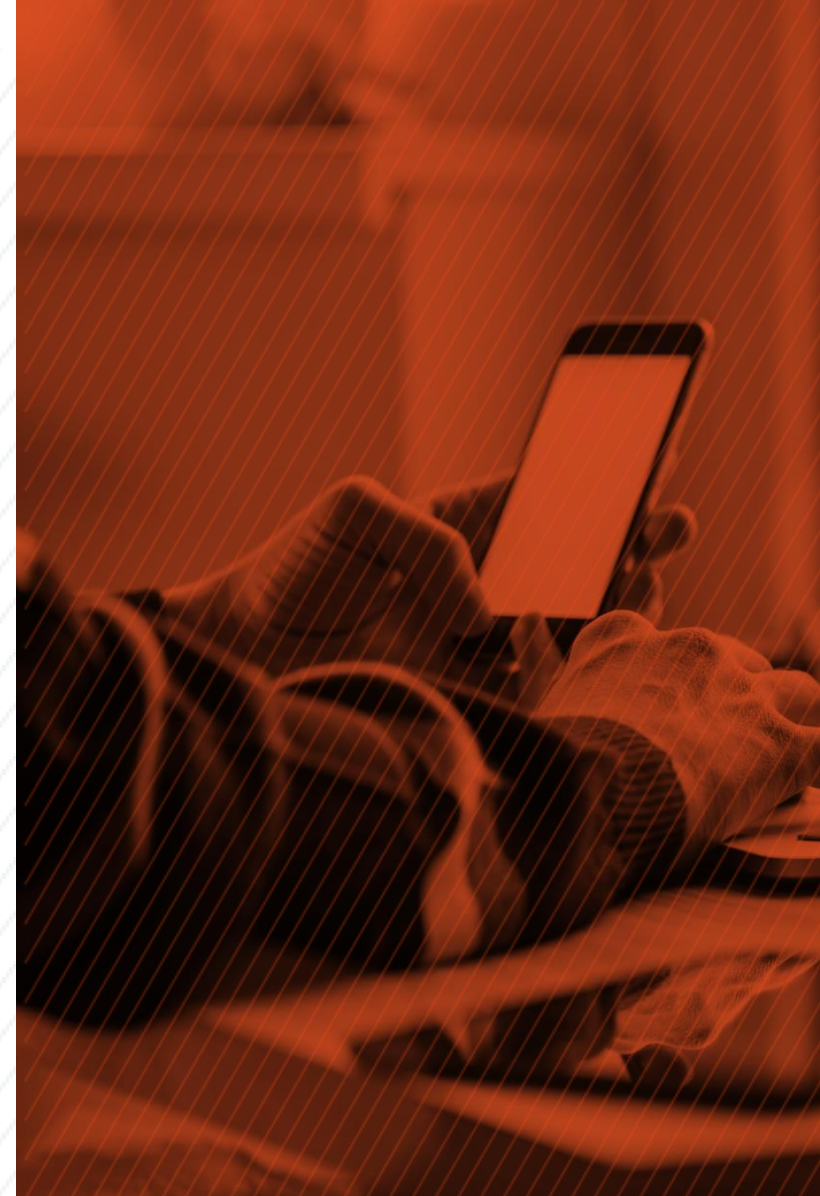
³ A "**Flipped classroom**" is an instructional strategy and a type of blended learning focused on participant engagement and active learning, giving the instructor a better opportunity to deal with mixed levels and differentiated learning styles during 'in-class' time.

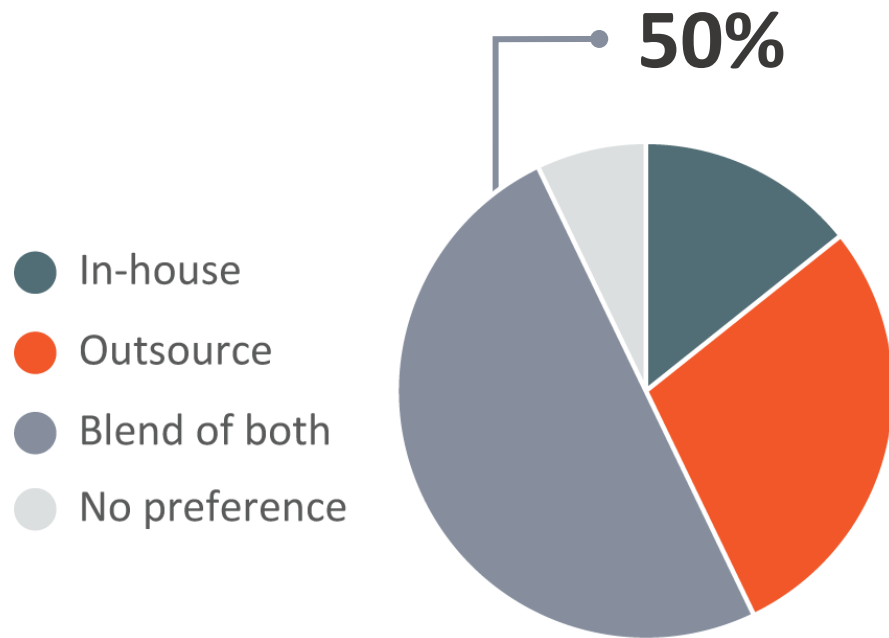


Finding No 3: We asked participants of the study whether mobile devices are used to access learning and the majority responded that learning was still mainly accessed via a PC.



The 2019 LinkedIn Workplace Learning Report indicates that mobile learning is on the rise and that there is a **5% increase in mobile learning year on year**⁴. Many organisations who use Maximo are starting to use Maximo mobile applications, therefore it would make sense for users to access their learning, at their time of need, on the same device they are using to record work.





Many organisations have the benefit of having internal training teams who can deliver training when new systems are rolled out or a change is made. This is by far the most sustainable option for businesses as they become self-sufficient in the long-term. However, many organisations do not have the luxury of having full-time trainers in-house and often the in-house trainers are only available during the implementation project then they go back to their day jobs.

Finding No 4: We asked whether there is a preference to outsourcing Maximo training or retaining in-house. A small percentage prefer to remain in-house, but the majority indicated a blend of both. It appears to be determined by the size of organisation and the stage of the Maximo journey that the organisation is at.



Some of the reasons for the responses are as follows:

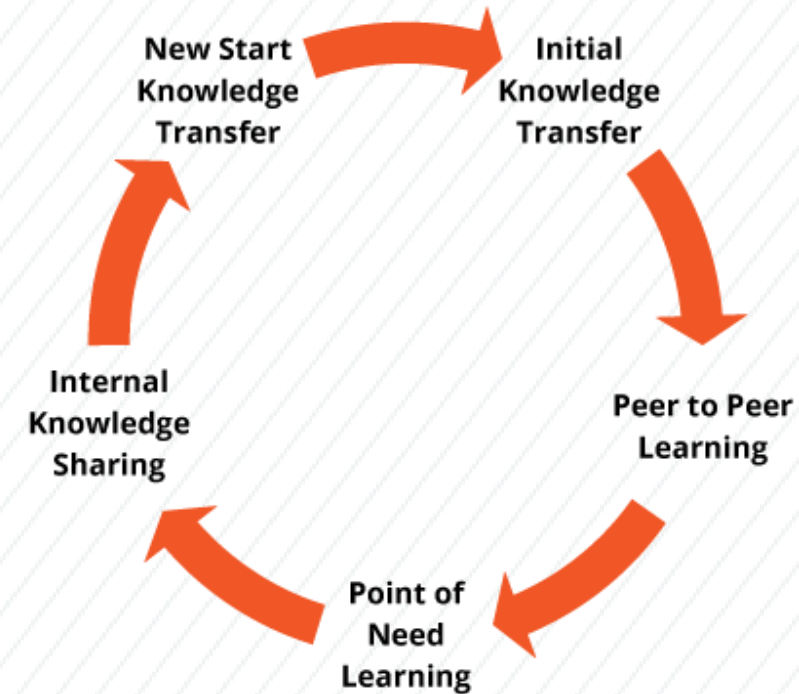
In-house	Outsourced	Blend
<ul style="list-style-type: none">• As we have had Maximo for a few years now and the teams are more familiar, we should only need to update the user guides that we have created and kept up to date. We may need to follow up any Maximo updates with some questions that we could manage in house with our current systems.• Maximo is very much customised to suit our Company processes, and Maximo training is integrated to other areas which are Company specific. That is reason of handling Maximo training in-house.	<ul style="list-style-type: none">• We have no-one in the organisation that has the expertise to serve the 12 sites we may wish to implement Maximo to in the future.• Answering from a recent project where training was outsourced, if I was to implement a new Maximo instance again, I would advocate the same mix of eLearning, face to face and online reference materials.• We do not have the resources to do it.• Lack of internal capability.• Outsourcing ensures professional training material development and frees project time after an initial brain dump.	<ul style="list-style-type: none">• For the generic learning this could easily be outsourced but for things that are more process specific then a blend is better especially for master data related training.• Blend with the use of Maximo Champions / Focal points for reminders and refresher training but for upgrades, lots of changes etc, outsourced Maximo specific training.• This is controlled by our IT department. Some light 121 training can be done in house but professional training more valuable.• Formal classroom training is more effective, supplemented with less formal one to one sessions. Upskilling in house focal points allows for better day to day support i.e. 'go to' people.• We have part time internal trainers, but they also have "jobs" so a blend of both would be good.• Internal resources tend not to have the time or specialist skills to develop optimal training materials. However, they should own this so it can be delivered to new starts, unless the quantity of new starts is significant enough that an external training session should be conducted.



One respondent detailed their blended learning approach - we at Electra would fully endorse this:

We are going live nationally approx. 3000 users. We are utilising a blend of workshops, eLearning, LMS, cheat sheets and classroom training which an internal team which with the numbers of users would be too large for an in-house L&D team to manage. We have expanded the team with secondments from the business who will become champions for the system once they back into the business and a number of short-term hires who are helping produce some of the collateral in terms of instruction packs and eLearning videos.

The Electra model for adoption is displayed in the diagram opposite.





29%

Develop
In-House



50%

Interested in
Developing
In-House



Finding No 5: With regards to developing eLearning in-house, **29% of survey respondents develop in-house** but **50% were interested in developing in-house** expertise as an alternative to procuring eLearning from a vendor.

The 2019 LinkedIn Workplace Learning Report states that “while online learning will never fully replace instructor-led training, it is important to enable modern learners to upskill when and where they need to”. Their research also indicates that **73% of companies use externally created content to train employees**. Aside from time and resource availability one of the main benefits of using an external training company is the ability to leverage the experience they have from supporting Maximo roll outs in the same or similar industries.

“73% of companies use externally created content to train employees”



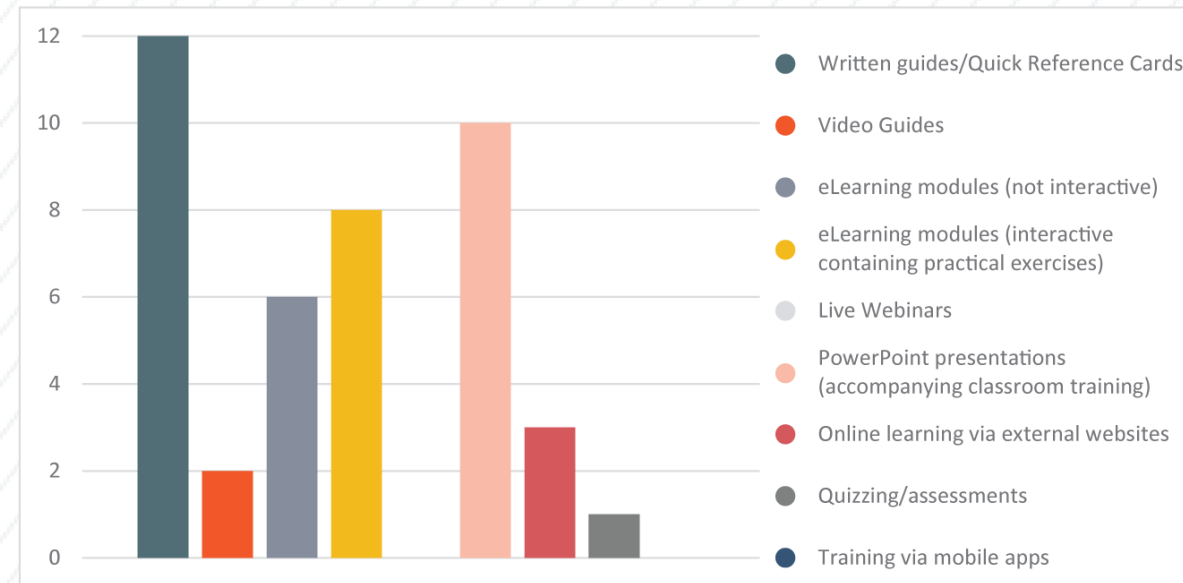


It is difficult to design a training package that suits all users. With a blended approach, organisations will satisfy most learning styles, but there is a massive difference in perspectives when it comes to training support materials. Should printed materials still be provided, or should everything be online? Should the format be traditional 'guide' or videos?

We asked, “**what are the three most-used types of training materials currently available for Maximo in your organisation?**”.

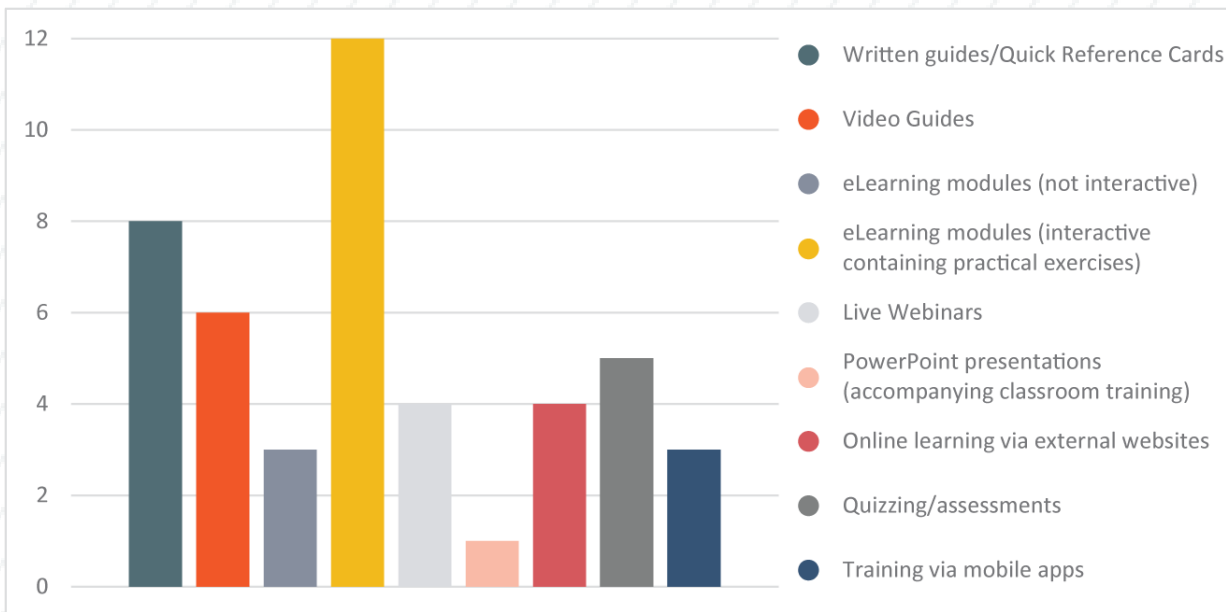
The traditional written guides and PowerPoint presentations came out on top, however, interestingly when we asked which types of material would add more value for supporting users, most respondents indicated that interactive eLearning modules are most valuable.

Select the 3 most used types of training materials currently available for Maximo in your organisation:





Select 3 types of training materials you feel would add more value for supporting Maximo users within your organisation:

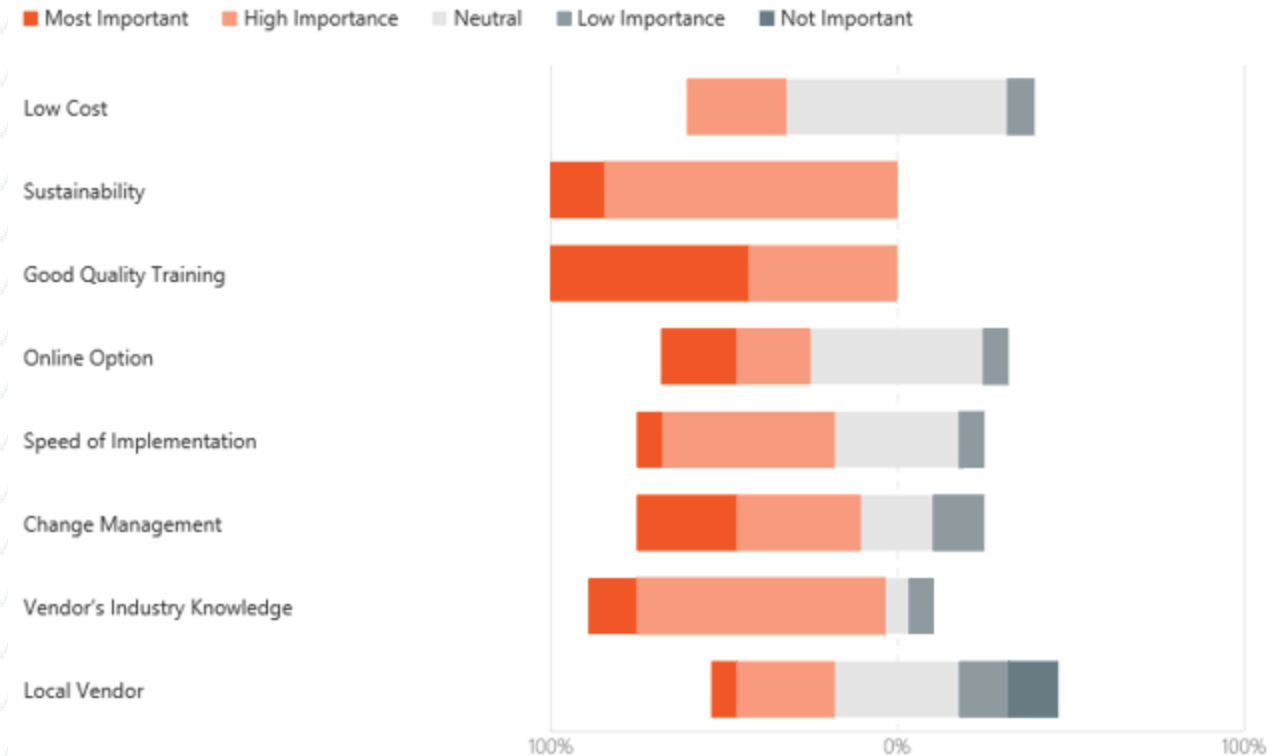


The 2019 Training Trends Report⁵, published by the Training Industry, recognises that following the delivery method, a **blended approach should also be taken when considering training support materials**. The report states “digital content has increased in prevalence and respondents indicate that learners are favouring shorter-form, mobile-based interactive content over print”. However, they also acknowledge that the rate of change has slowed over the past two years. At Electra, we recognise it is important to consider both demographic and learning culture before deciding on training support materials.

Important Factors when Considering Training



We asked respondents to rate the importance of several factors when considering training for a Maximo upgrade or implementation. Interestingly **cost** was the only factor that did not have any rating of being **most important** and received the most neutral result. The 2 key factors, that participants of the study identified to be most important were **Good Quality Training** and **Sustainability**.



Effectiveness of your Maximo Training



We asked respondents to share their experiences of training for their Maximo projects.

Organisations Electra have supported

- Hands on interactive sessions with local knowledge worked well.
- Feedback from users is that training is well delivered and relevant.
- Training scope was delivered on time and met our requirements.
- Users were trained, system went live with minimal support and few questions. Go live was a non-event.
- Well delivered by trainers who could marry system, process and industry knowledge.
- Classroom sessions with exercises are effective, floor walkers / 1-2-1 sessions / screen shares, QRC's are all successful. eLearning can be useful though there is a lack of uptake in the use of such unless users are made to during induction or pre system access processes.
- In the current organisation there have been issues with the use of multiple training providers, creating a lack of consistency with training materials and delivery. The organisation has not put in place robust support and sustain to manage training / training materials.
- We had a mix of classroom learning (which was well received) complemented by users guides, reference cards and eventually 1-2-1 buddy & coaching sessions. The underlying issue was really consistency as the training that supported the adoption phase covered a couple of years. Consistency was lost after about 9 months, with people detracting from optimal system use due to out of date materials & messages as short cuts and loopholes were identified in the system.
- If you train and follow up by coaching this is the best way to succeed.

Organisations Electra have not supported

- The difficulty with training is keeping it up to date with all the various fixes and changes that we apply to our system. It's also that some of the topics are quite heavy and need time for individuals to practice, our business doesn't always have that time so support afterwards.
- Training not good enough.
- Getting end users attention is always a challenge.
- Could have been delivered more comprehensively.
- The training collateral is being produced as I type, however specific pieces of training that are to related integrated systems to Maximo have been successfully delivered. Once we are live and at BAU we can assess the true effectiveness of training delivery.



The ultimate goal is to engage end users with the system and process and ensure they are working productively with the system. One-off training courses will not achieve that. Our experience, backed up by research, indicates that the ideal approach includes:



A Blended Training Offering: Fully train all users on process and system using a blended approach which includes online Learning, interactive instructor-led training and a knowledge check assessment following on from training. This helps to identify any users who may require follow-up training or coaching.



Training Resource Materials: Provide a suite of training resource materials in a range of accessible formats (i.e. Quick Reference Cards, Videos). These should be hosted in a location which is easy to find, perhaps a Learning Platform that can be navigated to via the Help link in Maximo. Learning Platforms enable the tracking of course completion, competence and allow hosting of reference material to help end users to become more self-sufficient. Any training support material must reference the documented business processes.



Coaching: Provision of external or in-house coaches who fully understand the process and the system to support the end users in the long-term.



New Start Training: Provision either via an online course or scheduled instructor-led training course run by an external provider or in-house trainer. New starts must receive the same consistent training messages that other users received during the project.



Knowledge checking: Online assessments used to check knowledge on a regular basis to identify and plug knowledge gaps – as often during assessment of learning we are measuring knowledge rather than competency.

Training is just one part of the Change Management effort during a Maximo Implementation or Upgrade.

This report focusses only on the Training Programme but is part of a much bigger picture.





1. 2019 Workplace Learning Report LinkedIn <https://learning.linkedin.com/blog/learning-thought-leadership/2019-workplace-learning-report> which references LinkedIn Learning platform data from 2017 to 2018
2. 2018 LinkedIn Workplace Learning Report https://learning.linkedin.com/resources/workplace-learning-report-2018?trk=lilblog_02-27-18_WLR-2018-launch-blog_tl&cid=70132000001AyziaAAC
3. Europass Teacher Academy| Flipped classroom; 2020
4. 2019 Workplace Learning Report LinkedIn <https://learning.linkedin.com/blog/learning-thought-leadership/2019-workplace-learning-report>
5. 2019 Training Trends Report, Training Industry <https://trainingindustry.com/trends-2019/>



Electra are Change Management and Learning Specialists based in Aberdeen and Calgary. We are a Gold Standard Learning Provider accredited by the Learning and Performance Institute, the body for global learning professionals and organisations.

<https://www.thelpi.org/>

The electra mission is to **Improve Productivity of People Processes and Systems** and our values are around **Teamwork, Passion** and **Quality**. We take the time to understand our clients' business goals to ensure we embed successful performance improvement across all levels of their business.



Our areas of expertise include:

Maximo Training and Change Management: We support our clients with their Change Management and Learning approach to their Maximo Implementation or Upgrade project.



IT Systems Training and Change Management: We improve performance and workforce efficiency across a wide range of IT systems including MS Office 365 applications.

eLearning: We create innovative and interactive eLearning packages. You can see some demos on our [YouTube](#) channel.





Our clients say:

“We've been working with Electra for a number of years now. They are **absolutely first-rate**. We can't afford any mistakes and we know we can trust **Electra to help us ensure our teams are working at peak performance.**”

“We developed a training package together. electra developed in line with how they operate as a business. A lot of training companies will do a good job, but it's the **ability to set training up in line with the business needs that makes a great partner**”.

“electra deliver at a **high high level EVERY time**. electra are 100% my **go to team of choice**. Competitors can deliver off the shelf training fine, but they don't fit in like electra do, they don't go the extra mile and they don't seem to have the ability to **understand what the client's business involves**”.

“Personnel that come on site are a little bit different from other providers. **There is an element of uniqueness with the kind of people that are coming from electra**”.



Donna McWilliams
Managing Director (Author)

I have worked in Learning & Development all of my working life, with a passion for helping to improve user productivity whether it is Maximo, Excel or any other business system. I've been lucky enough to see first-hand the positive impact of systems training for individuals and for companies.

I love the variety my role gives me from consulting with clients in the initial "ideas phase", delivering training, reflecting on the project successes to running the business. Normally I am the first point of contact for any customer who calls us and ensures that all customer requirements are met with excellent service.

In my spare time I enjoy weekends away with my husband and twin daughters as well as running.

“ Most people who have worked with electra as a client or member of the team will say it's quite special and unique and it certainly has been during my 11 years (and counting) ”



Neil Summers
Vice President - North American Operations

Nothing is predictable in my role and this is what excites me. Client requirements change quickly so I need to act appropriately to ensure their needs are met – a recent example is recruiting several new trainers to ensure a successful project delivery.

I have been involved in training for 20 years. This included training colleagues, clients and members of the public on many bespoke software usage and what best practice usage was across multiple industries in both public and private sectors

I love to travel and at last count I have been to 32 countries. Perhaps one day I will write my travel guide to the world detailing great places to go and also awful places to avoid!

“ electra Learning really cares about what we do, we are determined and passionate about delivering a great service to our clients ”



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