

# Delivering Maximo Training in a New Virtual World

Research Findings  
Report

May 2021



Electra

# Introduction

Following on from last years research report **“Challenges and Opportunities of Delivering Maximo Training in 2020”**, we shifted the focus this year to understand the changing perceptions of training delivery methods – specifically around Maximo implementations and upgrades in this new virtual world.

The report is broken down into the following sections:

➤ Training Delivery Approach



➤ Types of Training Materials



➤ Change Management



➤ The Learning Experience



From our experience of Maximo training delivery, Change Management programs and our observations of over the last year we have been able to analyse your responses, apply industry research and produce the recommendations within this report.

# Participant Demographics



We received responses from across Manufacturing, Energy, Pharmaceutical, Entertainment and Transportation with most users on Maximo versions 7.5 or 7.6.



Manufacturing



Energy



Pharmaceutical

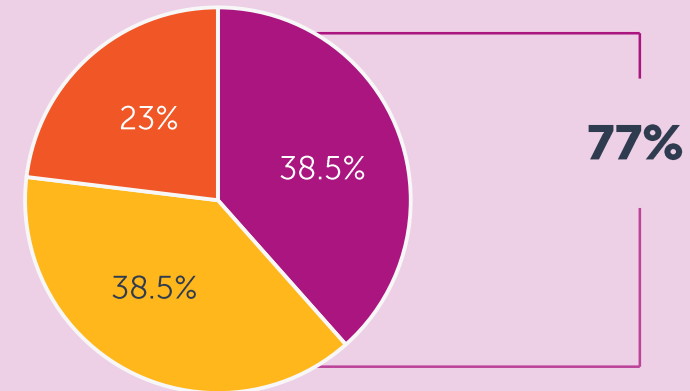


Entertainment



Transportation

We asked participants how likely they were to upgrade or implement IBM Maximo within the next 24 months – 77% responded that this was **likely** or **highly likely** therefore, this report will provide strong baseline evidence for deciding on your approach to training and change management.



■ Highly Likely ■ Likely ■ Unlikely

# Important Factors to Consider

We asked respondents to rate the importance of several factors when considering training for a Maximo upgrade or implementation.

Consistent with last year, **low cost** was not one of the most important factors when considering Maximo training.

Most important factors this year:

✓ Change Management



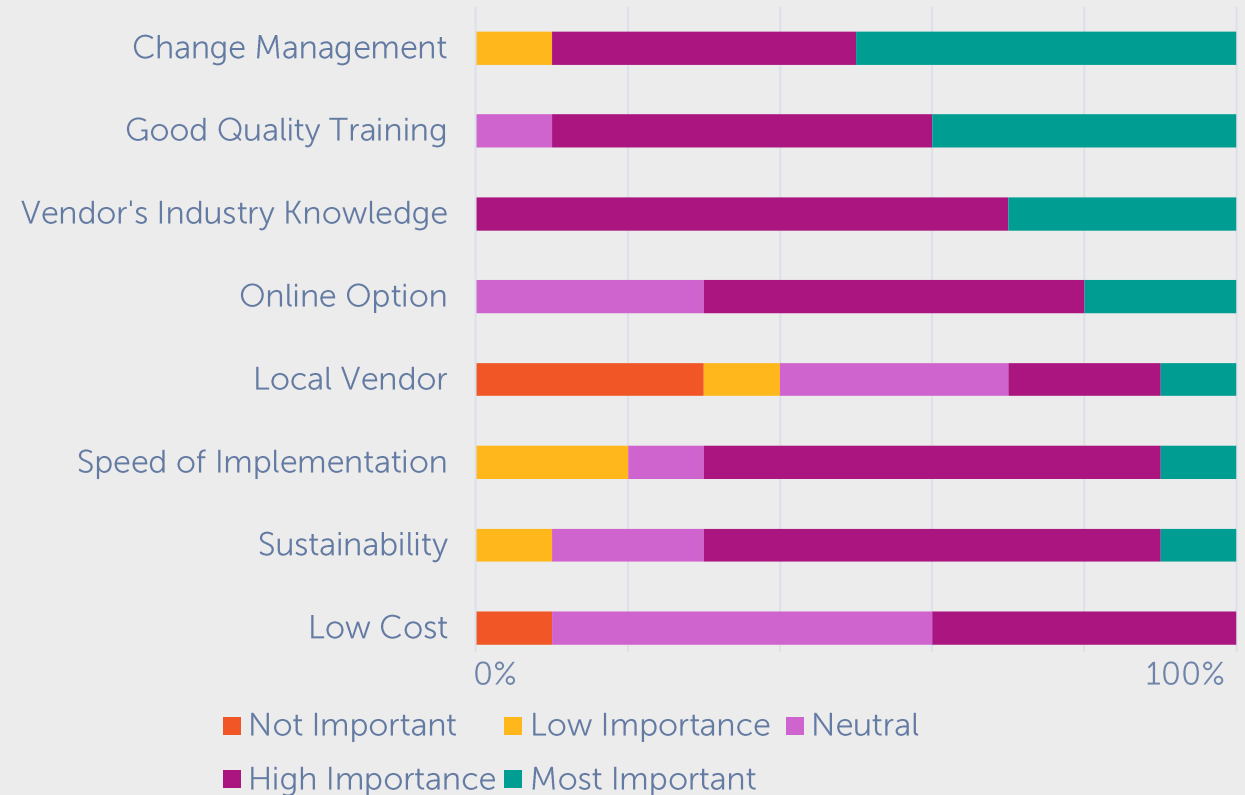
✓ Good Quality Training



✓ Industry Knowledge



✓ Online Option





# Training Delivery Approach

## Section 1

# Delivery Approach

## Beyond the Blend

The blended approach to delivering training programmes was already widely understood and applied pre-pandemic as companies generally steered clear of a 'one-size-fits-all' approach.

How we deliver Maximo training had evolved significantly over the past decade, but the current pandemic resulted in a sharp shift to 100% virtual delivery within as little as 24 hours.

This has been relatively straightforward for some companies but has been challenging for those without an established digital learning strategy.

A Fosway survey reported that **“those with a mature digital learning approach are twice as likely to have found coping with the impact of the pandemic easy”**

- Fosway COVID-19 Impact (2020)



The events of 2020 forced learning providers to look Beyond the Blend.

Gartner describes a move towards HyFlex<sup>1</sup> models which provide a range of possibilities and learning paths which can be driven by the individual.

When you take this approach and integrate learning activities into the existing platforms within organisations such as Microsoft Teams and Learning Management Systems (LMS), it becomes a very powerful approach to learning.

1. Flex models, sometimes called “HyFlex” are models of blended learning where learning activities occur online via video or eLearning modules as well as instructor-led (classroom or virtual) sessions. End users make their own choice of what learning activities work for them and although the learning formats are different, the end result is equivalent. (Gartner, 2020)



# Delivery Approach

Continued...

**We asked participants how they think the pandemic has changed the way training will be delivered in future?**

While our respondents initially felt that virtual delivery was not an equal substitute for face-to-face classroom training, they have been able to see the many benefits of virtual delivery.

➤ Ease of attending sessions



➤ Short and focussed



➤ Recordings available to watch as and when required



Concerns were focused on being able to replicate the classroom experience to ensure interactivity.

One of our respondents said:

- *"Video training where the trainer can be seen explaining the concepts is very helpful, and very close to a classroom experience. It should be supported with graded exercises at the end of each module to further cement in the concepts for the audience. These videos should be supported by discussion forums as well."*



**LinkedIn have four guiding principles that ensure learner needs are met:**

- ✓ Great content
- ✓ Great delivery of that content
- ✓ Operational excellence
- ✓ Delivery of a great learning experience

**"If you nail all four, regardless of whether people are in a virtual or in-person setting, then the learning will stick."**

- Kevin Delaney, VP of Learning & Development, LinkedIn

# Previous Experience of Maximo Training

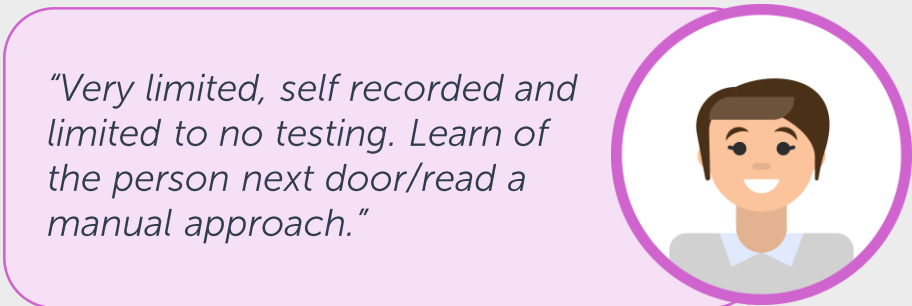
We asked about your previous experience of Maximo Training...



*"The training material and documentation can be the best in the world, but sometimes it just boils down to how it is rolled out and by who, I've seen some very competent trainers struggle to connect with their audience and all the delegates remember is the poor interaction."*



*"Here there was very little consideration for training support & change management, which has lead to a disjointed, unclear and overall poor experience of Maximo for our end users."*



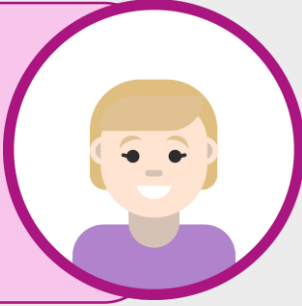
*"Very limited, self recorded and limited to no testing. Learn of the person next door/read a manual approach."*



*"We have excellent training materials, and our training partner ensured the business processes are reflected clearly, concisely and most importantly correctly - asking relevant questions throughout the development."*



*"Depending on the experience of the users, training has been tailored accordingly. For a 7.5-7.6 upgrade, there was very little functional change so simple Quick Reference Guides were used."*



*"For individual programmes where users are new to Maximo, we hold classroom sessions with presentations and user guides. Trainers/SMEs are available during go-live to provide support for a designated period before support moves to business as usual."*



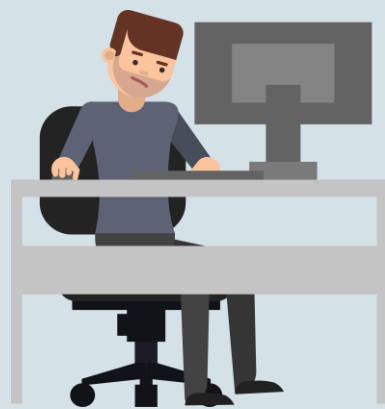
# Our Virtual Delivery Recommendations

- Virtual sessions should be short, max 2 hours (with a short break).
- High engagement and interactivity are key to keep users interested.
- Keep the questions and conversation flowing as much as possible to ensure that everyone is engaged.
- 2 screens for delegates for increased interaction with system while viewing the trainer's screen.
- Use polls, but only where it adds value. They are better used conceptually to drive discussion rather than as a tool to test memory/exam.



“Someone wise once said that your mind can only absorb **what your butt can endure**. In this environment, less is more. I’m thinking about 60-90 minutes of live interaction.”

- Kevin Delaney, VP of Learning & Development, LinkedIn








# Types of Training Materials

## Section 2

# Types of Training Materials

We asked what are the most-used types of training materials currently available for Maximo in your organisation and which would add more value.

There is a substantial gap between what is currently used and what would add the most value. Written guides are currently the most used but future value lies in:

- Interactive eLearning Modules 
- Live Webinars 
- Mobile Learning Apps 



*"The more interactive & accessible the training material is, the more valuable it will be for the delegate."*



*"Webinars, if they include Q&A sessions can generate great discussions."*

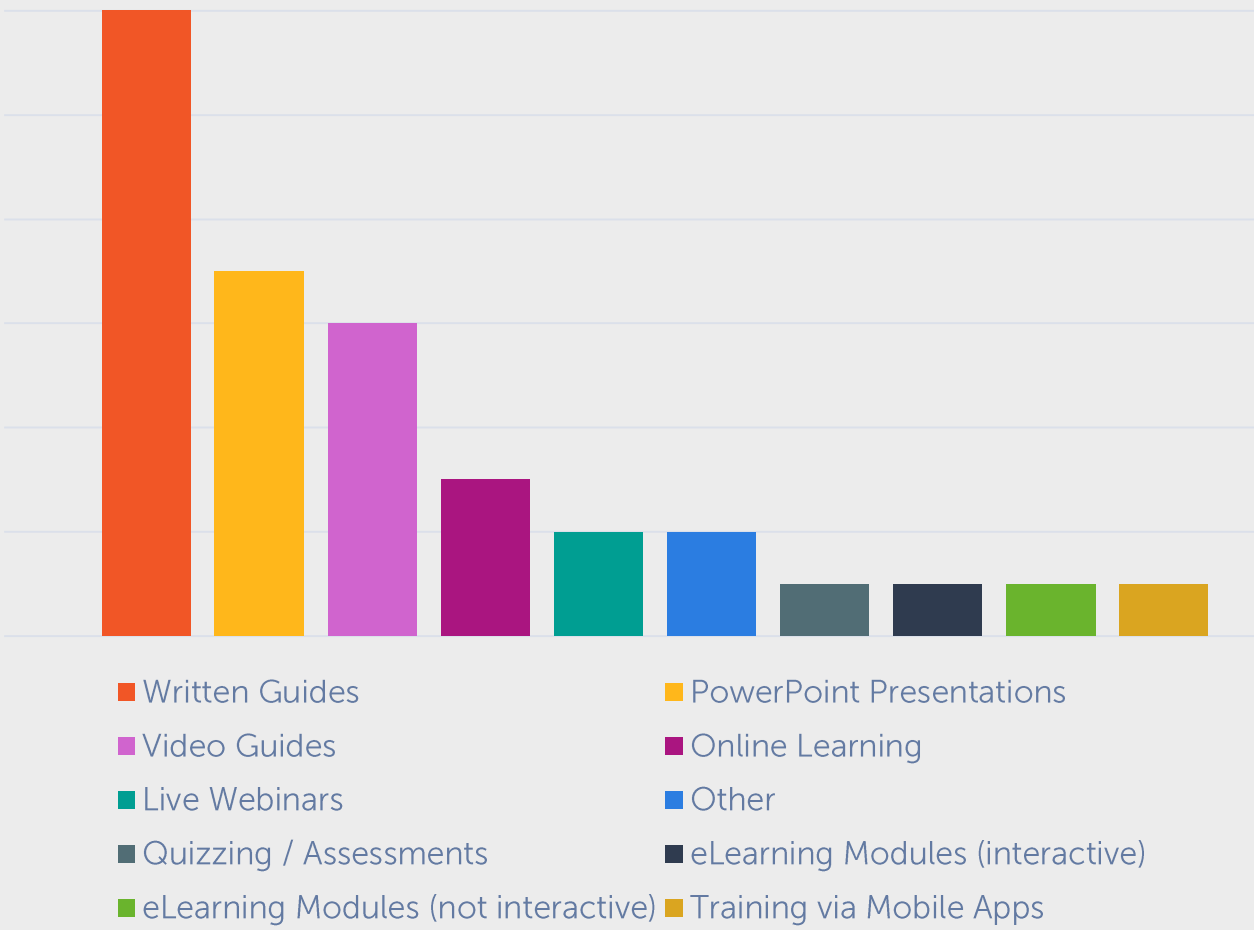


*"eLearning provides consistent and accurate messages and great to capture new starts as they arrive to the business and ensuring a level of competency prior to getting access to Maximo."*

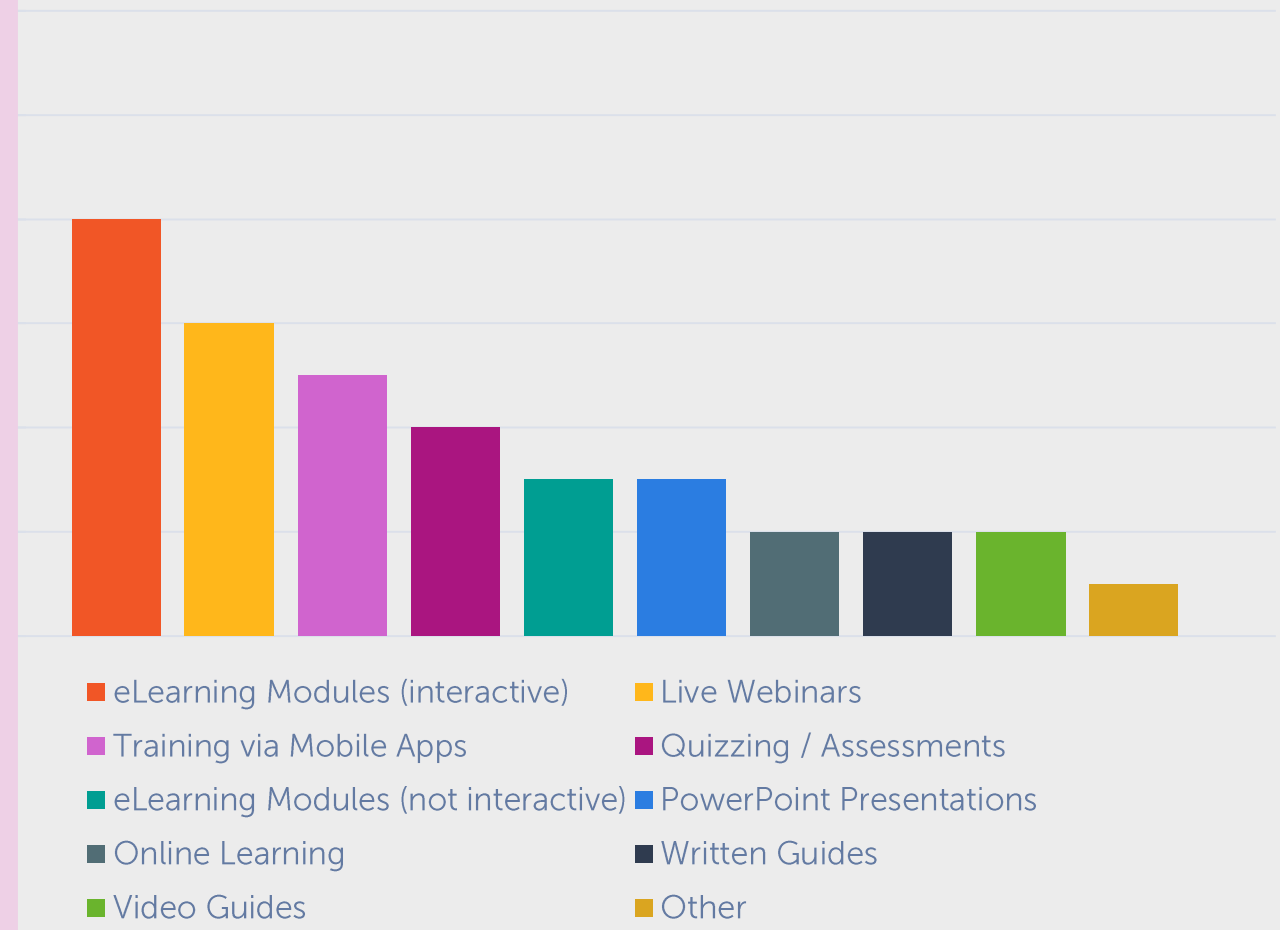
Section 2

Types of Training Materials

Most commonly used



Added value



# Types of Training Materials

However, the types of materials which add value to individuals may differ depending on what they are learning. For example, Quick Reference Cards can be useful for infrequent task driven activities, whereas eLearning might be more valuable for new starts understanding the context of the system within the organisation and their role within it.

Art Mirrow, Director of Customer Training at Google Cloud, conducted an internal survey about how learners prefer to learn specifically asking:

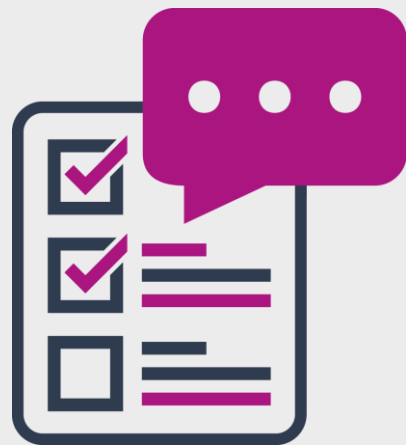
Q1 How do you prefer to learn a complex task like learning a software application		
Rank	Learning Methods	Percentage
1	Instructor led training (classroom + virtual)	80.22%
2	Daily work experiences (i.e. doing the day job)	67.85%
3	E-learning (i.e. online courses for self-study)	61.45%
4	Web resources (Google, YouTube videos etc.)	43.82%
5	Knowledge sharing within your team	41.88%
6	Coaching or mentoring	36.40%
7	Internal company resources (e.g. documents + guides)	33.33%
8	Conferences and other events	20.22%
9	Manager feedback and guidance	17.80%
10	Professional networks	13.33%
11	Regular blog posts and news feeds	9.35%

Q2 How do you prefer to learn a process task		
Rank	Learning Methods	Percentage
1	E-learning (i.e. online courses for self-study)	61.67%
2	Internal company resources (e.g. documents + guides)	46.56%
3	Instructor led training (classroom + virtual)	42.10%
4	Knowledge sharing within your team	40.59%
5	Daily work experiences (i.e. doing the day job)	39.25%
6	Manager feedback and guidance	20.32%
7	Web resources (Google, YouTube videos etc.)	16.02%
8	Coaching or mentoring	15.16%
9	Regular blog posts and news feeds	5.38%
10	Conferences and other events	5.16%
11	Professional networks	3.44%

# Types of Training Materials

Based on our experience, research and responses from surveys, it is not just about the types of materials but rather being fit for purpose in the right contexts.

It is also important to ask your own teams how they prefer to learn in each context. You can do this by a simple TNA survey - **contact us for a TNA survey.**







# Change Management

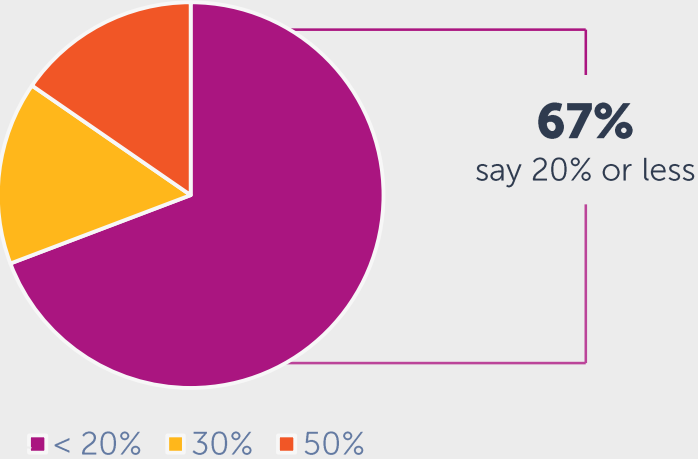
## Section 3

# Change Management

We asked what percentage of your Maximo budget was/is allocated to training and change management?

The majority of responses indicated that they spent between **10-30%** on training and change management.

What % do you think **SHOULD** be allocated?



*"Probably a very high proportion in relation to the implementation costs. Projects that involve training as part of change management always seem to be a lot smoother, especially when involved from the very start of a project - which budget may not always permit but it's so beneficial."*

– Janet Wilson, Premier Oil



During the 2020 Future Oil & Gas event discussing digital transformation, an accepted key concept was that people must be at the centre of change. The change management panel suggested that between **50 and 70%** of project cost and effort should be focussed on supporting employees through the change project.

Our experience, backed by research indicates that the **average budget allocation for training and change management is 30% of the overall implementation or upgrade project budget.** Whether the budget is spent on internal resources or external specialists.

**It is important that a significant effort is allocated to training and change management activities.**

# Change Management

When you implement or upgrade Maximo, it's easy to focus on the technology, rather than the people. It is critical that you align your people with processes and the system at every step as this is where you will get the most long-term value.

Gartner research has found that when there is a systems change, there is a drop in productivity. The depth and length of that drop is directly related to the effort and money spent on managing the changes.

A robust change management strategy is key for Maximo upgrades and Implementations. Change management activities should start early, from communicating changes and decisions, identifying and closing the skills gaps, to tracking and measuring the impact of the change.

Deloitte have published a very useful guide which outlines ERP top 10 challenges and states **“of the top 10 barriers to a successful ERP journey, 5 can be addressed by developing and implementing a structured change management programme”**.

<https://www2.deloitte.com/ca/en/pages/human-capital/articles/successful-ERP-journey.html>



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**Investment in change management and hands on scenario-based training has proven to be the right decision and is demonstrated in how well the system has been adopted in HUM.**

Andrew Hocking, Staff Engineer  
Honda of the UK Manufacturing Ltd



Electra

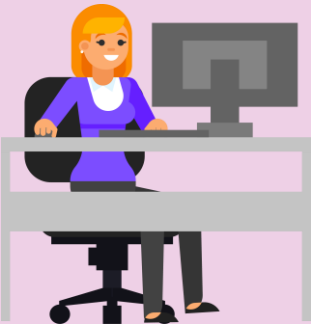
# Change Management

## Continued...

Research carried out by Panorama Consulting Group, in their 2021 ERP Report, stated that year on year, organisational issues are a consistent factor between the success and failure of an ERP implementation or upgrade.

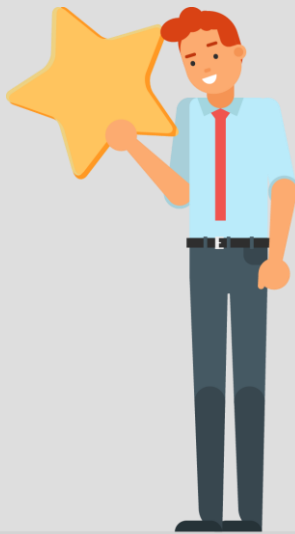
According to Panorama, **"It is rare to achieve significant business benefits without informed, engaged and capable employees"**.

➤ [Check out our blog for Electra's recommended best practices for end user engagement with Maximo.](#)



The Panorama report identifies the most common change management activities as follows (in order of importance):

- ✓ Communication Plan
- ✓ Customised Training
- ✓ Benefits realisation plan
- ✓ Change management strategy
- ✓ Business readiness assessments
- ✓ Resistance management
- ✓ Change impact analysis
- ✓ Stakeholder assessment
- ✓ Focus Groups
- ✓ Feedback loops
- ✓ Post go live assessments
- ✓ Coaching plan for leaders



# Measuring the Impact

“What we measure we improve” - James Clear, Atomic Habits

Based on our experience, the resistance to investing in change management comes from a difficulty in seeing a tangible return on investment.

However, focussing on the vision of the project and understanding at the outset what success looks like can help you measure the impact.

**Common KPIs for Maximo Implementations and Upgrade projects are:**

- Operational Efficiency
- Reducing Costs
- Standardising Operations
- Reporting and Visibility
- Compliance



## Other ways to track:

- Qualitative feedback from learners
- Qualitative feedback about behavioural changes
- Engagement survey scores
- Data quality
- Adherence to process
- Team/organisational/business metrics
- Time savings





# The Learning Experience

## Section 4

# The Learning Experience

## Prioritise your People

Only by focusing on the end user can you minimise risk of low adoption levels and poor performance of the system.

### Here are our key tips:

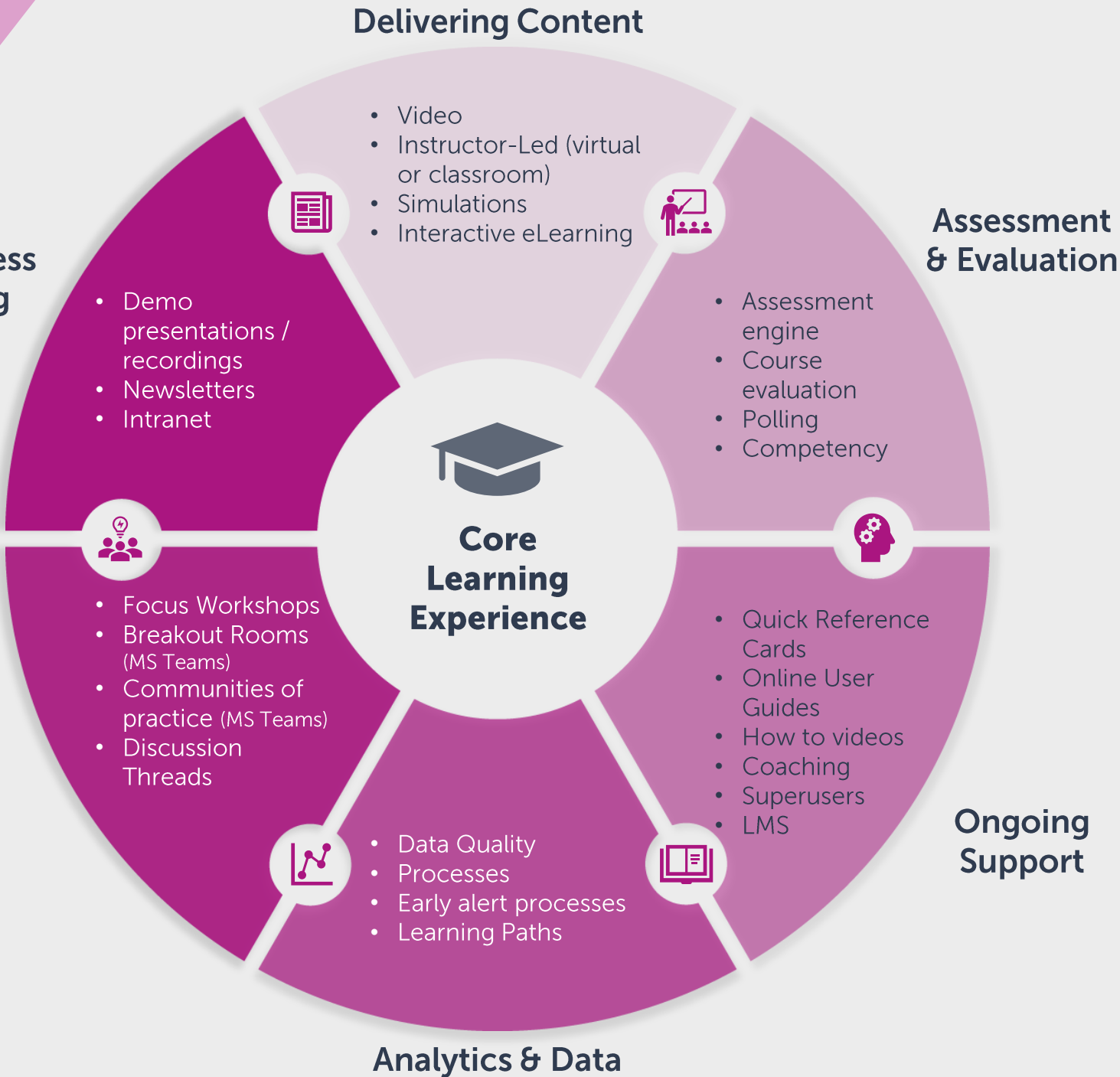
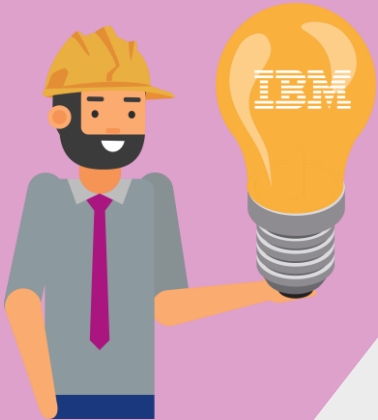
- Improve the consistency of the learning experience by utilising your Learning Management System (LMS) <sup>2</sup>
- Training materials, videos, assessments, reference materials all in one place (i.e., LMS or Intranet)
- Use real life scenarios and data
- Avoid too much synchronous activity – space out when learning activities are available, i.e., eLearning, demo sessions, departmental focus workshops

Gartner also suggests that reinforcement training should be offered three to four weeks after go live to improve training effectiveness.

2. [https://www.electralearning.com/totara-learn-lms/your-Learning-Management-System-\(LMS\)](https://www.electralearning.com/totara-learn-lms/your-Learning-Management-System-(LMS))



# Design and Plan a Maximo User Engagement Programme



# Low Budget, High Impact

## Do it yourself

There are various ways to use the tools already available in your organisation to support the end users.

- Create your own online demos and how to videos
  - [Record short screen recordings in PowerPoint](#) and [save them as a stream video](#) to share with your organisation
- Use MS forms to keep the feedback loop open
  - Ask about learning preferences
  - Measure the impact / effectiveness of the programme
- Use M365 tools or LMS to build communities of practice
  - “Contact your coach” “Ask your peers” groups – also accessible on mobile devices



## IBM Maximo MAXIMIZED

**Fully engaged** end users are more likely to adopt Maximo and leverage maximum **value** from the system.

# MAXIMIZE

Electra's people focused approach to IBM Maximo learning and change management increases end-user adoption and **MAXIMIZES** your return on investment.



# Further Reading and Support



[About Electra and our approach to Maximo Change Management and Training](#)

*Sign up to our newsletter from this page too*

[Members Area](#) – for access to Free Intro to Maximo User Guides, last year's research report and more exclusive user content on Maximo and M365.

[Blog: The Importance of Maximo Training and Change Management](#)

Access to **FREE** Complexity of Change Assessment

<https://www.electralearning.com/electra-complexity-assessment/>

## eLearning Demo's

Use the login below for access to the **Introduction to Maximo 7.6.1** and **Searching in Maximo** eLearning modules.

- Go to [www.learningspotlight.com](http://www.learningspotlight.com)
- Username: maximodemo1
- Password: Welcome!

Work through the 2 eLearning modules and assessment from the middle section on the home page - **Maximo 7.6.1 Modules**.



# References

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1. LinkedIn Learning Workplace Learning Report 2021: <https://learning.linkedin.com/resources/workplace-learning-report>
2. 2021 ERP Report, Panorama Consulting Group: <https://www.panorama-consulting.com/resource-center/erp-software-research-and-reports/>
3. How is COVID-19 Changing Learning, Fosway Group: <https://www.fosway.com/research/next-gen-learning/covid19-research/>
4. How do Learners Prefer to Learn, Art Mirrow, Google Cloud: <https://www.linkedin.com/pulse/how-do-learners-prefer-learn-we-asked-answers-surprised-art-mirrow/>
5. Your guide to a successful ERP journey, Deloitte: <https://www2.deloitte.com/ca/en/pages/human-capital/articles/successful-ERP-journey.html>

For more information about this report or for a free consultation, please email or call us on the details below.



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**Thank You,**  
Electra Learning