

CHAPTER 6: PHASE 3 - MONTHLY USER PROFICIENCY TASKS

“Choose to be optimistic, it feels better.”

- The 14th Dalai Lama

Phase 3 of the Training and Implementation Plan gives you an opportunity to showcase some creativity and to highlight, with real data, how users are progressing in the new system.

This phase keeps users engaged in the system leading up to go-live. During this phase, I will be introducing the use of one of my favorite (and free) collaboration tools: Google Drive.

As the name implies, the objective of this phase is to accurately gauge the proficiency of your user base.

Not just by seeing if they can follow a Job Aid and click where told, but to ascertain whether or not users are comprehending how the re-engineered business processes are functioning in the new system.

By conducting monthly user proficiency tasks, you will be keeping users engaged in the system and processes while helping them develop the required skills to operate post-launch.

Those of you implementing an ERP system will already know this: ERP systems are big, clunky, and often unintuitive to the user. It will take some time to get everyone in the organization functioning at the same skill level within the system. Still, by conducting these monthly tasks, it will shorten the time frame.

Another benefit of these monthly exercises is users can practice and learn the system on their own time. That will reduce the training time required during Phase 4.

Data will also show if users are struggling in certain areas. This allows you to focus your training efforts so the users are prepared for go-live.

Participants of the monthly tasks will include the SMEs and all end-users broken out by module/section of the system as defined in the user tracking sheet.

Supervisors and managers who will not be performing these tasks in the new system are not required to complete these tasks.

CREATING AND SETTING UP PROFICIENCY TASKS

There are five steps to creating user proficiency tasks:

1. Create the task
2. Create the online assessment
3. Validate the task with a colleague
4. Email the task and assessment URL (link) to users
5. Review and report user training statistics

As with Phases 1 and 2, these exercises will be conducted in a functioning test or development instance of your application.

STEP 1: CREATE TASK

Create tasks derived from the business processes to be conducted in the new system. Examples of this might be to run an inventory valuation report, create an invoice, or create a trial balance from certain accounts.

It will be important to provide detailed instructions with these tasks. Be sure to include necessary Job Aids and data sheets so users can complete these with minimal assistance.

Here's an excerpt of a task we sent out to users:

You just returned from vacation and have to send an invoice to the client ASAP. Log in to the system and navigate to appropriate screens to complete this task.

Be sure to list the specific items to be shown on the invoice in your data sheet:

- ◉ *Widget X, Qty 5*
- ◉ *Widget Y, Qty 10*
- ◉ *Widget Z, Qty 15*

These three line items will total to a known amount. Please draft and print the invoice and use it to answer the questions on the online assessment form.

One question you can ask for this task is a multiple choice question for the users to choose the correct invoice total or a text box where they must enter the invoice total.

The difficulty level of proficiency tasks can be raised should you choose to do so. In the example above, you could have one of the items above be exclusive of tax. Or you can split the invoice in two and then test users on the new amounts.

Take this opportunity to be creative with these assignments while also challenging users to raise their level of proficiency in the new system.

STEP 2: CREATE ONLINE ASSESSMENT

With a proficiency task created, we need a method of capturing the results. Here is where Google Drive comes in. Within Google Drive, there are applications to allow the creation and collaboration of documents, presentations, worksheets, drawings, and forms.

For the monthly proficiency tasks, you will use Google Forms to create the user assessments. If you have a Gmail account, log in, click on the square tiles in the top right corner of the application, and choose Drive.

Even if you don't have Gmail, [Google Drive](https://www.google.com/drive/) is free to anyone with a valid email address.



A safe place for all your files

[Go to Google Drive](#)

One account. All of Google.

Sign in to continue to Google Drive



Enter your email

Next

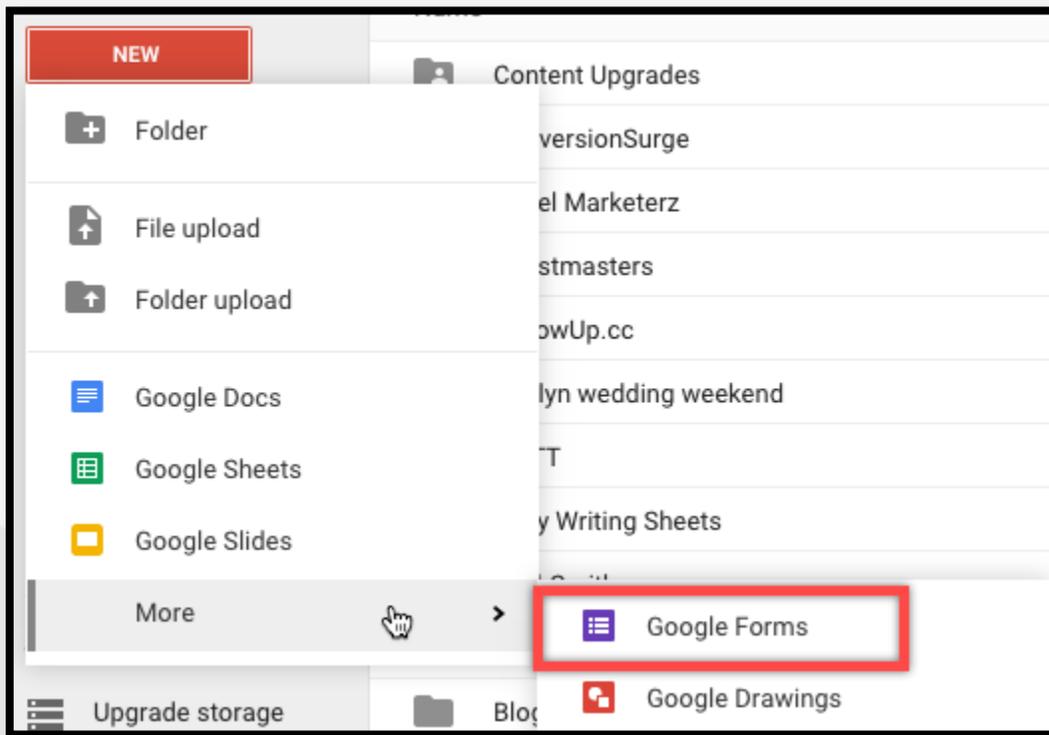
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After you have successfully logged in to Google Drive, create a new form by clicking “Create”, then selecting “Form” as shown below.



The application automatically places you in editing mode of the form.

Creating and designing these forms is fairly intuitive and there are many types of questions you can create. Click the drop down box next to “Question Type” to see the list. To add a new question, click “Add Item” and select the type of question you want to create.

Start by capturing the names of those who are completing the form so you can calculate the completion rate of the tasks and follow up with those who did not complete it.

QUESTIONS RESPONSES

August Proficiency Task

These questions relate to setting up a project, creating its respective agreement and budget, and also the creation of tasks and billable activities. Prior to taking this assessment, you should have printed a DRAFT invoice and FINAL invoice; both in DETAILED and SUMMARY format.

What is your FIRST and LAST name?

Please provide to receive credit for your submission

Short answer text

The types of questions asked are entirely up to you, but I strongly recommend mixing in practical and theoretical questions so users not only understand how things are done in the system, but why. An example of a practical question would be: “What is the total amount of your invoice?” A theoretical question would be: “Using the examples below, which option best illustrates why an invoice hard limit should be set for a project?”

I also recommend adding two scales at the end of the assessment to help you adjust future proficiency tasks: the time it took to complete the assigned task and task difficulty.

Just like this:

How long did it take you to complete this task?

1 2 3 4 5 6 7 8 9 10

Time in Hours Time in Hours

How difficult was this proficiency?

1 2 3 4 5 6 7 8 9 10

Not difficult at all Extremely difficult

Do you have any feedback for us?

Long answer text

This lets you know how much time users are spending to complete the task and whether the assigned tasks are too difficult or easy for them.

As always, be courteous of people's time and don't create long, complicated tasks that take up 8 hours of their day.

At the same time, look for outliers who may be taking an excessively long time to complete. You should reach out to these people to see if they need help from you or someone on the team.

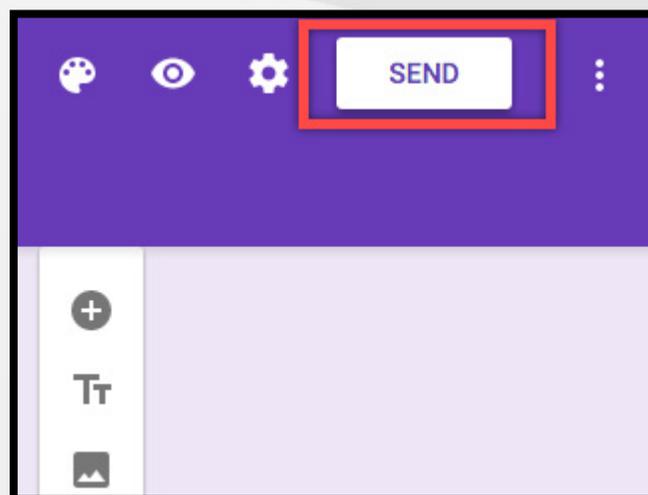
If the tasks are too easy, kick it up a notch. If they are too difficult, scale it back. Remember, the objective is not to trick users, but rather keep them working in the system while they learn from the assigned tasks.

STEP #3: VALIDATE TASK WITH COLLEAGUE

Just like in Phase 2, it is important to always validate and test what you are about to send out to the masses. That way, it will actually work the way you want.

Email the proficiency task with the instructions, data sheets, and online assessment link to another member of your team. Have this person assume the role of the user by completing the task and taking the online assessment.

This will ensure the instructions and test questions are well written and will save you from being inundated with confusion from the users. To get the link (URL) to the online form, click the "SEND" button when in editing mode:



The click the link icon in the “Send Via” line. Optionally, you can shorten the URL.

Send form ×

Can submit only 1 response (requires login)

Send via ✉ 🔗 <> g+ f t

Link

<https://docs.google.com/forms/d/16hIGjYBt6gU2K2MnzGPay9RBeAABmRr>

Shorten URL

CANCEL COPY

STEP #4: EMAIL TASK AND ASSESSMENT URL (LINK) TO USERS

With the proficiency task and online assessment validated, send it to the specified users to complete, along with a *due date* for completion. The recommended due date is two weeks from when the proficiency task is emailed.

Why? As I discovered, humans like to procrastinate and will wait until the last minute to complete an assignment. Anything longer than two weeks means the next month’s task will be mailed soon after the first was completed. This can create a sense of pile-up on the users and cause frustration.

Two weeks is long enough for people to be flexible completing the task and for you to review the data coming in from the assessments before creating the next one. Also, be sure to send out reminders as the due date nears.

I recommend encouraging users to form groups to work on the proficiency tasks together. This creates camaraderie among the user groups.

It also gives the nominated Subject Matter Experts (SMEs) an opportunity to start being a point of contact for users at various sites prior to go-live.

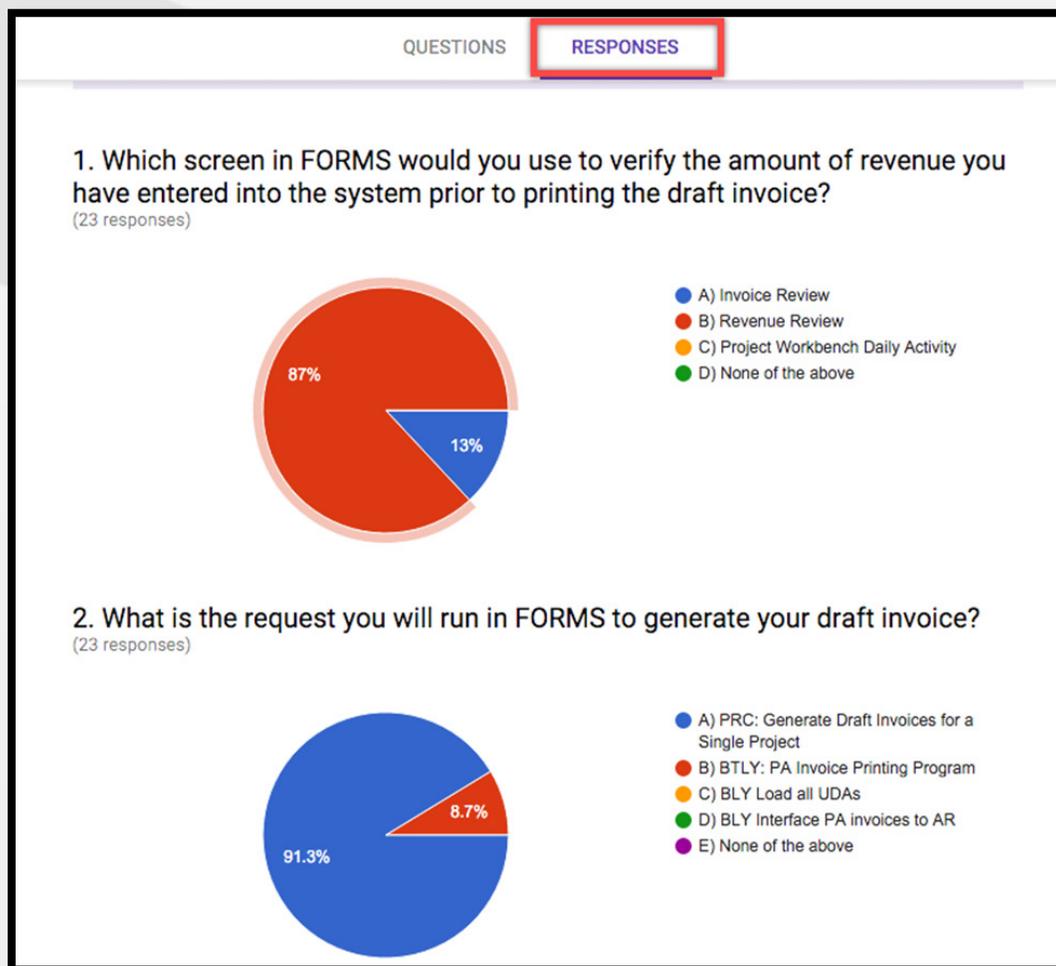
STEP #5: REVIEW AND REPORT USER TRAINING STATISTICS.

After users complete the online assessments, it is time to review how they fared with the proficiency task.

Hats off to Google for this one. As users are submitting their assessments, Google Forms is quietly aggregating and summarizing the data for you in to nice charts and graphs.

Thanks, Google, what a time saver!

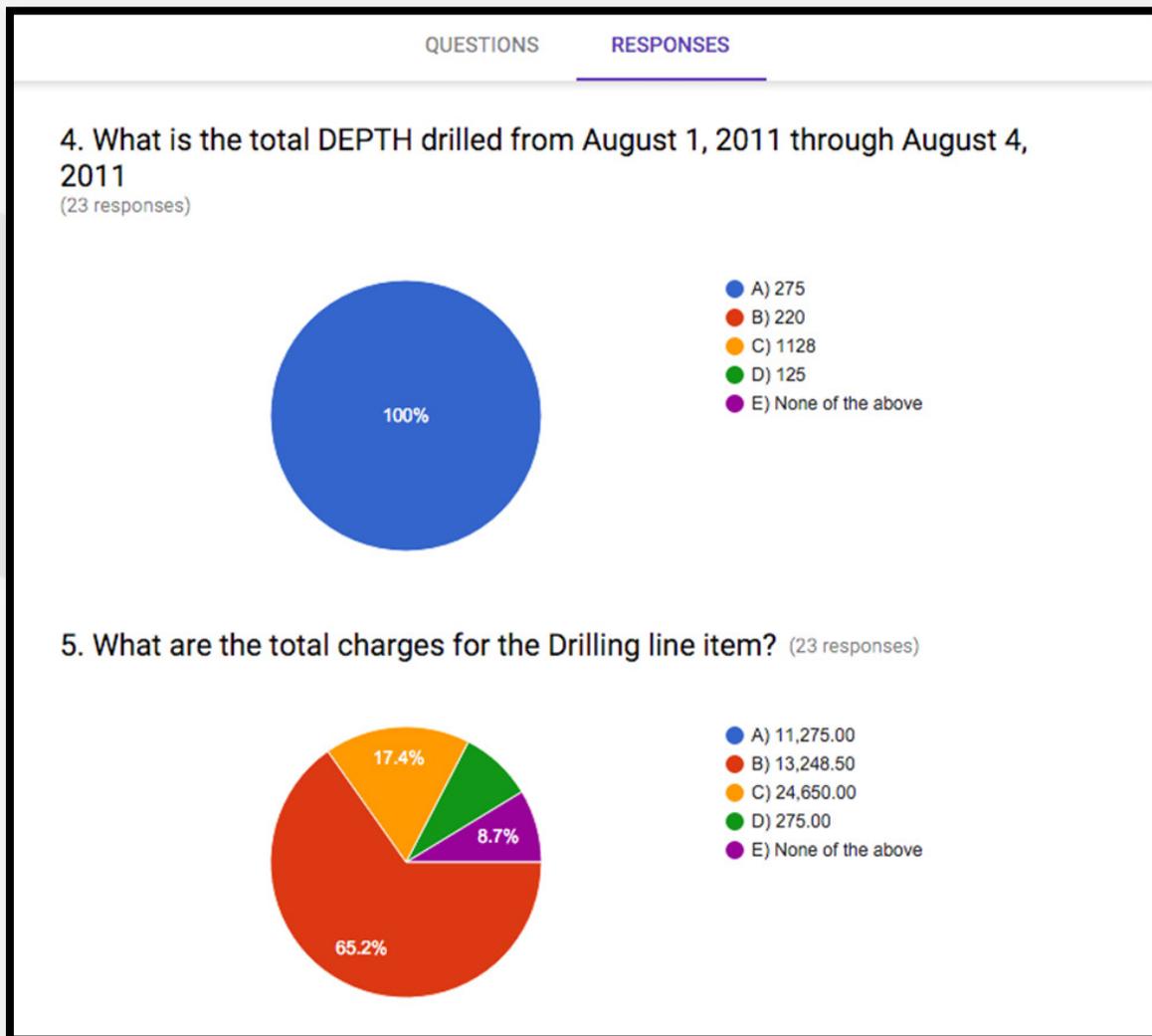
To get these charts, open the assessment form you created and click “Responses” at the top of the form:



Now you can see all of the user responses neatly charted, along with a percentage of what question was selected. And since you already know the answers to these questions, you can easily determine how many people chose the correct answer.

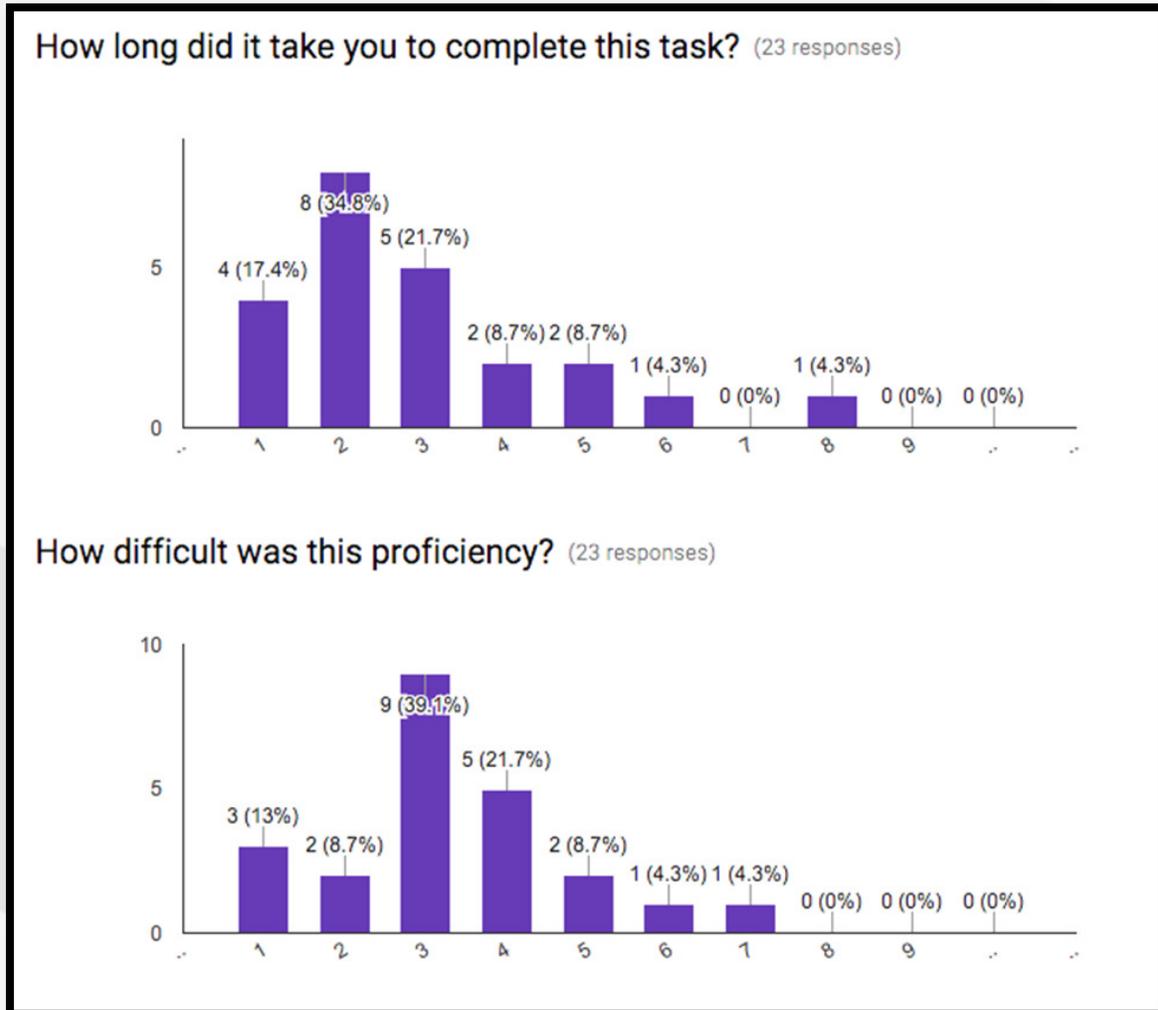
How did users fare on a particular proficiency task? Let's have a look:

Below we can see everyone got question #4 right but with question #5, people didn't seem as certain about the answer.



This might be something you would want to address with the users in phase 4 of the Training and Implementation Plan.

How about the time it took to complete the task and task difficulty?



It appears the proficiency task took the majority of users between 2 and 2 hours, but there were four who took 5 hours or more to finish.

Notice the bars on the far right? Looks like one particular user took 8 hours to finish. We should reach out to see why this person struggled, and offer them some one-on-one training and assistance to get them up to the same level as other users.

As you can see, this is powerful stuff! How many implementation projects do you know can provide up-to-date training metrics like this? I would estimate close to zero.

After reviewing the data and charts, share it! Send it to the users, along with the correct answers. They will want to know how well they did on the assessment.

Most importantly, share this information with the project team, steering committee, management, and any other key stakeholders.

Be transparent and honest. If users are doing well, great! If not, adjust the training and focus on the trouble spots. At least you know *where* to focus rather than guessing or taking the word of one or two individuals.

User readiness is one of the many things keeping executive management up at night during a big implementation.

Think about this: You're in an elevator or walking into the building when the CEO inquires about how the project is going. Then he or she asks this question, "Do you think users will be ready?"

If you didn't have reliable data from proficiency tasks, how could you possibly answer with conviction?

But by having this training data you can safely say, "Yes. Users are averaging 78% on their proficiency tasks and improving every month."

Pro-tip: [Here's how to use Google Sites](#) to host all proficiency tasks on a custom URL. This can cut time down by sending a different link every month. In this scenario, you would just direct everyone to the site for the monthly task.