



## Don't Forget the User!

User Focus Can Ensure You  
Achieve Enterprise Software ROI

*An Epicor White Paper: Lessons from 350 Corporate Implementations*

# Executive Summary

It is often stated that more than 60% of all software implementation projects fail. Why? Ask many industry analysts and commentators and you will hear similar stories, all pointing to a lack of end user focus throughout the implementation. What is often lacking throughout the early stages of implementation, is the inclusion of both data-driven and user-focused decisions or approaches – largely because they are often seen as being too time consuming or expensive. This white paper highlights how a strong user focus has been accomplished by many organizations; at multiple stages within the implementation lifecycle, and the benefits realized because of this. What's more, these organizations have accomplished these results without huge project delays or budget overruns as a result of this user-centric approach.

In short, a user focused approach can both ensure an implementation is delivered within deadlines and budgets, and that return on investment (ROI) potential is realized.

A user focused approach forces the organization to address the single biggest failure point within every system implementation: A lack of effective user adoption. At the same time, implementing such an approach generates data for proactive decision-making, reduces support costs, and ensures that the system implemented is optimally utilized. It's not uncommon to see up to 50% reduction in user time-to-productivity following such a focus.

Fundamental requirements of a user focused approach, if it is to be implemented effectively are as follows:

- **The provision of a comprehensive user environment that comprises the right content for the job:** *documentation, training simulations, live in-application graphical help files*
- A streamlined and synchronized approach to content development and delivery: *to reduce time and keep pace with changing systems*
- Management of data: *to identify, proactively address, and validate that the program has been implemented effectively*

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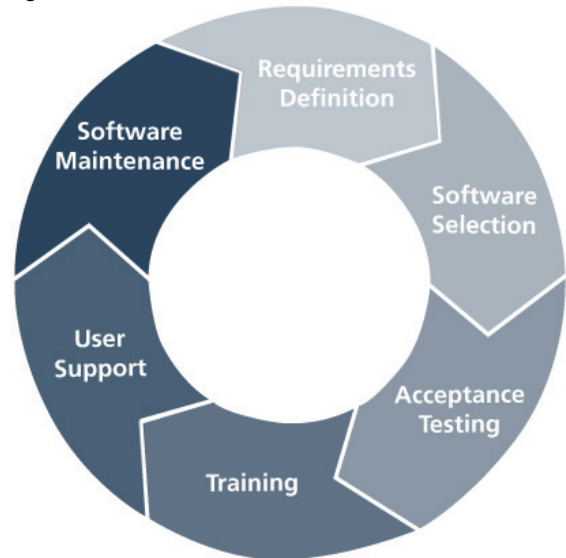
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# Implementation Lifecycle

Let's consider some typical project lifecycle stages:

- Requirements Definition
- Software Selection/Development
- User Acceptance Testing
- Training
- Post Go-Live User Support
- Software Maintenance

Within each of these stages lie opportunities for close user collaboration and involvement, but all too often it is the very concern that this involvement would lead to lengthy delays as revisions are made, that often results in user involvement becoming neglected. As we look at the opportunities and benefits of adding a greater user focus, we will discuss some key themes:



- The *synchronization of content development* at each stage in the implementation lifecycle
- The use of *appropriate content* throughout the application lifecycle
- The *collection and use of data* to focus efforts and proactively address process issues early in the rollout

## Requirements Definition

As organizations define new processes and reengineer existing processes, application requirements are developed. Often these requirements stem from shortfalls in existing processes and transactions.

### The Benefits of a User Focused Approach

Organizations can build a clear picture of the processes and transactions that cause the most common problems with today's systems by monitoring the use of existing applications and acquiring information such as:

- *Who asks for help?*
- *Where in the application are they seeking assistance?*
- *How often do users ask for help for this specific task?*

Effective electronic performance support solutions can provide this insight and assist project teams when defining the requirements and processes for a new or upgraded application. The benefits? A focus upon today's pain points rather than just the "new features" can help garner user buy-in and help prioritize functionality that can deliver measurable process improvement.

## Software Selection/Development

Today's approaches to application customization or development are rarely painless exercises. Invariably feature requests arrive based upon feedback during early testing that involves certain elements of reinventing the wheel and additional development or technical resources.

### **The Benefits of a User Focused Approach**

Many organizations that make use of electronic performance support solutions have effectively leveraged simulated application environments to expedite feedback mid development of content. By quickly creating a simulation from "mock-up" images of proposed application screens, processes and features can be delivered for review and suggested corrections made long before hard coding begins. Critically, these rapidly developed application "models" obviate the need for days of recoding upon receipt of change requests. In addition, by tracking use of these "mock-ups", project leaders can gain insight into problem areas which can focus modification efforts.

## User Acceptance Testing

The process of user acceptance testing takes many forms; from providing transaction procedure documents (test scripts) to users and asking them to complete the task within a live application instance while being monitored by observers, to simulated environments where monitoring and reporting of a geographically dispersed test community is facilitated.

### **The Benefits of a User Focused Approach**

Whichever approach to user acceptance testing is implemented it is imperative that data is collected and looked at in aggregate – with regional or international differences noted. Critically, while it may not always be possible to remedy all problems within the application prior to production, it remains possible to modify training to pre-empt questions and proactively provide solutions.

## Training

Training is possibly the most underrated component of any mission-critical software implementation. While it may be delivered in many fashions, its goal ought to be the same: Maximum AND Efficient user adoption of the application, in order to achieve the potential ROI.

Recent Gartner research indicates that organizations that have successfully implemented mission-critical systems have budgeted, on average, some 17% of the project costs to end user education. Adding fuel to the fire, other related research highlights that some 76% of employees have a sub-standard knowledge of new systems. Startling facts, but the message is simple: Training is a critical ingredient in the success of your project. The challenge is to deliver it in the right format for your users and at the right time in order to come close to realizing the ROI potential of the implementation.

### **The Benefits of a User Focused Approach**

While budgeting 17% of all project costs are an admirable goal, unfortunately many organizations actually spend less than 5% on training. However, training, documentation, and help files may be developed in unison (while also leveraging the same technologies and resources referenced in each other project stage discussed within this paper). Increasingly organizations are not looking at training in isolation, but rather as a part of the process that is connected to business process documents, test scripts, user documentation, and help. By synchronizing content development such that content developed for one purpose is automatically re-purposed and able to be modified for use as training materials (or user guides, or help files, etc.) saves time, money, and provides for a richer, more comprehensive user experience. What's more, if content can be delivered based upon role and/or need, users will be more inclined to focus their efforts on a curriculum that was designed for their needs and to address their role's interaction with the system.

As a final note on training, metrics are everything. Can you demonstrate and, more importantly, can supervisors see that individuals have completed, passed, and understood (demonstrated by passing task-based assessments) the content? This data, when viewed in aggregate, provides a solid indicator as to the readiness for your user community to embrace your new rollout.

Further Statistics also reveal:

Knowledge retention two weeks after training by traditional classroom and computer based training (CBT) equals 20% (approx.). Whereas knowledge retention two weeks after training through a traditional classroom and "simulation" based CBT approach = 80% (approx.). As a result, this online learning focus can reduce the amount of time spent on setting up classroom logistics and on training administrators by up to 90 percent.

## **Post Go-Live – User Support**

The launch of any project is often accompanied by a deluge of service desk calls for the IT staff that are supporting the new system. Importantly, this element of an implementation project can be where many of the unforeseen implementation costs occur. With Gartner Group citing the average help or service desk call costing anywhere from \$20-45, it is clear that minimizing call volumes will not only mitigate the need for supplementary staff post go-live, but also ensure that users remain productive.

### **The Benefits of a User Focused Approach**

In order to ensure a user focus while minimizing support costs, the premise ought to be very straightforward. It must be easier and more convenient for the user to help themselves than to pick up the telephone. In plain talk, you need to provide all the answers, all the time (without needing to search or browse intranet or even pull the manual off the top shelf). Organizations have accomplished this using the same technology that helps shape the requirements definition process. A robust electronic performance support solution knows where a user is and, when the user encounters difficulty, automatically presents the right content to complete the task.

In addition, the same reports used to identify problem application areas are also a viable indication of future training needs or opportunities to improve content.

## Software Maintenance

With every software implementation, regardless of the planning, forethought, feasibility studies, and process re-alignment that has taken place, comes changes. Updates, upgrades, changes and configurations that are required so that problems may be addressed or to ensure that the system keeps pace with the organization's evolving requirements can be frequent and often. At many financial institutions, changing regulations have necessitated system changes at a rate of 1 every 4-6 weeks on average. From a user's perspective, this means constantly learning or adapting to new processes. Therefore, from an organization's perspective, it requires constant user education.

### **The Benefits of a User Focused Approach**

While the task sounds daunting, the premise is uncannily similar to the user focused approach to delivering support post go-live. The crucial difference is that, rather than a user invoking help when they encounter difficulties, the content might be displayed proactively based upon the actual procedure that the user is currently attempting. If a change to a procedure or the systems graphical user Interface (GUI) has been made, users may be presented with transactional guide that will "walk them through" the procedure on the first few occasions following the change. The result? No training, fewer service-desk calls, and minimal adverse productivity implications.

The additional challenge with such frequent change is the ability for educational or helpful materials to keep pace with the application's update schedule. For every change, a lesson, a workbook, a procedural document, help file, test script, etc., must also be modified in order to maintain the comprehensive user experience described earlier. The critical success factor that determines the ability for an organization to achieve "dynamic content" is the granularity at which existing content may be edited. For example, if just one GUI within the application has changed, it ought to be possible to modify that screen in the lesson and simply leverage that change to ensure that help files and documentation are all updated – without reinventing the wheel.

# Summary

Simply put, a user focused approach forces the organization to address the single biggest failure point within every system implementation: A lack of effective user adoption. At the same time, implementing such an approach generates data for proactive decision-making, reduces support costs, and ensures that the system implemented is optimally utilized. Fundamental requirements of a user focused approach, if it is to be implemented effectively are:

- The provision a comprehensive user environment that comprises the right content for the job: *documentation, training simulations, live in-application graphical help files*
- A streamlined and synchronized approach to content development and delivery: *to reduce time and keep pace with changing systems*
- On-going management of data: *to identify, proactively address, and validate effective implementation*

## Epicor: Your Key to High User Adoption and Rapid ROI

According to recent survey results<sup>1</sup> based on total per user cost for software, services and maintenance, Epicor solutions cost 26% less than the overall industry average—and over 50% less than competing solutions. The same survey also showed Epicor overall per user cost of software and services is nearly 14% less than the average spent by mid-sized companies, and Epicor customers spend nearly 50% less on software implementation services. More significantly, when compared to mid-size companies implementing competitor systems, Epicor customers implemented more software and more features at an average of 4 to 6 times less cost respectively. This high level of user adoption can be attributed to a number of important reasons: an all round intuitive user experience; a strong and proven implementation methodology; availability of comprehensive documentation and eLearning content, backed by comprehensive support and maintenance plans. Epicor understands that in order for you to fully succeed, you need the freedom to concentrate on your core business. That's why today's Epicor global service offerings are designed to provide you with a comprehensive single solution source and single point of accountability for success.

## Introducing Epicor Knowledge Mentor

Epicor Knowledge Mentor is a set of tools, principles and ideas about how you can enable employees, partners and customers to assure that they are equipped with the knowledge they need to reach their objectives and minimize risk and losses.

Epicor Knowledge Mentor is a modern electronic performance support solution and as such is a comprehensive educational content development and learning management distribution environment that offers a unique “show me, try me, test me” approach. Epicor Knowledge Mentor provides a critical step on the path towards broader enterprise application adoption, empowered knowledge workers and overall business performance. Epicor Knowledge Mentor has the same importance to Service Quality as Quality Assurance has for Product Quality, and that Test Driven Development has for Software Quality.

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<sup>1</sup> Total Cost of ERP Ownership in Mid-size Companies. Cindy Jutras, Aberdeen Group, September 2007.

# About Epicor

Epicor, named one of FORTUNE magazine's 100 Fastest-Growing Companies in 2006, is a global leader dedicated to providing integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and professional services automation (PSA) software solutions to the midmarket and divisions of Global 1000 companies. Founded in 1984, Epicor serves over 20,000 customers in more than 140 countries, providing solutions in over 30 languages. Employing innovative service-oriented architecture (SOA) and Web services technology, Epicor delivers end-to-end, industry-specific solutions for manufacturing, distribution, retail, hospitality and services that enable companies to drive increased efficiency, improve performance and build competitive advantage. Epicor solutions provide the scalability and flexibility to meet today's business challenges, while empowering enterprises for even greater success tomorrow. Epicor offers a comprehensive range of services with its solutions, providing a single point of accountability to promote rapid return on investment and low total cost of ownership. Epicor's worldwide headquarters are located in Irvine, California with offices and affiliates around the world. For more information, visit [www.epicor.com](http://www.epicor.com).

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