CASE STUDY: A Major Steel Manufacturer Uses Knowledge Transfer to Improve ERP Rollout Training and Knowledge Retention

INTRODUCTION: The manufacturer is implementing a new ERP (Enterprise Resource Planning) software system throughout its North American plants as part of an effort to simplify, standardize, centralize and integrate its business processes. The new software will unify the organization on one accounting, purchasing, inventory and human capital management system that provides a superior range of real-time data resulting in improved efficiency and effectiveness and applying more sophisticated administrative controls. The plant-by-plant implementation of this Oracle software comes with many change management and employee learning challenges—ones that directly impact not only how quickly the manufacturer can begin to realize cost savings but also, in the short term, the speed at which each plant can perform routine departmental responsibilities.

I. THE BUSINESS PROBLEM

• The manufacturer needed a new and sustainable training approach that would prepare its accounting team to close their monthly accounting books within 7 days of the software’s go-live date at their Midwestern city plant. The Midwest plant would be the second plant to rollout the complete and fully integrated ERP solution.
  o The manufacturers first ERP rollout at their Eastern city plant in 2012 used a traditional training approach and can be viewed as a control group. This plant took 28 days to close the books—requiring overtime, resulting in employee strain, and eliminating time for cost-saving analyses and other value-adding work.
  o The Midwest plant is about 4x larger in size and is more complex than its Eastern plant counterpart. After the challenges faced at the Eastern plant, the executive team and plant leadership at the Midwest plant were committed to learning from prior mistakes and taking action to insure the larger plant go-live was a success.
  o In the 14 months since the Eastern plant deployment, the ERP system had matured and improved. Experts estimate the improvement to the software environment was significant—possibly enough to cut the previous 28-day close benchmark in half. This still left the Midwest plant team short of their 7-day goal.

• Critical ERP knowledge was siloed in just a few company experts, namely a single individual who would lead the training of the larger plant’s accounting team (the “Director of ERP Special Projects”). This was a business risk not only because it represented a potential single point of failure, but also because the Eastern plant rollout had shown that this expert was shouldering too much of the training and technical support burden and questions would quickly bottleneck. The company needed to rapidly develop an additional first-tier of Midwest plant of “super users” who would take on some of the training and answer basic questions after go-live, allowing this expert to handle more complex issues.

• The manufacturer needed a simple, disciplined training alternative to the “one size fits all” classroom model—and tools that would teach non-teachers how to train their peers, increase knowledge retention, and enable rapid knowledge transfer in palatable doses.
We were four months out from the biggest change that the accounting organization—and possibly even the entire corporation—had experienced in terms of the way we manage our business. We needed to get prepared for that. We basically had had a little training and knew a bit about what was coming, but we really needed to be able to hit the ground running....

Our ultimate goal was to be able to close the books accurately in a reasonable amount of time—which in our case was seven workdays—so that we could continue to focus on things that add value to the corporation, like cost studies and analyzing better ways to do business. We needed to limit the business interruption [caused by the rollout], make sure our results were reported accurately, and get people back to activities that add value to our bottom line. That was the challenge.” —THE CONTROLLER, MIDWEST PLANT

In late spring of 2013, the Midwest plant’s ERP rollout training was already underway. The team had held a couple weeks of traditional classroom-style training that followed the model used by the Eastern plant, plus added a job shadowing initiative between the larger plant’s accounting employees and their counterparts at the smaller plant. At this time, Dan Roberts, president of Ouellette & Associates—an IT professional development and consulting firm that was serving the steel manufacturer—assessed the challenges faced and brought in the knowledge transfer experts at The Steve Trautman Co. (STC) to immediately provide the manufacturer with an alternative training approach.

A PILOT LAUNCHED:

Organization — Accounting Dept.

The Midwest plant team of accountants and financial analysts would be prepared for the ERP rollout using The Steve Trautman Co.’s 3-step Knowledge Transfer Solution. The ERP expert who had led the Eastern plant’s training would again lead the training at the Midwest plant. This ERP expert would use STC tools to develop 20 non-IT super users from within the Midwestern plant’s accounting team (“mentors”), who would then train their remaining coworkers (“apprentices”) and deliver first-tier technical support. Managerial support would be provided by the pilot’s executive sponsors: an area VP and Controller, the Controller of North American Flat-Rolled Operations, and the General Manager of HR for Corporate and Global Operations. The on-location manager—the Midwest plant’s Controller—would set clear expectations, maintain urgency, remove obstacles, and hold the Midwest team accountable to its goals. If the pilot project proved successful, the steel manufacturer could adopt the new training model for future ERP rollouts.

II. STRATEGY

Use The Steve Trautman Co.’s 3-step Knowledge Transfer Solution to 1: Assess Risk via a structured framework that allows management not only to map who on the accounting team needs to learn what ERP knowledge areas, but also to use this map later to track when each knowledge risk has been mitigated as employees achieve ERP proficiency. 2: Create the KT Plan by clarifying what specific ERP knowledge and skills need to be transferred in which priority order to each super user, and then transferred from super users to the remaining accounting team. 3: Learn How to Act on the KT Plan by giving super users, apprentices, and managers the tools and know-how to quickly teach and learn ERP skills on the job, and provide a structured assessment to test that the knowledge was absorbed.
III. APPLICATION: THE STC 3-STEP KNOWLEDGE TRANSFER SOLUTION

A DEFINING MOMENT NEAR THE PROJECT’S START:
A critical turning point in the knowledge transfer pilot’s probable success or failure occurred early in the project. The ERP expert and lead trainer—who was just getting familiar with STC’s knowledge transfer tools—had scheduled four days of classroom-style training in late May 2013 with nearly 40 Midwest plant employees. The ERP expert had run a couple of these training sets at the Midwest plant prior to the launch of the 3-step knowledge transfer pilot. The accounting team’s developing super users were tagged to attend these four days in May along with their apprentices—essentially, re-creating the “one size fits all” approach used at the Eastern plant. The timing of this classroom training also posed a knowledge retention risk: apprentices would not have hands-on experience with the live ERP system until four months after these long lecture sessions.

"People were frustrated [using the traditional classroom approach]. The pace was too slow for some. The pace was too fast for others. For half the audience the material wasn’t targeted specifically for their roles. For the other half it was spot on but it didn’t go deep enough for what they would need to do. So that model really wasn’t customized enough to get everybody the information they needed as they needed it.”

—CONTROLLER, MIDWEST PLANT

Hearing of this, STC consultants raised a red flag. Since there was a single ERP expert, STC advised that the scheduled four days should be completely retargeted to developing the super users. First priority would be to replicate the knowledge of the ERP expert 20 times, so that those 20 super users could then train the rest of the Midwest staff—allowing the lead expert to pop up to a more strategic level and monitor. STC recommended the ERP expert cancel the scheduled classes and finish the first two steps of the knowledge transfer process [see KSM and SPD below] so that he could then train subsets of super users in exactly what they needed to know in a series of 1- to 2-hour bite-sized sessions.

"[The ERP expert] is one of the heroes of this knowledge transfer story, because he had the courage to stop ‘doing it the old way.’ We literally have to insist to our clients that they stop doing training the old, ineffectual way and start following our 3-step process. Because if all a client does is slightly modify a failing solution by bolting on a couple of our STC tools or making incremental changes, they will continue to fail. [The ERP expert] made the call to cancel the old-model training and that good judgment and commitment was, ultimately, the reason we were able to make a difference at [the manufacturer] and achieve success.”

—STEVE TRAUTMAN, THE STEVE TRAUTMAN CO.

After this decision to make a clean break, the ERP expert and the Midwestern plant’s followed the STC 3-step Knowledge Transfer Solution outlined below.

STEP 1: ASSESS RISK. The manufacturer used STC’s workforce risk assessment tool, the Knowledge Silo Matrix (KSM), to identify the knowledge areas (“silos”) each accounting team member needed to learn to perform their job roles using the new ERP system. Then, they prioritized these silos by critical learning needed to close the books. The KSM framework also provided an at-a-glance picture of who would be the designated super user (color-coded purple) for each knowledge silo and who were their apprentices (color-coded yellow). [see Figure 1]
This approach gives personnel, who might be under extreme stress, the ability to focus on what they needed to know in order to go-live. It kept them on track and on pace. The [Midwest] people could see, ‘This is the most important thing I need to know to be able to handle tomorrow.’” —THE DIRECTOR OF ERP SPECIAL PROJECTS [THE ERP EXPERT]

The KSM is the foundation of the whole training. It also shows you from a managerial standpoint where you’re weak and the areas you need to strengthen. You see this when you really sit down and profile your workforce. So that’s a must. It has to happen everywhere we go [to rollout ERP].” —DIRECTOR OF ERP SPECIAL PROJECTS

STEP 2: CREATE THE KT PLAN. The company then wrote date-driven Skill Development Plans (SDPs) for each knowledge silo. A master Skill Development Plan was written per silo, breaking out the individual skills required to do the work in that silo. (A skill is defined as something someone can say “go do” and can be taught to an apprentice in about 1 to 2 hours.) The master SDP also listed resources available to the apprentice (e.g. the mentor for each skill, online documentation, samples, wikis, etc.).

Next, a customized SDP was written for individual super users and later individual apprentices, showing which skills the employee was committed to learn. [see Figure 2] Skills on Customized SDPs were ordered in terms of priority and a date was affixed by which the apprentice should have learned the skill.

The Skill Development Plan was what really impressed me because it had a very specific plan for each individual role, with a way to measure when somebody had learned everything they needed to learn to be successful or independently working in that particular silo.” —GENERAL MANAGER, HR FOR CORPORATE AND GLOBAL OPERATIONS
Once we had the customized SDPs developed, you could assign accountability to the person who needed to learn. It took the responsibility for the training away from the single person who had a lot of the knowledge and put that responsibility on the individuals who needed to learn it. I think that ultimately proved to be much more productive than the route we had been heading down.

—CONTROLLER, MIDWEST PLANT

<table>
<thead>
<tr>
<th>Skills and Tasks</th>
<th>Sequence</th>
<th>Test Questions</th>
<th>Due Date</th>
<th>Actual Date</th>
<th>Resources</th>
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<tr>
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<td>1</td>
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<td>8/9/2013</td>
<td>8/9/2013</td>
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<tr>
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<td>2</td>
<td>1, 2, 4, 5</td>
<td>8/9/2013</td>
<td>8/9/2013</td>
<td>GENERAL LEDGER, GENERAL LEDGER DVA SUB LEDGER ACCOUNTING, L-DVA, 4</td>
</tr>
<tr>
<td>Pull trial balance report and cost statement</td>
<td>3</td>
<td>1, 2, 3, 4, 5</td>
<td>8/9/2013</td>
<td>8/9/2013</td>
<td>GENERAL LEDGER, GENERAL LEDGER REPORTING, L-REPORTS ONE, 3, PART 1 &amp; 2</td>
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<tr>
<td>Write a journal entry thru approval and posting</td>
<td>4</td>
<td>1, 2, 3, 4</td>
<td>8/9/2013</td>
<td>8/9/2013</td>
<td>GENERAL LEDGER, GENERAL LEDGER JOURNALS, L-JOURNAL ENTRIES, DVA</td>
</tr>
<tr>
<td>Extract month end statistical reports</td>
<td>5</td>
<td>1, 2, 3, 4</td>
<td>8/9/2013</td>
<td>8/9/2013</td>
<td>GENERAL LEDGER, GENERAL LEDGER STATISTICS, L-GENERAL STATISTICS, L-DVA, 4</td>
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<td>Build month end allocations via the workbench</td>
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<td>1, 2, 3, 4</td>
<td>8/9/2013</td>
<td>8/9/2013</td>
<td>GENERAL LEDGER, GENERAL LEDGER ALLOCATIONS, L-GENERAL ALS, A1 WORKBENCH</td>
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</table>

Test questions” were assigned for each SDP skill to confirm that the right knowledge had been effectively transferred. These test questions are quick, verbal assessments that reveal the wisdom and tacit knowledge needed to use a skill on the job (e.g. “Explain the steps in the process and why each is important?” and “How do you troubleshoot the three most common problems?”). The mentor chooses which test questions to apply from a set of 20 that STC has refined over decades and can be used with any job role. The test questions are one of most important assets of 3-step knowledge transfer—they give the process teeth via a metric for whether critical knowledge has transferred.

Through the SDP tool, apprentices could see what was expected of them and drive their own learning. Super users and other mentors could see clear priorities for what to teach to whom and which knowledge tests to apply. And, the team’s manager could track skill level status to ensure accountability for results.

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The SDP assessment is very specific. You know what it is you’re going to be assessed on when you begin the process. I think that’s very beneficial because it means, ‘I know I really need go get these particular points from this particular person that is my mentor.’ It was really easy to wrap my head around.”

—ACCOUNTING COORDINATOR FOR PLANT ERP, MIDWEST PLANT, AND A SUPER USER
People learned what they needed to learn. Probably the best example of that were people coming out of the assessment process and saying to me, ‘Not only did I know the answers to all the questions that were asked of me in this assessment, but also I’ve learned more and I’m more well prepared than [the ERP expert] or the ERP team even expected me to be.’ That was probably the moment when I thought, ‘Alright, we’re going to be OK.’”

—Controller, Midwest Plant

**STEP 3: LEARN HOW TO ACT ON THE PLAN.** STC led a 2-day Knowledge Transfer Workshop (KTW) that taught the ERP expert, super users, other mentors, apprentices, and their managers 15 proven techniques for quick knowledge transfer on the job (e.g. how to teach to different learning styles, how to plan an agenda for a knowledge transfer session, how to assess an apprentice). Using the KTW tools, mentors and apprentices did not need to be naturally gifted teachers or “people persons” to succeed. Most important, the techniques showed the mentor how to prioritize and conduct on-the-job training sessions while the mentor maintained a regular workload.

“The workshop taught technical experts how to communicate or transfer knowledge in a more effective way. These are accountants who know accounting. They don’t necessarily know how to craft a message or communicate information in a way that makes it the most retainable. We were able to teach them how to teach, if you will.”

—General Manager, HR for Corporate and Global Operations

“I’ll put it like this: I’ve been with the company 23 years. I’ve attended well over a 100 training courses. And I would put that [Knowledge Transfer Workshop] in the top 5.”

—Director of ERP Special Projects

After the Knowledge Transfer Workshop, the ERP expert trained the 20 super users one-on-one or, when possible, in small groups that needed to learn the same specific skill. Test questions were answered individually. Once super users had passed all their assessments for an assigned silo, they then become mentors and began to schedule knowledge transfer sessions with their own apprentices as the go-live date neared. Team managers and executive sponsors drove toward pilot completion by requiring regular status updates and accountability to the plan.

“We got a lot of feedback from the mentees that they felt much more comfortable and less intimated having their peer be the teacher. And they were more open to asking questions and forming answers from that perspective.”

—Director of ERP Special Projects

“The most important change was that you had a group of people who you knew that you could go to. When it’s a classroom setting, you have one individual standing in the front lecturing any number of people. It’s often times not as open and you don’t feel comfortable asking questions. Whereas when you’re just sitting one-on-one, more or less having a conversation about this material, you feel comfortable. And you know that if you run into a problem later, you can go to that person. I think that that helped us because we needed to build those connections with people for the issues that we were going to run into.”

—Financial Analyst for Commercial, Midwest Plant, and a Super User

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THE MIDWESTERN PLANT’S MANAGEMENT EMBODIES A BEST PRACTICE:
The controller at the Midwest plant demonstrated excellent managerial skills that contributed to the knowledge transfer project’s success. First, he clearly communicated to his team their knowledge transfer goal. Then he maintained a sense of urgency and personal responsibility by continual reinforcement of the knowledge transfer priority throughout the three months leading up to the go-live date. He also understood that when learning is observable, valued, and credited it reduces a team’s risk of failure and builds employee engagement. As a way to publically recognize employees who achieved knowledge transfer success, he coined “The Greenies”—an accolade which took its name from green being the KSM color of skill competence (“Able to Do the Work Independently”). When an accounting team member had passed her assessment for the final silo skill on her Skill Development Plan, the controller would send a lighthearted email to the entire team celebrating that the employee had become a “Greenie.” He incorporated humorous images of green-clad people and jokes into the email, feeding morale and engagement. The acknowledgment served not only to recognize the individual achievement, but also to highlight a short-term win for team, bringing them one step closer to ERP self-sufficiency as a department. This is a knowledge transfer best practice: management drives toward results by steady tracking and recognition of individual and team wins.

[The Midwestern plant’s controller] stands out to me as one of the important factors in the manufacturer’s success with the ERP rollout. [The controller] did a great job communicating to his team and helping them to embrace the knowledge transfer process. He was committed to results and made sure to publically acknowledge when the first of his team passed their test questions and completed their training in a knowledge silo. He even added hilarious pictures and comments to these “Greenies” emails. That’s a great example of how managers can have a little fun rewarding progress and still accomplish the serious business of ensuring accountability to goals.” —TODD HUDSON, THE STEVE TRAUTMAN CO., MASTER CONSULTANT AND PROJECT LEAD

USING JOB SHADOWING WITH KNOWLEDGE TRANSFER:
The manufacturer also used a job-shadowing program, in addition to the knowledge transfer project, to help the Midwestern plant’s team prepare for go-live. Prior to the pilot, the manufacturer was already flying Midwest plant employees to the Eastern plant to meet with their job role counterparts who had experienced the first ERP rollout and were now current ERP users. Midwest plant super users, mentors, and apprentices interviewed for this case study all agreed that this was very useful preparation and helped them to form more cooperative, cross-location relationships.

"We at STC support job shadowing as a valuable technique. But what we insist upon is that employees never get on a plane without a plan. A Skill Development Plan. Meaning, you do all of the work you possibly can over the phone and through other means in advance—like creating a customized SDP and understanding the KTW’s learning tools—so that when you do get on a plane you are super targeted about what you need to learn most. What we hate to see is when companies put a person on a plane to ‘go sort things out’ or to ‘follow this person around and soak up what they know.’ That’s wasteful, expensive, time consuming, and frustrating for both the expert and the learner.” —STEVE TRAUTMAN, THE STEVE TRAUTMAN CO.

STC advised the manufacturer to list in the Resource column of the master SDP the job shadowing program (e.g. “Travel to Eastern plant”) as one of the learning resources available to super users and
apprentices. Then, while the apprentice is on-location, he would be working on passing his assessment test for that skill or set of skills in the SDP. This way management could give clear direction: e.g. “Make sure that by the end of the day you can answer the test questions to these six skills on your plan. So you’re going to chase down the answers to these six skills’ test questions—and you have the added benefit of getting the answers in the context of this real world, live-data situation.”

IV. RESULTS

1. The Midwest plant accounting team met their stated goal to close the books in 7 business days after their first month of ERP go-live, allowing employees to do more value-adding work with the remaining time. In successive months, the team further reduced their closing time. This was clear cut improvement over the smaller and less complex control group (the Eastern plant) whose team members had been trained using only traditional methods.

<table>
<thead>
<tr>
<th>ERP</th>
<th>EASTERN PLANT (w/ Traditional)</th>
<th>MIDWEST PLANT (w/ Knowledge Transfer)</th>
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<tbody>
<tr>
<td>1st Month Live</td>
<td>28 days to close</td>
<td>7.5 days to close</td>
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<tr>
<td>2nd Month Live</td>
<td>17 days to close</td>
<td>7 days to close</td>
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<tr>
<td>3rd Month Live</td>
<td>12 days to close</td>
<td>5 days to close</td>
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“We met our objectives. We closed our books in 7 days—well ahead of the previous rollout’s 28.” —CONTROLLER, MIDWEST PLANT

“I can give you one big statement of result: I pulled my ERP deployment team out of the Midwest plant after the second month’s closing [to go start preparing for the next scheduled rollout], leaving responsibilities in the hands of the accounting team. Now, were the people at the Midwest plant nervous? Yes. But they were nervous in a good way. They were thinking and asking the right questions.... At the Eastern plant, we went live in May and I stayed until November. Three times longer.” —DIRECTOR OF ERP SPECIAL PROJECTS

2. Employees have measurably grown skill sets within the short timeframe allotted, while maintaining their regular workload. From July to September 2013, thirty-four of the Midwestern plant’s accounting team each learned up to a total of 131 new skills in up to 6 ERP knowledge silos and passed their knowledge assessments given by the mentor. This mitigated all priority knowledge risks on the team’s Knowledge Silo Matrix (KSM). [See Figure 3] Both the traveling ERP training team and the Midwest plant accounting team reported the knowledge transfer pilot a success and that they preferred the 3-step Knowledge Transfer Solution over a traditional classroom training approach.

“The method helped us target the direct, hands-on information needed for knowledge transfer. It helped us eliminate the noise in what we were teaching.” —DIRECTOR OF ERP SPECIAL PROJECTS
I think we went into that first closing 3 months ahead of where we would have been had we not switched our training approach. That's pretty exceptional considering we started the knowledge transfer sessions less than two months before go-live.” —CONTROLLER, MIDWEST PLANT

Heading into the closing, I think I was as adequately trained as I could have been.” —PLANT CONSOLIDATION ANALYST, MIDWEST PLANT, AN APPRENTICE AND LATER A MENTOR

Figure 3. Before and after KSM images, showing that the Midwest plant’s accounting team learned new skills and passed their knowledge tests, enabling them to turn from yellow “Actively Learning” to green “Able to Work Independently.” Some data has been changed to protect client confidentiality.

3. The Midwest team is months ahead of where its control group counterparts were, in terms of making reporting improvements and looking for cost savings opportunities. This result is in part because the Eastern plant employees had already worked out solutions to certain report difficulties in the early months of struggle after their rollout, and shared these with the Midwest team. However, operations at the Midwest plant are more complex than the Eastern plant and the smaller plant did not experience the wider range of issues that the Midwest plant would face using ERP. So clearly another contributor to the Midwestern team’s acceleration was that they were better trained before heading into go-live. This enabled employees at the Midwest plant to move more quickly to value-adding activities.
One thing that’s most telling: there isn’t anybody here saying, ‘I don’t know how to do my job.’ ‘I haven't been trained.’ The issues we’re having are more, ‘How do we get better?’ ‘This report we thought we’d have in 15 minutes is taking us 3 hours to run. How do we improve that?’ …It’s to the extent where, there were a couple of people in from [the Eastern plant] to help us out and they said that we were looking at things and asking questions that they didn’t ask until they were rolled out for six months. That shows we were very, very well prepared.” —CONTROLLER, MIDWEST PLANT

I do think a lot of the difference was the process—because we were able to be more focused than [the Eastern plant] was. The tools that we were taught with were just so much further advanced than what [the Eastern plant] had. We knew where the problems were going to be. That’s what was stressed upon, that’s what was taught, and that’s what we focused on in the assessments. —FINANCIAL ANALYST FOR COMMERCIAL, MIDWEST PLANT, AND A SUPER USER

<table>
<thead>
<tr>
<th>Real Costs Saved — Midwest Plant Accounting Team Employee Hours</th>
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<tbody>
<tr>
<td>37 Employees and Managers:</td>
</tr>
<tr>
<td>20.5 Business Days Saved:</td>
</tr>
<tr>
<td>vs. Control Group (28 day close - 7.5 day close)</td>
</tr>
<tr>
<td>Total Hours Saved in 1st Month Alone:</td>
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4. Long-term benefit: establishing a path for faster, smoother ERP rollouts.
The manufacturer is in the process of planning their next ERP deployments. The 3-step knowledge transfer process can be used in each plant’s rollout in an even further turn-key fashion, aided by pre-made master SDPs and the familiarity of the ERP expert and other executives with the knowledge transfer tools.

5. Long-term benefit: greater team communication, collaboration, and knowledge sharing within the Midwest plant and cross-location. The relationship-building nature of the knowledge transfer approach increased intra- and inter-team communication and knowledge sharing between the Midwest and Eastern plant teams. Employees are now better positioned to share resources, gain new problem solving perspectives, and prevent rework due to the collaboration.

“The teamwork that we have because of this—we never had it before to this degree. Now, people talk to me. They know that their actions are going to affect me. Now they let me know, because we’ve built that teamwork. We built that relationship during the knowledge transfer. With Oracle being such an integrated system, it’s important that we have that communication for things to run smoothly. That will benefit us through the entire process and for years to come.” —FINANCIAL ANALYST, MIDWEST PLANT, AND A SUPER USER
6. **Long-term benefit: pilot tools remain useful for hiring, onboarding, continuing staff development, and preparing future mentors.** The master SDPs created in the pilot remain as skill set lists that can inform future hiring and become ready-made onboarding plans, saving time and money. This tool can also identify new hires who are lagging behind the normal learning time for a certain knowledge silo, giving early detection to potential capability problems or a bad hire. Also, today’s apprentices become tomorrow’s mentors. Three-step knowledge transfer inherently prepares the future generation to one day mentor. A common language and concepts have been adopted throughout the Midwest plant accounting team, and this toolset can be reused to provide other types of staff development. This maximizes the steel manufacturer’s investment.

"What really sold me on the Trautman idea was this: it is a tool I can use going forward to prepare employees for their next step. Their next job assignment. I don’t have to go back and reinvent the wheel. Over the next 5 – 10 years, I can build a mature staff with what they need to know to run the business, based on the toolset that’s been developed.”

—**DIRECTOR OF ERP SPECIAL PROJECTS**

"One of the things we had been struggling with was the longer term view. After we rollout the ERP, there will be an ongoing need for knowledge transfer. As time goes on, people move to other jobs and new people come into the organization. This program gives us a whole set of Skill Development Plans that we can reuse again and again. You pull out the SDP and you do it all over again with your new hire. We’ll need to tweak the plans over time as conditions change, but it’s a nice base to have that we can use in the future.”

—**GENERAL MANAGER, HR FOR CORPORATE AND GLOBAL OPERATIONS**

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Data for this case study current as of November 2013.