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Asphalt Supply System Training

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Systems Training: An Integrated Approach

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Abstract

This BAS capstone project focuses on a professional action for my employer. This paper addresses the leadership and development of a team to provide training regarding our enterprise resource planning program, transportation program, and internal requirements. This paper will cover the different leadership styles and approaches in developing, training, and implementing each requirement.

Introduction

Either I develop all the training materials for the systems training or create a charter where I am the team leader and create a team to develop training for their areas and deliver the training for our ERP system.

I created a team that would allow me to use my leadership skills and develop and deliver the training in the time required by the class and my employer. The impact on all of the stakeholders should be noticeable in several areas. These areas included better customer service, less rework, better financial statements, and inventory tracking. My approach is broken down into the following areas. Develop a team of power users/subject matter experts, develop training materials and programs, and deliver the training. The project's success will be measured through the exit/wrap-up meeting and the VP of operations assessment.

 This project started by picking a team, setting a timeline, finding a location, and developing the training. The finished product will be an in-person training class for all the users of our ERP system.

Section 1: Innovative Approach

Bringing Together Perspectives

The different fields are accounting, sales, operations, and training. Each of these fields has its drivers and business needs. Cooperation and quality can improve if each department recognizes the drivers and conditions of the other departments.

This approach is innovative for the company since they are usually departmentalized and do not use cross-departmental training. Bringing all departments together will create teamwork and connections for better communication, data entry, and tracking. In today's world of emails

and zoom meetings, processes are not usually broken down and addressed as a whole. Each mistake is pinpointed to an individual moment.

Simon Sinek makes a statement that can apply to internal stakeholders "the goal is to do business with people who believe what you believe." Training operations employees on the sales department's steps and requirements allow them to understand better the information being provided to them.

Section 2: Emotional Intelligence

Awareness of Self and Others

The research and work in creating a skilled team of users to develop company training build self-awareness in myself and that other stakeholders. As my team went through all the different department responsibilities and requirements, we each learned where to improve our services to the other departments. Understanding others' needs allows me and the other team members to develop an approach of understanding and teamwork that will enhance the process. Not all stakeholders understand how the information and their job functions affect others, and our path to learning will foster a new level of understanding. Applying empathy is " the act of experiencing things as if we were in another person's shoes" (Reil & Martin, 2017). As a leader, if we are empathetic, we will better understand how to meet the needs of others and provide a better learning environment.

We all care about our jobs or tasks and often forget about how we may influence others. The self-awareness that will come out of this project will allow each team member and stakeholder to see past their selves. Everyone wants to see others succeed and grow while the company becomes better. This learning will enable us to see the different aspects of each individual and embrace their strengths and weaknesses.

Most of the self-awareness happened with the stakeholders developing and receiving the training. Downstream stakeholders will gain some self-awareness from the team members, who will return to their sites and pass the training on. Self-awareness is "a process in which individuals understand themselves, including their strengths and weaknesses, and the impact they have on others" (Northhouse, 2019). I found that once I identified my weaknesses, they could be turned into a strength by seeking guidance from other team members.

Creative Thinking

The creative framework for developing training material and training users familiar with the system requires some thought. Training SOPs and requirements are pretty straightforward, so the innovative approach has to do more with where and how the training was presented.

The first thing that I did when it came to the actual training program was to create screen-by-screen snapshots of the steps. This allowed all the users to see where it was in the programs they could find each process step. These snapshots were then added to the word document of the SOP. When anyone opens the SOP, they can read the procedure and continue the training without opening a new document.

One of the other approaches is live and recorded Zoom training presentations. Since some people will not be able to attend and provide their training in person, I still want them involved. When looking for trainers/presenters, I did not necessarily pick the ones that knew the system the best. As a team, we evaluated some of the other employees who seemed to be able to present a little easier and lacked some of the systems skills they needed.

Unique Approach

Starting the training out as a constructive argument created a sense that everyone can participate without the fear of being shut down and that no question is wrong. This can be a

great step in letting everyone know that we want to have some open discussions and all come together for a common goal.

The second item I think is essential and unique to our company is having someone without all of the skills help develop the training and present it. This worked very well so far in that each person learns the system better. One thing I heard throughout my career is to see it, do it, then train it. The project's ultimate goal was to familiarize everyone with our ERP programs and the data entry requirements.

The next item that was pretty creative was picking the training conference room. Instead of using a conference room on one level, I found one set up as a lecture hall. This type of room is rare in hotels, which helped narrow the choice of hotels down a little. This allowed every attendee to see what was going on and improved the sound of the presenters in the room.

Section 4: Innovative Solution

Accomplishment

My project was to lead a team to identify, develop and train multiple users in our Enterprise Resource Planning (ERP) system. To create a balanced team, I choose employees who exhibit superior skills in our system. I also added one employee who was new to the company but had a lot of training experience. This worked well in developing better ideas and approaches from the most experienced to the least experienced.

The outcome is that each user better understands the drivers of all departments and employees. Customers will see fewer mistakes, therefore, a better customer experience. Several programs track financial data that senior managers use to make decisions. As time goes on, they will see fewer discrepancies.

Section 3: Results

Measuring the overall success of the training will take some time. The training was completed in the last several weeks, which does not allow time to collect the data for this report.

There are many benefits to all stakeholders for the project. The project focuses on training and using our systems in how they were developed. Many of our designs started as canned systems, and we modified or upgraded them to meet the needs of all stakeholders.

Users who are new to the system benefited by learning more about the methods we use. Power users will benefit by having a refresher and tune-up in the programs. Each person will have less rework, and departments will have better-costing data. This benefits the sales department by giving them accurate information to bid on projects and ensure they meet their margin goals. The accounting department will be able to better balance revenue and cost of goods. Senior management can make better decisions since the information will be accurate and repeatable. Customers will see fewer invoicing errors and less work by their teams not chasing down our errors.

In the week following the training. I answered over 20 calls in regard to our systems. These questions clarified timelines or ways to access information in the system. At the end of the training, a like-dislike session was conducted with all the attendees. The number one comment for the like was that everyone appreciated learning how their actions affected other departments, and the room was a lecture hall set up. The dislikes were that they would like to have some break-out sessions next time specific to their departments.

Section 4: Conclusion

I have learned that developing a diverse team is critical to the success of projects. Having insight and understanding of multiple perspectives allows me to create material that

applies to the entire group. This project has helped me become more comfortable presenting training to a large group. There were 48 employees in actual attendance, and over 20 more attended through zoom.

Another important thing that I learned is that I do not have to do all of the work. I need to create a vision and approach upon which all team members can build. Authentic leadership requires balanced processing, "an individual's ability to analyze information objectively and explore other people's opinions before making a decision" (Northouse, 2018). One of the best results of this training was bringing a diverse work group together and building upon all of their skills.

If I was going to do something different, it would be to bring more people into the presentation of the material and its development. This would have allowed for more learning opportunities for the entire group.

Section 5: References

Northouse, P. G. (2018). *Leadership. theory and practice*. SAGE Publications.

Riel, J., & Martin, R. L. (2017). *Creating great choices: A leader's Guide to Integrative thinking*. Harvard Business Review Press.

TEDxTalks. (2009, September 28). *Start with why -- how great leaders inspire action | Simon Sinek | tedxpugetsound*. YouTube. Retrieved December 2, 2022, from https://www.youtube.com/watch?v=u4ZoJKF_VuA

Section 6: Appendix

Opening presentation with pictures added from the training

https://docs.google.com/presentation/d/1URivmadbJRwIi3BAjjEByIwkH1-

4D4j0/edit?usp=sharing&ouid=107907517602766278118&rtpof=true&sd=true

Training Agenda

https://docs.google.com/spreadsheets/d/1wzxgpVA8w04-

w0vHiAerlkGTr9uRtrLr/edit?usp=sharing&ouid=107907517602766278118&rtpof=true&sd=tru

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Team Charter

https://docs.google.com/document/d/1UfpbYTTs6w0iMMfxuPJ8WDIp0wspWeWH/edit?usp=s

haring&ouid=107907517602766278118&rtpof=true&sd=true