Client need

Our client's record of paying suppliers on time was poor and, to help address this, implemented a new e-procurement system together with new processes for requisition approval, recording commitments and invoice matching. We were asked to provide classroom based training around the new and changed processes to complement e-learning and hands-on system training for end users.

maltway approach

We worked closely with our client to identify the process changes and develop a course that would ensure consistent use of processes and controls around the new system while be engaging for participants.

In developing training a key issue we faced was whether to develop one course or several more targeted courses on specific end user roles. We settled on a single course for all users, which gave distinct advantages in this instance, over more targeted role specific training:

- The ease of organisation and administration for our client, particularly when end users might be uncertain what their specific role would be or where they had multiple roles
- The ability to train teams from the same service, but with different system roles, together
- The benefit of users understanding the end-to-end process
- The ability for end users to subsequently move between roles without retraining.

Outcomes

We conducted an initial roll out of training, targeting around 100 key end users and then focused training more specifically to target user groups as they adopted the new processes and then subsequently to steady state training for staff new to the role.

Since the introduction of the new system, process and training our client has moved from processing just 55% of supplier invoices on time to over 80%. Typical of feedback from participants is this comment; "Great course, the instructor explained everything very clearly. I will now be able to take ownership of processing instead of relying on others in the team."

Additional information

In our experience, lack of understanding of procedures and controls by users of purchase systems is commonplace, leading to increased risks of mismanagement, errors and fraud.   Do you have adequate end user training in place to ensure your procedures are undertaken efficiently and financial controls operated effectively?