



The Customer

- **Industry:** Financial Services and Consulting
- **Geographics:** Headquartered in Chicago, Illinois, with 35 offices nationwide
- **Employees:** 2,000

PeopleSoft Enterprise Products

- Enterprise Performance Management
- Financial Management
- Human Capital Management

Applications Technology

- Oracle User Productivity Kit, Powered by OnDemand Software*

Support Service Level

Standard

"If I were talking with someone at another firm, I'd ask them how long it takes them to develop content, and I'd say, 'You can cut that down by 75 percent.' And then I'd ask them how many tools they were using, and I'd say, 'Picture yourself with one—Oracle User Productivity Kit.'"

MaryEm Musser

Center for Professional Development Assistant Director, Technology Training Initiatives

BDO Seidman

Business Challenge

BDO Seidman needed an effective method for creating, maintaining, and distributing documentation, training, and online performance support materials for its PeopleSoft Enterprise applications from Oracle—a task made more difficult by the wide geographical dispersion of its user base.

Applications Technology Solution

BDO is using the Oracle User Productivity Kit to develop content for and web-publish its educational materials.

Business Benefits

- Streamlined content development by subject matter experts.
- Cost and time savings due to reduced development effort.
- Reduced time to deployment.
- Ability to develop materials rapidly during system testing, as well as during and after go-live.
- Ability to keep materials current and accessible anytime/anywhere via the web.

Quantifiable Benefits

- Reduced time to develop a one-hour web-based tutorial from eight weeks to one week.
- Reduced time to finalize training materials—following completion of all application development and testing—from two to three weeks to two to three days.
- Replaced six different content development tools with just one—the User Productivity Kit.

BDO Seidman Streamlines Training Development

BDO Seidman, LLP, is a national professional services firm providing assurance, tax, financial advisory, and consulting services to private and publicly traded businesses. BDO International, BDO Seidman's parent organization, is the fifth largest accounting and consulting organization in the world.

In Search of a Training Solution

"When we first started looking at a training solution for our PeopleSoft Enterprise products, we had implemented eight major systems in the preceding seven years," says MaryEm Musser, BDO's Center for Professional Development assistant director, Technology Training Initiatives. For each product, it was necessary to create a broad range of materials in multiple formats: self-study web-based tutorials, instructors' training guides and student participants' guides for live sessions, quick

On-Demand Training: Access When and Where It's Needed

The User Productivity Kit enables BDO to easily deploy training content both from within PeopleSoft Enterprise applications and from a learning portal. This fits well with the varied needs of the material's dispersed audience. BDO's approach is extremely results-oriented, its user base very action-oriented. Says Musser, "In general, we don't do five days of training from 8 a.m. to 5 p.m. where everyone is overwhelmed. We're not wasting their time giving them a lot of material up front that they may not use or that they'll simply forget three or four months down the road. We give them the foundation and the basics up front, and then, as needed on the job, they can go in and expand their knowledge of particular topics—on-demand training, in three-to-five-minute chunks. The User Productivity Kit, unlike most tools, is very good at chunking up the material into digestible pieces."

Access to training material on demand is mission-critical to BDO. Musser's mantra is that help can never be more than three clicks away—and one or two clicks is ideal. By design, the UPK supports modular, topic-based content development. "What that means to my end users is that they don't have to sit through an hour-long course, whether it's web-based or live, to get one piece, like entering foreign currency for an expense. When their need arises for that, they're in the application and working. And they can simply go to the help, which immediately launches the UPK player on that topic. It's on-demand training when they need it. It gives them more value for their time."

tips and hints for on-the-job reference, and business process guides. The company was using six different content-creation tools, each dedicated to a specific output format. BDO found that maintaining such a broad range of materials was cumbersome, costly, time-consuming, and error-prone. "Whenever you implement a technology, you can expect updates, fixes, and new releases," says Musser. "You have to be constantly updating your training material to reflect your own ever-changing processes and customizations, as well as new or expanded modules. Over the lifecycle of our materials, whenever we needed to make a change, we would have so many different sources to go back to. Versioning and manpower issues became a big problem."

It was also taking too long to develop the original materials. Typically, the creators of training materials would have to wait until all application development and testing was done and then, according to Musser, "do a mad scramble" to get the content done in time for go-live—a process that took up to eight weeks.

Another consideration was BDO's widely dispersed user community. Musser explains: "We needed a system that could be accessible anywhere, anytime, and ensure that everyone was getting the same up-to-date content. That's why a web-based solution was very attractive to us."

Leveraging the User Productivity Kit

Musser and BDO found a potent solution in the User Productivity Kit (UPK). The UPK enables organizations to easily create, customize, and deploy content in multiple formats quickly and effectively—from a single platform.

"What we saw in the UPK tool was a single source file for multiple output modes—the outputs matched very closely to what we had traditionally published, only using six different tools to do it. We saw the ability to build content throughout the testing phases, which is what we're doing now," says Musser.

The option to develop content during application development and testing was never available to BDO before. Previously, all training material was created during a very small "window of opportunity" when work on the application was complete. Musser explains: "Rapid content development is key. No one wants to wait for the training department to develop their training material if an application is ready to go live. With the UPK, we found that what used to take eight weeks—scripting, recording, definitions, and everything else—we could now do in a single week. In some cases, the time between when the application is done and we have our materials finalized and ready for training has been collapsed down to two or three days, because the whole training development cycle is pushed back further into the project.

Nonspecialists Become Training Development Experts

The User Productivity Kit transformed people who are not traditionally training developers—subject matter experts, business analysts, business process owners, application developers, tech support personnel—into skilled builders of content. With a half-day's training, most people are up and running on the UPK, able to create sophisticated content, including recorded procedures with screen shots and links to documents such as company policies and flowcharts.

Musser's favorite UPK feature is its ability, when recording material, to combine multiple steps into one. This is made possible by the UPK's built-in object recognition with PeopleSoft Enterprise applications. For example, with previous tools, the developer had to capture a screen and then, in separate steps, define the type of click that activated the screen, define the hot spot area, define the incorrect action, and define the bubble text.

"With the UPK, all you do is click on a specific area, and it records all those other things for you. It knows where you click, what type of click it was, what object you clicked on, and what the resulting action was. So it has really streamlined our development tasks in just the record feature alone.

"Imagine giving your lead developer the UPK and telling him to install it. Then imagine him coming back three hours later saying, 'I was kind of messing around with it, I hope that's all right,' and handing you a finished training guide. You feel like chuckling and saying, 'That's not just all right, that's amazing.'"

Musser plans to enlist BDO's tech support group to use the User Productivity Kit to develop baseline content based on the type and frequency of calls they receive. Once the baseline content is developed, it can be forwarded on to training developers for expansion, formatting, and polish. "The UPK is easy enough to use that you can have someone who is right there on the phones in the front lines of support start to recognize the need and start to develop baseline content."

Test Scripts to Business Process Documentation

To develop training materials, Musser's team begins with predelivered unit test scripts in Microsoft Excel format; these scripts are moved into the User Productivity Kit, where they are used—and edited—first in integration testing and subsequently in operational and performance testing. As Musser describes the process, "With each round of testing, the training material is getting looked at, revalidated, and reshaped every single time." BDO customized the testing template to include a hint column. "As our subject matter experts go through the scripts and want to give users a hint, we have a way to capture that." The hints are quickly and easily incorporated into bubble help text. Says Musser, "In this way, the development of our training materials runs hand in hand with all the testing phases."

To develop business process guides that support the company's various departments, Musser's team asks the various business process owners to list all the events that trigger a particular task. Again, this material is added to the same source files in the UPK, making actual production of the business process documents a simple matter.

The UPK has proved its worth to BDO Seidman. Musser summarizes, "We've cut our development time by 60 to 70 percent. And in terms of ongoing maintenance, it's so easy to come back and update content in a single source if a field changes or a customization is put in. Plus, because the solution is web-based, changes are automatically published to all users in all formats."

*OnDemand Personal Navigator, a product from OnDemand Software, a division of Global Knowledge, is the technology backbone for the Oracle User Productivity Kit.