

## i3Logic Case Study: Global Document Management System Rollout Program

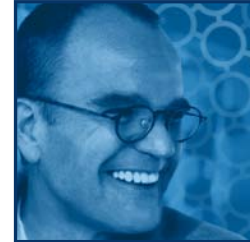
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## Case Study: Global Document Management System Rollout

Over the past decade, i3Logic has gained an expertise supporting application rollouts for a variety of industries and companies. Through experience, we have developed methodologies and systems designed to instruct users on the use of new applications, and communication and role-based process tools to accelerate user adoption and achieve performance improvement goals.



The following case study highlights i3Logic's comprehensive approach to supporting **the world's largest pharmaceutical company** in the rollout of a new enterprise-wide document management system.

### The Challenge

Our client was in the process of developing their "Global Document Management System (GDMS)" to replace over thirty (30) legacy document repositories within their Research & Development (R&D) and Commercial organizations. The new system was intended to impact corporate operations worldwide. Quick adoption by the organization was critical.



The global rollout was structured in phases over a twelve to twenty-four month timeline. The users included 10,000 people located globally. Approximately 30-40% of the target audience spoke English as a second language. A portion of the intended audience was familiar with some of the tools within the new system, while others had no prior exposure. Users had to complete training in order to be granted permission to perform a role in the system.

Training was scheduled three weeks before implementation. i3Logic was chosen as the GDMS rollout partner. The primary goal of the program was to prepare users to perform their assigned roles and adopt new processes. The business process design was the responsibility of the client's business lines. One complicating factor was that the application was still being built and customized within a Documentum® framework to meet our client's specifications, and was not declared ready for production until approximately six weeks before the onset of implementation.

In addition, the system was initially rolled-out to a single pilot group within the organization and the training provided at that time was considered ineffective. This information circulated throughout the organization, threatening the wholesale adoption of the system.

### The Solution

Our client recognized the need for training with more focus on user engagement and user needs, and contracted with i3Logic to create and deliver five courses in the program.

We effectively communicated to the client the importance of integrating i3Logic staff into the client's project team in order to learn the application, business needs, audience skill levels, and issues that needed to be addressed in the training. Once viewed as part of our client's project team, our Lead Instructional System Designer began attending planning meetings on a regular basis, where we were able to support a number of related initiatives.

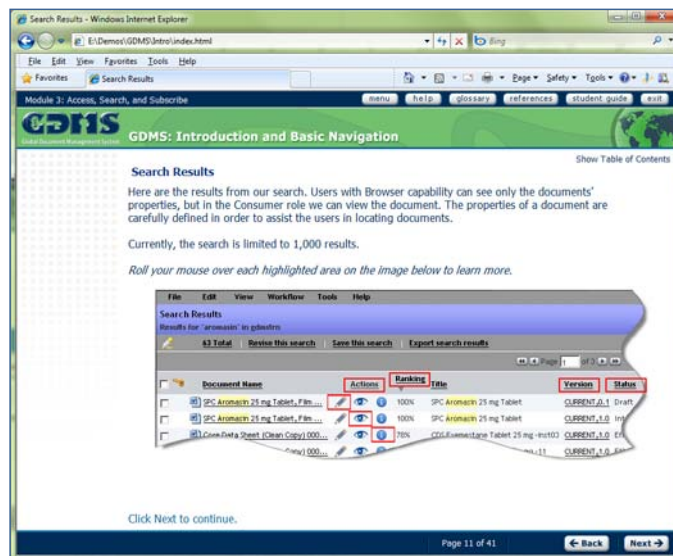
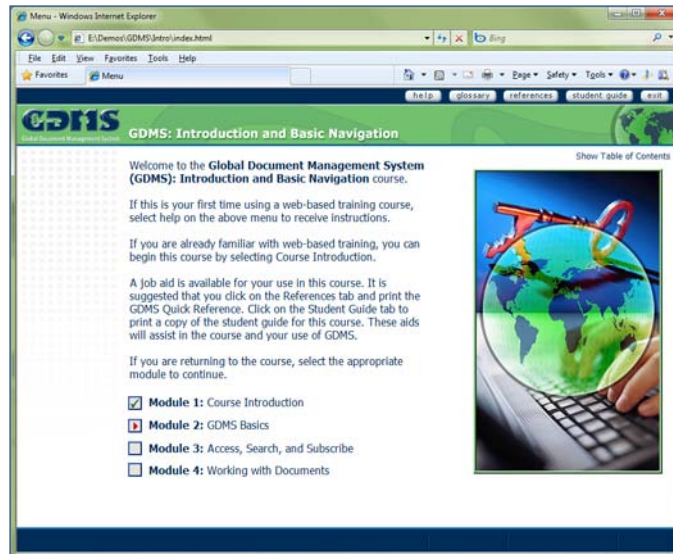
i3Logic's team members began working closely with a member of our client's training and process team to write the plan. An oversight group was formed to represent all of the business lines and charged with reviewing and approving the training materials.

We worked with a designated client project manager to design, develop, and facilitate a three-day workshop designed to acquaint the internal line training leads with the goals of GDMS, the implementation plan, and the training plan in order to inform, sell, and garner support for the new system.

The resulting training plan defined the following initiatives:

- › Development of instructor-led courses to be used in the first implementation phases.
- › Repurposing the instructor-led courses into web-based courses when the application was stable.
- › Updating of training materials to reflect changes in the application at specified times per year.
- › Focus of all training development and communication around “ease-of-use” messages related to the new system.
- › Development of all courseware for business-specific processes so that training was relevant to the job function of each person taking a course.
- › Preparation of a blended training solution; initial training was instructor led using simulated materials and then courseware was repurposed for web delivery.
- › Creation of a video with corporate leadership testimonials for use in corporate information sessions.

In addition, we determined our ability to support this initiative would be greatly enhanced if several of our team members became well versed in Documentum® and acted as subject matter experts on the team.



Training was to be offered at least three weeks before an area was to go live. Therefore, the training delivery schedule was closely tied to the implementation schedule, requiring i3Logic to be responsive and agile.

i3Logic team members also asked to be connected with the GDMS Project Communications team to help ensure that training materials reflected a consistent message. We participated in the development of the “look and feel” of the communications materials and made sure we mirrored it in the training materials.

We worked alongside the GDMS build team as the application was readied for production and, due to the in-depth knowledge garnered through our immersion in the project, the five courses were completed in time for training to commence as scheduled, three weeks before implementation.

Members of the i3Logic team became the initial system instructors, teaching the first GDMS courses in the Netherlands, the United Kingdom, and the US. Our trainers taught most of the instructor-led courses until the web-based courses were launched.

i3Logic completed updates to the eLearning courses for the next three years.

## Results

This critical business application was rolled out on time and on budget. The decision by i3Logic to immerse itself into the client project team was a key for several reasons:

- › Provided firsthand knowledge of the internal barriers to implementation and allowed collaboration with the client to eliminate those barriers
- › Accelerated the review and authorization process for each intervention, which allowed for the extremely aggressive project timetable to be realized
- › Developed greater levels of trust and understanding between customer and supplier, which manifested itself when i3Logic was invited back to prepare the training materials for Phases 3-5 of this on-going global application rollout

A variety of Level One evaluation methods were used at first to monitor acceptance and the quality of the training program.

In addition, a series of monitored chat sessions were set up to support new users. One of our subject matter experts was the chat session leader. The format that was the most popular was to use part of the session to show a demo about a particular function and then to have an open question and answer time.

A blog site was set up to capture comments and questions; the feedback received here was greater than 80% positive about the users’ ability to function in the system.

## Supplemental Information

### Additional Topics for Discussion

Below is a listing of additional topics we would be very interested in discussing with you from philosophical, strategic, and tactical perspectives. If you would like more insights into these subjects, please don't hesitate to contact us by email or phone.

#### Subjects:

- › The Impact of Learning Strategies on Business Planning
- › Change Management Methodologies as a Framework for Learning Strategies
- › The Benefits of the "APPLE" Framework in the Learning Development Process
- › The Future is Here in the form of Scenario and Simulation-Based Learning
- › The Evolution of "Collaborative" (or "Social") Learning in Corporate Environments
- › Driving Engagement Levels and Results with "Motivation-Based" Learning
- › Applying Understanding Through "Discovery" and "Thematic-Based" Learning
- › The Rebirth of the Virtual Classroom Training (VCT) Revolution
- › Approaching New Employee Orientation Programs from a New Perspective

### Contact Information

#### Company Contact:

i3Logic  
7 N. Saginaw Street, Suite 300  
Pontiac, Michigan 48342

T: 1(888) 720-Goi3 [4643]

P: 1(248) 292-5100

F: 1(248) 292-5080

W: [www.i3logic.net](http://www.i3logic.net)

#### Individual Contact:

Peter Kelley  
Partner / EVP, Business Strategy

T: (248) 292-5088

C: (248) 229-5650

E: [pkelley@i3logic.net](mailto:pkelley@i3logic.net)

W: [www.i3logic.net](http://www.i3logic.net)

