

5 Reasons Learning and Adoption Programs Fail—And What To Do About Them

Product Lifecycle Management (PLM) solutions deliver extensive business advantages. These include lower time-to-manufacture, greater productivity, reduced product development costs, and less time to find information. But PLM complexity means that employees may have difficulty making the most out of these solutions or may even resist adoption.

Organizations must put programs in place to ensure that employees effectively learn and eagerly adopt PLM solutions. This paper describes five areas where learning and adoption efforts typically go awry, and what organizations can do to ensure that their adoption stays on track and fully realize PLM benefits.

Make the Most of Your PLM

PLM solutions have been shown to deliver significant top-line and bottom-line benefits. Based on research undertaken by analyst company CIMdata, Inc., previous PLM adopters have:

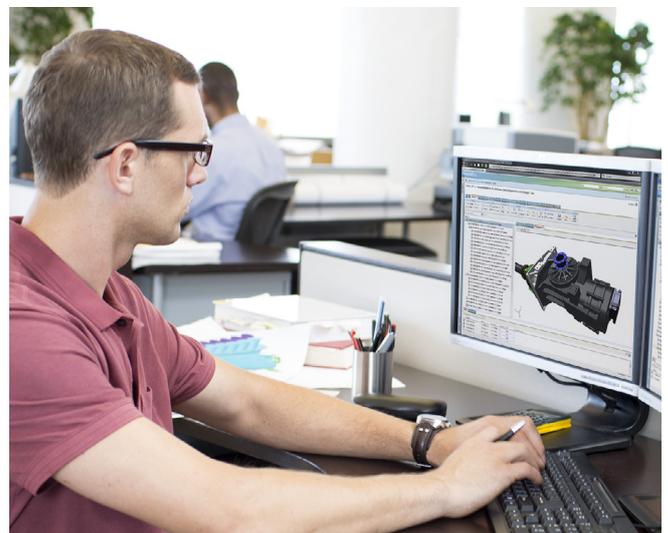
- Reduced time-to-manufacture by up to 50%
- Increased productivity by up to 20%
- Lowered product development costs by up to 40%
- Cut time to find information by up to 90%

Those benefits are primarily achieved through process optimization embedded in a PLM solution. Organizations fail to achieve ROI, however, if users don't understand why change is happening and how to make the most of the solution. As a result they may resist using it. Organizations must actively encourage adoption as well as properly train and support users as they incorporate the solution into their day-to-day workflows to reap the promised rewards.

The following are the top 5 reasons why PLM adoptions fail and tips on how to address these challenges.

1. Organizations Focus on Learning, but Ignore Adoption and Performance Support

While companies usually provide formal training programs when they roll out a new PLM solution, they often fail to pay adequate attention to product adoption or performance support. As a result, employees may not be motivated to make the changes necessary to use the new product. Even if they employ the solution, they may be unable to effectively apply what they learned to their daily tasks.



The Solution

Develop a balanced program that includes not only training, but also adoption and performance support to ensure employees can productively use the new solution—and are excited to do so.

- Learning programs train employees on the capabilities of the product and on best practices for using it
- Adoption programs motivate employees to use the new software by explaining why the change is necessary and detailing the business value of the solution as it relates to the company's vision and strategy
- Performance support programs help engineers make the most of the PLM solution in their moment of need by delivering context-sensitive in-program training, hotlines, mentoring, and support

2. Organizations Fail to Properly Manage Timelines

Many organizations do not properly align timelines between software implementations and their accompanying learning and adoption programs. Training efforts come too late. Adoption timeframes run too long.



Adoption Tip

While rolling out an adoption program, be sure to use the right people to sell the message. Organizations often use an IT program manager to lead the program. But they really need a business leader who can give the program credibility and explain the need for the change from a business perspective. Ideally you have an executive sponsor for the PLM program supporting these awareness campaigns.

Consider one company's PLM implementation. The company saw its learning program flounder because it was planned late in the implementation process, which prevented trainers from influencing milestones. The company invited the learning architect to deliver a training program two weeks before Go Live. It had run an alpha test four weeks before Go Live and a Beta Test two weeks later, and continued to modify the PLM system throughout the testing. Because the system was changing, the learning architect was unable to properly train users in the company's desired timeframe.

In other cases, organizations define a long-term strategy for implementing and adopting the solution; taking perhaps six months to define the strategy and another two years to put it in place. But most executives want to achieve the benefits from the PLM much faster.

The Solution

To train engineers effectively and meet senior management's ROI expectations, think about adoption programs early and roll out discrete deliverables over a shorter timeframe.

Plan learning and adoption strategies at the beginning of—and in context with—the implementation project to avoid unpleasant surprises. Be sure to properly align all milestones and understand the dependencies. In the previous example, the company might have addressed its problem of system changes during training by freezing code four weeks before Go-Live so it could train engineers on the current version of the application.

To demonstrate the value of the new solution to impatient executives, avoid a Big Bang implementation. Identify smaller projects that allow you to deliver quick wins.

3. Training Programs Offer the Wrong Didactic Approach

Different organizations have different approaches to learning and adoption. For example, U.S. based companies are more comfortable with eLearning while European or Asian companies very often prefer face-to-face training. If the vendor is inflexible in the training approach they offer, the company's training program may fail to meet its needs.

The Solution

For the flexibility to meet your organization's training requirements, look for a vendor who offers a variety of training approaches:

- eLearning for basic information
- Face-to-face, instructor-led seminars for client-specific information
- Hotlines, mentoring, and support to help with ongoing performance

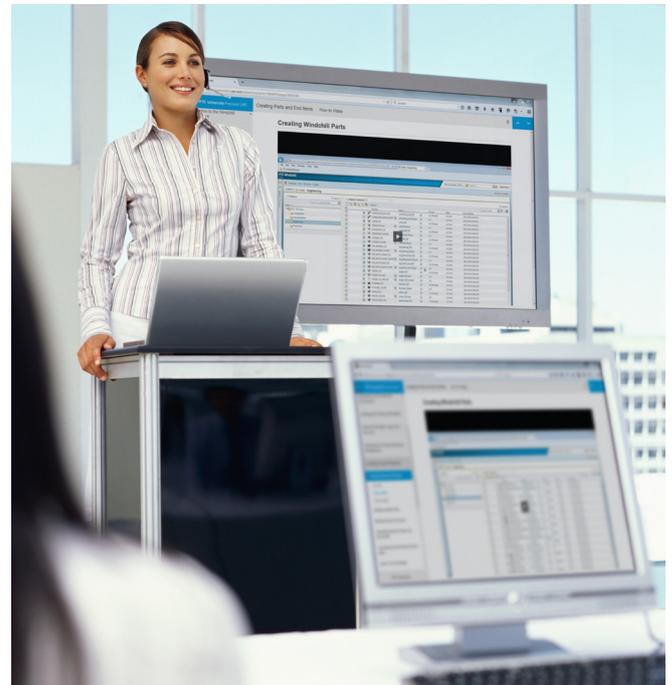
4. Program Quality is Inadequate Due to Insufficient Budget or Improperly Allocated Funds

Insufficient budgets or improper budget allocations can have a significant negative impact on the effectiveness of learning and adoption programs.

PTC commissions an independent research firm to assess how well PLM learning and adoption programs succeed in helping clients meet their goals. We've found that clients who devote less budget to training and adoption are less satisfied.

Additionally, organizations often neglect to apportion adequate budget to customizing training to meet their employees' specific needs, which means the program uses employee time ineffectively. Say an organization has 1,000 users taking a five-day training program. If it does not strategically map out the training requirements for each user, it can easily waste 20 percent of each person's time; for example, training them on capabilities their job will never require. On the other hand, if the organization spends 100 hours planning and customizing training, it can potentially save 1,000 days for end users.

Companies often do not recognize these inefficiencies due to their budgeting practices. The IT project manager may hold the training budget while employee salaries are part of the LOB department's budget. As a result, IT's efforts to calculate TCO for the learning and adoption program are incomplete because they don't include the cost of employee salaries during training.



The Solution

Allocate enough budget to training and plan training strategically.

PTC has found that the most successful projects devote 20 percent of their software implementation budgets to learning and adoption. Payback comes from reducing the risk of not achieving benefits of the new software, more motivated users, and earlier and better adoption.

To convince your steering committee to adopt strategic training, track the total cost of the project. Then, as a rule of thumb, plan to allocate 50-60 percent of the budget for standardized end user learning and adoption efforts, and the other 50 percent to customized training. The more time organizations spend tailoring training, the more effectively they use employees' time during the Go Live.

5. Failure to Measure ROI of the Learning and Adoption Program

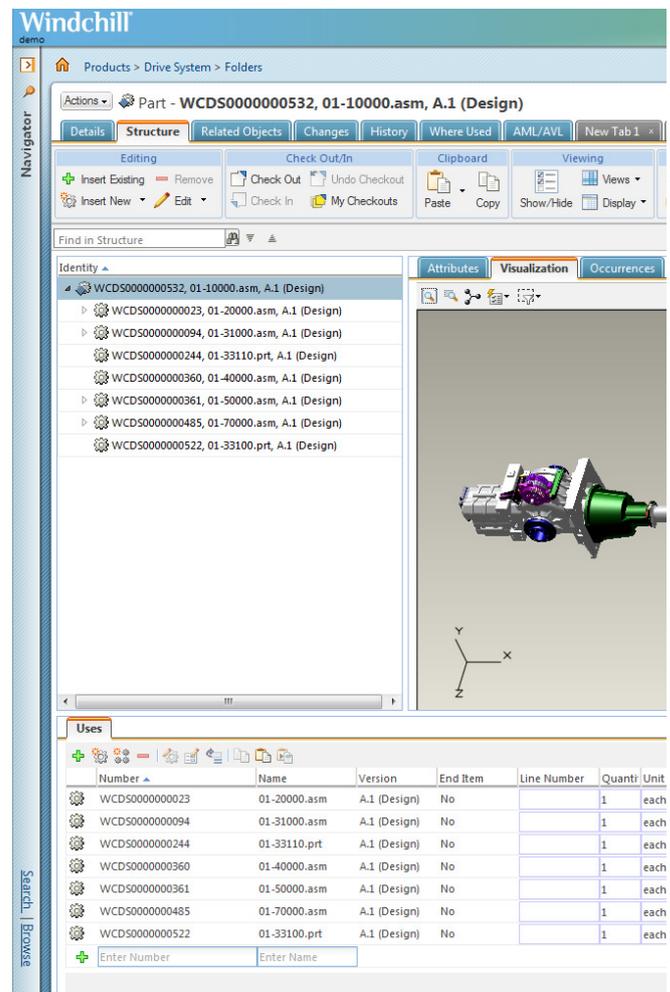
The more effectively employees adopt the new PLM solution, the greater the benefits the company stands to gain. But it's difficult to achieve what's not measured. Many organizations neglect to evaluate the results of their learning and adoption programs. They remain unsure whether the training has succeeded in increasing adoption and optimizing productivity and are therefore unable to take steps to improve their results.

The Solution

Organizations should define key performance indicators (KPIs) for how they'll evaluate software adoption and productivity gains, and then measure those KPIs throughout the learning and adoption program. Ask for regular feedback to measure end user motivation, user satisfaction, and efficiency in using the software. Tracking these metrics helps companies take the right measures to improve productivity and time-to-market.

Typical metrics to validate end user adoption activity after a PTC Windchill implementation

- Number users trained
- Number of objects created in PTC Windchill
- Number of help desk tickets related to training issues
- Number of change objects created



The screenshot shows the PTC Windchill interface. At the top, it displays the current part: "Part - WCD5000000532, 01-10000.asm, A.1 (Design)". Below this, there are tabs for "Details", "Structure", "Related Objects", "Changes", "History", "Where Used", "AML/AVL", and "New Tab 1". The "Structure" tab is active, showing a tree view of the assembly structure. The "Uses" table at the bottom lists the components used in the assembly:

Number	Name	Version	End Item	Line Number	Quantity	Unit
WCD5000000023	01-20000.asm	A.1 (Design)	No		1	each
WCD5000000094	01-31000.asm	A.1 (Design)	No		1	each
WCD5000000244	01-33110.prt	A.1 (Design)	No		1	each
WCD5000000360	01-40000.asm	A.1 (Design)	No		1	each
WCD5000000361	01-50000.asm	A.1 (Design)	No		1	each
WCD5000000485	01-70000.asm	A.1 (Design)	No		1	each
WCD5000000522	01-33100.prt	A.1 (Design)	No		1	each

Learning and Adoption Checklist

Organizations wishing to successfully address the learning and adoption issues detailed in the previous section should develop a strategic plan for their program. This plan should include the following steps:

1. Plan: Develop a comprehensive strategy and plan to ensure that the organization is ready to accept and take full advantage of the people, process, and technology changes that come with the new PLM solution.

- Develop a strategy that addresses adoption, learning, and support. For each area define:
 - Parameters and goals
 - Methods and best practices
 - Key success factors and key performance indicators
 - A budget estimate
- Perform a needs analysis. Examine current processes, methods, and tools to determine what training, communication, and support you need to meet business requirements.
 - Evaluate the current skills and needs of users
 - Come to an agreement on the importance of the training/adoption/support program and the need to make the investment
 - Develop plans for communication, role-based training and curriculum, mentoring, and user support

2. Create awareness: Sponsor and communicate the program to make the audience aware of the change and its importance.

- Identify and contact sponsors to explain adoption needs.
- Determine the organization's readiness for roll out.
- Define the communication methods to be used to facilitate change for each target group.
- Create a concrete communication plan for all relevant stakeholders that includes all tactics, to-dos, and timelines.

DID YOU KNOW:

Benefit from running PTC Windchill in the Cloud

Your learning & adoption strategy has a tremendous impact on the success of your PLM implementation. To further secure a fast and successful deployment, you might also want to consider having PTC Cloud Services host and manage your solution for you. Benefits include more predictable operating expenses, less burden on your inhouse IT and faster time to value. We will be happy to discuss options with you. [Contact us today!](#)



3. Acquire skills: Implement a role-based learning program to empower end users with the knowledge and skills required to do their jobs.

- Design, develop, and publish custom education content or configure existing education content to training needs and consider providing in more than one delivery format (i.e., instructor-led seminars, virtual, etc.)
- Integrate content with company-specific processes.

4. Apply knowledge: Take advantage of a multi-tiered performance support system to ensure that employees apply technology, processes, and knowledge within the work environment.

- Use a solution that employs context-sensitive in-product training support that helps users as they encounter challenges using the product in their day-to-day tasks.
- Offer extra mentoring immediately after the initial training when users require extra support to use the new product effectively in their jobs.
- Provide hot lines and a support desk to ensure that users can use the product optimally.

How PTC University Helps

PTC University enables organizations to develop and implement learning and adoption programs that support business priorities. Our 400 certified instructors and training consultants help organizations analyze their learning and adoption needs, plan education programs, and deliver off-the-shelf and customized training curriculum. Our flexible learning delivery options include eLearning, instructor-led learning that trains users on application capabilities and best practices, and ongoing support including: context-sensitive in-product training, mentoring that helps employees use their product to perform their specific job functions, and support hotlines. These programs are designed to ensure that the right people have the right tools to productively do their jobs and to align with business goals.

Conclusion: Achieve Full Benefits from Your PLM

Training end users and encouraging adoption are critical to enabling organizations to fully take advantage of their PLM implementation. But learning and adoption efforts need to overcome common pitfalls. To do so, they must provide comprehensive learning, adoption, and performance support; manage timelines effectively; deliver blended learning that addresses the organization's requirements; plan and allocate budgets most effectively; and develop the right KPIs to measure success. PTC University provides consulting services and learning solutions that address these issues. With these solutions, our clients fully benefit from their PLM's ability to reduce time-to-manufacturing, increase productivity, lower product development costs, and cut time to find information.

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