TrainingPartner™

Case History: Property Management

TrainingPartner helps real estate firm consolidate learning management.

Sector:	Corporate
Industry:	Real Estate
Revenue:	1,612,529,000
Geography:	500 locations throughout the U.S.A.
Properties Managed:	150,000
Employees:	6,000
TrainingPartner purchased:	2006
Learner Licensing:	6,000
Administrator Licensing:	11

Before going to work for the Tribune Company in 2008, Paul Mitnick was the principle consultant at Practical Technologies in Dallas, Texas. Paul was an IT consultant specializing in project management, process reengineering, and systems implementation. His practice had gradually come to focus on the implementation of Learning Management Systems (LMS) and was proud of providing systems and services that were user friendly, cost effective, results oriented and enduring.

In his role as an IT consultant, he helped a client determine requirements, select the appropriate LMS vendor and implement the system.

In this case, the client was the operator and developer of more than 150 thousand apartments across the U.S.A. "The client was a large publicly held real estate organization with corporate and regional offices, as well as over 500 property locations throughout the United States," Mitnick explained.

The requirements for the project included accommodating 6,000 learners, 30 administrators (who had some part-time administrative responsibility) and two system administrators.

The company had been using a homegrown conglomeration of SQL and Access databases and Excel spreadsheets to manage employee learning. The goal was to consolidate into a single integrated system to accommodate recent and future expansion with minimal manual processing.

Although his technical background is significant, Mitnick said that his real value was his ability to understand business application issues and adapt practical technical solutions to them. "Process is important, but results are the ultimate measurement. Projects with which I have been associated remain in production an average of almost 10 years, with some ERP implementations lasting over 17 years."

Defining Requirements

The first step in the process for Mitnick was to determine and document the specific requirements and objectives for this client's LMS. "It is almost impossible to overstate the importance of this step," emphasized Mitnick. "Too often, the search for the software vendor begins before the requirements and objectives have been examined, documented or even agreed to among the key stakeholders. This usually results in differing sets of expectations, some of which will not even be addressed and therefore almost certainly not met." Mitnick outlined the actual process for requirements as follows.

Current System

"We started with a careful examination of the current system, particularly with regards to reporting. The purpose of this was to document key reports or functions that needed to be maintained by the replacement system, as well as identifying any problems with the current system that needed correction. My experience has shown that when new systems are sought, a great effort is made to make certain that the current problems are not repeated.

"Unfortunately, the good things in the current system are often overlooked, and therefore not addressed in the new system. This can result in merely trading one set of problems for another."

Stakeholder Interviews

"We interviewed numerous people with a vested interest in the education process, including the education department, management and IT. The latter was aimed primarily at making sure that whatever solution was selected would fit the current IT strategy and would be supported properly within the organization."

Requirements Document

"A detailed requirements document was produced indicating specific technical requirements, 'must have' functionality, and 'nice to have' functionality that would be required. It was relatively specific and did not so much list individual software features as business requirements of the client."

Approval Process

"Once the first draft of the Requirements Document was finished, it was distributed to the appropriate stakeholders for approval. After one or two iterations, we had a solid document with which we could go to the marketplace and determine the best fit for our need. Having a detailed and approved Requirements Document had several key benefits."

Setting Expectations

"The document was instrumental in defining realistic expectations for all of the stakeholders and avoiding miscommunication of our objectives."

Project Scope

"One of the biggest problems in projects of this kind is the almost inevitable 'scope creep.' The Requirements Document helps to insure that the project stays within the predefined boundaries."

Product Search

"Because we had a benchmark document to work from, it was not necessary for the entire committee to do the initial product screening. In fact, as their consultant, I conducted all of the initial vendor interviews to compare functionality against the defined requirements. This resulted in a dramatic reduction of personnel time for the search."

Going to the Market

Going to market proved to be somewhat of a surprise to Mitnick due to the sheer number of vendors he found in the LMS market space. But after some research, he sent the requirements document to 27 vendors.

After evaluating the responses, demonstrations and interviews were held with 14 LMS vendors. These included going over the requirements and how their system handled each issue.

From the demonstrations, three vendors were chosen to present their products to the entire selection committee, which included representatives from education, IT and management. "We prepared a scripted demonstration for each of the vendors highlighting those issues that we considered most critical," noted Mitnick.

"After some discussion, the committee as a whole overwhelmingly selected the Training Partner system from GeoMetrix Data Systems Inc."

Mitnick explained that there were several key reasons for this decision. "Training Partner seemed to have a better fit for the things we considered most important."

The ability to customize the product was also important. "Training Partner is designed with the expectation of modifications while most vendors make significant customization either impossible or very risky."

"As a pure software product, it seemed to be a better crafted product in many ways. In addition, GeoMetrix provided excellent customer references."

Mitnick noted that in general, TrainingPartner seemed easier to use for learners as well as for administrators. Mitnick was also impressed with the entrepreneurial nature and business style of GeoMetrix. "Its people seemed more suited to our way of doing business."

In the final stages of selection, Mitnick noted that cost was not really a consideration since all three finalists were within the budget. "In fact, to avoid this issue, we did not inform the selection committee of the relative costs until the decision had already been made based solely on the product. As it turned out, TrainingPartner was not only the popular choice; it was also the least costly.

Customization & Integration

Once the agreement was completed, the process of implementing Training Partner began. "We had a useful training session on the administration of the system and it proved valuable in many ways. Primarily, it allowed us to begin setting up the key files that were required to operate the system."

The client implementation team was able to do the initial file conversions of key information including Courses, Learners, and other key tables with the standard Training Partner import tool.

In this implementation, the HR interface was critical and was the first and most complicated of the customizations that took place.

"It was accomplished within a few weeks and has worked perfectly since then."

Customizing Training Partner to meet client requirements took the most time and involved four distinct steps.

Defining Functional Requirements

"To expedite the process we wrote detailed functional specifications for each desired customization that we sent to GeoMetrix for discussion and made sure we all understood what was required."

Statement of Work (SOW)

"GeoMetrix has a rigorous standard for a statement of work to further define the requirements in technical detail. We went over each SOW in detail, and it usually took one or two iterations to get a specification that we all considered correct."

Programming

"Once the SOW was approved, GeoMetrix began the actual programming of the specific customizations."

Testing

"Although GeoMetrix does have an effective quality assurance process, we considered this to be our responsibility, and test cases were prepared and run for each customization."

Issues

"In general, the process and execution of customizations has worked exceptionally well. Although the effort of functional requirements and a detailed SOW is somewhat time consuming, it is more than made up for in the reduced programming and testing time. To date we have had six separate customizations delivered (some quite complicated) and have had only two cases where they did not work as required on the first pass and those were corrected within days."

Roll Out

The implementation team members originally elected to do their own reports using Crystal Reports®. After recognizing the power that exists within TrainingPartner's graphical report designer, they decided to use that built-in tool for all required custom reports.

Mitnick remarked that GeoMetrix did a good job of training the trainer. "We used a tiered training for administrators similar to a train-the-trainer program but administered internally. For Learners, we customized some of the training pages to be more intuitive so that we could roll out with little more than an overview document."

Finally, the weekend before roll-out, they re-converted all of the activity data from the previous system. This required extensive testing and timing to insure that all data was in the new system before it was accessed by the user population.

Conclusion

Mitnick selected and Implemented Learning Management Systems for several businesses and concluded, "Ultimately, if the customer is not happy, the project is a failure. Making your LMS implementation successful involves several key factors none of which should be short changed," asserted Mitnick.

"If done correctly, a good LMS should be serviceable for at least five and possibly as long as ten years."

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Success Factors

Based on his experience, Mitnick breaks down the key factors in a successful implementation as follows.

1. Define Your Requirements	Make sure that every stakeholder is operating from the same set of expectations and that your specific needs are documented. Failure to do so often results in your selection criteria being based on vendor features rather than your needs.
2. Find a Good Partner	Vendor selection is important and should be based on numerous factors including the product, the company, business philosophy, and comfort level. In the best circumstances, your vendor is a partner not just a vendor. Price should be a factor in terms of budgeting and justifying the project but not so much a criteria for vendor selection. It is very rare that organizations regard a successful installation as too expensive.
3. Take Responsibility	No matter how good the vendor is, it is the organization's ultimate responsibility for a successful implementation. Looking to your vendor to take that responsibility almost assures a number of problems.
4. Sell it to Your Organization	New systems mean change and that is not always welcome. Engage your user population and promote the change as you would a new product.