

Navigate Staff through System decisions and actions



A CLEVVA ORACLE Case Study

The background

When a large telecommunications company decided to adopt Oracle as their primary operating system, they explored effective ways to reduce the impact of this major change on staff.

Key to delivering on the roll-out business case was staff's ability to execute on new business processes, to accurately capture customer orders, and to apply key business rules in various account-related decisions.

Previous experiences had highlighted the short term value of knowledge systems and simulation tools that offered generic support but were unable to provide users with context-relevant answers to specific challenges.

As a result, the post go live support demands were significant, with super users being stretched and unable to offer end users real-time support to specific issues. As a result, adoption slowed and the return on investment targets were not met.

This time the company wanted to ensure they offered a solution capable of delivering expert-level support to users on scale and in a sustainable and cost effective way. They were also looking for a solution that could reduce training times and increase user adoption rates.

The challenge

Knowledge retention. While formal training could ensure that staff were taught all the key functions, the challenge was ensuring that they retained this detailed knowledge over time. Experience had shown that staff tended to forget systems details quickly, specifically related to tasks that were tackled infrequently. As a result, users either avoided these activities or kept looking for expert support from super users.

Decision errors. While staff could often repeat a system process, they often made errors in key system-related decisions where context mattered and the business rules tended to be complex. These errors would prove costly downstream, and it was a key success factor to reduce human-related input errors going forward.

Super users. The company had access to a number of system super users, but these resources were highly valuable and could not afford to be tied down to offering first line support. The company needed a way to virtualize their expertise so they did not become a bottleneck to post go live support.

Compliance. Many decisions taken outside the system, but that impacted the integrity of the system data, required a level of documentation to prove user compliance to specified policy and procedure rules. The challenge was the consistency and accuracy of the reporting, given the free text fields and huge range of reporting accuracy. What was required was a way to reduce compliance risk by ensuring staff firstly complied, and secondly recorded their compliance accurately.

The requirement

The management team was looking for a solution that would deliver on the following key requirements:

- Be able to be built and maintained by business not IT teams. Given that the user logic was owned by business, non-coding teams needed to be able to build and maintain the Navigator
- Be able to offer specific advice to specific user queries i.e. diagnose the users specific situation and offer targeted, not generic advice on what to do
- Be able to be accessed by users as they perform on the system
- Be able to guide user through system actions in line with business processes
- Be able to track advice for compliance and analytical purposes



The solution

After reviewing a number of online system help, knowledge systems, and simulation tools, CLEVVA was chosen as the ideal solution. This was largely due to CLEVVA's ability to offer users contextually-relevant support at the level of any super user or system expert. A small team of approved CLEVVA authors then worked with the project team to rapidly capture all the diagnostic logic that the few system experts were applying to resolve all known user queries. The build process was agile, ensuring that targeted processes and decisions were captured and released for testing and optimization.

The resulting solution was accessed by staff via an icon placed in their taskbar, and the Oracle Navigator was viewed via a Stay-On-Top floating window that allowed users to work on their Oracle screen while accessing guided support. The logic allowed all users to diagnose any system query themselves, and to resolve it without having to call a super user or the support call centre. Users were also given access to their Oracle Navigator in training, allowing trainers to focus more of their efforts on user understanding and giving more learning time to practical application exercises than training the specifics. Users were taught at the beginning that whenever they needed to know how to do anything on Oracle, they simply referred to their Oracle Navigator.

The results

1. **Reduced formal training.** Users were simply taken through the key concepts (the WHAT and the WHY of the change) before then shown the HOW using exercises supported by the Oracle Navigator. This meant that learning times could be reduced by over 40%, as users were taught to self-solve right from the start.
2. **Reduced post go live support.** Once users were live, they were able to refer to their Oracle Navigator whenever they got stuck – as this is how they had learned in the first place. As a result, they were less dependent on external support, freeing up super users to target more complex support issues.
3. **Reduced errors.** Given that the Oracle Navigator was capable of diagnosing the users specific context, whenever a user was faced with a complex system decision e.g. what invoice code do I use in this situation?, they could work out the right answer with the help of their Oracle Navigator. This reduced resulting errors that would cause significant rework and service issues.
4. **Improved compliance.** Given that the Oracle Navigator automatically tracked how the user solved any key decision, the business had recorded evidence of user compliance without relying on the user to document it every time. The data also offered deep insights into how decisions were being taken, and the situations users were being faced with.

The benefits

The Oracle Navigator, built, maintained and deployed off CLEVVA, ensures that users not only learned how to perform on the new system quicker, but they were also able to self-solve system challenges after go live. As a result, users were taught to be self sufficient with the technology, and as a result the demands on the project team to offer extensive hand holding was minimized.

In addition, change management efforts were also simplified when process or system updates were enacted, as users were not being expected to memorise details. The Oracle Navigator would simply navigate them to the right decision or action, and so users required simple notification of changes as opposed to formalized retraining.

By offering a Oracle Navigator at each user's fingertips, the company was able to reduce user anxiety and improve overall system adoption. In addition, the hidden costs of post go live support were significantly reduced simply by offering every person real time access to answers they needed in order to get their jobs done.

