

Climate Change!

Emerson Climate Technologies Accelerates
Learning Using Documented Business Processes

Lia Mason

***Emerson Climate Technologies, Inc.
Supervisor, Global IT Training***

Joe Kuntner

***Solbourne
Director of Consulting***



EMERSON
Climate Technologies

Agenda

- Emerson Climate Technologies Overview
- Solbourne Overview
- Education Goals
- Leveraging UPK Core Content
- Development
- Blended Learning
- Creating Learning Plans
- Usage Tracking & Certification
- Questions & Answers

Emerson Climate Technologies Overview

Emerson Climate Technologies, A Business Of Emerson, Is The World's Leading Provider Of Heating, Ventilation, Air Conditioning And Refrigeration Solutions For Residential, Industrial And Commercial Applications.

Emerson Climate Technologies' Innovative Solutions, Which Include Industry-leading Brands Such As Copeland Scroll And White-Rodgers, Improve Human Comfort, Safeguard Food And Protect The Environment...

- **2007 Sales Of \$3.6 Billion**
- **Global Locations**

Region	# of facilities
North America	18
Latin America	5
Europe	16
Asia & Australia	20



Oracle Applications

- Current Release 11.5.10
- Modules Include Finance Including Project Accounting, Procurement, Manufacturing, Distribution And Quality
- Self-Service (iProcurement And iExpense)
- User Productivity Kit 2.7.3

Solbourne Overview

- Solbourne Provides Enterprise Solutions Based On Oracle Fusion Middleware Technology And Oracle's E-business Suite And PeopleSoft Enterprise Applications
- Our Goal Is To Help Our Customers Realize The Full Benefit Of Their Investment In Oracle Technology
- Solbourne's 15 Years Of Success, Depth Of Experience And Commitment To Customer Success Have Established Us As A Leader In The Oracle Community



Education Goals

- Support Oracle Implementations Globally For Emerson Climate Technologies
- Create Solid Platform Of Documented Business Processes To Provide Good Foundation For Each Implementation
- Provide Hands-On Oracle Experience During The Complete Project Lifecycle
- Flexible Output Options To Assist With Blended Learning Scenarios
- Provide Tracking Capabilities To Certify Users Have Mastered Skills To Perform Their Job Functions In Oracle
- Create Learning Paths For Oracle Users Based Upon Responsibilities

UPK Usage At Emerson Climate Technologies

- Tool Designated To Develop And Deliver All End User Training
- Facilitates Blended Learning
- Documented Business Processes Assist Project Team Members During Implementation
- Usage Tracking Critical In End User Certification Process
- Core Processes Documented In UPK
 - Manufacturing - 171
 - Finance - 196
 - Procurement – 64
 - Navigation/Inquiry - 33

UPK in the Implementation Lifecycle

Documentation

Process Guides
User Acceptance
Test Scripts

Training

Instructor-led Training
Web-based Training
Job Aids

Usage Tracking

Go-Live

Performance Support Material

Simulations
Application Coach
Job Aids

Usage Tracking

UPK Developer
Single Source Development and Customization

Development

- Partnered With Solbourne To Modify Documented Business Processes To Mirror Our Processes And Screens
- Able To Capture And Document Tribal Knowledge By Reviewing Baseline Documented Process Content With Our Subject Matter Experts And Identify Gaps
- Approximately 15% Customization Was Required
- Initial Development Included 211 Financial & Procurement Topics

Blended Learning

- Education Was Delivered In Instructor-Led Format, Designed To Integrate UPK Printed Materials And UPK eLearning
 - Instructor Would Explain The Topic And Cover The Printed Material While Student Followed Along In UPK Try It! Mode
 - Then, The Instructor Used Emerson Climate Technologies Training Instance To Cover The Topic Again In The “Live” Platform
 - Tested Knowledge Retention And Certified Students By Using UPK's Know It! Mode
 - Students Reviewed The Processes As Needed Prior To Go Live In UPK Which Increased Confidence To Perform Their Tasks In The Production Environment

Creation of Learning Plans

- Publish Content Using The Report – Module Statistics Function
- Edit The Output File Into Usable List Format
- Create Cross Reference Between Topic List And Responsibilities
- Use User Responsibility Mapping To Align Topics To Users For Creation Of Learning Plan

Usage Tracking & Certification

- Usage Tracking Output In Multiple Formats Offers Flexibility To Export In Formats That Can Be Used For Data Collection
- Matching Learning Paths With Usage Tracking Statistics Allows Validation Of Knowledge Retained For Certification Purposes
- Emerson Climate Technologies Set The Properties Of Its Topics To A Passing Score Of 80% In Know It! Mode

Sample Usage Reporting

Name / Nombre	Learning Path Line Items	Line Items Passed	% Of Line Items Passed	Position / Puesto
Student1	72	75	104.2%	Materials Team Manager
Student2	77	90	116.9%	Planner/Buyer
Student3	70	70	100.0%	Planeador / Comprador
Student4	36	37	102.8%	Production Engineer (Monuments)
Student5	38	38	100.0%	Motors Production Manager
Student6	46	46	100.0%	MRO Specialist
Student7	43	43	100.0%	Controller Assistant
Student8	98	115	117.3%	BOM / Asistente de Contabilidad
Student9	30	40	133.3%	Accounts Payable
Student10	30	44	146.7%	Payroll Clerk
Student11	23	23	100.0%	Quality Engineer
Student12	36	37	102.8%	Maintenance Technician (Winding)
Student13	22	22	100.0%	Plant Manager
Student14	72	79	109.7%	Materials Manager
Student15	88	100	113.6%	Controller
Student16	23	33	143.5%	Training Manager
Student17	32	32	100.0%	Quality Manager
Student18	38	38	100.0%	Service Manager
Totals	874	962	110.1%	

Throughout This Initiative We Have Been Gathering Knowledge

- The Documentation Of Processes Partnered With Oracle Leading Practices Has Provided The Solid Foundation That Has Been The Primary Goal Driving The Oracle Education Plan
- Expanded UPK Knowledge Enables Us To Be Self Supporting In The Future
- Understanding And Realizing The Benefits Of Accelerating Learning Using Documented Business Processes Will Help Forecast Scope And Cost Of Future Education Development

Questions & Answers

- Key contact information:
 - Lia Mason, Supervisor, Global IT Training
 - Lia.Mason@emerson.com
 - (937) 493-2302
 - www.emersonclimate.com
 - Joe Kuntner, Director of Education Consulting
 - jkuntner@solbourne.com
 - (303) 417-2800
 - www.solbourne.com
- Thank you for participating in today's session!