

Effective WMS Training

Planning and Execution Ensure User Confidence and System Acceptance

When implementing a warehouse management system (WMS), proper training of the project team and system users is critical to success. Thorough, strategic training prior to go-live substantially reduces production errors, minimizes customer service disruptions, and improves productivity and efficiency.

Operating Procedures

Standard Operating Procedures (SOPs) serve as the starting point for written training materials. All operating procedures need to be categorized by functional area and documented. SOPs are your business and serve as the starting point for written training materials. Flow charts, tables and diagrams are a plus where useful. and software screen shots are a must. The SOP should serve as a complete desktop reference — an easy-to-read document that can be used by new associates to quickly understand business and system processes. Make

sure to include important details such as exception scenarios, naming conventions, and other special information or instructions. Most importantly, keep your SOPs relevant. They are living documents that should be updated as your business changes.

Scheduling

An effective training plan is based on a realistic training schedule — one that includes all necessary topics and attendees, along with an accurate assessment of the number of training days required. To create a training schedule, start by creating a matrix of

topics and the number of users per role (Receiving, Putaway, Waving, etc.) who require training. This gives you the trainee total, or the number of trainees required by topic. See Table 1 (next page).

Now that we know what topics need to be taught and to whom, the next step is to determine the total class hours required to execute the plan. To do so, the number of classes (iterations) required to teach each topic is calculated by dividing the trainee total by the number of available seats per class. Make sure to round up to the next whole number to account for partial classes.

Table 1

| Class Topic | Receiving Associates | Putaway Associates | Waving Loads | Trainee Total | Number of Classes (10 seats) | Class Duration (hours) | Total Class Hours |
|-----------------------------|----------------------|--------------------|--------------|---------------|------------------------------|------------------------|-------------------|
| Radio Frequency (RF) Basics | 4 | 7 | 1 | 12 | 2 | 2 | 4 |
| System Navigation | 4 | 7 | 1 | 12 | 2 | 2 | 4 |
| Pre-Receiving | 4 | 0 | 0 | 4 | 2 | 4 | 8 |
| Receiving | 4 | 7 | 0 | 11 | 2 | 4 | 8 |
| | | | | | | Total | 24 |

Now multiply the number of classes by the class duration to obtain the total class hours required to teach the topic. Class duration is often an estimate and will most likely be refreshed after SOPs and training materials are finalized.

Total class hours can be divided by eight (assuming an eight-hour training day) to convert to total class days. This number is useful for project management when determining if there are enough training resources to adhere to the training milestone date. You may discover that the training milestone is not achievable unless you increase your class size or the number of classrooms and instructors. Having this knowledge upfront is crucial to the training plan, training execution and overall project success.

The “train-the-trainer” approach is recommended and involves training a subset of users — often called “super users” or “power users” — and then having them train the remaining end users. After go-live, the super users serve as a great first level of support.

Equipment and Materials

Proper training equipment and materials are essential. Each classroom must be equipped with the proper equipment. If you’re implementing RF devices, you should train using actual RF devices, as opposed to using an emulator or simulator. If you’re implementing voice-directed technology, there is no substitute for using real equipment. Paper-based training is no match for actual hands-

on training. User confidence and performance will be much higher at go-live if associates have been trained on the devices they will be required to use in their day-to-day jobs. This may require the purchase of additional hardware, so plan and budget accordingly.

There are several approaches when it comes to training materials, but the underlying key to success is tight integration with actual system configurations, data and screen shots. Job aides, quick reference guides and other “cheat sheets” are invaluable during the initial days and weeks following go-live. For example, when implementing voice-directed picking using alpha-numeric check digits, a laminated quick-reference card listing the code words for the NATO phonetic alphabet is critical until this information is memorized.



The most efficient way to generate training data is to create a pristine training environment and then replicate for individual trainee environments.

Training Data

Repetition fuels the learning process. As you create system data for training exercises, go the extra mile and create at least two sets of training data for each exercise. Use the first data set to show users how to perform the exercise and the second set to walk through the exercise together.

Then let users perform the exercise the third time on their own. “Wait a minute — isn’t that three sets of data that are required,” you say? Nope, it’s just two. The trick is that everyone has his or her own copy of the data!

Depending on the WMS software and platform you are implementing, techniques will vary. Individual trainee environments provide more flexibility and reduce the amount of data set-up required. In a shared training environment, each trainee would require his or her own data set. For a 10-student class, that’s 10 sets of data, or 20 sets if you want them to practice on their own.

Final Preparations

Prior to the day of class, perform the training exercises on your own using actual training data and materials. Make adjustments to system configurations, data, documents or schedules as needed. This will help ensure smooth classroom execution. Individual trainee confidence is much higher when the instructor avoids getting “stuck” or skipping exercises in front of the class.

Instructor confidence results in higher user group confidence and system acceptance.

In the words of Dwight D. Eisenhower, “Plans are worthless, but planning is everything.” In other words, you can build the perfect training plan, but in the end, it’s all about execution.

This article is authored by Dennis Kost, a Senior Technology Consultant at enVista. For more information, contact 877-684-7700 or inforequest@envistacorp.com.