



# **Guide to developing an effective TPx training program**



## Guide to planning a strong training program for your TPM Implementation

Implementation of a trade promotion solution is a big leap towards strategic advancement and operational efficiency. However, the pivot from spreadsheets or outdated systems is a journey that demands a well-structured roadmap.

Whether you're introducing a new system or enhancing your current processes, the success of your platform largely depends on how well your team understands and utilizes it. An effective training program is the cornerstone of your change management plan.

## Why "train the trainer" is your go-to strategy

The 'train the trainer' model is an effective approach where a selected group of employees are thoroughly trained, and these individuals, in turn, train the larger workforce. This methodology is not just cost-effective but also ensures a standardized and continuous learning process - you are literally planting expert advocates throughout your workforce.

### Benefits of train the trainer approach:

**Standardization:** This ensures consistency in the training content and delivery, as all trainers undergo the same disciplined training process and understand the objectives thoroughly.

**Continuity:** This creates a pool of internal experts who facilitate ongoing training sessions, including initial launch, onboarding new hires, and refresher courses, thus significantly reducing dependence on external resources.

**Agility in updates:** Any changes in the system or processes can be quickly communicated and taught across the organization through these internal trainers.

**Change management:** Seeing peers using and benefitting from the new system encourages users to embrace the change positively.

**Pro tip: Before commencing the training program, discuss with the trainers' supervisors to ensure they can dedicate sufficient time to training responsibilities.**

## Selecting the ideal trainers

Your trainers are the backbone of your training program. They should not only be knowledgeable but also possess certain qualities that make them effective educators. These qualities include:

- Technology proficiency
- Robust communication and presentation skills
- TPx subject-matter expertise
- Being influential and respected within the company

### Pro tip:

- Regularly appreciate and incentivize your trainers. Recognition can significantly enhance motivation and performance.
- Introduce your trainers to the system gradually and consistently. Align training sessions with the implementation phases to ensure comprehensive learning.

## Segmented training for various functions

Recognizing that different roles necessitate a distinct set of skills and understanding is crucial, therefore, customized training by function is important. This approach acknowledges the unique functionalities and responsibilities across different departments, ensuring that each team member receives tailored training relevant to their specific role. Training with your function peers also allows for deeper exploration of key subject topics.

This targeted method does not only streamline the learning process but also enhances the practical application of the system, ensuring every team member can navigate through and exploit the trade promotion solution with confidence and precision.

## Suggested TPx training subjects

Navigating the complexities of TPx requires not just an understanding of the system's end goals, but a deep dive into the various facets that make up its core. Your aim is to equip every user with the knowledge to not just navigate the system effectively but to master it, making the most of functionalities that are often overlooked yet can drive significant value.

### 1. System overview

- Information flow: ERP—TPx—demand planning—Retail
- Platform basics
- System settings and master data
- Calendar configuration/fiscal year, language, currency, time zone settings
- Account and product hierarchies, planning accounts
- Authorized products
- System navigation basics
- Price management
- Home dashboard and platform navigation
- Logging on, shortcuts, and user tips

**Pro tip:** Prepare and integrate your company's Standard Operating Procedures (SOPs) into the relevant training sections to ensure all users are consistent and meet expectations.

## 2. Managing funds:

Setting up the right funds, linked to the right budget accounts, is a key functionality of your trade system. Ensure users are fully trained in the following areas:

- Trade fund structure
- Accrual methodology
- Budget fund types
- Account fund types
- Allocating funds

**Pro tip:** Make promotion planning sessions interactive - workshops and screenshares work well. Schedule follow-up "office hours" for the sales team to address specific queries or challenges.

## 3. Promotional planning

Promotion planning is a critical phase in your TPx journey. It's where foresight meets execution. To maximize impact in the marketplace, each promotion needs to be meticulously planned and executed.

- Planning methodology
- Promotions
- Creating
- Adding and removing products
- Allocating and committing funds
- Tactics, causals
- Calendar and list views
- Downloading, cloning
- Approvals, promotion status

**Pro tip:** Incorporate clear, detailed workflows in your training materials, especially for the approval processes.



## 4. Accruing liability

While strategies and campaigns often take center stage, it is the financial mechanisms working behind the scenes that ensure the system's sustainability and effectiveness. At the heart of booking accurate financial liability are accruals, a vital component ensuring financial clarity and alignment. Ensuring smooth and transparent accrual processes is essential to maintaining financial health and ensuring trust among stakeholders.

- [System flow](#)
- [Accrual rules by liability type](#)

## 5. Settlements:

Trade promotions can entail various financial commitments, and accordingly, there are multiple settlement types to address each unique scenario:

- [System flow](#)
- [Deduction promotion match](#)
- [Types of settlements](#)
- [Closing promotions](#)
- [True-up process](#)

**Pro tip:** Ensure training materials explicitly designate responsibility areas within the settlement process for clarity and accountability.

## 6. Reporting:

Trade promotions are more than just campaigns and strategies; they're a wealth of data and insights. Properly harnessed, this data can guide future campaigns, optimize trade spending, and highlight areas of growth or concern. This is where reporting tools are designed to provide clarity, depth, and actionable insights to users.

- [Standard reports](#)
- [Custom report creation](#)
- [Integration with other company reporting tools](#)
- [In-app and help desk procedures](#)

## Post-training support and continuous learning:

We recommend providing office hours, sometimes referred to as hypercare, during which recently trained end-users can log on, share screens, and ask questions. Request that your vendor participate in this period of user adoption. Post-training surveys will give you a good indication of whether the end-users feel comfortable with what they've learned, or if additional sessions are required. Continuous monitoring of system usage, deadlines, and displayed knowledge will help identify those who might need further support. Ensure that system training is included in the onboarding process for all new employees who will be utilizing the solution.

With a thoughtfully designed training program, you can ensure that your team is not just using the system but leveraging it to its fullest potential.

The effectiveness of any tool hinges on the proficiency of its user. Following our guide, you're paving the way for a well-equipped, confident team, poised to drive success and growth for your organization. [Get in touch](#) and achieve more with our comprehensive TPx solutions!