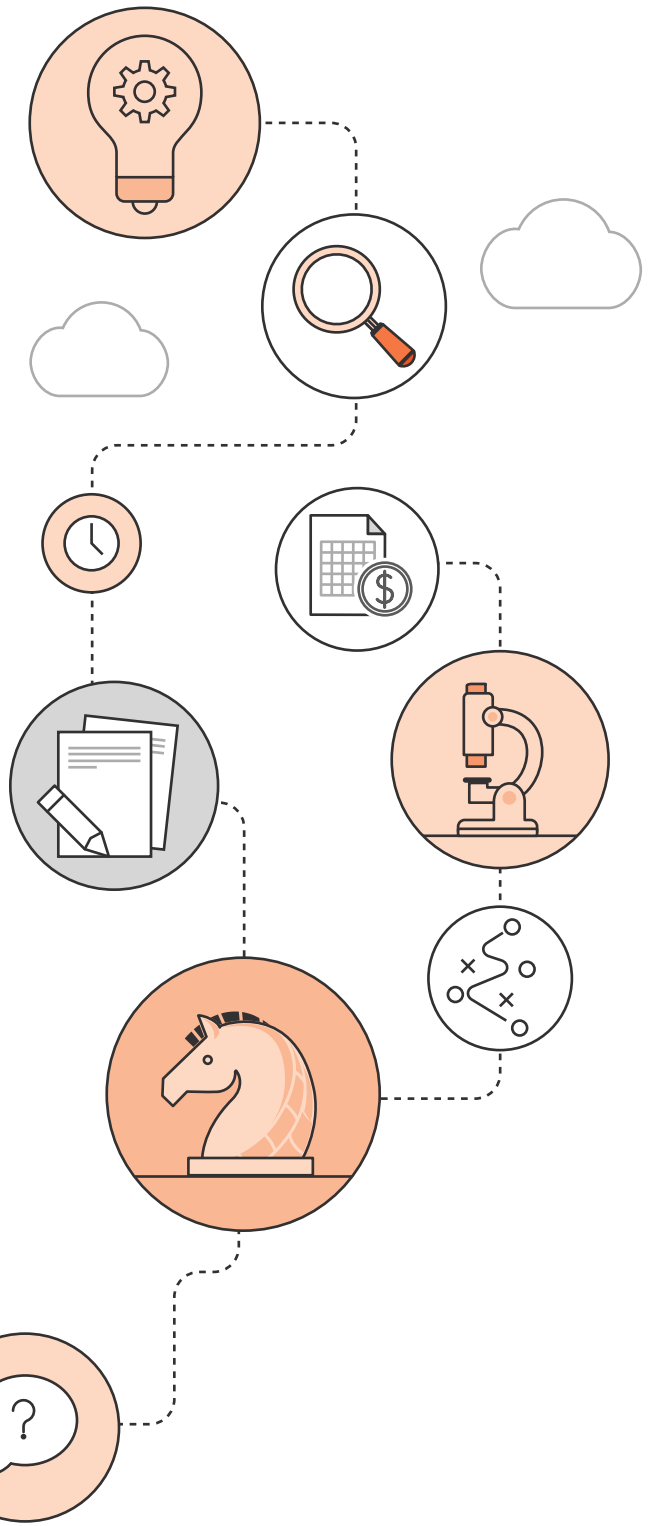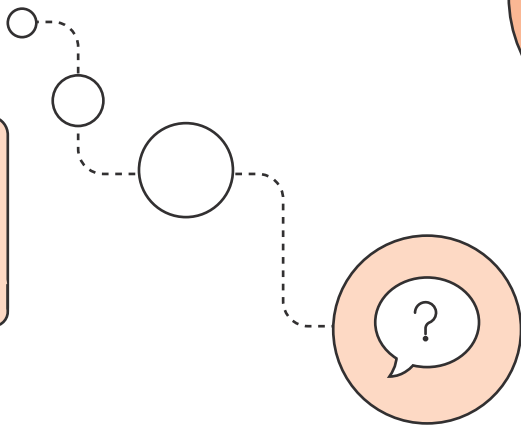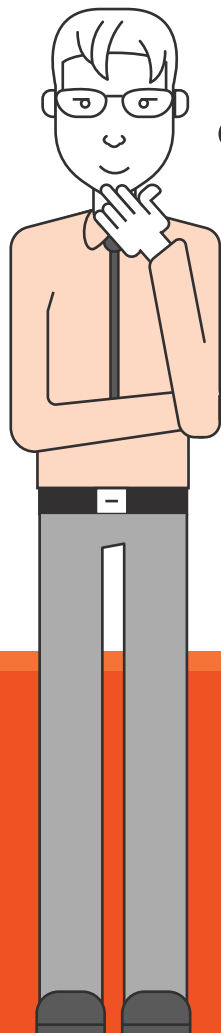HOW TO OPTIMIZE YOUR
CUSTOMER SOFTWARE TRAINING

51

BEST PRACTICES TO ACHIEVE NEW LEVELS OF PERFORMANCE

cloudshare

Contents

INTRODUCTION
Are you a learning leader?

Customer training is one of the most important, and sometimes overlooked, needs of enterprise software companies. Handled effectively, training contributes directly to product adoption, customer success, and company growth.

The best training organizations can trace their success to effective leadership and dedication to perpetual process improvement. In partnership with their customers, effective training leaders make strategic decisions encompassing numerous processes that work together (or should) to make training an invaluable function of the business.
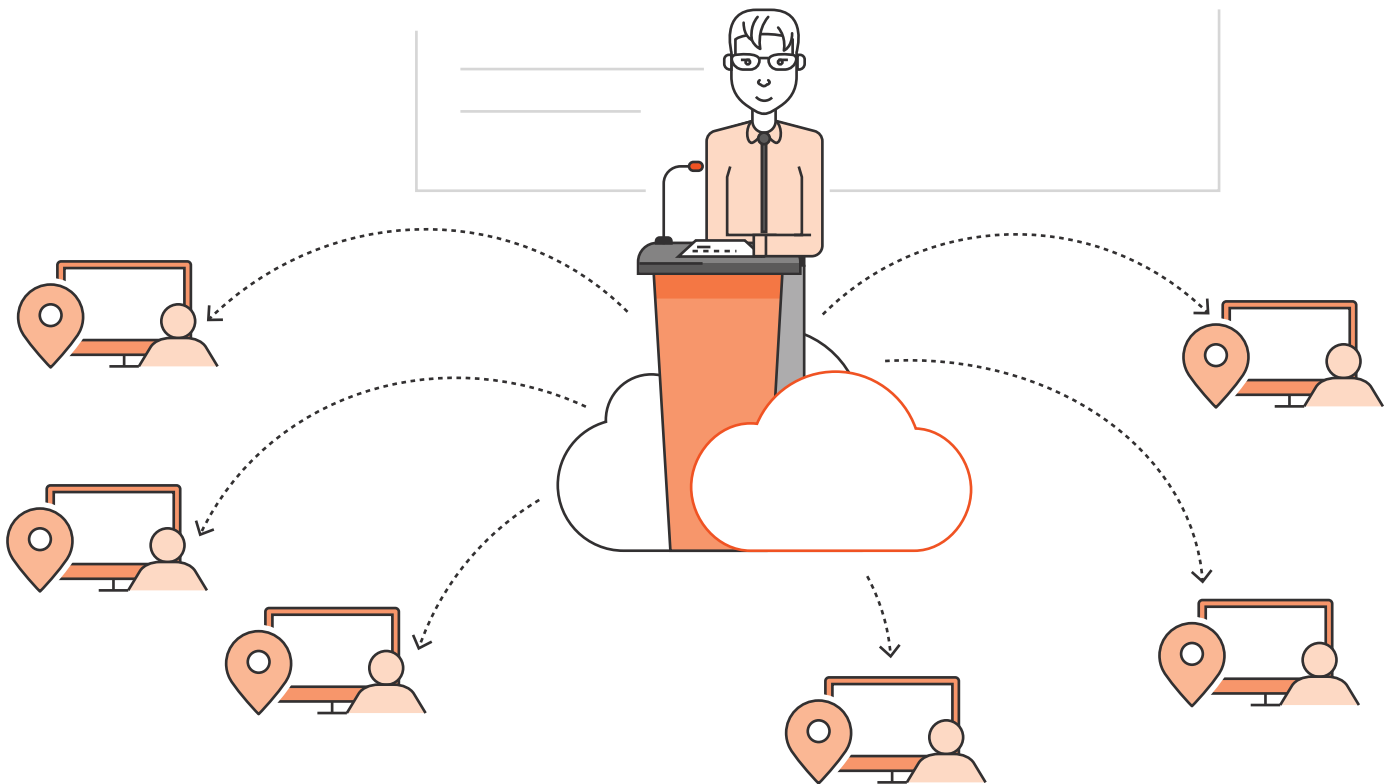
This eBook presents a plethora of best practices to help you understand how to optimize your customer software training to achieve new levels of performance.

STRATEGY
What are you trying to accomplish?

Great software training can have a meaningful effect on your business. When your software training is strategically aligned with the specific objectives of the company, it can solve a variety of problems and boost business.

1. Begin with the end in mind

Can you answer the question, "How is your software training program strategically aligned to your business?" Perhaps the goal is to:

- Reduce customer support costs
- Generate revenue

Steve Penfold, Customer Success Director at Elucida, offers these additional objectives[1]:

- Reduce churn
- Create customer advocates
- Gain feedback to improve the product and customer experience

What's your destination? Determine it before your begin your journey.

2. Align with company strategists

An important step toward aligning software training with the needs of the company requires that training leaders have direct communication with company strategists. Work closely with corporate executives to take a consultative approach for identifying requirements and designing solutions that best serve the company's and customers' needs.

3. Ask the right questions and listen

Training leaders should also work with customers to establish and prioritize training needs and set expectations. This calls for asking the right questions and listening closely to interpret customer needs.

4. Anticipate future needs

Your software training objectives are likely to evolve along with your company, its products and market. Try to anticipate your company's future needs in your training strategy sessions. Will an introductory course for new users need to be followed with a more advanced one?
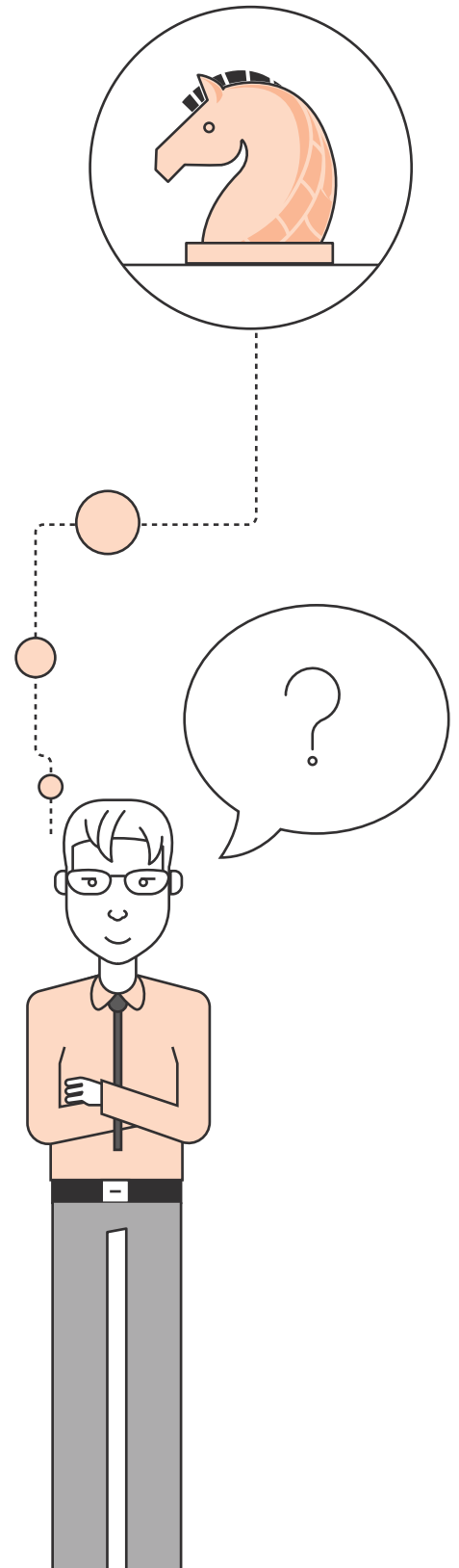
5. Focus on business outcomes for accountability

Identify key performance indicators (KPIs) that reflect your success (and challenges), and commit to analyzing them and producing reports regularly to ensure that your training organization remains accountable for performance.

The right metrics can reveal where the company is succeeding and shed light on weaknesses. Metrics will also prove useful for identifying trends and places where management can take steps to improve performance.
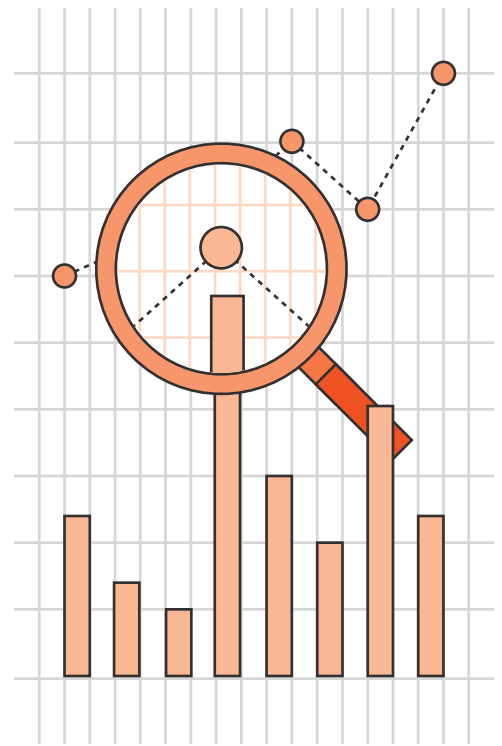
6. Learn the customer's business to effectively adapt training to its needs

When training organizations understand the needs of those they serve, off-the-shelf programs may not be the answer. In fact, you may need to tailor standard programs or create new ones. Many top training organizations understand the importance of investing resources into learning the customer's business so they can effectively adapt the training.

For example, customer consultations may reveal that a virtual instructor-led* training program would be more useful than pre-recorded webinars or traditional instructor-led training.

* What is Virtual Instructor-Led Training?

Virtual Instructor-Led Training (VILT) is a real-time, interactive learning experience where participants and instructors are in separate locations, while connected via computers or web-enabled devices.
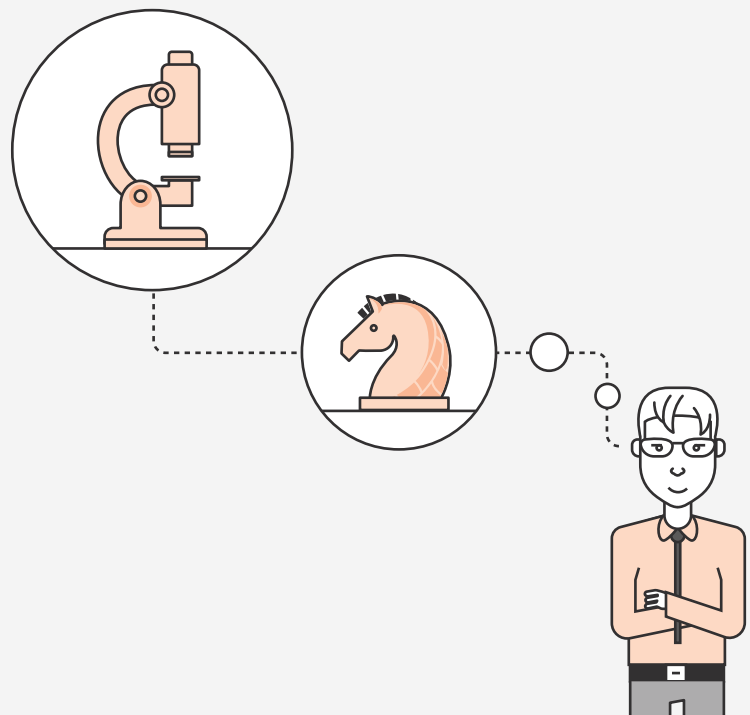
DIAGNOSTICS
Do you know what's working?

Diagnostics follows strategy.

The focus is for training leaders to hone in on problems that must be addressed to achieve the desired results.

Done effectively, diagnostics helps you achieve successful outcomes and increase the efficiency of your customer software training programs.

7. Aim for developing recommendations

Diagnostics isn't merely about understanding a problem. Ultimately, diagnostics should deliver a set of recommendations or specifications to the instructional design team to address performance gaps.

8. Create an effective information flow

To fulfill the purpose of diagnostics you must apply the lessons learned from your customers to your content development. It's vital to establish a consistent flow of information from the customer, to the software training leadership team, and finally, to the content development team.

9. Listen

Asking questions and listening is as important for diagnostics as it is in the strategy process. Great software training organizations uncover real business problems and needs by listening.

Focus on the root causes of problems by asking questions such as:

- What's the intended impact of the training?
- What might hinder success?
- What's been implemented to date?
- How have past solutions fared?
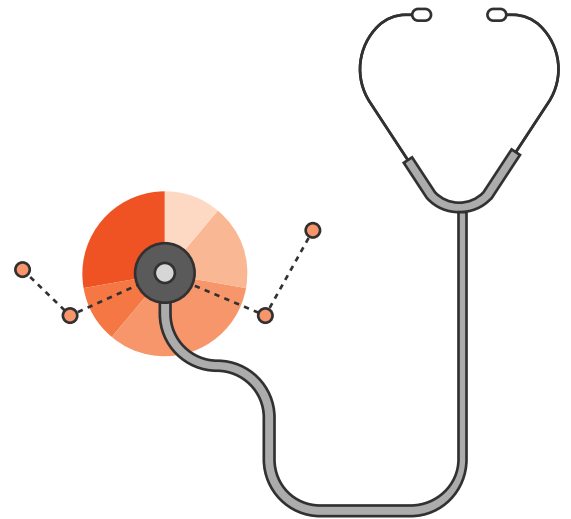
10. Collect data

The collection and management of data is central to your diagnostic efforts. Surveys, interviews, focus groups, and test results may all prove useful.

Keep records for yourself and your successors, including results from previous training programs. The data could save the company a lot of money in the future when new staff members face similar problems.

11. Forge a structured approach to analysis

The top performing organizations conduct assessments of training needs with a systematic and structured approach.

A systematic needs analysis can include:

- Formal data collection
- Analysis of performance data
- Gap analysis between desired skills and current competencies
- Root cause analysis

The design of your analysis system may need to be customized specifically to your organization and customers. The key is to use a consistent approach before developing programs[2].

Needs Assessment
- ☐ Planning
- ☐ Data Collection
- ☐ Data Analysis and Reporting

Summative Evaluation

Formative Evaluation

Design

Implementation

Development
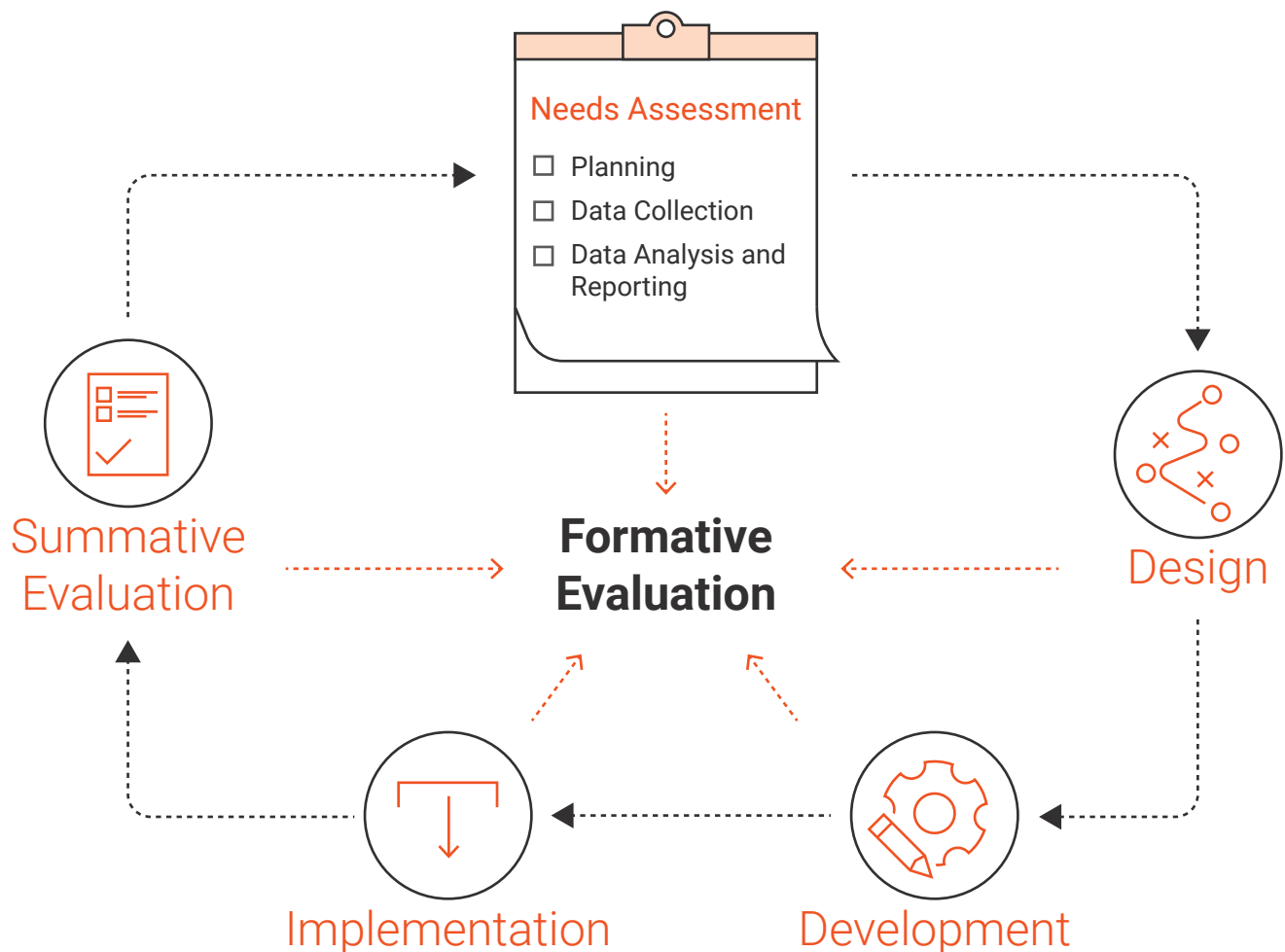
12. Look beyond your training department

Your training organization can gather valuable knowledge by looking at solutions that are working in other areas of the organization. Look to gather insights and experience from team leaders adept at solving problems outside of the customer software training team.
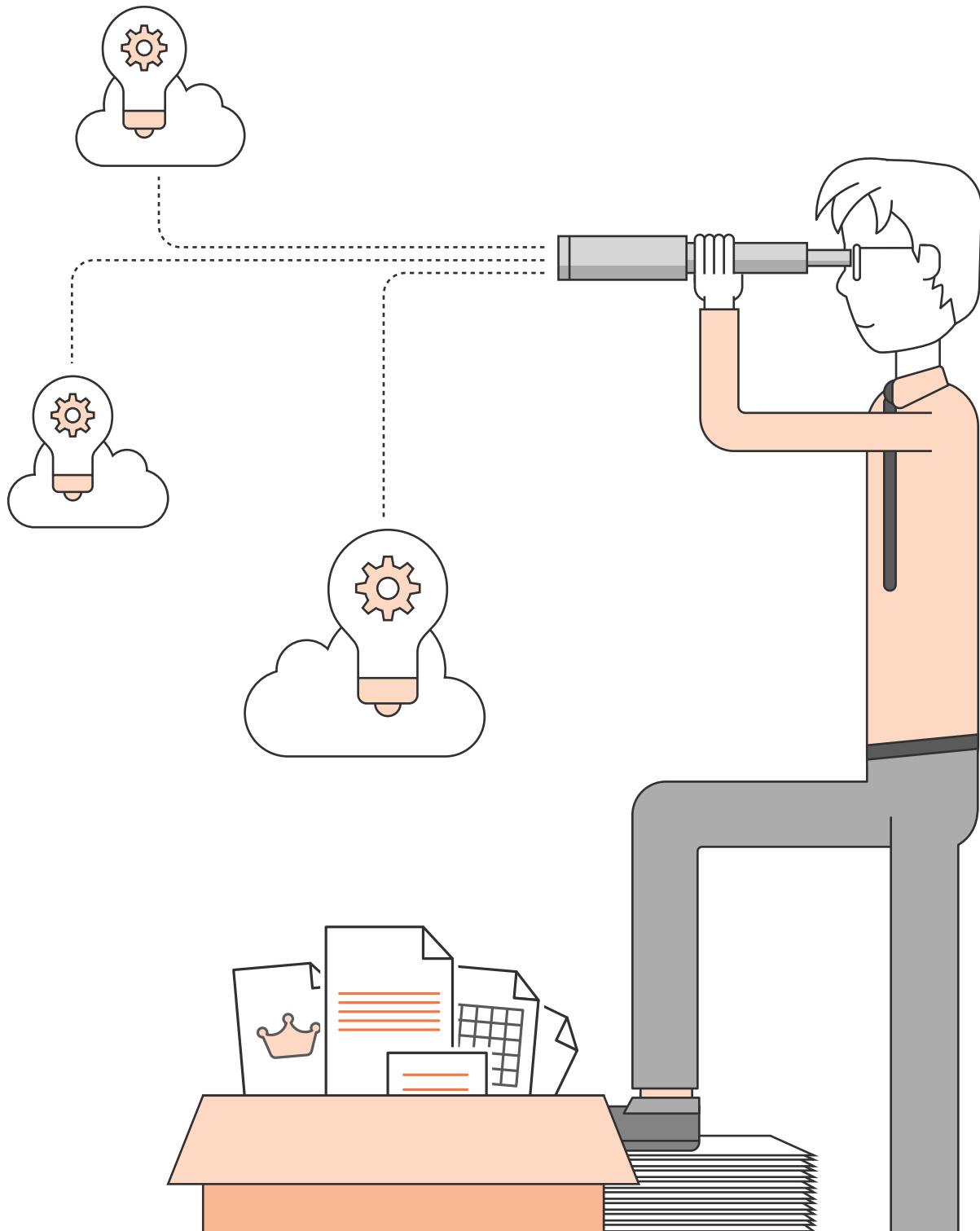
CONTENT DEVELOPMENT
## Are your training programs engaging?

Content is the crux of your software training. If it's not useful to the different types of learners in your audience, nothing else matters. Great content is timely, easily accessible, consumable, applicable, and based on real-world situations.

Developing content is a creative exercise, but doing it well calls on a number of best practices and processes.
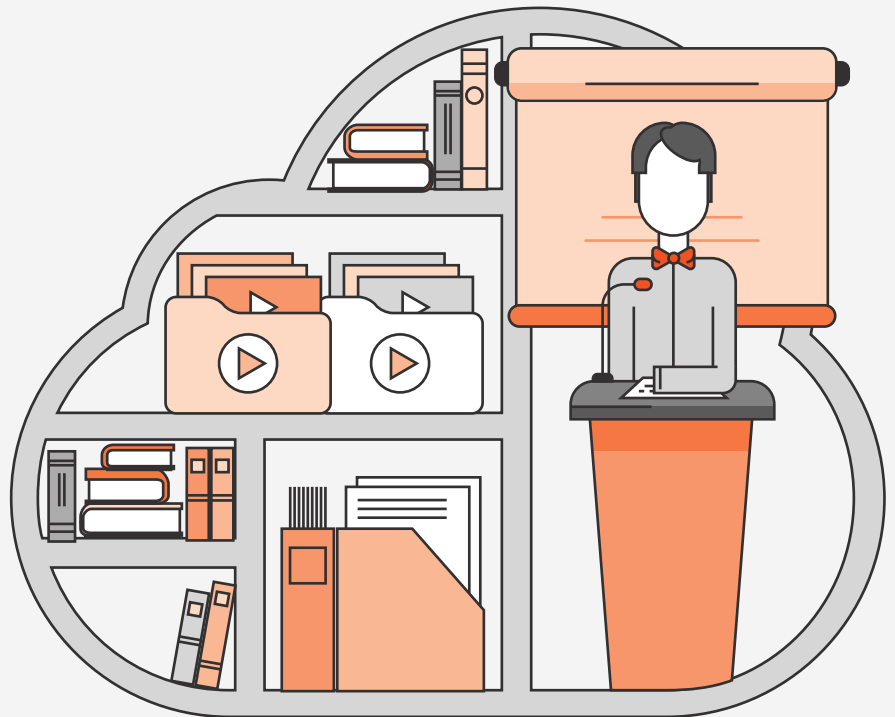
13. Stay current

Your content must meet the immediate needs of your students. **Content development should focus on:**

- Needs assessments
- Curriculum and instructional design
- An ongoing process to keep content up to date – culturally and technically

14. Focus on job relevancy and context

People learn best when they're able to associate information with their own experience and environment. Students won't relate well to training that is abstract or theoretical. Make sure your training provides relevant and practical examples learners can connect to the work they do.

15. Involve subject matter experts

Make your content relevant by involving subject matter experts in its creation.

Seek out and engage experts early in the design process and again in testing.

16. Make training interactive

Few students do well with courses that are entirely lecture-based. Conversely, experiential learning allows student to learn by doing and understand how to apply the lessons on the job. The use of simulations, gamification and role-playing helps make training more engaging and fun. These techniques also allow students to fail in a safe environment, which helps to accelerate the learning process.
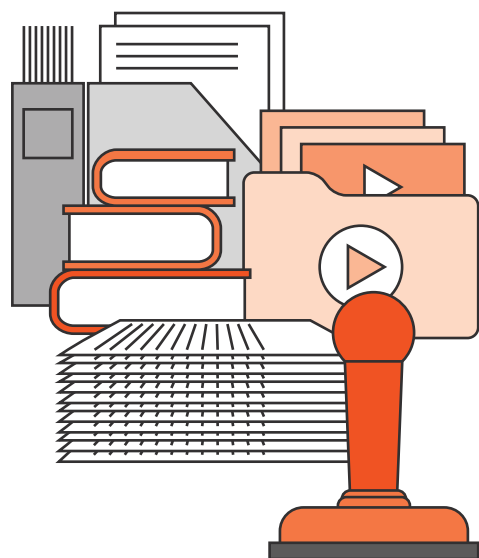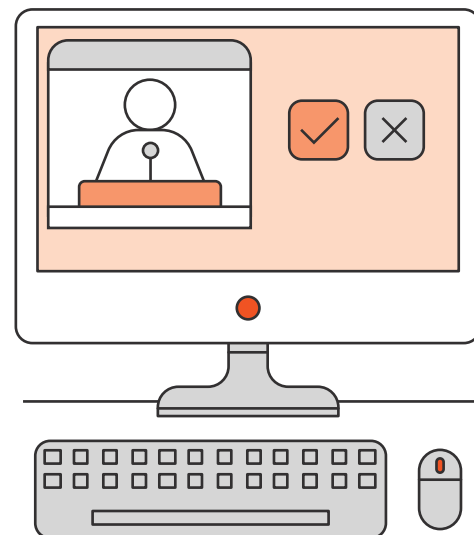
17. Offer research-based information

Research-based information and data increases credibility. Software training, when it involves the use of proven protocols and facts, is more likely to be perceived as reliable.

18. Accommodate multiple learning styles

Blended learning refers to the use of two or more delivery methods. Content delivery that blends multiple learning modalities enhances the student learning experience. What's more, blended learning can help reduce the cost of delivery. For example:

- When content that requires live interaction is delivered virtually
- When supporting content is delivered via an online or asynchronous medium
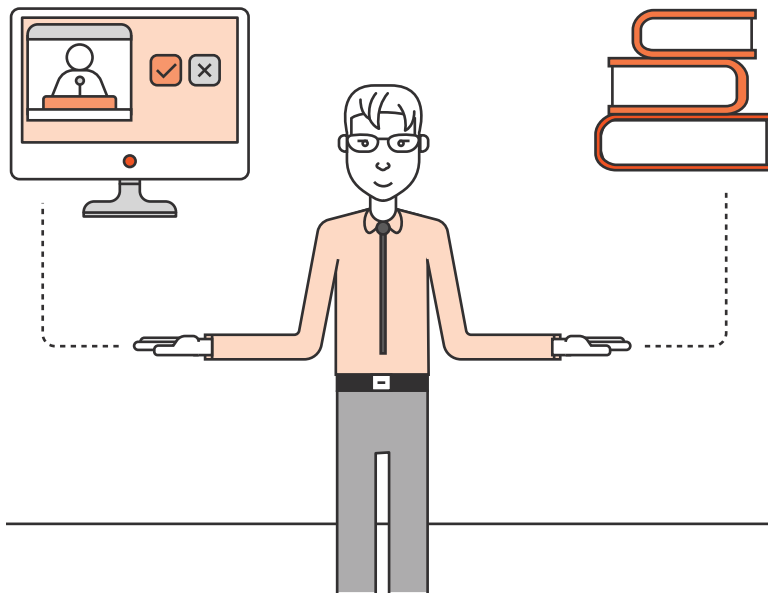
Microsoft's Learning Paths program delivers engineering training using a blended model. Microsoft has more than 100 different Learning Paths, which include about 60% to 70% informal content blended with 30% to 40% structured, instructionally-designed courseware.

The approach allows engineers to access relevant lessons on an as-needed basis when they have time.

## 19. Include post-training activities for reinforcement

You can improve your software training and your students' subsequent performance by developing post-training activities to reinforce the lessons. Post-training activities (such as quizzes, hands-on group projects and lab-based exercises) help ensure trainees don't leave the knowledge behind and are better able to apply the lessons correctly.

20. Offer easy-to-use support materials

Help sustain customer workforce performance improvements with support documentation for post-training use. Materials can be provided in physical form or through online repositories of training content and collateral materials.

A common practice is to send articles, research, whitepapers, etc. after the conclusion of a course in order to continue the learning process.
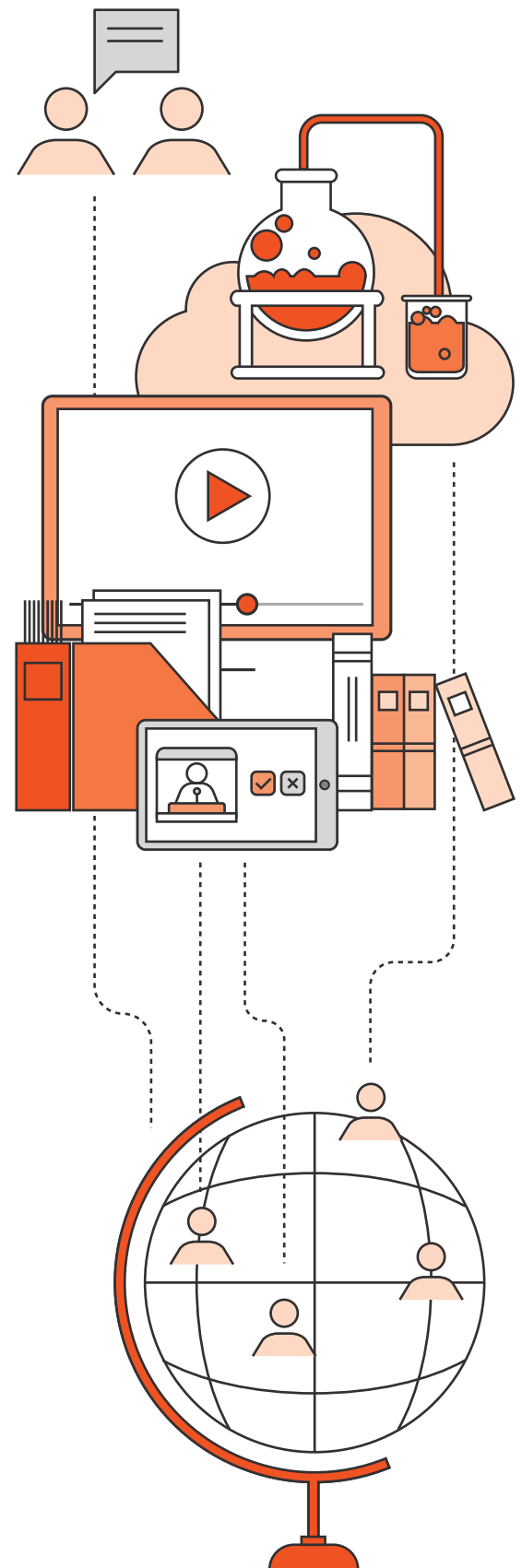
21 Design with innovation

Using innovative technologies, such as cloud-based labs, mobile technologies and devices, informal learning tools, and communities of practice often creates a learning environment that helps engage students. As such, the content is more interesting and the student focus increases, making the knowledge transfer more effective.

CONTENT DELIVERY
Are your students learning the material?

Content delivery is where the rubber meets the road (or Internet). It represents the culmination of all your software training processes.

Content delivery encompasses how the training is conveyed, distributed, and accessed. Its scope extends beyond instruction and includes all aspects of the learning experience.
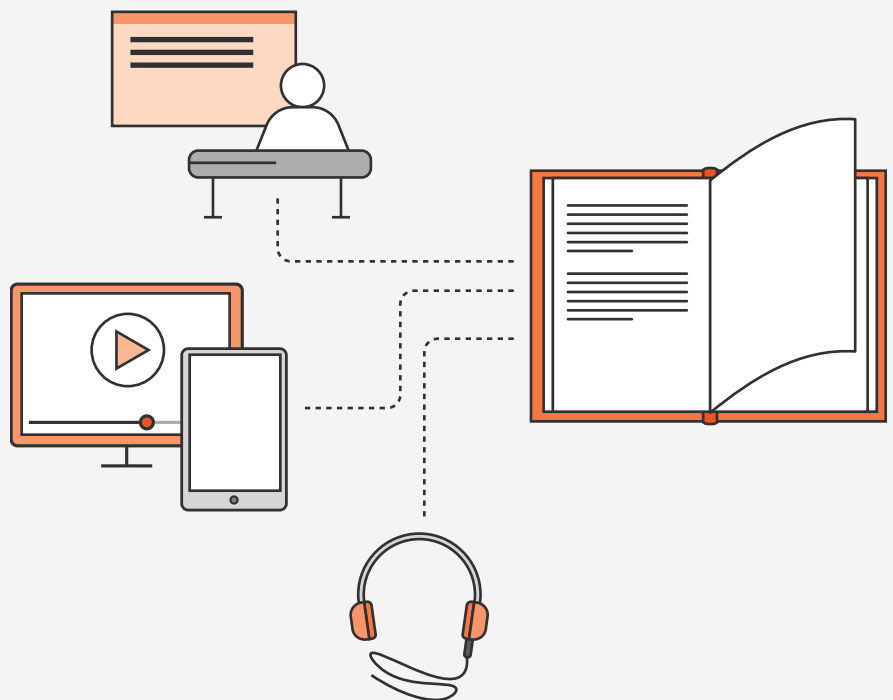
22. Understand your options

A spectrum of content delivery modalities is now available to software trainers – both online and off. A training delivery guide developed by MIT presents the following methods:

- Classroom training with instructor
- E-learning facilitated*
- E-learning, self-paced
- One-on-one tutorial
- Lecture/demonstration
- Self-paced learning, non-electronic
- Blended learning[3]

*This is the model often referred to as virtual instructor-led training (VILT).

A 2015 report on digital content delivering platforms published by VitalSource and TrainingIndustry.com offers the top objectives of digital content delivery platforms.

Improving retention	80%
Improving consistency	79%
Improving effectivness	79%
Improving engagement	78%
Tracking content usage and relevance	77%
Measuring attentivness and participation	77%
Reducing travel cost and time	77%
Increasing the number of people trained	76%
Incorporating innovative technologies	71%
Accessing via mobile devices	64%
Incorporating gamification	52%

54% of technical skills training

41% of product and IT training

At the time of publication, 54% of technical skills training and 41% of product and IT training utilized digital content platforms[4].

23. Integrate e-learning methodologies

E-learning might include VILT, electronic performance support systems, video, mobile learning methods, and more. In order to execute the best possible delivery, software training leaders should strive to integrate various methods where they are most appropriate.

Blended, or hybrid, approaches can integrate live, interactive and offline components. High-performing training organizations make courses available utilizing a variety of delivery methods.

The available variety gives learners the option to choose and helps them consume content in the ways most effective for them.

24. Work together

Delivering great content requires closely linking design and development to delivery expectations. The process only works effectively when developers and instructors work together closely. Content developers should clearly define their expectations to the instructors.

25. Profile instructor requirements

To maintain consistent quality and consistency, the development team should profile or define the skills and qualities required of program instructors. Learning leaders must then ensure that delivery processes are properly executed.

## 26. Insist on great facilitation and presentation skills

Instructors must have excellent facilitation and presentation skills. Keep in mind, also, a great instructor for any one type of training may not make for a great software trainer. In their book, What Makes a Great Training Organization, Doug Harward and Ken Taylor examine the qualities that constitute excellent facilitation skills:

Being able to listen well to students' needs

Being able to relate to participants on their level
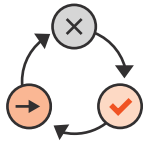
Being flexible to the ever-changing and diverse needs of the learner

Being timely

Being creative

Being entertaining

Being able to communicate and speak clearly and concisely

Being confident

Having a sense of logic and being able to solve problems using reasoning

Being able to accept criticism

Being relevant to the business and industry you are teaching in

Being compassionate and able to develop a relationship with students[5]

Being tidy and having a good appearance

Finally, don't underestimate the importance of likeability. Delivery is far more effective when students like the instructor.

Being influential while being respectful

27. Hire instructors with real-world experience

The best training is led by subject matter experts with real-world experience in the industry for which they are providing training. The facilitator also should have the ability to make the learning real by calling on actual examples that demonstrate or highlight the skills being taught.

28. Anticipate the need to scale

The top training organizations have the ability to train small or large numbers of customers. Effective scalability requires having clearly defined expectations, the ability to communicate consistently to a broad audience, and effective use of resources.

Education

Experience

Skills

**Languages**
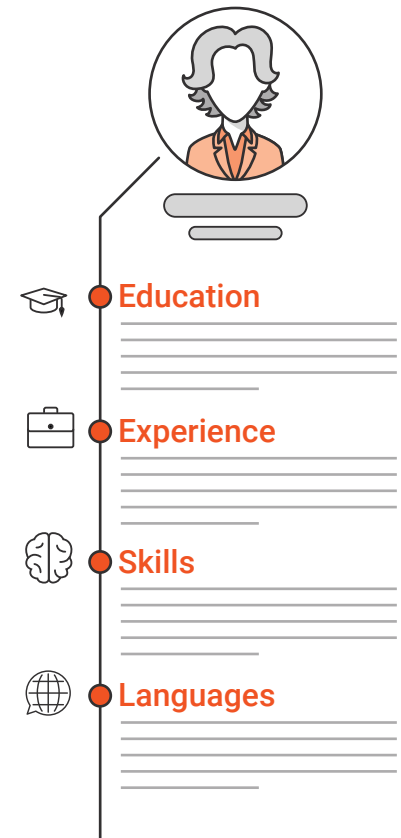
29. Consider culture

Understanding the audience is essential.
This includes:

- Addressing individual learning or delivery preferences, along with geographic, linguistic, or cultural standards

- Customizing content or delivery methods to satisfy language or culture requirements

- Teaching in the language the audience prefers

ADMINISTRATION
Are you executing effectively?

Many believe that administration is the lifeblood of an effective training operation. Optimal software training programs are managed effectively end-to-end with administrative processes that don't impede or slow down the learning experience.
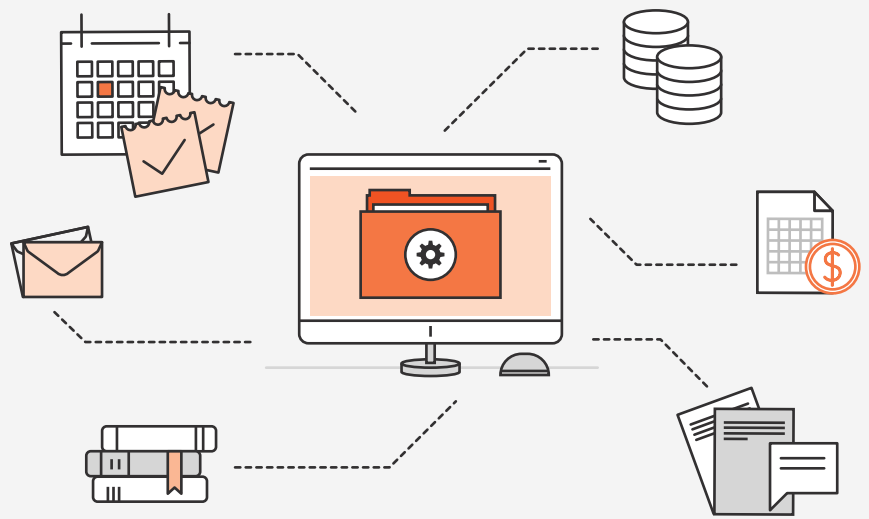
30. Focus on the details

High-performing training organizations are process-oriented and focus on managing daily activities with exceptional detail. They work to continuously find ways to improve efficiency, largely via technology.

31. Master tracking

Training organizations need to track who took which courses and compile data to report on the performance of the training program. To plan for future requirements, data management is critical.

32. Master logistics

The process of logistically managing instructors, materials, and facilities is also vital. Having low-capacity classrooms is a huge waste of resources. Training facilities are a major expense, so it's important to maximize utilization.

Of course, the trend toward moving classroom training to virtual delivery helps minimize associated costs.

33. Make enrollment efficient

Once a course is scheduled, enrollment should be easy for students. All additional logistics should be automated. High-performing organizations utilize a targeted enrollment approach where students are prescheduled for training programs based on their needs.

34. Manage suppliers effectively

It's rare that a training organization can perform every required learning service, so they must manage relationships with other service providers. Goals should include developing good rapport with suppliers and keeping turnover to a minimum.

Moreover, high-performing training organizations are able to effectively integrate the capabilities of external suppliers with each other and with their own internal capabilities. Strive to utilize technology to its fullest advantage (for example, by using APIs and automated integrated workflows) to ensure that your systems and those of your suppliers "play nicely" together.

MEASUREMENT & REPORTING
Do you know how to measure results and improve ROI?

Software training organizations must measure progress, results, and ultimately, the ROI of their customer training spend. A measurement and reporting strategy is critical to systematically making process improvements.
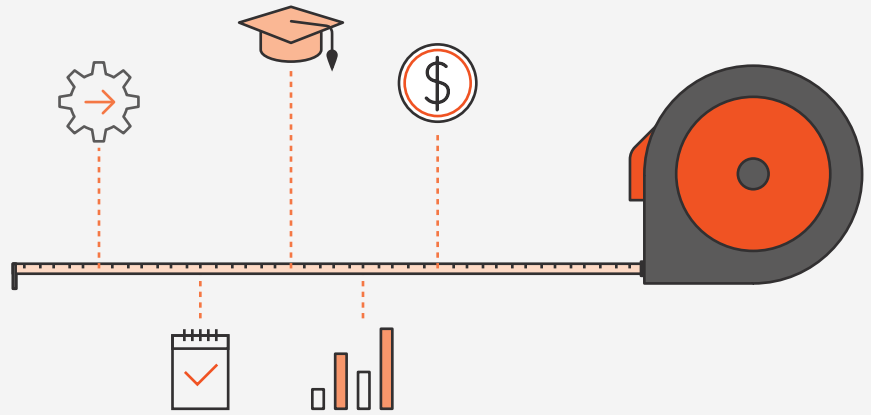
35. Understand evaluation levels

Obviously, you don't want to spend time or money on training that doesn't provide good ROI. In their 1994 book, Evaluating Training Programs, authors Donald L. Kirkpatrick and James D. Kirkpatrick introduced the four-level training evaluation model, to help objectively analyze the effectiveness of training.
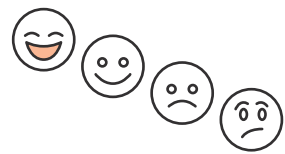
Level 1
Student reaction

What students thought about the training

Level 2
Learning

The resulting increase in knowledge or capability

Level 3
Behavior

The extent of behavior and capability improvement

Level 4
Results

The effects on the business or environment resulting from the trainees' performance[6]

36. Issue credentials, certifications and badges

Recognize people for their achievements with:

Credentials

Attest to a level of qualification, competence, or authority

Certifications

Confirm an individual's training achievements

Badges

Allow trainees to signify their accomplishments to their customers

37. Assess learning outcomes

To ensure training translates into improved performance, software training organizations should assess learners' knowledge and skills both before and after training.

38. Collect feedback

To improve the effectiveness of your software training always collect student feedback about the quality of the training. Feedback can be as simple as informal interviews or can employ surveys and questionnaires.

39. Develop useful reports

Learning dashboards can be useful to provide management with metrics indicating whether the organization is meeting performance expectations. Dashboards make key data easily visible and therefore enable leaders and their staff to make adjustments quickly when needed.

40. Collect cost data

Cost data includes the costs of producing, administering, and delivering the training content as well as ancillary expenses, such as travel. This is why converting to virtual training models, though they may require upfront capital expenditure, can deliver substantial savings.
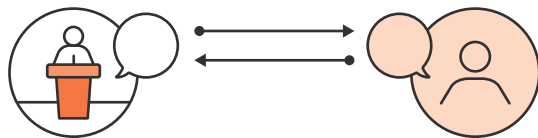
PORTFOLIO MANAGEMENT
How well are your programs managed?

Portfolio management is an important component of managing customer training programs to ensure a diverse mix of courses and training modalities. The ability to manage large portfolios of learning content is also instrumental in reducing costs and ensuring proper program positioning.
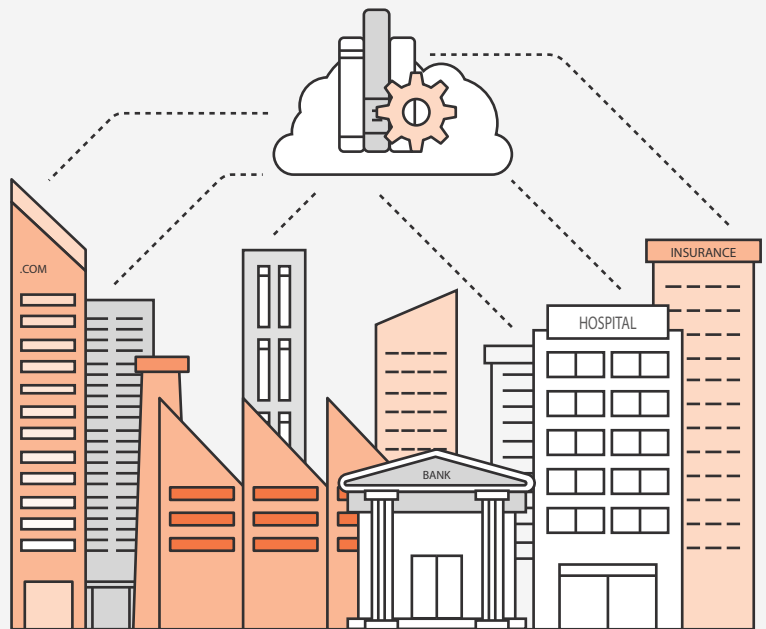
41. Keep training material current

Your software training will only be valued if the content remains relevant and current. Training materials must be added often, and older content needs to be updated to remain relevant.

Develop structured feedback loops between the instructors and students to enable portfolio managers to know where changes are required.

Have subject matter experts review course materials regularly.

42. Utilize a variety of methods

Software training organizations usually need to make their content available in a variety of ways (e.g., online, in person, blended) because all trainees won't always be available at the same time. What's more, you want to enable learners to learn in the way that works best for them.

The many methods of training includes:

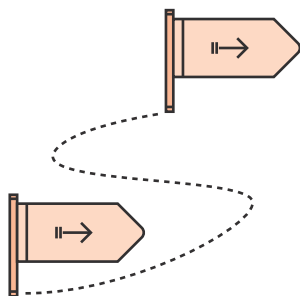Virtual Instructor-led training (VILT)

Self-paced e-learning

Mobile learning

Performance support and context-driven learning

Online communities and content hubs

43. Organize content as pathways

Work to ensure your software training is relevant to your students' needs by organizing courses in a recommended order. Microsoft has dubbed these mini curriculums Learning Paths.

44. Organize for accessibility

Learners need to find the courses and information relevant to their needs easily and understandably. When possible, design course portfolios not only around topics, but also for specific roles and responsibilities within your customers' organizations.

APPLYING TECHNOLOGY
Are you making the most of new technologies?

In recent years, training delivery has undergone radical change, with technology ushering in the age of virtual learning. More importantly, the role of technology in learning has evolved from a singular focus on cost savings to include a focus on effectiveness.
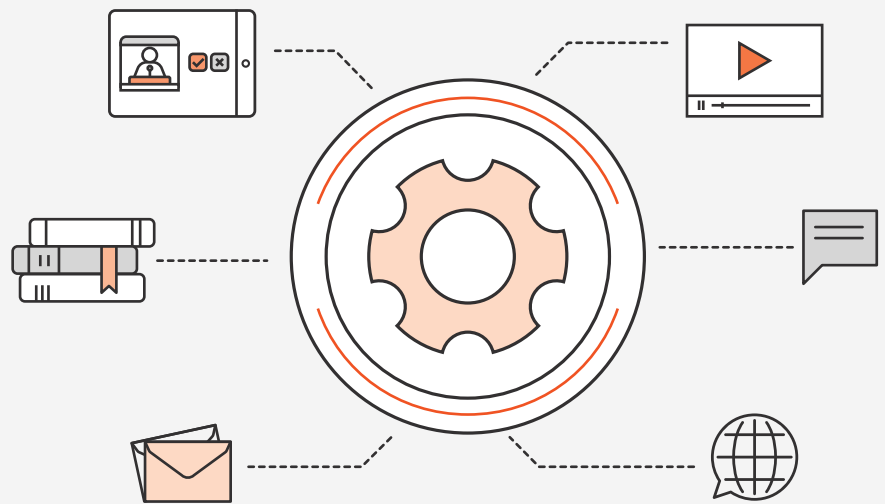
45. Enable, don't distract

The effective use of technology in software training focuses on enhancing the way students consume content and interact with administrators, facilitators, and others. It's vital to ensure the technology is never cumbersome or difficult to access and navigate.

46. Remove geographical concerns

Traditionally, distributing content to global audiences was cost-intensive and time-consuming. Materials had to be shipped and facilitators had to be prepped on how to deliver them.

Virtual learning technologies now allow training to be delivered simultaneously, regardless of location. Learners in all regions receive the same training at the same time – utilizing virtual technologies to speed content delivery to audiences all around the globe.

47. Understand the required platforms

To integrate training technology effectively, you must understand roles of various types of platforms and how to use them in the training experience:
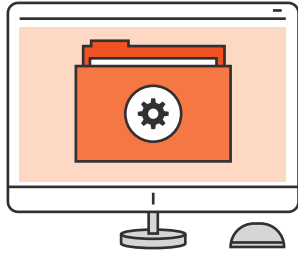
Administrative platform

The administrative platform is commonly referred to as a learning management systems (LMS). An LMS assists in managing back-office tasks related to tracking activities and automating communications between administrators, trainers/instructors, and learners.

Authoring platform

The authoring platform allows instructional designers to create sophisticated online training programs and enables subject matter experts to convert standard presentation materials into online courses.

Delivery platform

The delivery platform enables the virtual delivery of content in formal training settings as well as in virtual environments, such as remote hands-on labs, conference rooms, or via mobile devices.

Collaboration platform

The collaboration platform (or social learning tools) gives students the ability to communicate and share information with other learners and facilitators.

48. Integrate effectively with enterprise software applications

Most software training now requires integrating learning technologies with enterprise applications. To effectively integrate with enterprise systems, training organizations need to communicate with both internal IT staff and the IT teams of partners and suppliers. Effective systems integration will improve efficiency, enable better measurement, and eliminate duplicate data entry and costly maintenance.

49. Welcome any device

This is the "bring your own device" (BYOD) era. It's time to embrace it and ensure that your content will work with any device.

50. Engage via multimedia and hands-on experiences

Reading content on a computer screen is not interaction. Trainees need to actively engage and interact to apply your lessons. Interactive multimedia programs will increase comprehension, retention, and the transfer of skills and knowledge.

Particularly in the context of software training, the importance of "learning by doing" cannot be overemphasized. Leading software courses often include 50% (or more) hands-on lab time. The opportunity to try out the new skills learned in real-world environments increases student engagement and interest, dramatically improves retention, and ultimately leads to successful training outcomes.

VIRTUAL TRAINING
How will you grow your programs?

51. Scale smart with cloud-based solutions

In addition to adopting cloud-based LMSs, authoring platforms and collaboration tools, leading training organizations are moving their IT lab delivery systems to the cloud. A virtualized IT lab ecosystem gives you the ability to deliver hands-on IT training to students anywhere, while eliminating infrastructure and setup costs.
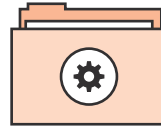
While some smaller training programs find a generalized public cloud provider – such as AWS or Microsoft Azure – sufficient to their needs (particularly when their course offerings and training environments are relatively basic), increasingly, leading training organizations are adopting specialized IT lab platforms.
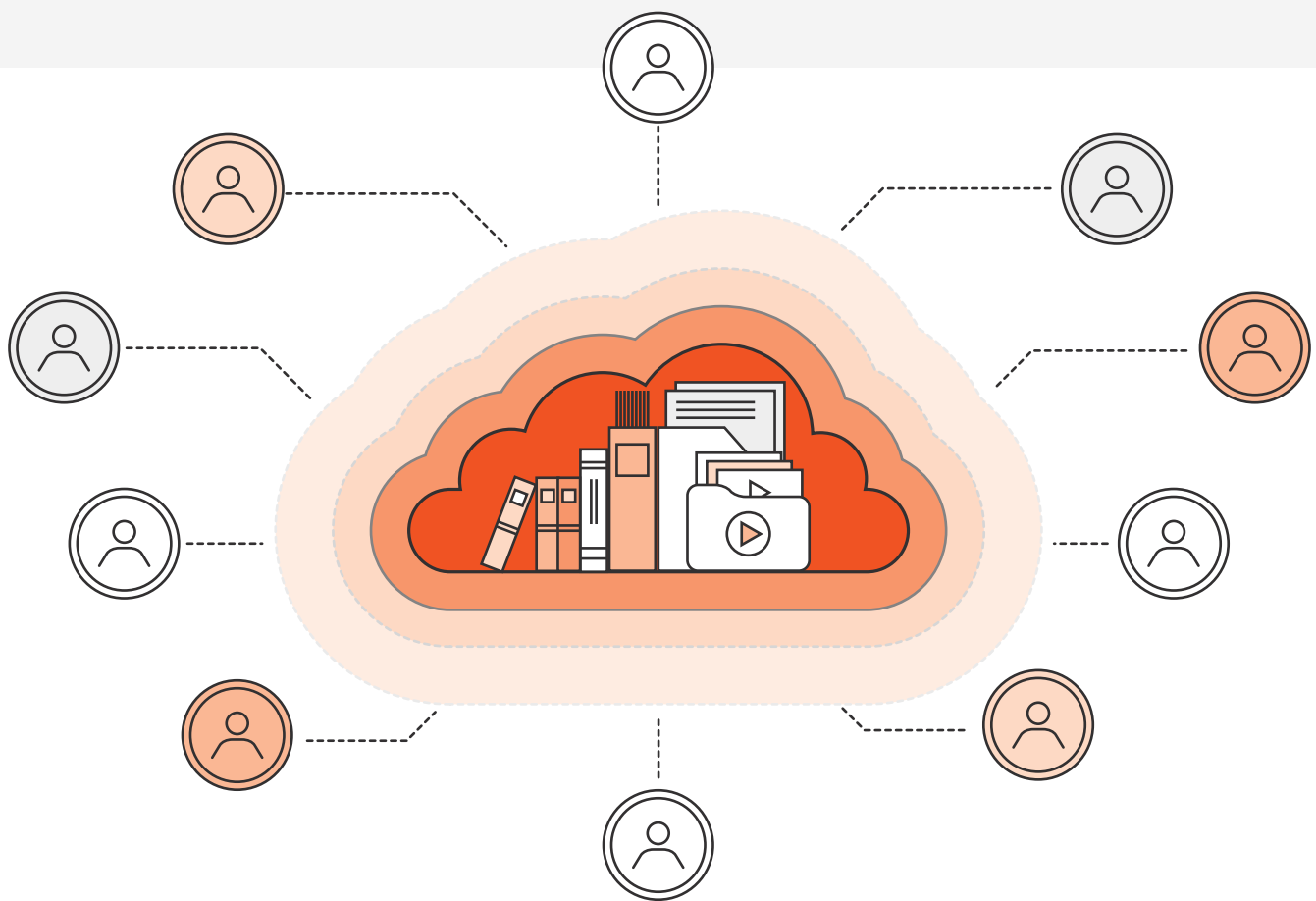
These platforms, such as CloudShare, offer numerous features designed specifically to meet the needs of training leaders, administrators, course developers, instructors and students:

Pre-configured best practice templates, allowing course developers to build their training environments quickly and without the need for IT intervention – a feature particularly important for organizations with plans to expand the range and diversity of their course offering

A fully cloud-based SaaS interface, enabling the development of lab environments with nothing more than an internet connection and a web browser

Support for training environments requiring complex networking

Efficient environment imaging, cloning and replication – simplifying the process of providing each student with an individual environment to use as their "playground" and making it easy for instructors and students to revert environments to a clean state

Administrative course management features such as automatic registration and student invitations/instructions
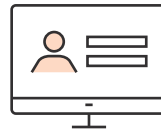
The ability for students to **log in to their lab environments from any modern web browser** without the need to download software clients or plug-ins
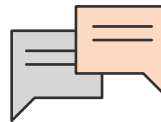
Advanced virtual classroom management features, giving instructors the tools they need to provide over-the-shoulder support and monitoring

Classroom chat feature, providing real-time student-teacher and peer interaction

CLOUDSHARE
Premium IT Training Lab Solution

CloudShare offers powerful tools and templates, along with advanced cloud-based resources and infrastructure to support the deployment and delivery of advanced IT training labs.

Buy now

Learn more

The company's premium training lab solution powers thousands of software training sessions each month, from large-scale events to impromptu meetups and online virtual classes.

CloudShare's advanced technology enables course developers and trainers to create and provision hands-on IT lab environments to multiple students anywhere – while eliminating IT infrastructure setup and cost overruns.
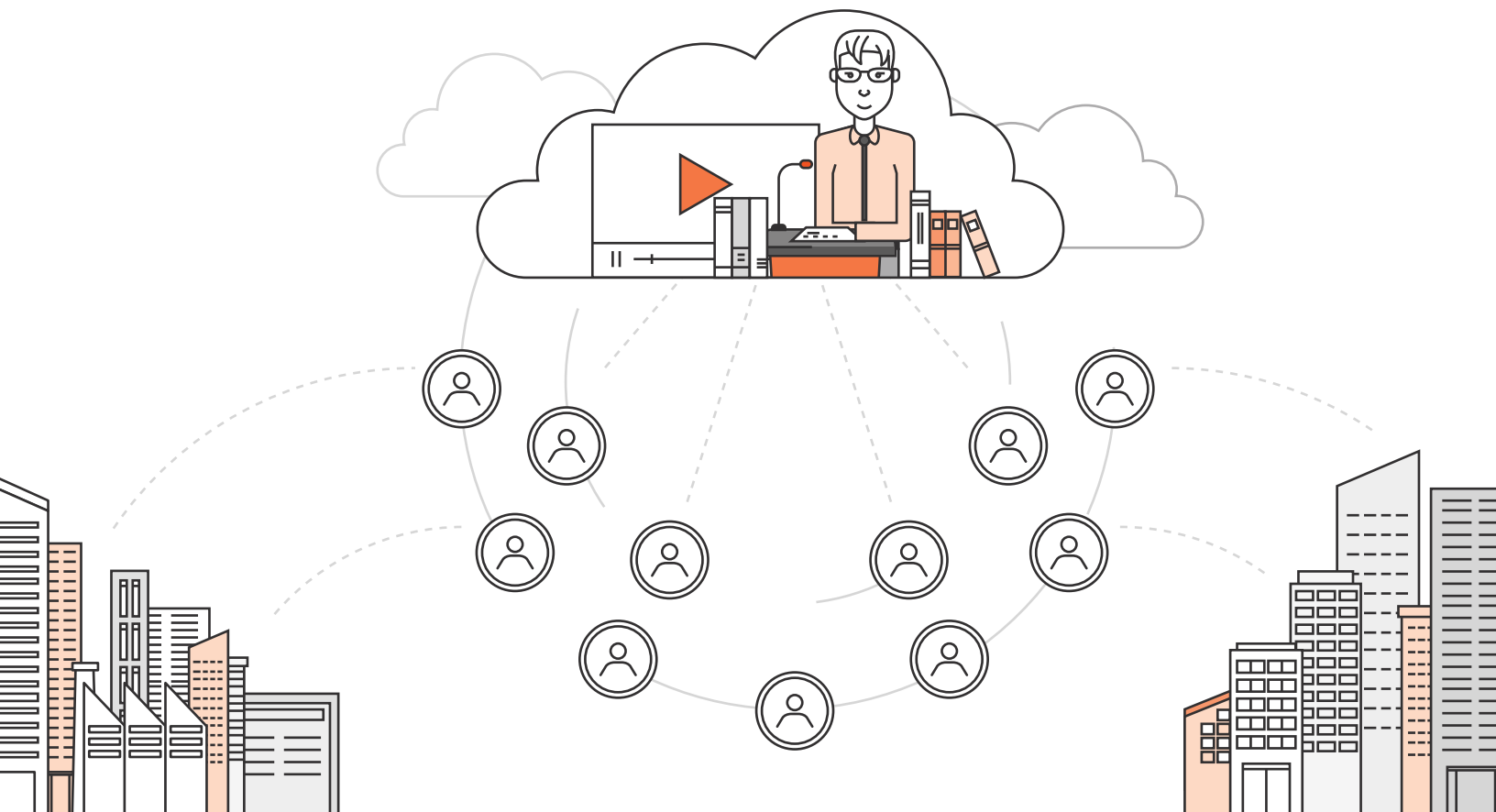
RESOURCES
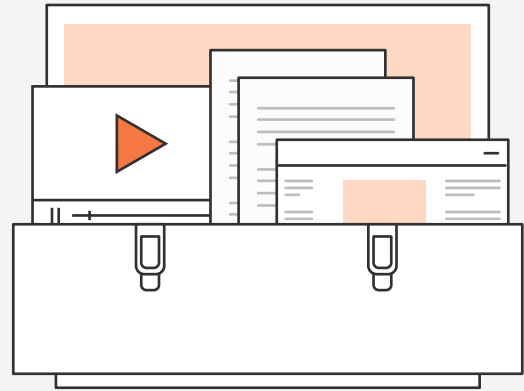
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