

How to Optimize Your Customer Software Training

51

Best Practices to Achieve New Levels of Performance



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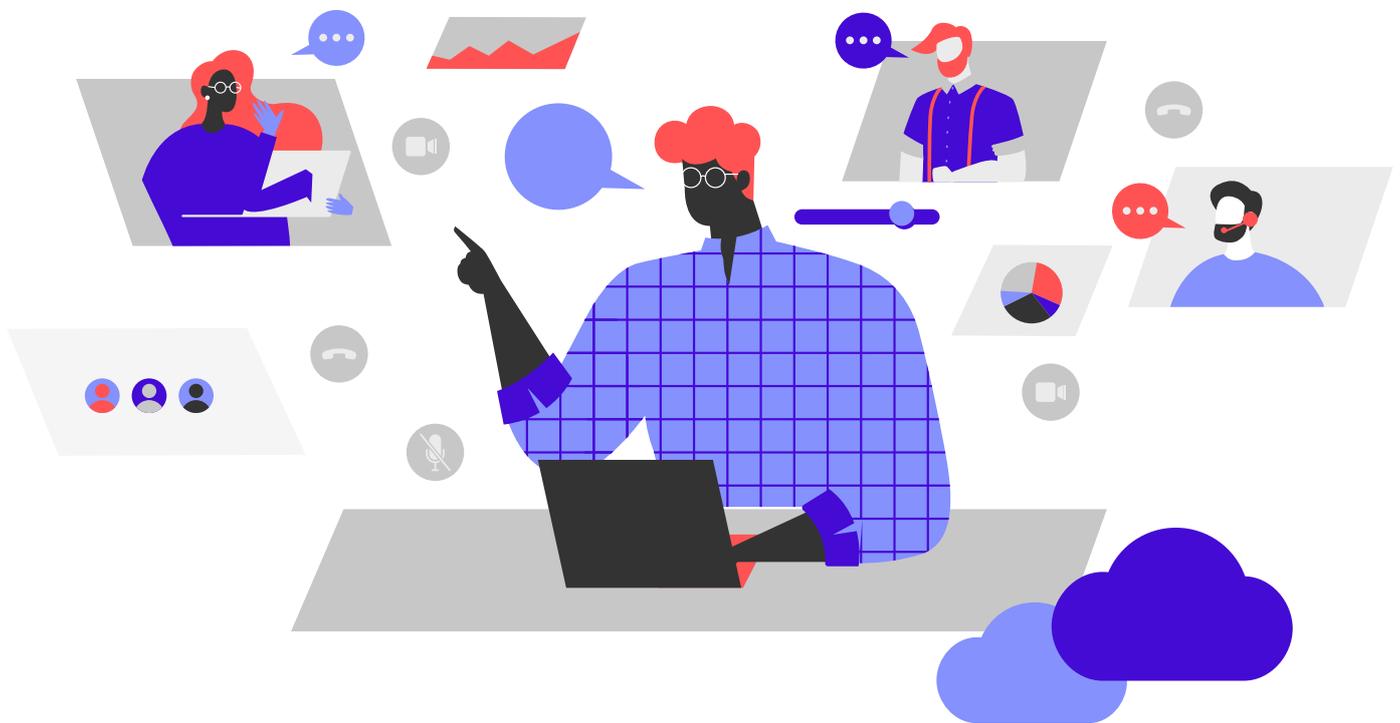
INTRODUCTION

Are you offering exceptional training experiences?

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 retention, and company growth.

Today customers expect more from training experiences than ever before. In an increasingly remote and hybrid workplace, offering flexibility for both customers and trainers is key. So too is delivering highly engaging, interactive, and personalized training programs that help customers get real-world value from your software.

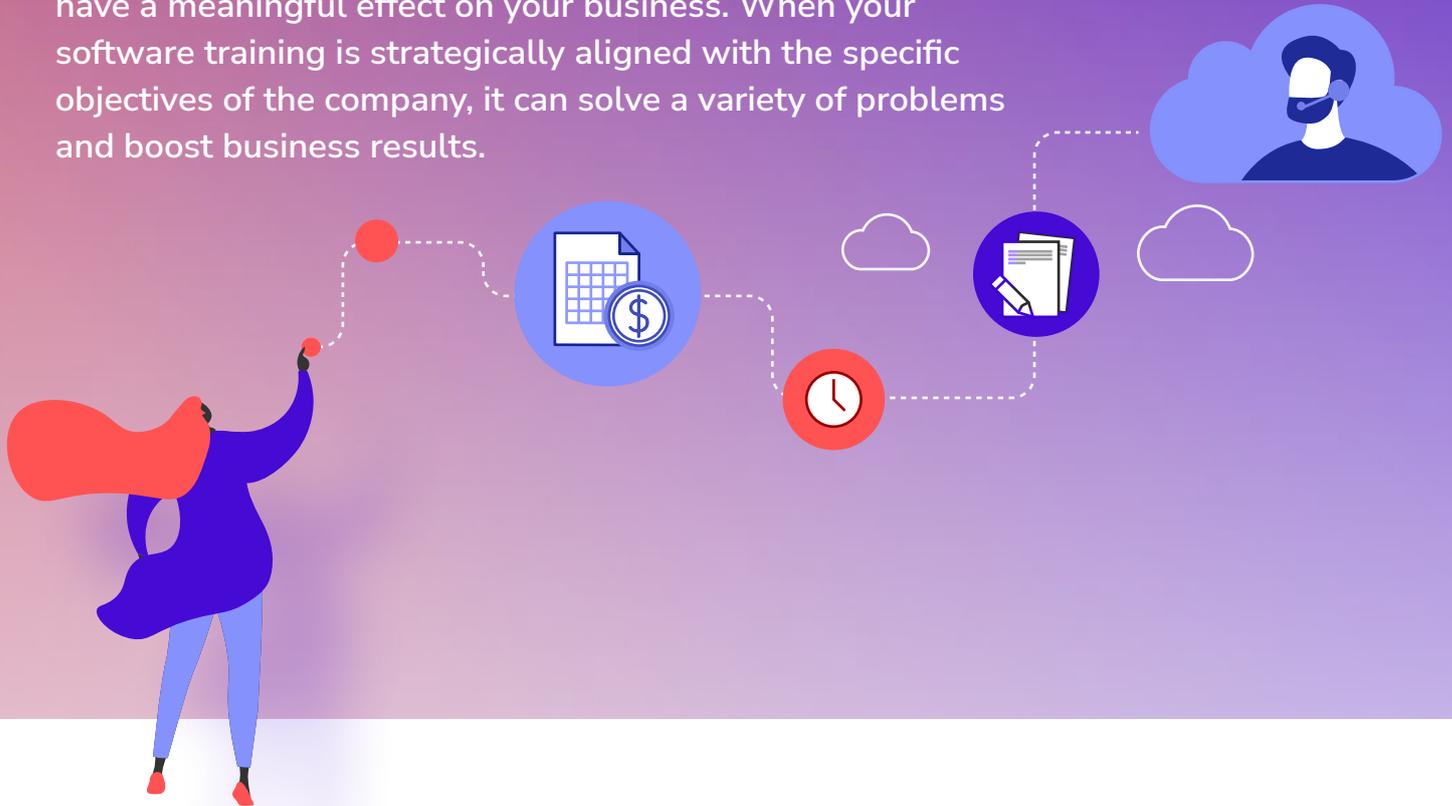
This eBook presents a plethora of best practices to deliver exceptional training experiences and improve training outcomes in a world of remote and hybrid working.



STRATEGY

What are you trying to accomplish?

Whether remote or in-person, 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 results.



1 Begin with the end in mind

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

- ⦿ Reduce customer support costs
- ⦿ Generate revenue

Steve Penfold, Customer Success Director at Elucida, offers these additional objectives¹:

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

What’s your destination?
Determine it before you begin your journey

2 Align with company strategists before designing solutions*

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?

* Calculating your training budget is another important early step.

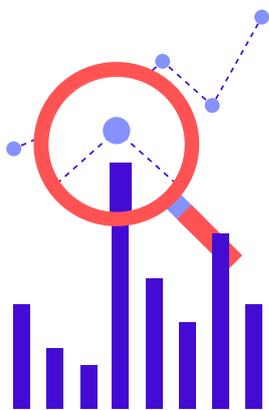
Learn how to plan your training budget.

[Download here >>](#)



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, customers with remote or hybrid setups will expect virtual instructor-led training and may find virtual hands-on training more valuable than pre-recorded webinars.

* What is Virtual Instructor-Led Training?

Virtual Instructor-Led Training (VILT) is a real-time interactive learning experience where participants and instructors engage in training remotely in a virtual training environment. For many businesses, virtual interactions have become the default way to interact with customers, as there are many benefits over traditional, in-person training. With functionality for hands-on virtual training and over-the-shoulder monitoring, VILT can create powerful collaborative learning experiences for everyone involved.

DIAGNOSTICS

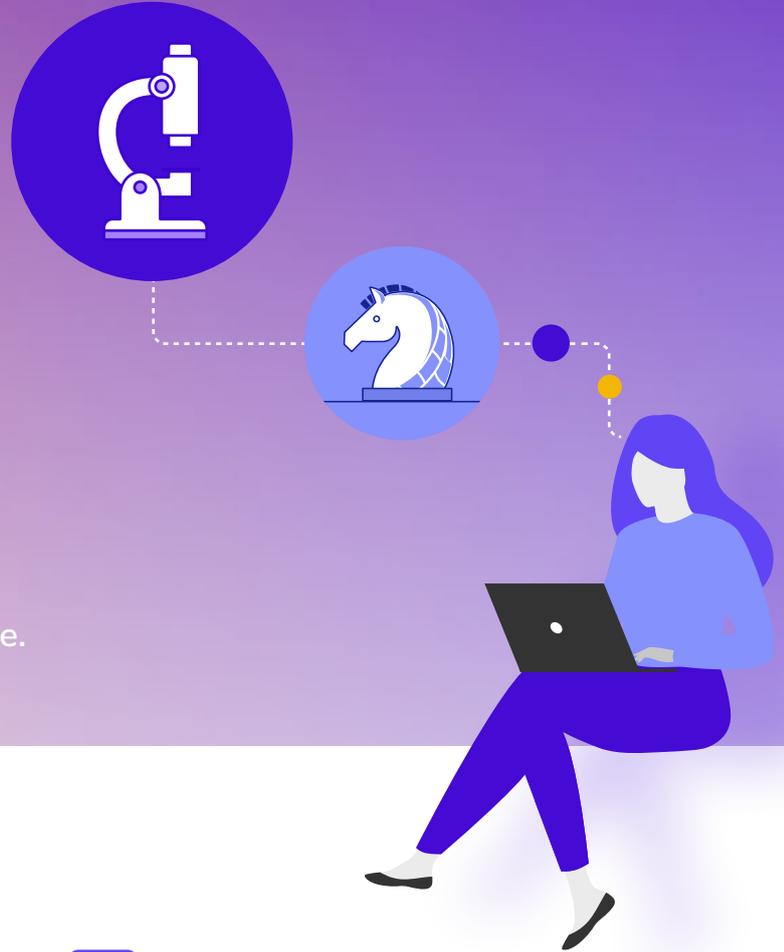
Do you know what's working?

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.

In the remote workplace, this is even more crucial, as unexpected challenges may arise.



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

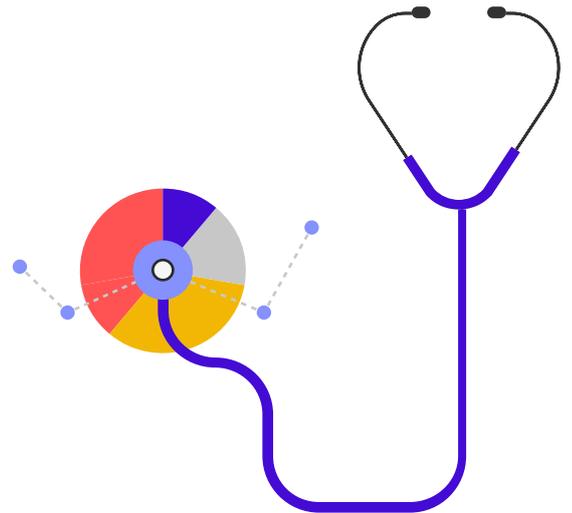
To fulfill the purpose of diagnostics you must apply the lessons learned from your customers to your content development. It's vital to establish a consistent flow of information from the customer, to the software training leadership team, and finally, to the content development team.

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.

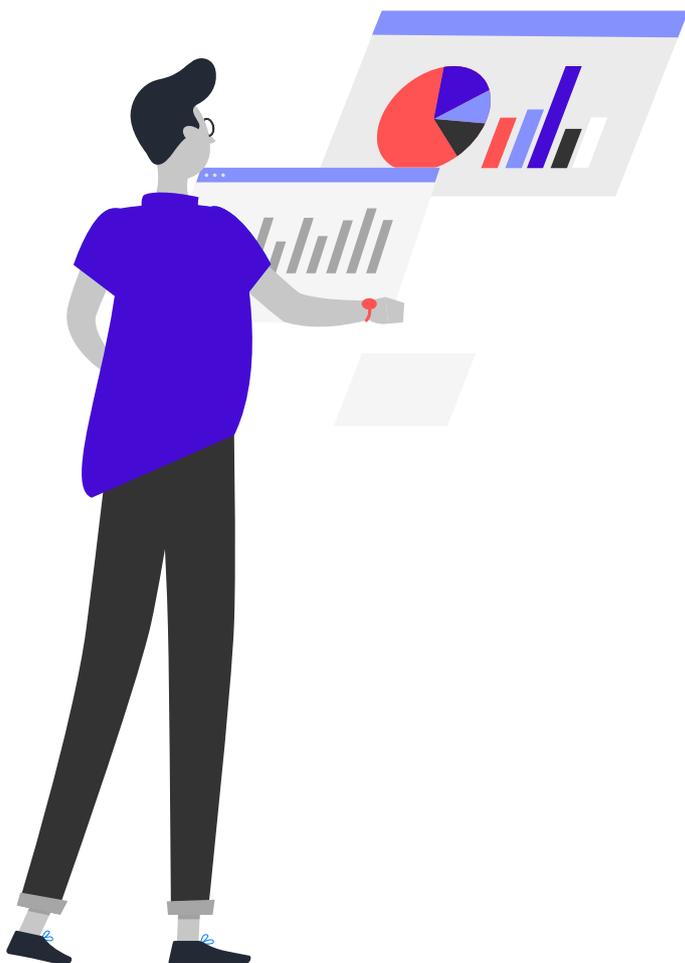
Keep records for yourself and your successors, including results from previous training programs. The data could save the company a lot of money in the future when new staff members face similar problems.

Advanced analytics can help to monitor training efficacy. Some next-generation customer training platforms have data analytics built in, so that you can directly see how effective your training programs are.

Looking for new ways to analyze your class performance?

Learn how to leverage real-time insights to improve virtual training & sales results immediately.

[Show me how >>](#)



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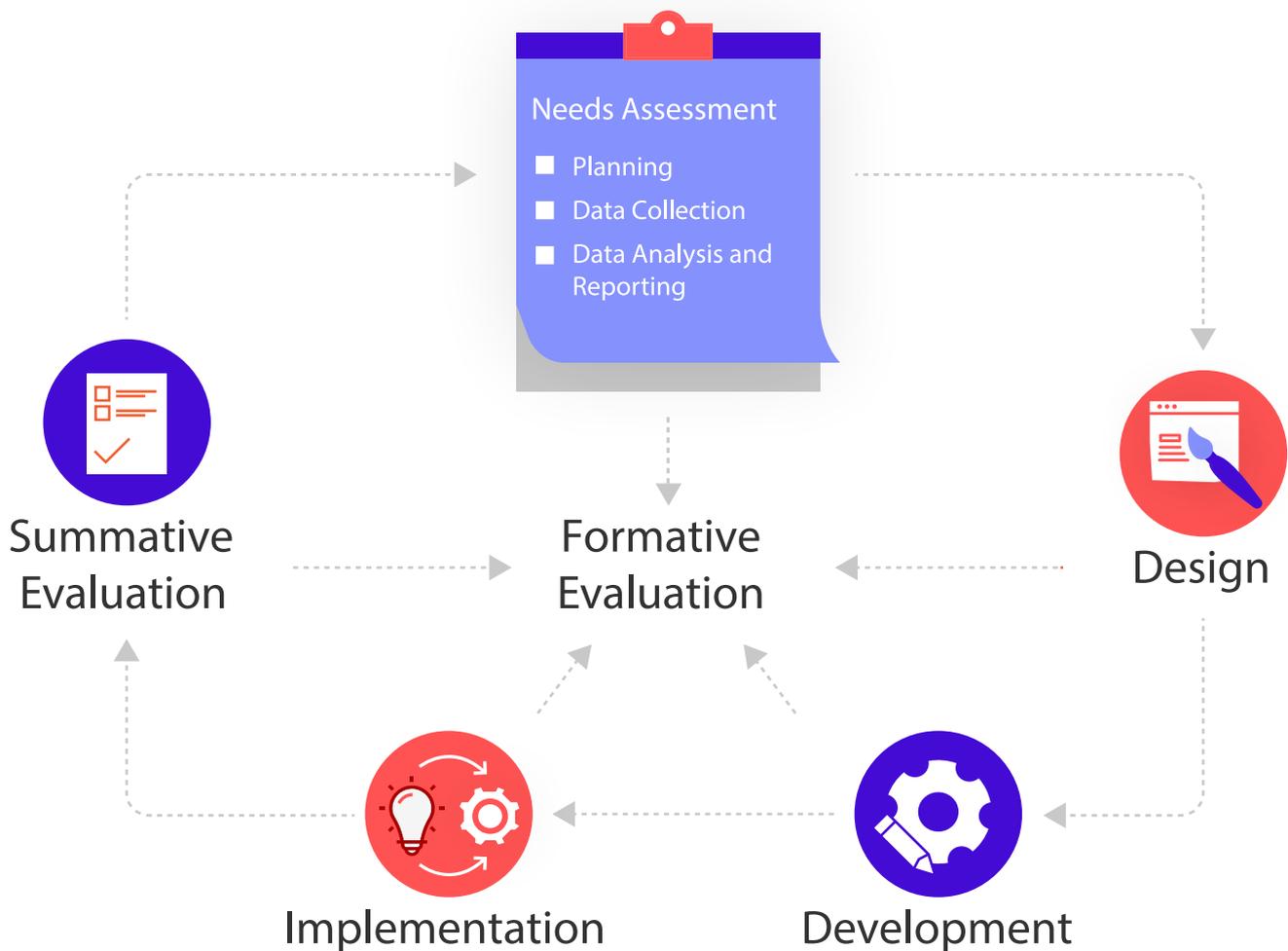
Forge a structured approach to analysis

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 programs².



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

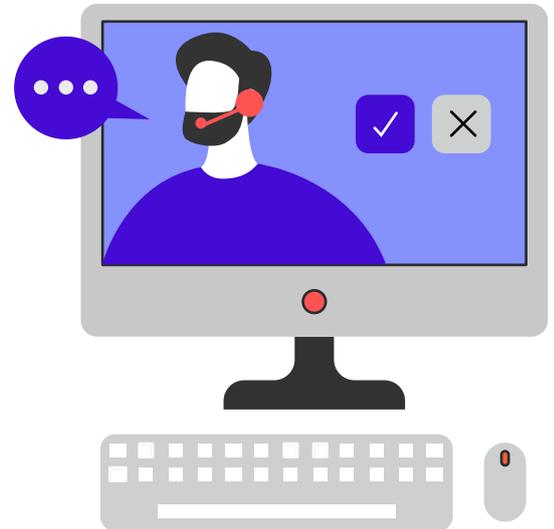
14 Focus on job relevancy and context

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 so 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 students 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

Want to learn more about the differences between Hybrid Learning and Blended Learning?

[Read more here >>](#)



19 Include post-training activities for reinforcement

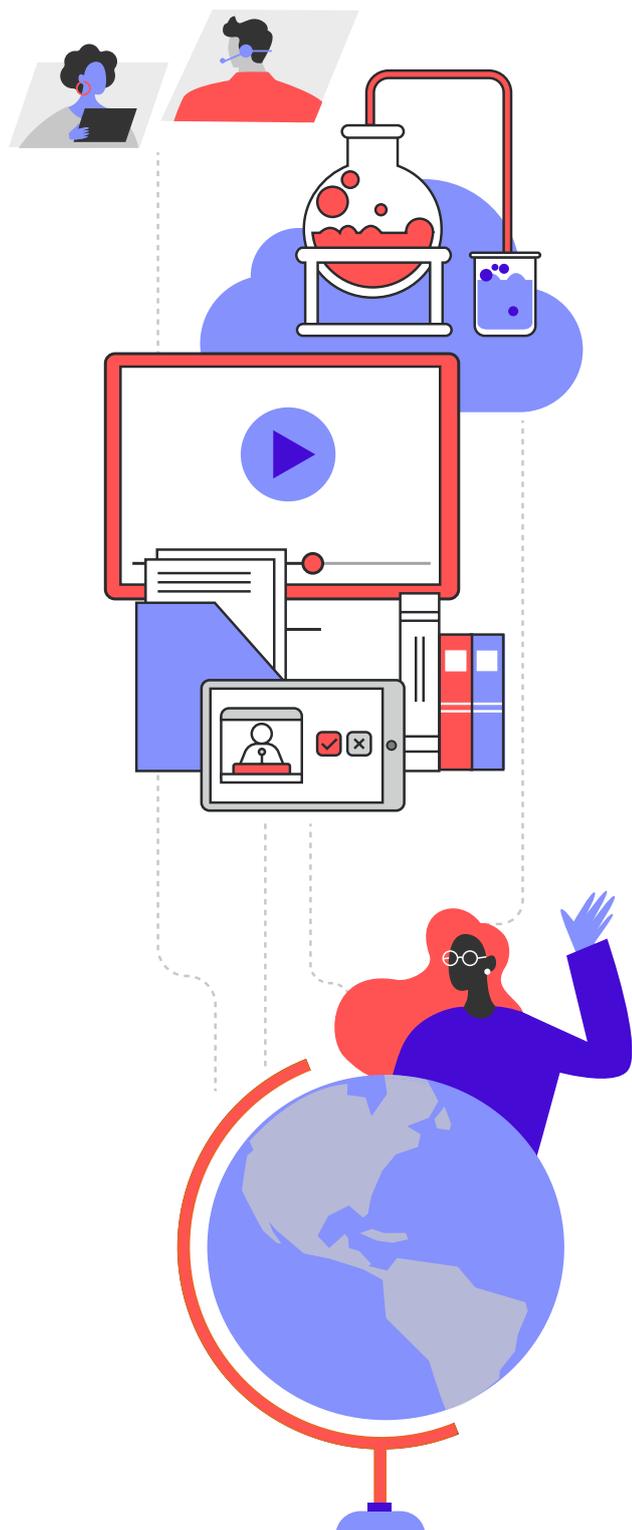
You can improve your software training and your students' subsequent performance by developing post-training activities to reinforce the lessons. Post-training activities (such as quizzes, hands-on group projects and lab-based exercises) help ensure trainees don't leave the knowledge behind and are better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

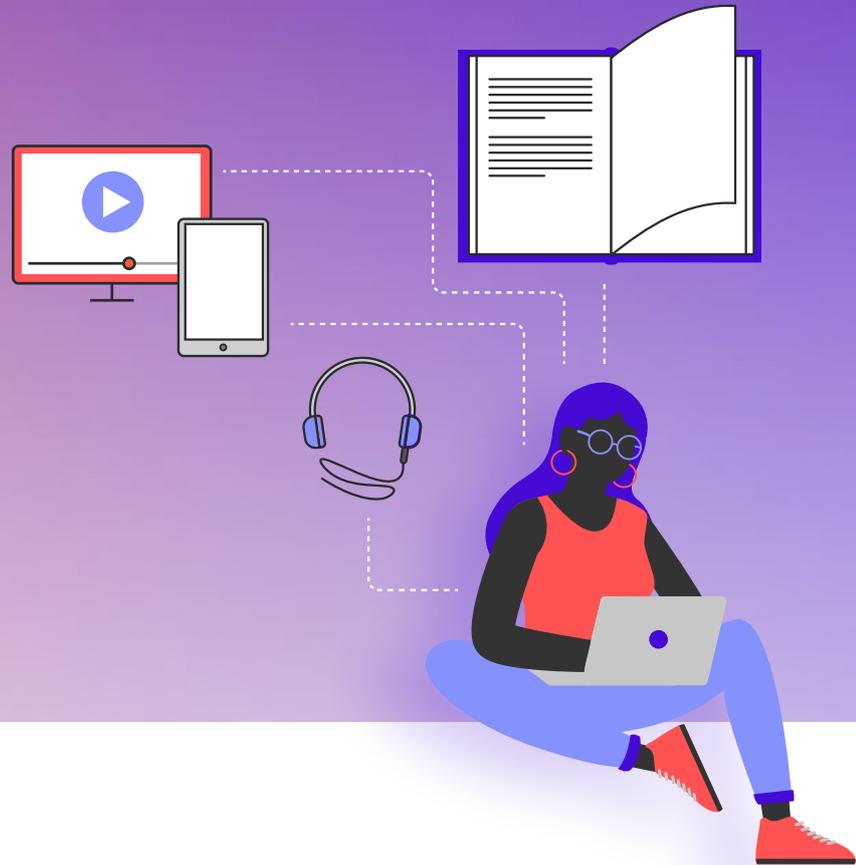
Using innovative technologies, such as cloud-based labs, mobile technologies and devices, informal learning tools, and communities of practice often creates a learning environment that helps engage students. As such, the content is more interesting and the student focus increases, making the knowledge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



TRAINING EXPERIENCES

Are your customers engaged in your training programs?

At the training delivery stage, success is all about delivering exceptional experiences. If you fail to fully engage participants in your training programs, all efforts up to this point will be in vain. Training delivery encompasses how training is actually conveyed, distributed, and accessed. In a remote and hybrid world, this is most likely to take place in a virtual setting.



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:

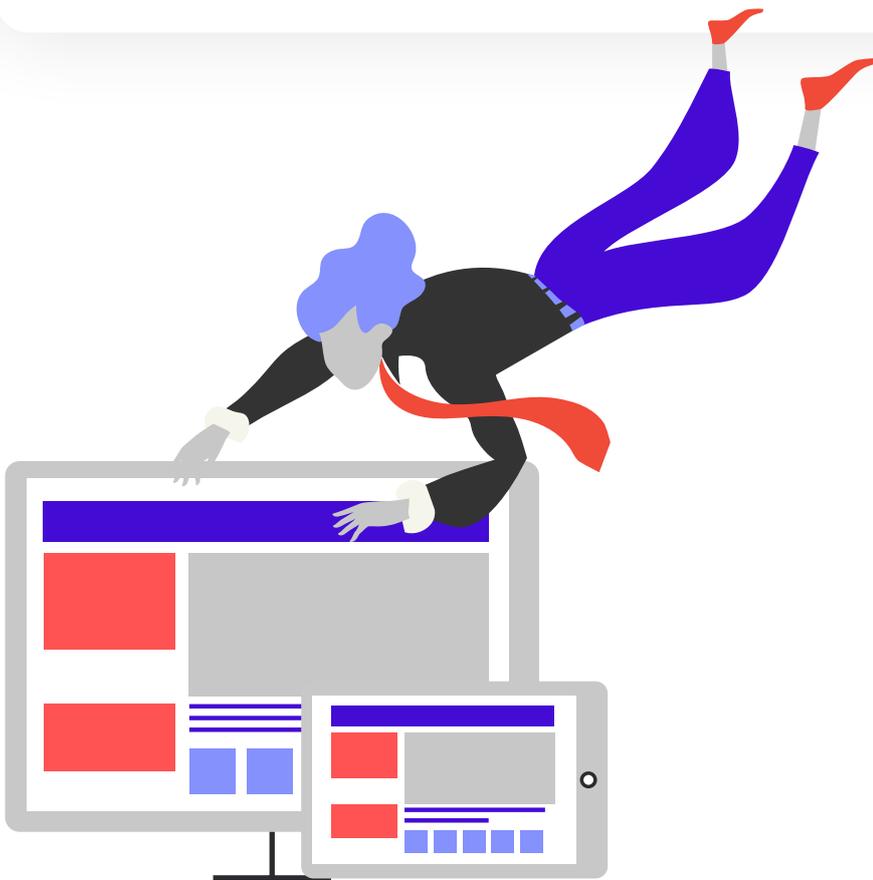
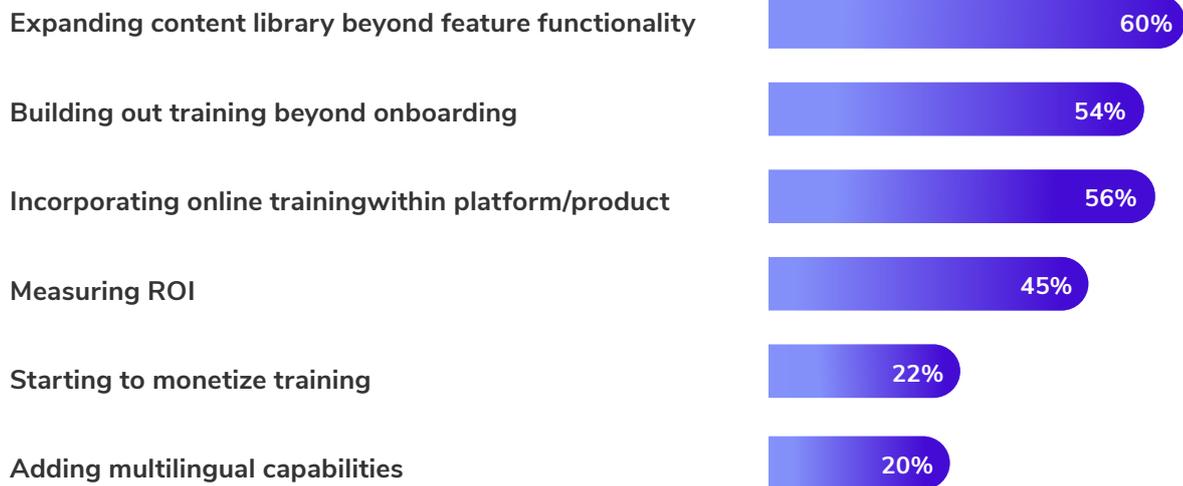
- ⦿ Classroom training with instructor
- ⦿ E-learning facilitated**
- ⦿ E-learning, self-paced
- ⦿ One-on-one tutorial
- ⦿ Lecture/demonstration
- ⦿ Self-paced learning, non-electronic
- ⦿ Blended learning³.
- ⦿ Virtual hands-on training

* Discover the software training technology trends you need to know.

[Download The State of Training Technology Today >>](#)

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

The 2021 State of Customer Education report by Thought Industries indicates the priorities organizations are setting for customer training.



23 Embrace virtual training technologies

E-learning and virtual training is now an unavoidable aspect of training delivery. Without it, you will not only be unable to reach all your customers, but you will be failing to deliver the level of training experiences that modern business users expect.

This can include VILT, self-paced hands-on training, micro-learning, in-app video, mobile learning and much more. There is no shortage of innovative technology out there to deliver engaging online training experiences. Crucially, you must find one that is right for your training objectives.

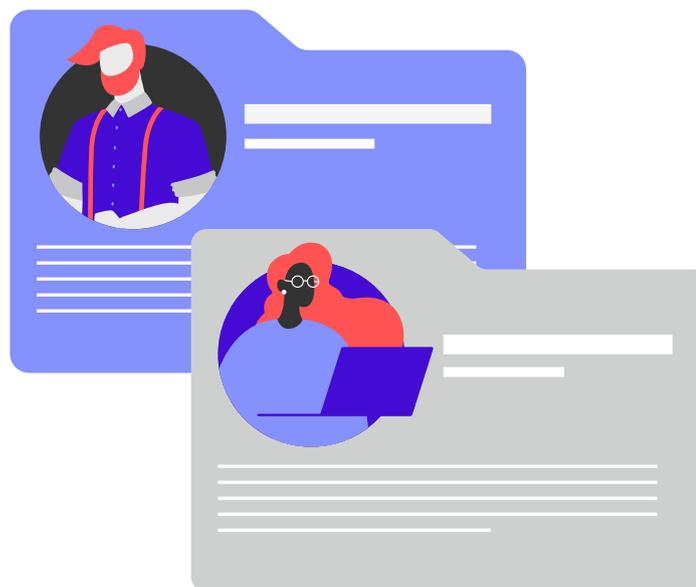
Delivering a range of different virtual training options, such as offering both VILT and self-paced training, gives learners the option to learn in the way that suits them best.

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 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.



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 everchanging 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 students⁵



Being tidy and having a good appearance



Being influential while being respectful

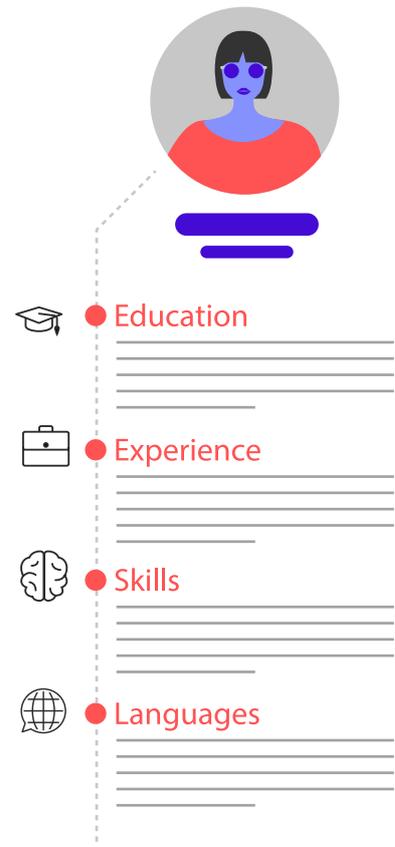
Finally, don't underestimate the importance of likeability. Delivery is far more effective when students like the instructor.

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.



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 Remote admin tools for remote training

Optimizing training experiences for remote and hybrid workplaces is as important for administration roles as it is for customers and instructors. Look for ways to make life as easy as possible for your own admin staff. Consider technology that is not only quick and easy to use but integrates with other IT systems.

Here are 5 Reasons To Integrate Your Customer Training Data With Your CRM.

[Learn more >>](#)

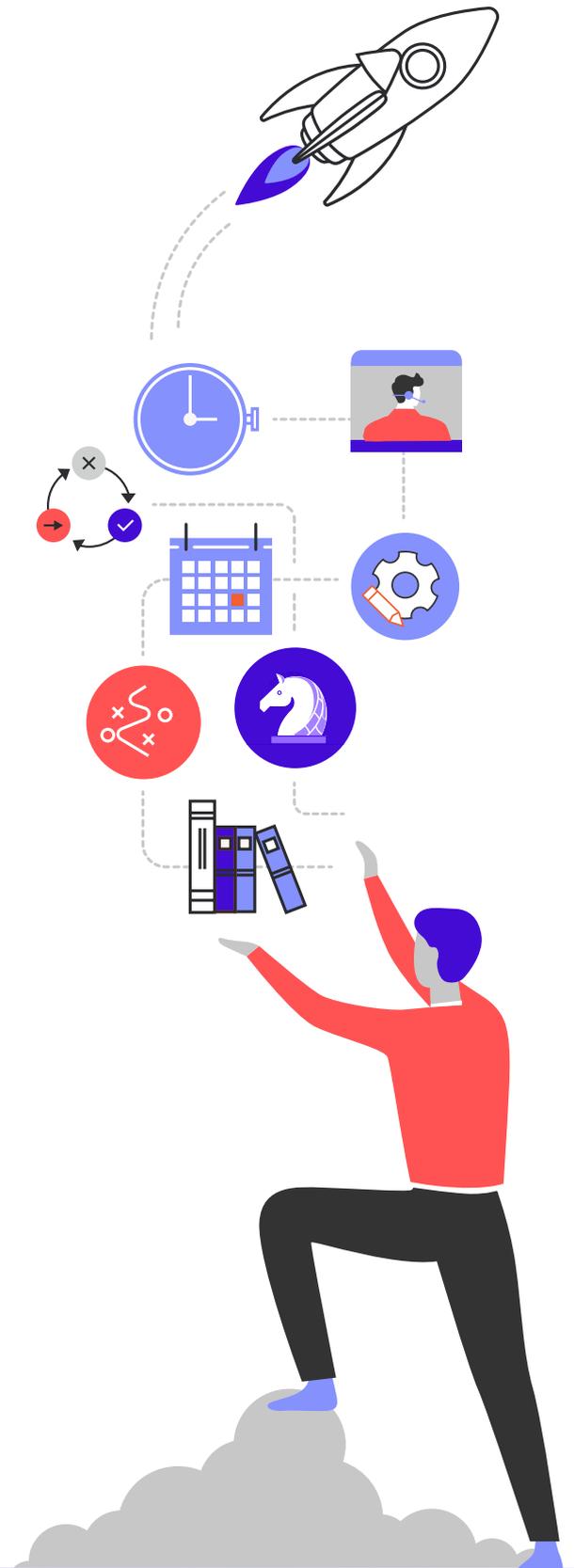
33 Make enrollment efficient

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.

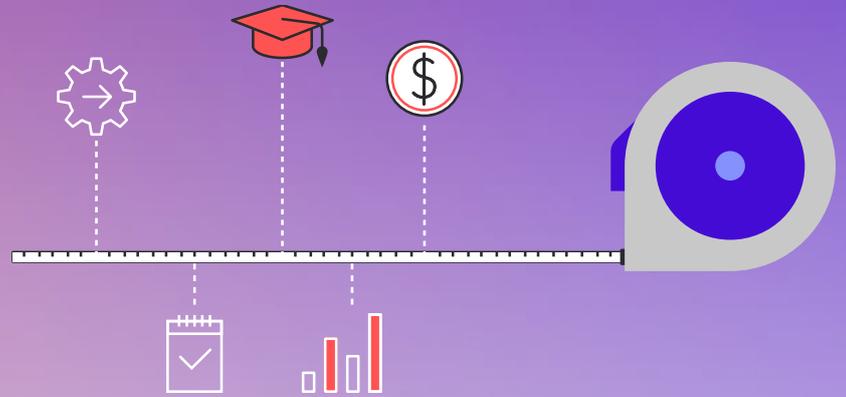
Moreover, high-performing training organizations are able to effectively integrate the capabilities of external suppliers with each other and with their own internal capabilities. Strive to utilize technology to its fullest advantage (for example, by using APIs and automated integrated workflows) to 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 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' performance⁶

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.

39 Focus on the details

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.

38 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 cost of producing, administering, and delivering the training content, as well as ancillary expenses, such as travel when applicable. The move to virtual training platforms has the added value of removing costs associated with travel and booking physical space. Some training platforms will offer analytics to help monitor costs.

4 Checklists to Assess Your Software Training Platform ROI

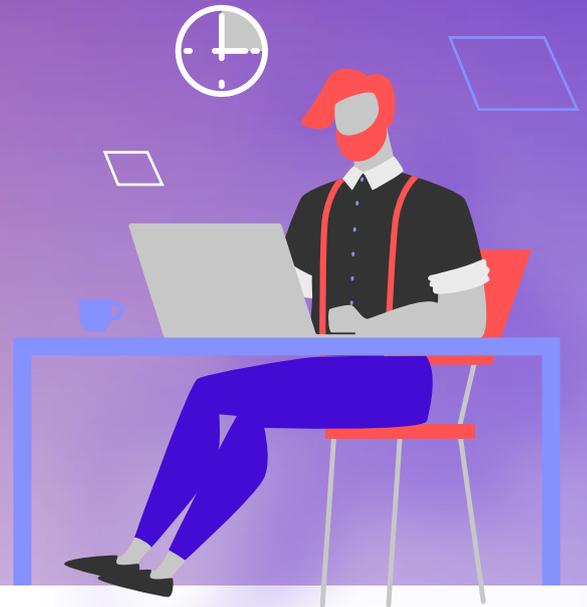
You cannot afford to run your software training program without measuring ROI

[Download checklists now](#)

PORTFOLIO MANAGEMENT

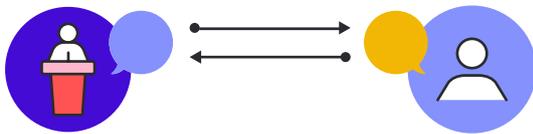
How well are your programs managed?

Portfolio management is an important component of managing customer training programs to ensure a diverse mix of engaging content and training modalities. The ability to manage large portfolios of learning content is also instrumental in reducing costs, ensuring proper program positioning, and delivering exceptional experiences for remote learners.



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



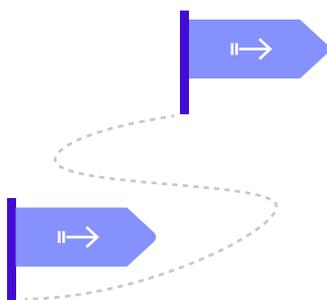
Performance support and context-driven learning



Online communities and content hubs



Hands-on training



43 Organize content as pathways

Work to ensure your software training is relevant to your students' needs by organizing courses in a recommended order.



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 getting the most out of remote training technology?

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.

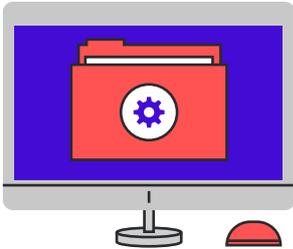
46 Remove geographical concerns

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.

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:



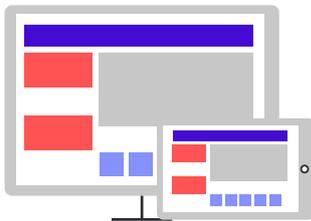
Administrative platform

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.



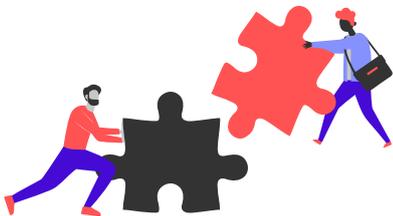
Authoring platform

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.

Did you know using multi-instructors can raise student attendance in VILT by 53%?

[Read more in this 2022 user trends report >>](#)

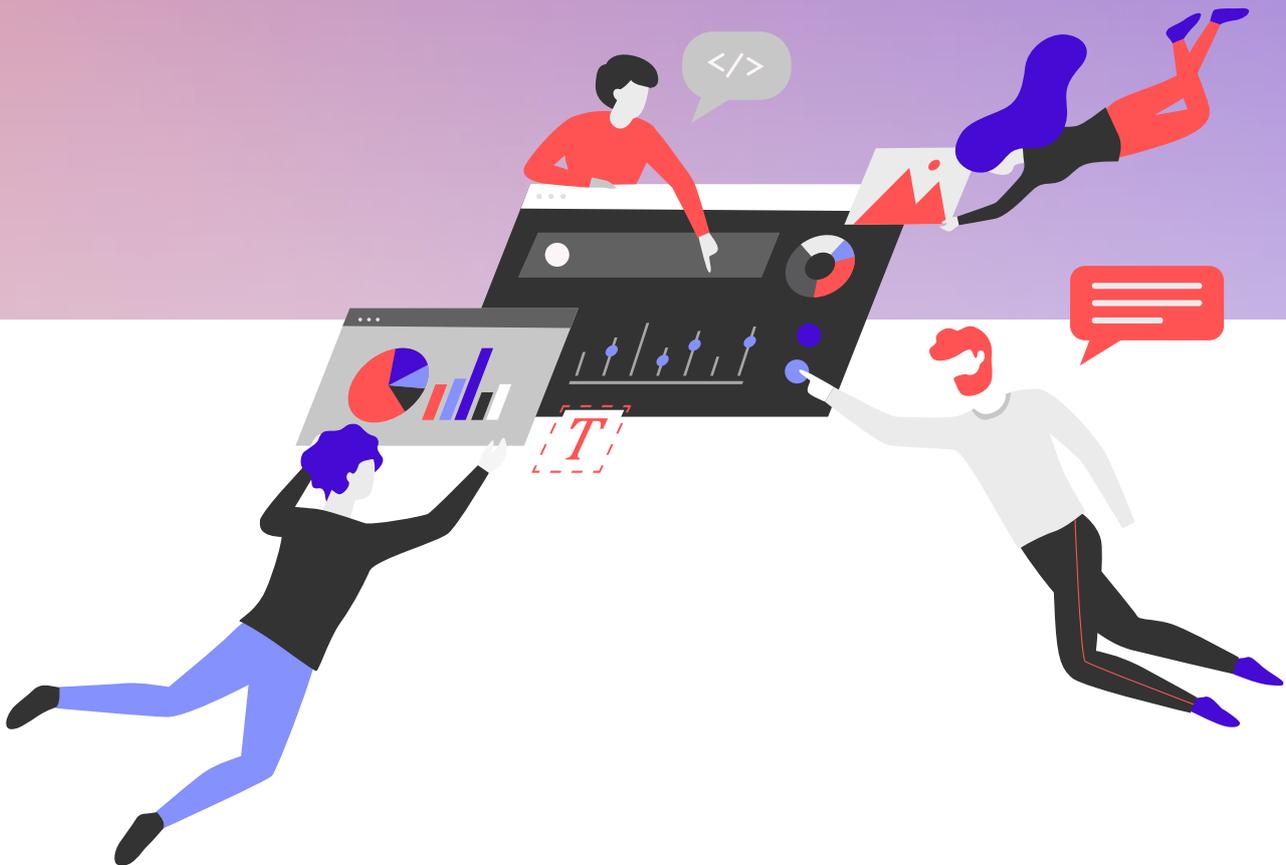
VIRTUAL TRAINING

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



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



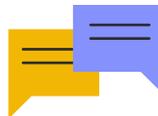
A fully cloud-based SaaS interface, enabling the development of lab environments with nothing more than an internet connection and a web browser



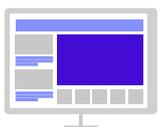
Advanced virtual classroom management features, giving instructors the tools they need to provide over-the-shoulder support and monitoring



Support for training environments requiring complex networking



Training interactions including in-app video and audio, over-the-shoulder functionality, and classroom chat provide real-time student-teacher and peer interaction.



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 requiring complex networking



Real-time analytics and dashboards to provide insights on trainee engagement. Make data-driven decisions on how to optimize training programs and experiences.



Virtual hands-on training gives trainees first-hand experience of using your software in safe, sandbox environments. When students “learn by doing” in real-world scenarios, they actively engage in learning and retain knowledge more effectively.

CLOUDSHARE

The new standard for virtual training

Discover the power of virtual training experiences with CloudShare. Drive user engagement through collaboration and first-hand experimentation with your software. Spin up realistic simulations of complex environments in minutes, so that participants can learn in real-world scenarios.

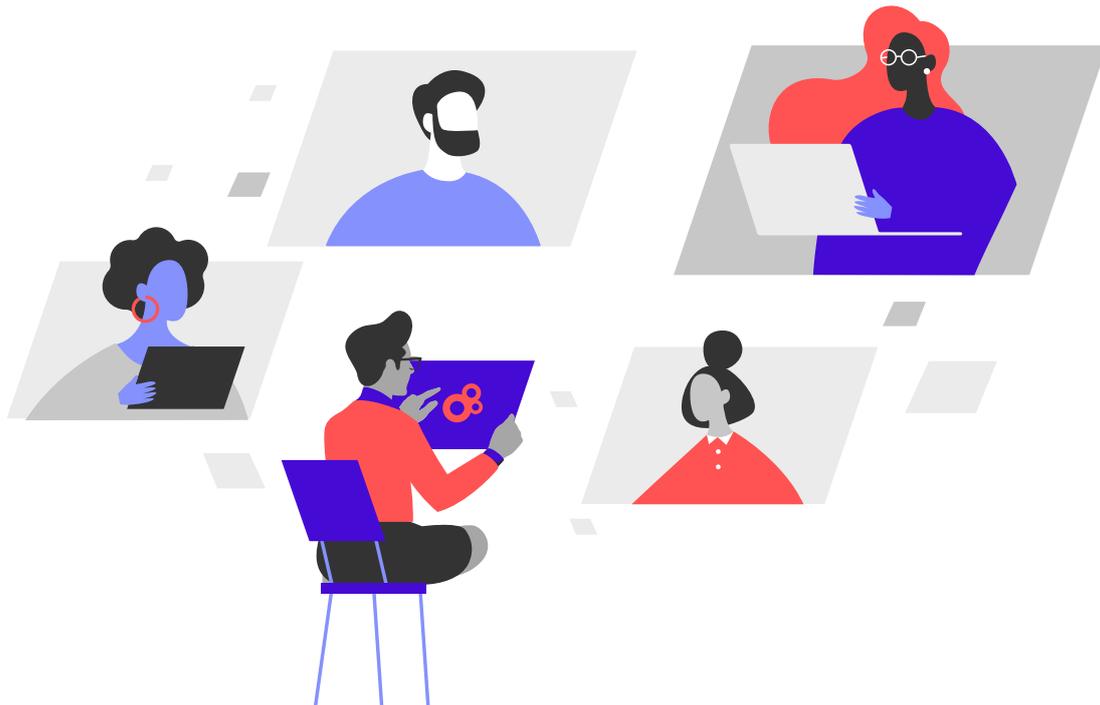
[Book a Demo](#)

[Learn more](#)

CloudShare is an enterprise-grade solution for all your virtual training needs. Flexible training options and purpose-built to drive user engagement, it provides all the tools to transform passive learning into active practice. With simple pricing plans (including automated cost control) and reliable ongoing support, it couldn't be easier to improve virtual training outcomes.

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.



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