

THE **2021** PLAYBOOK

**5 Steps To Achieve
The Highest Possible
Software Training
Results**

CloudShare.

Going virtual was only the first step.
Now it's time to up your game.

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According to a
Gallup report,

60%

of B2B
customers are
indifferent

11%

are actively
disengaged,

while only
29%

are fully engaged.

“

*This failure to engage
customers means that
B2B companies will
fail to create organic
growth, that is, get
more business from
existing accounts”*

“B2B Customers are Indifferent”

Gallup

Introduction

Did the game change, or is customer training the game-changer?

The answer is clearly: both.

Yes, the game has changed. Because most software is now sold as a cloud-based subscription service (SaaS), the industry has undergone a massive evolution in how it handles marketing, sales, and customer service (and far more). On the buyer's side, while it's less risky to become a customer, it's easier than ever to jump to a competing product and thereby become an ex-customer.



Retention is the name of the game, which is why customer training is indeed in the spotlight as a game-changer in the software industry. First and foremost, consider the initial, tone-setting customer experience once a product is acquired: the onboarding process. The largest predictor of customer churn in the SaaS business is, of course, poor onboarding.

But let's flip the coin and look at the challenge in a positive light.





A study by Forrester Consulting published in late 2019 found that 90% of companies have seen positive returns on their investment in customer education. They go on to report that, on average, formalized customer education programs drive a 6.2% increase in organizational bottom-line revenue, a 7.4% increase in customer retention, and a 6.1% decrease in support costs.

Those are what you call game-changing numbers.

We're not going to tell you it's easy to develop your customer software training into the growth engine you'd like it to be. Our hope is that the guide you're reading now—which breaks the process down into a series of concrete, specific steps—provides the practical advice you need to get started and/or to refine your mission-critical customer software training programs.



Step

1

**Define your
objectives
and metrics**

There's no way around it: You're going to need significant resources to launch and maintain an effective software training program.

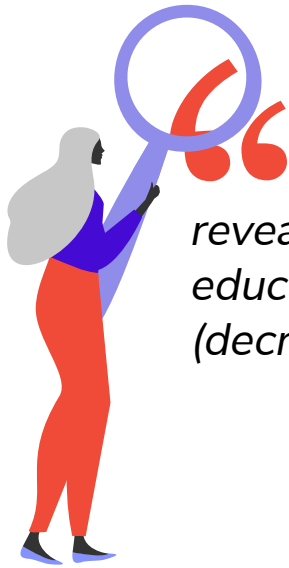
Of course, to get them, you'll need the support of your company's leaders. Their questions aren't likely to be complicated. They'll want to know (justifiably!) what the costs and rewards will be. Put simply, you'll need to shed light on the investment and return, or ROI.

So, as in the case with most programs, the first step in creating an impactful software training program for your customers is establishing definitive, measurable objectives. To get started, ask yourself the following questions:

What business objectives do you aim to achieve with software training?

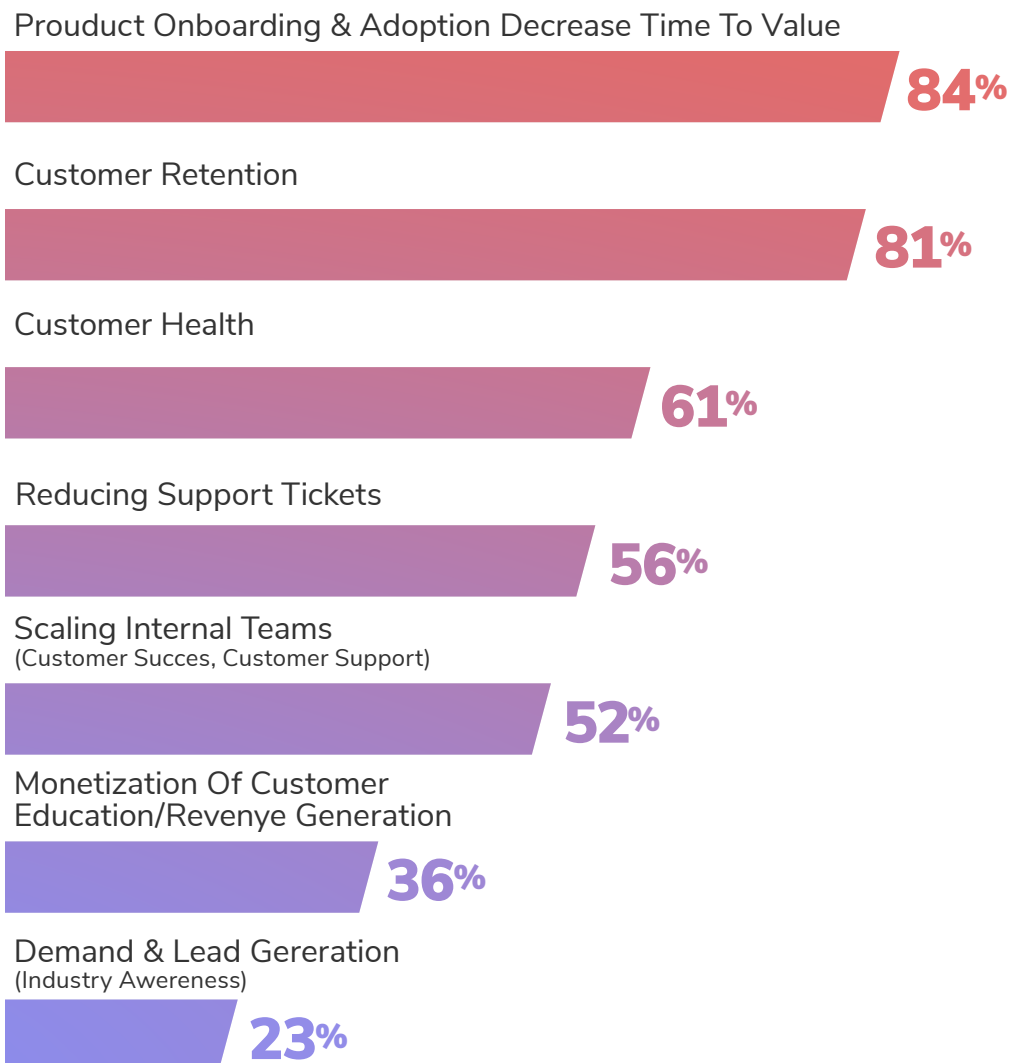
- Create a revenue stream?
- Reduce support costs?
- Increase adoption?
- Lower churn?
- Promote sales of supplementary or new products?
- All of the above?





Data from Skilljar's 2020 Customer Education Benchmarks and Trends Report reveals the top two driving forces behind external education programs are product onboarding (decrease time to value) and customer retention.

What metrics will you use to evaluate the success of each separate goal of your customer training program?





Step

2

Define Customer Success

Your customer invested in your software to overcome a critical business challenge, or to address multiple challenges; helping your customer do so is the ultimate goal of your customer software training program and the simplest definition of success.

Learning objectives

Create a list of learning objectives before you begin creating your software training.

Learning objectives are the activities and tasks your customers will be able to successfully complete as a result of their training.

Take CloudShare, for example. Most of our customers invest in our platform to:



As such, our objectives are both to ensure our clients succeed at delivering outstanding virtual training, and to streamline the processes required to accelerate software sales.

How does your company define customer success?

Answering the question in the form of a clear definition will affect every subsequent step of the process. Consider these questions:

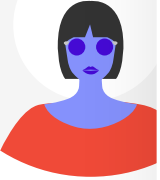
- What are your customers trying to achieve?
- Do their goals vary, based on different segments or demographics?
- How does your software align with your client's goals?
- How do they measure success? Specifically, what metrics do they use to measure success with your software?



Additionally, ask these questions about your customers as it applies to various milestones in their journeys. You need to understand your customer's needs at all stages and continuously monitor their progress. As their goals evolve, you need to ensure your software training programs evolve in parallel to continue to help meet them.

Personas

You'll find it's enormously valuable to segment your audience by personas to accurately evaluate what specific customers need to learn. Consider the following:

- 
- **Where is the customer in the lifecycle? Are they prospects? New customers? Existing customers?**

Each has a different need and level of experience to address.


- **Will specific features of your product help each persona or category succeed?**

- **What unique challenges does each face?**

This is hard to determine on a case-by-case basis, but you can certainly create well-defined categories.

- **Are they basic users, super users, administrators, developers, or managers?**

- **Where might they struggle?**



A solid strategy is to ask your support teams to share the questions customers ask with one another as well as with the sales team.

The background of the slide is a collage of various colored sticky notes (purple, blue, pink, orange) with handwritten text in different colors. One prominent note in the center-right says "Change during" in purple cursive. Another note in the bottom right corner has "Just a" and "with" written in red. The overall aesthetic is creative and collaborative.

Step 3

Develop your training

Begin with a development plan

Once you have a firm understanding of precisely what defines customer success, you should be prepared to create a formal training plan. As you do so, consider each of the following considerations:

Selecting the ideal instructors who incorporate both knowledge and engaging teaching skills

- Aligning the content to accomplish all important learning outcomes
- Assess the time you'll need to develop the content
- Possibilities for repurposing existing relevant content
- The specific technical tools you'll require
- Who will be responsible for creating and approving the content
- Content development budget requirements
- How often, and by whom, your content will be updated
- How results will be measured and reported
- Presenting your plan to executive stakeholders for buy-in

TIPS

How To Increase Customer Engagement?

#1

Enroll students immediately

The goal is to speed the time to adoption and value. Make it clear how to begin learning via your software training programs as soon as possible. You might even offer some “sneak peek” training programs to prospects.

#2

Offer a certificate program

You might call it a “university,” “school,” “academy,” or the like. In any case, the program will feature largely pre-packaged courses, probably self-paced; Cover a variety of topics in some depth, and conclude with an exam and certification.



Identify the best formats

What forms will your training take? It's time to examine your needs and make decisions regarding the training content you'll require. Consider the following:

- Which formats will be the most engaging? Most flexible? Most effective? Most scalable?
- Will you offer blended learning experiences with Instructor-Led Training (ILT) or Virtual Instructor-Led Training (VILT)?
- Will these be one-way, webinar-like courses or will you require virtual environments to enable hands-on learning?
- Should the training (or parts of it) be delivered as self-paced courses?
- Is the training continuous or linear?
- How much time will learners need to consume it?
- Will you offer a variety of content formats to accommodate learners with distinct preferences?



#3

Gamify

The gamified learning experience introduces elements of fun and competitiveness that tend to motivate participants and improve retention of the material.

#4

Host webinars

Consider various ways you can deliver training via webinars, be they one-to-many, or one-to-one online meetings. In some cases, your webinars might be ideal for demonstrating product features and answering customer questions. Of course, you can record webinars and make them available on-demand.

#5

Personalize the training

One-size-fits-all training may not appeal to some of your customers. Personalize your training by persona, use case, plans, features, or whatever variables make sense for your company and clientele. The extra time and effort in creating relevancy will likely be justified by much better engagement.

#6

Get real

Try to excite and engage learners with real-world examples that feel close to

Create training content

After examining the considerations above (and getting buy-in), you should be ready to create the learning experiences that best serve your software customers' needs. The final steps to building your training program are:

- Determine how to organize your content in a logical, progressive manner
- Create outlines, scripts, and prepare whatever visuals are needed.
- Decide how you'll deliver the content displayed. What training platforms will you need, and what features are must-have vs. nice-to-have
- Develop tools and tactics to drive engagement and motivate learners, such as scoring, gamification, certifications, etc.
- Test the learning experience and your content to confirm you've designed it correctly



home. You might include case studies with actual results that help customers better “see” the value of your platform.

#7

Create product tours

A broad, initial product tour is a wise option to enable new customers to learn how to use your software on their own time, and discover the breadth of its feature set. Product tours can take various forms including slides, eBooks, videos, web pages, or a combination. Your product tour, or a version of it, may double as an impactful sales tool.

#8

Interactive

Want to get even more real? If yours is a complex product, virtual instructor-led training (VILT) is the ultimate weapon for increasing engagement. Bringing a virtual environment to your training enables learners to interact better with the instructor, each other, and above all, the software.

#9

Train continuously

Offer customers continuous training to cover new feature releases, use cases, best practices, and more. Consider creating structured learning paths to guide learners continuously forward.



Step

4

Train The Trainers

Do you have a strategy in place to ensure your trainers are prepared to succeed?

First things first - What do they know?

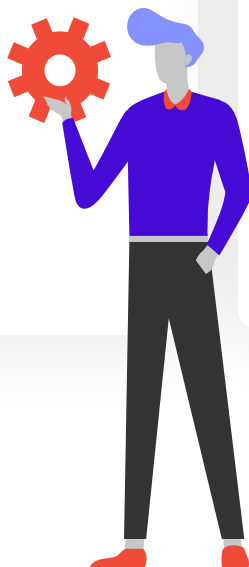
You'll want to begin by assessing how familiar your trainers are with the software – especially the less-used or hidden features. Obviously, software evolves rapidly, so you'll want to identify current knowledge gaps and establish practical procedures that enable everyone to stay up-to-date on the platforms they'll teach. Not only do they need to be able to discuss all functionality and benefits, but their materials may need to be updated to reflect these as well.

Who's the best source of up-to-date info?

Product training should be provided by at least two departments in your company, each of which brings its own unique priorities and expertise: Product Management and Sales:

Product managers

are key, as they are the creators and gatekeepers for new features, market-driven functionality, and are participants in the documentation process. They can provide the granular details of each feature, and even provide background on how each evolved in response to market – or even specific customer – demand. They can also provide a glimpse into what works well and what doesn't, which features need a workaround or more detailed instructions, and what's going to improve in the future. All of these insights can be communicated to the trainer and folded into the training process to help create well-informed customers.



The Sales Team

by contrast, can help the trainer be sure that the training curriculum includes all the functionality and value they had promised during the sales process, especially those that had been emphasized as a core business requirement by the client. By focusing the training on specific features that very well may have been the impetus of the purchase, the trainer can likewise be sure that the session will meet these needs.

Beyond knowledge: Personality and Talent

The other half of a trainer's qualification is their didactic skills and "charisma". Do they speak clearly and fluently, with a grasp of the technical lingo that matches the audience? Do they engage with the trainees instead of lecturing? Can they remain flexible and fluid as the course goes on instead of being wed to a script? Not everyone is meant to be an instructor, no matter how technically skilled they are. The delivery is often just as important as the content.

For this training, there are two options. First, there are experts in presentation and communication skills who can train your team, either as a group or on an individual basis. For "polishing up" one's skills, a few sessions is sufficient; generally, these involve simulations and practice, not simply instructions or a list of tips. For those who need more help, ongoing training by such an expert is helpful.

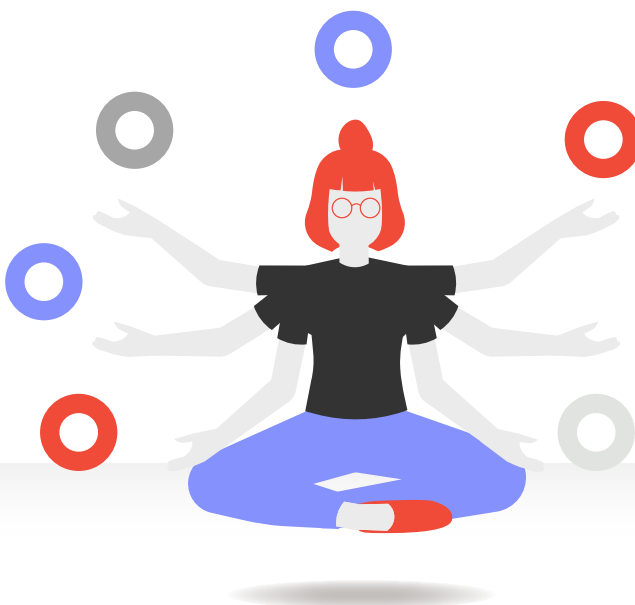


Leverage your best trainer to makes others their best

Often, there is a veteran trainer who has mastered the art or training, and is recognized as the company “guru.” These individuals are also easy to identify through surveys presented to clients at the end of a training session. Leveraging these experts to train colleagues allows them to train the trainers using the actual content associated with the product, rather than abstract concepts and universal tips. One common and very practical technique in sessions like this is to record a trainer’s actual training with a client (either with a video camera or video capture directly from the screen in an online session) and critique it together.

On an ongoing basis, you will want to assess your trainers on their:

- Teaching and customer interaction skills
- Understanding of the company’s training objectives, customer success plans, content, and delivery methods
- Ability to assess learning outcomes
- Ability to respond to customer questions and feedback



The background features a stylized illustration of a paper airplane flying from the bottom left towards the top right. A large, white number '5' is positioned on the left side, with a line extending from its base towards the airplane. The sky is a gradient of purple and blue, with soft, white clouds. A faint city skyline is visible in the background.

Step

5

Assess and improve your results

We spoke of objectives and metrics in Step One. The final step is about crunching those numbers to evaluate the impact of your customer training. You should think of “impact” on two separate, but closely linked, dimensions:

1 Impact on your
customers' success

2 Impact on your own
business's bottom line

Program assessment

Here are the steps involved in assessing the results of your software training:



Revisit and **formalize** your success metrics so they can be consistently applied.



Establish performance baselines for comparison.



Analyze the metrics your training programs produce.



Measure customer engagement with your content and training sessions.



Determine completion rates and time spent by customers.



Based on your learning objectives, **determine** learning outcomes through assessments, simulations, and surveys.



Measure how the training has influenced the customers' use of the software.



Allow multiple stakeholders to review the metrics from their own perspectives.



Ask for open feedback from customers for future improvements.

“

We don't want to be spending time creating content that customers don't need. By monitoring what content customers don't consume, we can stop creating that type of content, and focus our time and resources developing training on topics that customers do need more information on.”

Monica Green,
Director of L&D strategy, Epicor



Revenue metrics

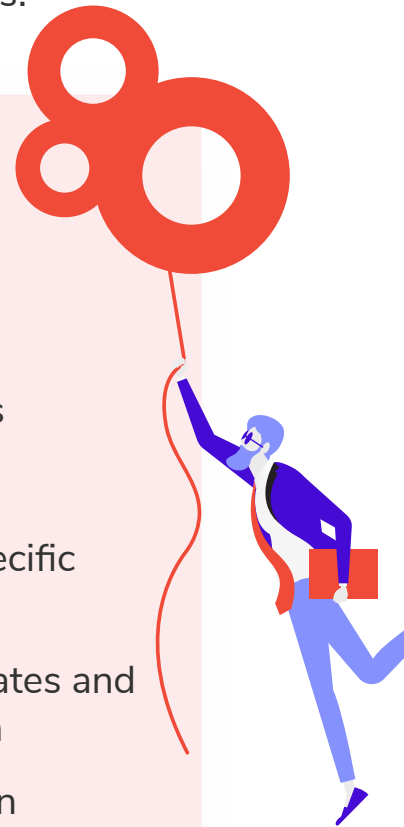
While it can be challenging to determine the exact impact of customer software training, you should strive to find ways to correlate it with revenue metrics. As outlined in our ebook, [“Remote Training ROI Guide: Key Usage Insights”](#), each training program has its own unique set of data points to assess.

Depending on your goals and audience, you might gain insights from looking at general data points like:

- Duration of participation per session, per user
- Drop-off data
- Traffic across specific pages/areas
- Content engagement
- Number of requests for assistance during the session
- Percent of requests and questions answered by the trainer
- Frequently asked questions

Other specific business metrics you examine might include:

- Upsells/upgrades
- Retention
- Traffic across specific pages/areas
- User activation rates and product adoption
- Time to resolution for support tickets
- Use of specific features, especially those given special attention in training
- Customer satisfaction scores (such as NPS)



Continuous Improvement

The most successful software training programs not only regularly measure their outcomes but also continuously aim to iterate and improve. Make it a team effort.



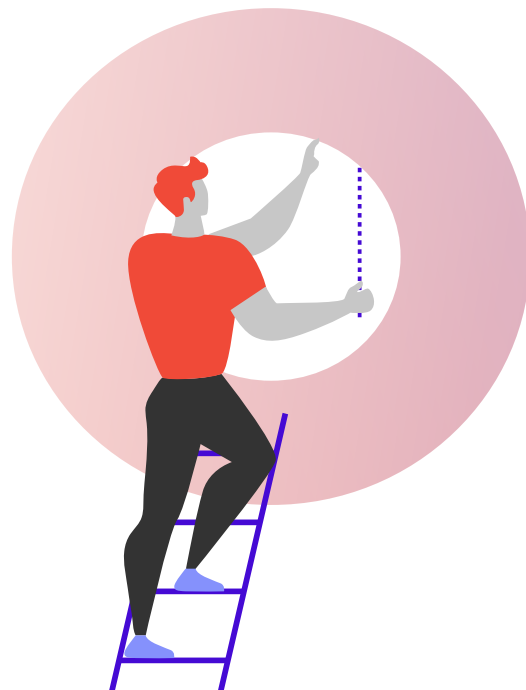
Call on your customer support team to identify common pain points and frequently asked questions.



Call on the product specialists to identify features the customers seldom use. While this could be the result of poor design in UX/UI or simply little value in the feature, it may very well be due to poor training.

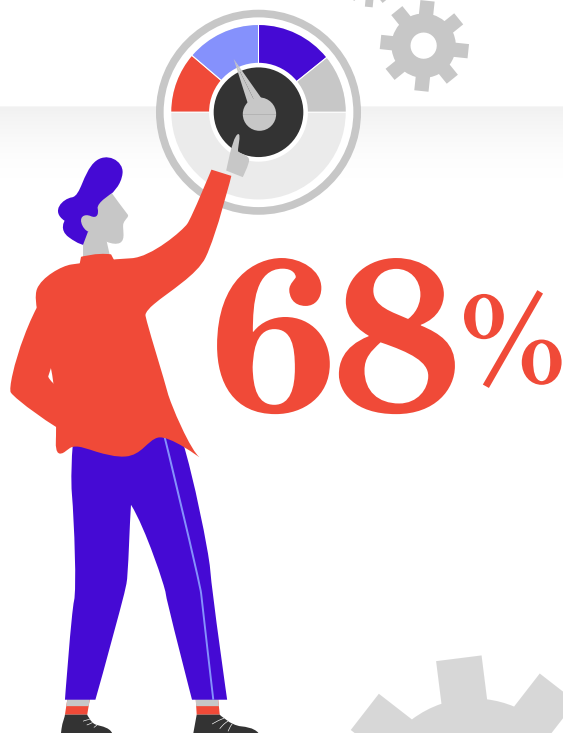
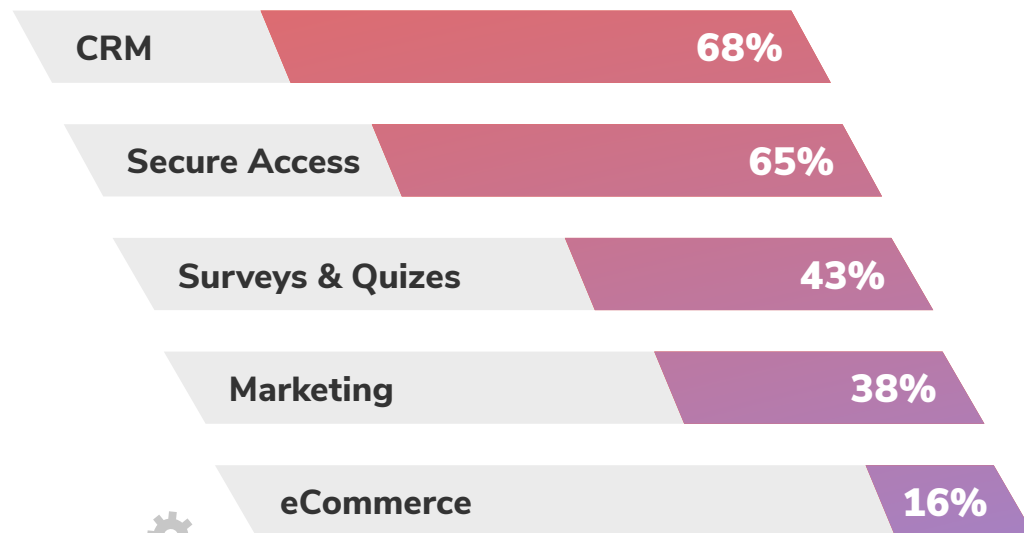


Identify which content should be revised or retired; schedule sessions with the team focused specifically on content improvement.



Technology integration

Training metrics should not be locked in a self-contained silo, analyzed in a vacuum. Integrating cross-department technology platforms has proven to be a valuable key for measuring the impact of software training and optimizing for future improvements. Integrations make it possible to cross-reference education consumption with targeted business outcomes such as revenue, higher satisfaction scores, lower support costs.



68%

of respondents integrate training systems with CRM systems, as reported in Skilljar's 2020 Customer Education Benchmarks and Trends Report.

Conclusion

Customer training is the key to the growth of your software company

It's clear your ability to accelerate growth with effective customer software training is tied to your ability to engage customers with your training programs.

As we've detailed in this guide, you'll achieve greater results by embracing a 5-step methodology that involves:



Game changing software experiences

Because CloudShare offers an enterprise-grade all-in-one platform, it's easy for our customers to smoothly move their prospects from remote demos to customer training in a way that feels natural, intuitive, and seamless. Our goal is to support companies in delivering engaging experiences to prospects, so you can close better deals faster and keep customers coming back again and again.



Get in touch

with CloudShare and try our platform for yourself.

Book a free demo now

and see how you could take your customer acquisition and retention to the next level.

Proud to be Working With These Awesome Companies

