



# Top Executives and Organizations Share Their #1 Tips



If you're starting to feel the pressure of driving bigger and better results in 2019, you're not alone. Training leaders across the world are feeling the same as professional development is increasingly becoming a differentiator, impacting key business areas from employee retention and branding to customer success and loyalty.

To give you a competitive advantage, we reached out to some of the biggest names in corporate technology and training for insight, including ForgeRock, NASDAQ

BWise, MASIE Center, TrainingIndustry.com, CEdMA, the Association for Talent Development, and other inspiring companies.

Their executives gladly shared their top recommendations that every corporate tech training leader should make in 2019, ones that helped their own organization, employees and customers succeed.

Continue reading to receive the powerful advice from industry influencers at the cutting edge of corporate training.





# Understand Team and Customer Experiences to Build Stronger Working Relationships



Listen to your team and listen to your customers.
As a manager, you may not necessarily witness or experience the issues that your team or customers face on a day-to-day basis."

Lo Wright, manager of global delivery operations at ForgeRock

ForgeRock is a digital identity management company that secures billions of identities worldwide and helps governments and brands monetize customer relationships, address stringent regulations for privacy and consent, and leverage the Internet of Things.

"Never stop striving to be better. One phrase I can't stand is 'But we've always done it that way.' That may very well be how it's always been done, but that certainly doesn't mean it can't be improved. Times change, industries evolve, and either you adapt and evolve with them or get left behind."

#### How has this tenet helped ForgeRock?

"No matter the relationship, professional or personal, they are all based on trust. I feel that by listening to my team, we have been able to create a stronger working relationship," said Wright.







# Support Learners When They Need It Most to Save Costs and Time



Think beyond the classroom. Design for performance support, not just formal training."

Linda Dougary, lead learning consultant at NASDAQ BWise

NASDAQ BWise is a global governance, risk and compliance (GRC) technology leader and a cornerstone of NASDAQ's portfolio. Among others, its customers include TNT, Arab Banking Corporation, Clariant and NASDAQ itself.

#### How has this tenet helped NASDAQ BWise?

"This innovative training approach has helped us reduce the time and costs of formal training, while better supporting learners (software users) in their moment of need," said Dougary.







# Train for End User Needs to Provide Better Customer Experiences



At the top of my list for where training managers should focus during 2019 is what I call user experience and design."

Elliot Masie, founder and CEO of the MASIE Center

MASIE Center is a learning lab serving global organizations with networking, collaboration and research in the training industry. The organization is also the home for the Learning CONSORTIUM activities, where 3,000+ training professionals from over 200 of the largest companies in the world (including American Express, McDonald's, Shell, Southwest Airlines and the Kellogg Company) gather together to improve and reinvent the Learning and Training field.

Expanding on his recommendation to prioritize user experience and design, Maise explained that by building things to be useful and intuitive from the start, they ultimately, have a lower cost of support, and a faster speed to readiness, require less training, and fewer updates.

"This really requires you not only to be a good technical designer, but also to take a user experience and design thinking perspective, which means that you're focusing on the experience of the user rather than on just the function or the security of the code."

How has this tenet helped the MASIE Center?

"For a recent conference we did with almost 2,000 attendees, we had a mobile app with attendee and exhibitor info to help them connect online.

"We also decided on a chatbot as an interactive tool where users could ask questions and get answers. The app looked nice, but severely lacked in functionality.

"We then decided to use another chatbot provider and started asking the right questions such as 'What if the chatbot could do X, Y, and Z?' and 'What if we ask some users what they need?'

"At the end of the day, the chatbot user experience and design were much better - and we're constantly improving on it."





# Prioritize the Learner Experience to Get a Seat at the Decision-making Table



As a tech training leader, your priority for 2019 should be to focus on the learner experience."

Ken Taylor, president of *Training Industry* 

Training Industry is the world's largest website focused on helping corporate training professionals get the information, insight and tools they need to manage the business of learning more effectively.

"Understand your business needs and use data about your workforce's skills to determine the best blend of learning experiences (not just one-off courses) to build employee's knowledge and skills to fill the gaps. Make sure those experiences offer the opportunity for learners to practice new skills to ensure they are sustained, and put measurement mechanisms in place so you can make data-driven decisions," said Taylor.

### How has Training Industry seen this help organizations?

"The tech learning leaders we talk to say that focusing on the learner experience results in them being brought to the table to solve business problems, improving the training department's brand equity (peers in other departments respect them more), and gaining credibility with senior managers when they recommend future investments in employee development."







### Measure Business Impact to Get Resources from the C-Suite



Measure the impact of training on business results. Compare churn rate, net promoter scores, and average number of support cases for trained vs untrained customers."

Pat Durante, president of the Customer Education Management Association (CEdMA)

Customer Education Management
Association (CEdMA) is a nonprofit
organization that provides training
executives, managers, and professionals
on a management path in technology
companies, such as Microsoft, Apple,
Oracle, EMC and others, with mentoring,
metrics/benchmarking, professional
development and networking
opportunities to increase their success.

Durante is also the senior director of technical enablement at Talend – an open, adaptive and unified integration platform that gives enterprises the data agility they need to rapidly adopt technology innovations and scale.

How has this tenet helped you and other CEdMA members?

"Measuring the impact of training on business results has helped me and other CEdMA members get the resources needed to build world-class training, badging and certification programs. The challenge is getting the data you need to make the correlations mentioned above, which requires aligning your LMS, CRM and support system. Once you have the data, these are numbers that speak to the C-Suite in a language they understand and respect," said Durante.





### Train Your Own Team to Drive Better Results



An important principle for anyone in training is to commit to their own learning goals."

Kristen Fyfe-Mills, associate director of communications, Association for Talent Development

Association for Talent Development (ATD) is the world's largest association dedicated to professionals who develop talent in organizations in more than 120 countries and in every industry sector.

"The rapid pace of change in the business world and technology means that we need to be in a constant cycle of learning and upskilling – or we risk becoming irrelevant," said Fyfe-Mills.

# How has this principle helped your team at ATD?

"At ATD, every employee is encouraged to have learning goals and we are held accountable for reaching them. This led me to take a certificate program in management excellence, which has transformed the way I work with my team and colleagues."







# Conduct an Audit to Identify Learning Gaps and Increase Engagement



Start the year with an audit of your existing customer training.

Don't just keep doing what you are doing. Take a step back,
evaluate and rethink your customer education strategy because
there may be a more effective way to train customers. Learner
behavior is changing and you need to be nimble to meet shifting
expectations."

Dilyana Hadjeva, head of marketing at *Learndot by ServiceRocket* 

Learndot by ServiceRocket helps companies accelerate alignment, reduce friction and connect with their teams, partners and customers. The following are some practical steps Hadjeva recommends taking.

### Identify your most and least popular training offerings:

Look closely into the underlying reasons for high or low engagement. Compare the number of enrollments, time from enrollment to completion, training formats, drop rates, ratings and feedback from learners.

## Focus on training offerings that need improvement and figure out why:

Are the topics still relevant? Is the format engaging? Have you put in the same amount of promotional effort? Classify them in one of three categories: keep as is, transform, or remove.





Hadjeva further noted, "Don't just start updating content for the sake of updating because you'll be spinning your wheels. You need to get to the root cause of low engagement before taking action. Keep in mind that data tells one side of the story. Talk to peers in support, customer success and product management. They'll have good insights to share."

"Once you do that, you're ready to continue. Focus on identifying the biggest knowledge gaps. Re-evaluate your planned initiatives according to three-month, six-month and 12-month milestones. Commit to what you can deliver in each phase and start assigning tasks and priorities based on the impact they would make and value they would bring."

#### How has this strategy helped Learndot?

"We realized we had to better scale how we supported our customers through their onboarding journey. To do this, we needed to provide a more tailored, streamlined experience for new admins and existing customers and spend less time on ad hoc training for our growing customer base.

Jesse Miller, general manager at Learndot

Miller explained, "We performed an audit to evaluate the current training we have and define what else we need to develop. We looked at where we had the biggest knowledge gaps to fill and started there. We segmented our learner groups based on their level of experience with our system. This led to identifying three tiers of training.

"For each of these tiers, we were able to identify what supplementary training

offerings we had to create for the three, six and 12-month milestones of our roadmap. Generating high-quality content is a laborious process that requires a lot of resources, so it was important to be strategic about it.

"For instance, the first segment we identified had a gap in the fundamental knowledge of our product. New users were getting off to a rocky start that had to be corrected later. Customers clearly recognized that they needed the training, and as a result, they were completing it. By closing this gap, we immediately saw engagement go up.

"These positive results continue to be amplified as more customers go through the training. Our customers like the fact that there is a predefined path to follow and there is training to support them at every step of the way."



### **Administrate**

### Invest in Scalable Systems That Can Track Results with Minimum Team Involvement



Invest in systems and processes that can increase your scalability, transparency and efficiency."

John Peebles, CEO of *Administrate* 

Administrate is a learning management software that helps companies streamline course scheduling, resource management, eLearning, marketing, CRM, reporting and more.

"Training departments are always under pressure to do more with less, but training is also notoriously difficult to scale efficiently. Investing in the right technical systems designed to support your administrative team members and processes is one of

the best ways to set yourself up for future success," stated Peebles.

"Not only will you and your team become more scalable, you'll be able to prove it to leadership, and gain insights into how and where you can improve your offerings.

Is your technical landscape already a burden or too fragmented to make sense? The right training management solution will help you integrate these systems into one platform for greater visibility and efficiency."

#### How has this strategy helped Administrate?

"We use our own solution to manage our training, which means we can roll out a comprehensive program with almost no manual involvement from our team. We can also quickly and easily report on who has been through the training, how far they got, and how well they did. This enabled us to look into the results and see where our content needed to be improved."

"All of this was achieved without a single fulltime person assigned to manage the training delivery. This experience mirrors the journey of most of our customers, some of whom are running large, geographically disparate training operations that involve millions of dollars of revenue with just a few people."





# Leverage Technology to React Quickly to Adapt to Changing Training and Learner Needs

When working on this ebook, we turned to our in-house influencers as well. They discussed how technology can be leveraged to address growing trends in the industry.

CloudShare is a leading provider of specialized cloud solutions for training, sales enablement, sandboxing and

support. CloudShare's training solution helps software organizations, including, ForgeRock, Palo Alto Networks, Atlassian, Dell and HP to deliver realistic handson training for SaaS and on-premise applications, enabling them to increase adoption and grow revenues.

#### Leverage Technology to Support Multi-Step Classes



Expect multi-step classes to become standard in 2019."

Zvi Guterman, CEO of *CloudShare* 

"In the past year, we've seen users create more sophisticated environments and, as a result, multi-step classes and training initiatives are trending up. It's powerful when virtual instructors can seamlessly guide students from level to level in a logical way without adding complexity and time-intensive resources."





#### Prioritize Fast, Omnichannel Learner Experiences



Modern training needs to be quick and responsive, and your technical and content solutions need to support that."

Michal Frenkel, vice president of product at *CloudShare* 

"Speed, agility, scalability and performance are increasingly important for organizations that need to keep global learners abreast of quickly evolving features and technologies."

"People want to learn quickly, use their skills and then learn more. In order to adapt, your courses need to be targeted and precise, as short as possible, and easily modifiable."

"And your training needs to be convenient. You need to provide a true hands-on, classroom-like, virtual training experience regardless of whether your application is deployed on-premise, on Google Cloud, Azure, or AWS. By leveraging an intelligent virtual training solution that supports complex architectures and cross-cloud configurations, you can save time and expenses

while ensuring an excellent training experience at all times."





### Invest in Digital Transformation to Redefine Employee Roles



Every tech training leader should resolve to invest in digital transformation in 2019. Especially given the skill shortage around data science and machine learning skills, this is a must."

Alper Tekin, general manager of enterprise at *Udacity* 

Udacity provides fluency training in critical technical areas (like artificial intelligence, machine learning and data sciences) to more than 100 global companies.

"There are so many resources available today that make it possible for motivated employees to completely redefine their roles, upgrade their skills and boost their impact with support from their tech training leaders."

# How has this resolution helped Udacity?

"Our resolution to invest in digital transformation has led us to develop online learning programs and tools tailored to employers' needs and employees' skill levels. We work with our clients to map out their employees' professional goals and attitudes toward retraining. Designing a learning environment that speaks to employees and motivates them is a great way to ensure tech training success in your organization," said Tekin.





# Automate Candidate Training to Save Time and Effort



# Every training leader should simplify and automate wherever they can."

Raphael Branger, chief operating officer and chief knowledge officer at *IT-Logix* 

IT-Logix is a business intelligence, data warehouse and data science company that helps companies transform structured and unstructured data into valuable business information to make more reliable decisions.



# How has your recommendation helped IT-Logix?

"As the COO, I'm in charge of our recruiting process. We assess our candidates by asking them to perform a few activities in a virtual environment. CloudShare's class module makes it super easy for us to do this. A new environment is ready in seconds and candidates can access it without even having to register," said Branger.





### Build an Insight-Driven Culture to Transform Results



The most important thing every training leader should do this year is to build an insight-driven organization, which is first and foremost a cultural change."

Yoav Einav, VP of product at GigaSpaces

GigaSpaces provides software for inmemory computing, fast data analytics and cloud orchestration for hundreds of Tier-1 and Fortune-listed organizations across the world.

"Companies don't fail because of changes in the environment or technologies. Failures stem from leaders who have not adopted a data-driven cultural paradigm. This requires a DNA change which should

be promoted across the entire decisionmaking chain within the organization," said Einav.

"It's a leadership choice to leverage smarter and relevant information for effective data-driven decision making, which, in turn, can impact the entire business through increased revenue, reduced costs, risk mitigation and more."

#### How has this strategy helped GigaSpaces?

"This strategy has helped us across the entire organization. That includes the methodical process used to build our pipeline and qualify leads from marketing to sales, as well as the way we train and coach our sales team and drive insights from our CRM. It even impacts how we execute our product's short-term and long-term roadmap in an agile manner on a weekly sprint."

"The insight-driven transformation is a journey that requires constant adjustments and the ability to change in an agile manner. Without the right technology and a supporting culture – it will not succeed."



#### INSTANA

# Track Engagement to Increase Revenue and Customer Retention



Make sure that whatever assets you create to improve training, specifically in the technology sector, you get people involved. Don't just provide materials and expect them to be read. Having metrics that can provide insights into what is being used will help focus efforts."

Doug Ehrenreich, head of sales enablement at *Instana* 

Instana ensures companies' application delivery organizations have the data, visibility and information they need to manage critical business application performance across the DevOps lifecycle.

#### How does this advice help Instana?

"In small startups and rapidly growing companies like Instana, most programs grow organically and informal knowledge transfer occurs. At a certain point, this needs to be transitioned to more formal sets of processes and materials that can expand the knowledge base in order to continue to grow. The results are basically measured on new and recurring revenues from existing customers."





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# Create Cross-Departmental Training to Scale Faster and Provide Better Experiences



In our industry we say the perimeter no longer exists when it comes to securing identities and data. In the same way, customer education leaders should realize that customer education doesn't belong to a single department (or person)."

Kimberly Seale, customer education manager at *Idaptive* 

Idaptive delivers next-gen access to organizations, protecting them from data breaches through a zero trust approach.

How is Idaptive benefiting from this view?

"Customer education is also the job of marketing, customer support managers, documentation and product engineering. At Idaptive, we are working collaboratively with all these cross-functional areas to

build a seamless education experience from the first moment an admin logs in, all the way through their end-user launch," said Seale.

"We are building a 'freemium to premium' approach to provide blended customer education offerings that include embedded videos in the UI, educational assets on our home page, free eLearnings hosted on SkillJar and premium instructorled training for those who want the guided hands-on lab experience."



# Be at the Cutting Edge of Training

We want to say a big thank you to all the influencers for the time and thought they put into participating in this report.

We encourage you to make the most of their advice and use it to create a competitive advantage for your own organization. If your team doesn't have the bandwidth to implement all the strategies and advice provided, prioritize them based on your company's specific needs.

If you start acting now, by 2020, you too could be at the cutting edge of the training industry and one of the top influencers we consult with next year!



#### Meet Our Influencers



#### Lo Wright, Manager of Global Delivery Operations



Lo Wright has built her way in the industry from the ground up. She joined ForgeRock over five years ago as a business administrator and editorial assistant and quickly moved up the ranks. She transitioned to operations, becoming a senior delivery operations specialist, and today manages the company's global delivery operations.



Linda Dougary, Lead Learning Consultant



Linda Dougary brings more than 15 years of experience as a trainer, instructional designer and course developer to her work as NASDAQ BWise's lead learning consultant. There, she analyzes learning needs, develops tailored learning designs, courses, courseware and product documentation, and trains the trainers that help BWise customers, partners and employees grow.



Elliot Masie, Founder and CEO



Elliot Masie is the founder and CEO of the MASIE Center and the leader of the Learning Consortium, a coalition of over 200 global organizations cooperating on the evolution of learning strategies, including CNN, Walmart, American Express, Emirates Airline, Starbucks, General Electric and Fidelity Investments.

Masie, who is recognized as the first analyst to use the term e-Learning, is an adviser to a wealth of government, education and nonprofit organizations, including the CIA University Board of Visitors, the Department of Defense, and the White House Advisory Council on Expanding Learning Opportunities.

In addition, he is an accomplished Broadway producer and investor, with a portfolio that includes MacBeth, Allegiance, SpongeBob the Musical, The Prom, The Cher Show and the Tony Award-winning Kinky Boots.





Ken Taylor, President



Ken Taylor is the president of Training Industry and the co-author of What Makes a Great Training Organization.

After spending the first 17 years of his career moving up the ranks at Nortel, an international telecommunications and data networking equipment manufacturer, he became the managing director at Hudson, a talent recruitment and management agency known for finding high quality candidates for hard-to-fill positions. At Hudson, Taylor provided solutions to complex financial challenges for companies in all industries, including enterprise risk management.

He started his 12 years (and counting) at Training Industry as its chief operating officer – focusing on business operations, IT and service delivery – and was promoted to president in early 2015.



# Pat Durante, President of CEdMA and Senior Director of Technical Enablement at Talend



Pat Durante has been in the high tech industry for 25 years. He has managed sales, customer, partner and employee training programs for global technology organizations, including IBM, and has led multiple profitable education companies.

Passionate about measuring the impact of training customers on business results, Durante serves as both the senior director of training enablement at Talend and as the president of the Customer Education Management Association (CEdMA).

In the latter, he won the CEdMA Service Award for exceptional contributions to the organization, and has provided leadership for education managers and executives at some of the world's most successful software companies, including Talend, Synopsys, Black Duck Software, IBM, Netezza, Digital Guardian, Endeca, ATG, and more.





#### Kristen Fyfe-Mills, Associate Director of Communications



Kristen Fyfe-Mills started her 30+ year career in communications at Hearst, one of the world's largest media, information and services organizations, with over 360 businesses, 200 million print readers and 400 million unique digital visitors.

Now closing in on a full decade at the Association for Talent Development, Fyfe-Mills strategizes and executes complex communication plans that increase the association's earned media and social media engagement significantly.

In her role, she also writes for senior leaders, serves as the executive producer of corporate and marketing video campaigns, and directs the association's global award programs and public policy efforts.



#### Dilyana Hadjeva, Head of Marketing



With a decade of experience driving customer acquisition and engagement with high-impact marketing and go-to-market strategies, Dilyana Hadjeva is an effective content and marketing strategist with a wealth of expertise and management experience.



Jesse Miller, General Manager



Bringing an entrepreneurial mindset to building products, Jesse Miller keeps his eye on driving business outcomes, while making sure to stay highly technically involved with products and their communities.

He started his journey at ServiceRocket as a technology consultant and quickly moved up the ranks to product manager of various products, including Atlassian apps and the Learndot platform, improving and relaunching apps for Salesforce, Marketo, HubSpot and Data Pipeline.

Currently the general manager, he's in charge of a team of engineers, product managers, marketers and sales professionals, leading long-term product vision and driving core business results.





John Peebles, CEO

#### **Administrate**

John Peebles has been serving in leadership positions for over 17 years, building and growing companies that are focused on helping customers succeed and providing employees with an outstanding work environment.

Experienced in all facets of complex software development lifecycles, Peebles knows how to drive business results that make a difference.

Besides serving as Administrate's CEO, he's also a non-executive director at snap40, which reduces healthcare delivery costs by automating patient deterioration detection.



Zvi Guterman, Founder & CEO



CloudShare's CEO, Zvi Guterman, has spent 20 years building extraordinary teams in organizations as large as the Israeli Defense Forces and as small as a startup taking its first step.

Guterman's industry experience includes serving as the CTO of Safend, an endpoint security solution acquired by Wave Systems, and as a board member and mentor at Qlika, a big-data platform for AdWords optimization, which was acquired by The Priceline Group. A serial entrepreneur with a computer science doctorate, Guterman is an internationally recognized expert in cloud security, cryptanalysis, data leakage protection and cyberattacks.

Guterman also serves as a board member on Medorion, an enterprise persuasion software that helps managed care organizations engage members with behavioral science, artificial intelligence and marketing technologies.





#### Michal Frenkel, VP Product



Michal Frenkel began her career as a software engineer at Amdocs. Within a few short years, she became a project manager at Mercury, then product manager at HP, and senior product manager and product team lead at Kenshoo.

With two decades of experience in product definition and product design for SaaS environments, security and online marketing products, Frenkel brings a wealth of skills to CloudShare, where she leads product vision and strategies.

Her versatile experience helps her collaborate with R&D, sales, marketing and support to guarantee full alignment and effective execution of product strategy.



Alper Tekin, General Manager of Enterprise



Alper Tekin started his 17+ year career with internships in Penguin Computing and PayPal, and within a few short years, became Microsoft's EMEA partner program manager.

Tekin went on to co-found AlfaPeople, one of the largest Microsoft Dynamic partners in the world, developing more CRM applications than any other partner. He also co-founded Mekanist, Turkey's largest local search and review service, and served as the interim country manager of BlaBlaCar, Europe's largest P2P ride sharing community with over 10 million members.

After scaling up Udacity in the EMEA region, Tekin now works out of its San Francisco office as general manager of enterprise, where he is building sales, marketing, customer success and product teams and operations.



# Raphael Branger, Chief Operating Officer and Chief Knowledge Officer

### IT-LOGIX

Raphael Branger has been with IT-Logix for over 16 years, helping grow the company from two people to over 20 consultants.

His role at the company has been multi-faceted. As chief knowledge officer, he's responsible for generating and simplifying the process of implementing knowledge into the company's consulting work. As the chief operating officer, he's also responsible for HR, internal infrastructure and operations.



#### Yoav Einav, VP of Product



With over 12 years of hands-on product management and software development experience, Yoav Einav has a reputation for driving technological excellence and strong business results.

Einav was a product manager at Qwilt, where he helped some of the world's largest cable, telco and mobile service providers serve their audiences well despite dramatic growth in media streaming.

Prior to becoming VP of Product at Gigaspaces, Einav served as a senior product manager at Iguazio, accelerating digital transformation across industries with applications for the Internet of Things, autonomous systems, media, cybersecurity and smart mobility.



#### Doug Ehrenreich, Senior Director of Business Development and Sales Enablement

#### INSTANA

Doug Ehrenreich started his 30+ year career as a system engineer and worked his way up to director of telecommunications market development at Sun Microsystems, a wholly owned Oracle subsidiary.

Ehrenreich also served as VP of marketing and VP of business development at Kabira Technologies, which enables communications service providers across the world to accelerate time to revenue while lowering cost of growth. Afterwards, he served as the VP of Americas at iQuate, which helps enterprises enable digital transformation in cloud and on-premise environments without agents or hardware.

Now Instana's senior director of business development and sales enablement, Ehrenreich develops successful business relationships with C-level executives.



# Kimberly Seale, Customer Education Manager

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Kimberly Seale posses over 13 years of multi-award winning experience in the training industry.

Seale has taught prospects, professionals and trainers across a wealth of industries around the globe both face-to-face and via virtual classrooms. She has also consulted for Fortune 100 companies and participated in cross-departmental teams to ensure revenue goals are met. She's also helped develop technical courseware, learning paths, assessments and certification exams.

In 2017, Seale became the head of technical education for applications and endpoint at Centrify. There, she is responsible for the technical certification program, content development and virtual instructor-led training delivery. When Idaptive was born out of Centrify in 2018, Seale also took on the role of education services manager at the organization.



# **About CloudShare**

CloudShare is a specialty cloud provider that helps software companies replicate complex on-premise IT environments in the cloud for training, PoCs (proof of concepts), and sandboxing for support and testing. CloudShare's specialized solutions help vendors of on-premise and SaaS applications grow revenues, increase efficiency and improve customer success.

To learn more about how CloudShare can help your organization, visit us at: www.cloudshare.com

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