



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE



Training Your Team: The Key to Successful User Adoption

Jennifer Hermesmeyer
Manager, Education Services, RightNow Technologies

Agenda

- Introduction
- Keys to successful training
- Timing is everything
- Creating a learning environment
- What is the right approach to training?
- Measuring business results to define future training needs
- Case Scenario: MSNCU
- Q and A

Training Your Team: Elements for Success

- Define your audience
- Outline goals and objectives of training
- Determine training logistics
- Define training methods/materials
- Measure the success
- Reassess, review, and redefine goals as necessary
- Must have “buy in” from the right people!

Define Your Audience

- Different audiences require different training – and content
- Don't "mix" roles – does everyone really need to know everything?
- Keep skill levels in mind
- Create scenarios that apply to the role being trained
- Examples
 - Agents
 - Administrators
 - Business Analyst

Define Goals and Objectives

- **Identify how RightNow helps you meet your customer experience objectives in terms of each role**
- Always keep the role in mind – the “complete role”
 - What are your business goals?
 - How does each “role” help you meet those goals?
- Clearly define expectations for each role – what do you expect each person to be able to achieve/accomplish after they complete the course?

Define Training Logistics

- How are you going to train?
- What are the topics/duration of training?
- Who is doing the training?
- Where are you training them?
 - Classroom
 - Remotely
 - Online
- Environmental considerations
 - How many people in each class
 - Working equipment
 - Network connections
 - Testing before training
 - Systems to support your training effort (LMS)

Define Training Methods: What Are Your Options?

- Key to remember – what makes the most sense for the audience you're delivering the training to? What's most effective for you/your team?
- "Out of the Box" Training
- Custom Training
- Train the Trainer
- Do it Yourself

Determining Training Materials

- Using “standard” materials
- Customizing materials
- Reference guides and take-always
- Reinforcement after training
- The right content is key

Training Content Success = Product + Process

- Teaching functionality is only part of the equation
- Develop scenarios that are derived from every day business experience
- Hands-on exercises/practice is critical
 - Explain it
 - In this section we will be covering.....
 - Demonstrate it
 - Let me show you how it works....
 - Follow me
 - Follow along with me....
 - Show me
 - Show me you understand by completing...
- Other elements of training – providing a good customer experience
 - “How to be a successful customer service agent”
 - “Sales methodologies and processes”

Measure the Success

- Make sure the assessments match your learning objectives
- Hold people accountable for their results
- Make results available to employees
- If objectives aren't met
 - Evaluate
 - Adjust
 - Execute

Support is Critical

- Staff should be excited about training
 - Branding
 - Incentives
 - Food
 - Advancement opportunities
- Management support from the top down
- Include the right people in training
- Address support – how do people get help after training is complete?

Training is a Process, Not an Event

- Reassess, Review, Redefine
- Business process changes
- Upgrades/product changes
- Job role changes
- New hires/career paths

TIMING IS EVERYTHING!

- Don't train before you're ready!
- Make a checklist of what needs to be in place prior to training
 - Sites ready?
 - Materials ready?
 - Trainers prepared?
 - Equipment ready?
 - Training marked on everyone's schedule?
 - Attendees confirmed?
- Are you training the right people at the right time?

RightNow Training Roadmap to Success!

Project Team Training

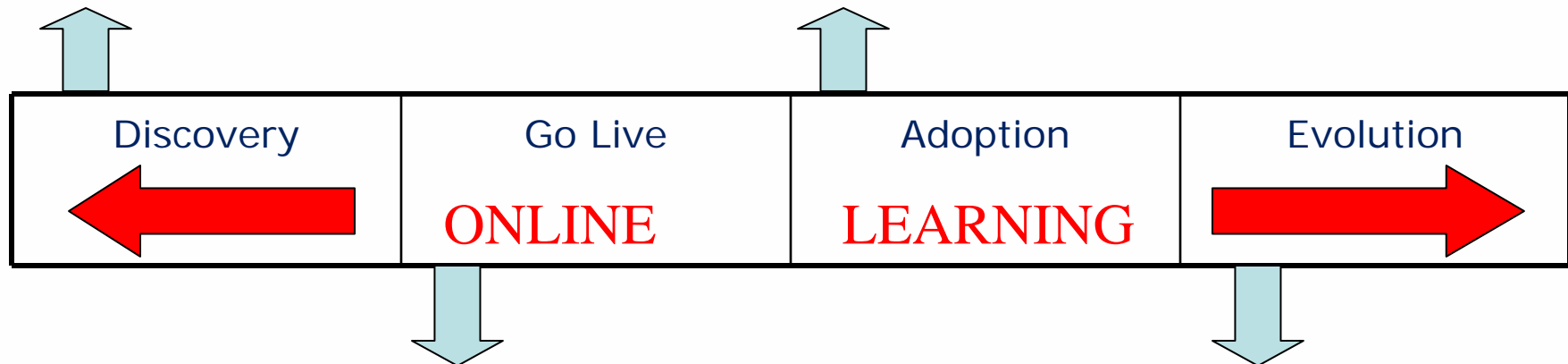
- Product Overview Sessions
- Regional Workshops
- Onsite Workshops

Business Analyst

- Analytics Training (onsite or regional)

Advanced Administrator

- Advanced onsite or regional training



Administrator Training

- Onsite/Regional Workshops

End User Training

- Remote training
- Onsite Training

Train the Trainer

- Corporate training team

Continued Education

- Upgrade training
 - SmartConversion offerings
- New Administrators
 - Regional/onsite workshops

Creating A Learning Environment

- A “Learning Environment” provides the right opportunities for your staff to attend the right trainings at the right time – with the right support!
- Supplement with the right tools
- Establish mentors
- Give people time/methods to ask questions and communicate
- Consider the way people learn

What is the Right Approach to Training?

- Classroom/workshop style
- Blended Learning Approach
- Online Learning
 - Self-paced
 - Virtual Classes
- On the job training

Measuring Business Results to Define Training Needs

- Creating reports to measure success
 - Review standard reports available
 - Create custom reports
 - Schedule and deliver reports to the right people who can provide coaching where necessary
- Determine gaps/future training needs based on results
- Quarterly Survey of employees – their input counts!

Case Study: Minnesota State Colleges & Universities (MNSCU)

- Application overview – how does MNSCU use RNT?
- Defining a training program based on business goals
 - Audience
 - Role-based training
 - Determining training methods
 - When to deploy classroom?
 - When to deploy online?
 - Materials
 - Measuring the success
- Ongoing growth of training program – planning for the future

What Can RNT Education Services Do For You?

Delivery Mode	Customer Training Services
Regional Training	<ul style="list-style-type: none">•V8 CRM Administrator•V8 CRM Analytics•SmartConversion Workshops v7.5 to v8•Salesnet Administrator Workshops
Onsite Training	<ul style="list-style-type: none">•Regional workshops onsite•Custom onsite training•3 day minimum onsite engagement
Remote Training	<ul style="list-style-type: none">•Online Learning Center Subscription•Remote Agent/End-User Training•Remote Administrator Training (1 Day)

Resources

- Everything you need is in the RightNow Community!
 - Training schedule
 - Training resources
 - Online Learning Center
 - Library
 - RightNow Knowledge Base
 - Discussion boards
- Other resources:
 - ASTD.org
 - Journals (Training Magazine, Training & Development, etc.)