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Software Training Success

For weeks you have searched for just the right software—you have a vision of streamlined procedures for you and your staff. You have seen sales demonstrations and played with a test version. As you click the “Install Now” button of your new software, you can’t wait! Finally, your vision will be a reality.

The software is installed and ready, waiting for your next move. What next? Suddenly, you feel a little queasy. How do I set up the system? How do I set up a User ID? How do I enter my data? How do I print reports? What if I hit the wrong key? Wait...what have I gotten myself into? Who is going to help me? Where is that salesperson?

The most successful software implementations are a partnership between customer and supplier. Use your software vendor’s services to ensure your success. This article focuses on software training services and the benefits and options available.

WHY TRAINING MATTERS

Most of the objections raised against purchasing training services relate to cost, time and attitude. From your software provider’s perspective, your success is critical. Their goal is to assist you as you implement their product to ensure your continued business.

From your perspective, the software is purchased to increase efficiency, enhance current procedures and add new functionality. Isn’t it logical that the fastest, most efficient and cost effective way to implement your new system is to learn from someone who already knows how the software works?

- **Save learning time.** A trainer’s familiarity with the documentation can save you hours of reading. Reviewing enough material to form a solid mental model of how the software works (and how it should work within your organization) requires far more time than a trainer needs to impart the same information. A trainer knows what areas to focus on; you don’t until after you have read it. Use a trainer to get the foundation down, then use the self-help materials to supplement, review and refresh. Leveraging your time by using expert help is generally cost effective

and frees you to manage your business.

- **Improve the quality of training.** Different people have different learning styles. Some individuals learn best by reading, others have better auditory understanding, while some require hands-on “show me” learning. A combination of approaches, addressing different learning styles, can improve the quality of learning.
- **Assist the transition to new processes.** People are creatures of habit and often have a natural bias regarding how certain procedures should work with the new software. You will spend unproductive time trying to decipher the differences and unlearn old methods. A trainer can immediately identify these areas and help you transition to new methods. Thus, the learning process takes less time and is less stressful.
- **Shorten setup time.** When you first begin using your software, you will need to make many setup decisions. If these choices are made incorrectly, you will spend extra time, once you discover your errors, to undo the damage. Even worse, you may not be able to make the corrections and will require outside help. It will take longer to make things right than the original setup would have required; therefore, this approach will cost more when delivered later than sooner in the process. An ounce of prevention versus a pounding headache.
- **Learn about additional capabilities.** When you purchased the software, you had distinct features that you needed. It is likely, however, that the software has numerous other features that can benefit your organization. A trainer can quickly assess your needs and point out features of the software that will help your organization in ways you had not considered. Additionally, the trainer can identify business processes that can now be refined or retired due to efficiencies gained with the software. Ultimately, the more features of the software that you use to add value to your business, the more cost effective your software investment.

DEVELOP A TRAINING STRATEGY

Investigate training options as you go through your software selection process. Questions for software providers include:

- Do they provide an orientation program? Information concerning available services and contacts can speed your implementation process.
- Do they have a prototype implementation plan available? This document should lead you through a number of issues to consider in constructing the process to fit your business.
- Do they have a training staff and programs for different levels of assistance? Are they knowledgeable about the software features? Learn about their teaching experience and their understanding of organizations like yours.
- What tools, such as user manuals, video tutorials, and online searchable help are available to help you save time and money, and maximize the return on your software investment?

WHO TO TRAIN?

There are several factors to consider including division of responsibilities, how many people are on staff, and your turnover rate. The primary objective should be for more than one person to know how to use the software. If the only person who knows your software leaves abruptly, you will immediately discover the importance of this point. Larger organizations often have multiple people knowledgeable on how to use the software from A-Z, while others learn the features that directly relate to their job function. A smaller office may have everyone up to speed on all features. For organizations with high turnover, consider carefully which employees receive full training to avoid unnecessary costs. One technique is to implement a “Train the Trainer” model—one person is formally trained and then they teach the rest of the people.

WHEN TO PROVIDE TRAINING?

Review of the fundamentals, setup decisions, and the most essential tasks should be completed before or during the first few weeks of implementation. Get these items right from the beginning, and don't waste time spinning your wheels. After this initial round, use the software for a few weeks and then have a follow-up training session. Focus on your specific needs and questions. Web-based delivery is well suited for this.


WHAT TRAINING METHOD IS BEST?

There are instructor-led options such as off-site classes, on-site workshops, and web-based teleconferencing, and self-led methods using online and offline materials. Consider more than one type of training

and match it to who needs to attend the training, your location (availability and suitability of equipment) as well as your time and cost constraints.

- Off-site classes allow you to become fully immersed in the new software for a couple of days and leave the distractions of the office. Thanks to technology, classrooms can be fully interactive with live computer workstations and instructor projection capabilities. It is best if each attendee has their own computer.
- On-site classroom training has the same immersion and interactive benefits of off-site, but the entire focus is on your organization's need and questions. You can schedule the class to best fit your organization's calendar and, because it is on-site, you can include a larger number of your staff. It is important to consider if the facilities are adequate—will everyone be able to work on a computer? Also, minimize office distractions that can interfere with class time.
- Web-based teleconferencing (via tools such as GoToMeeting or WebEx) allows for the most flexibility in cost, number of trainees, time and location. This approach generally costs less than classroom training; therefore, you can have multiple sessions and train more employees if you choose. Additionally, you may be able to select the content so it can be delivered in small chunks without information overload. Since it is web-based, there are no travel costs and limiting time constraints so scheduling is more flexible. Maximize your contact time by avoiding complications with the teleconferencing medium. Attend a webinar or similar delivery method to familiarize yourself with this approach and discover if any IT issues need to be resolved.
- Self-led training tools may include online tutorials and videos, computer-based training programs (CBT), online documentation (indexed with online search capability) and user manuals. These may be used as stand-alone programs or may be designed to coordinate with instructor-led programs. Self-led tools have the advantage of being available whenever you need them.

CONCLUSION

It is important to recognize that training is a partnership between yourself, your software vendor, and your software trainer. You know your business needs and processes better than anyone else, and they know the software solution you have chosen. Working together you can effectively utilize the features of the software solution to maximize the efficiency of your day-to-day operations. 

“Personalized training unlocked our software's potential by helping us use many additional features that have improved communications with residents and increased satisfaction of owners who are getting paid more quickly through electronic transactions.”

**-- Debra Shafer
C. Dan Joyner
Property
Management**