

## A Primer on the Top Ten Critical Success Factors for End-User Training

### Overview

If your organization is changing the way it does business, then technology is probably at the heart of the change. If you are responsible for making sure that people are proficient and productive in the new environment, how can you design and develop a performance improvement program that ensures that your project is a success and that your firm realizes its return on its investment in the technology?



Whether your project involves an enterprise-wide initiative, such as a customer relationship management (CRM) implementation, or processes and systems to support a very specific business function, there are guidelines you can follow to ensure a smooth transition and ongoing success. This primer takes a brief look at the top ten critical success factors for designing performance improvement programs for new technology and associated business process reengineering.

### #10 Don't overwhelm users with content.

Probably the most common mistake that people make when designing instruction for systems roll-outs is trying to cover too much content during implementation training events. Most instruction that you deliver, no matter how well it's designed, will be quickly forgotten unless applied during or soon after the initial training event. Also, training people on exception processing (that is, things that *might* happen but are outside of the norm) can make learners lose perspective and a critical frame of reference.





So, focus your training efforts on:



- Actions that people will perform frequently
- General principles or typical transactions that can be applied to other transactions that you might not be specifically addressing in the training
- Teaching individuals how to be self-sufficient after the initial learning event is over, such as finding answers to “how to” questions in online reference materials

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### **#9 Organize your materials by business event or business process.**



Though you may be implementing new technology and associated procedures, it’s likely that the list of core business processes will remain the same. For example, you may be implementing a claims payment system with new procedures, but the core processes will probably remain as pay a claim, respond to a customer inquiry on the status of a claim, and pend a claim for more information, etc.

If you organize your materials according to business events, rather than the structure of the system, you will help your users grasp the new content without requiring them to make independent mental leaps to get there.

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### **#8 Provide a safe environment to practice.**



How would it feel if you were responsible for electronically depositing the CEO’s annual bonus into an online bank account and you didn’t have an opportunity to practice first?

Many adult learners learn by doing and doing means practice. You know the type of learner we’re talking about. They are five steps ahead of an instructor during class, they don’t read user guides, and they don’t bother asking “how do I?” before they just do it. For these people and for others, you must



provide a safe training environment where individuals can practice as they learn. Develop a training database outside of the production environment, in other words a “sandbox”, that individuals can use for practice as they continue to acquire new skills.

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## #7 Start early.

Sure, you may not be rolling out your system for another twelve months, but can you wait nine months to think about how you will get your users’ up to speed? Not likely. Why not? For starters, think about:



- Involving your end users in the design and development of learning materials. If you wait to involve users until just before implementation, those same people are probably going to be tied up with user acceptance testing and conversion activities.
- It takes time to design a system, develop it, test it and retest it. Similarly, those same phases should be employed in designing and developing user-oriented learning materials. The testing and retesting phases are particularly important in projects involving new technology since the content is often a moving target. Often changes are made from the beginning of the project right up through the time a new system is rolled out to users.
- Do you think that the workflow planning and process design you did early on in the project fixed your new procedures in a frozen state, never to be tinkered with again? Not likely. On a project that integrates the learning development with the system development, the learning materials can act as the blueprint for continual process improvements for the new environment.





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#### #6 Don't let "scope creep" creep up on you.



With so much volatility on systems projects, about the only thing you can count on is scope creep. The way to manage it is to assume that it will happen and account for it when you build your project plan. Remember that your workload will increase exponentially the later scope creep occurs in the project.

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#### #5 Realize that it's not just about training.



Sure, you want the users to acquire new skills, perform new functions and deliver the business results you promised when you were building your business case. However, while these objectives, are important, so is building enthusiasm and managing end users' expectations. In fact, these are critical to enabling you to deliver on all your other promises. So, while you're focusing on knowledge transfer, pay equal attention to getting people excited about the change, help them understand what's in it for them, and ensure that the learning event (which may be their first exposure to the new system) leaves a positive lasting impression.

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#### #4 Pilot your materials.



On projects involving new technology, the development team will undoubtedly want to test the system during a user acceptance phase of the project. Use this opportunity to pilot test your learning materials. Consider involving individuals who have not had any previous exposure to the learning materials during the development phase. Include a cross-section of individuals including:

- People from various functional units
- People with varying skill levels
- People with varying learning styles



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### **#3 Provide credible instructors and content sources.**



When acquiring new technology skills, training participants often need to make the connection between the “old” way of doing things and the “new” way. Everything about the content, examples, and scenarios must be realistic and credible or participants will be distracted by what’s “off” and will not be fully engaged in the learning experience. If you’re conducting live instruction, make sure your instructors are familiar with the old way of doing business as well as in the new system and processes. If necessary, use two instructors as co-teachers.

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### **#2 Account for cultural differences.**

We all know that training delivered in Asia has to be different than training delivered in the U.S. to account for cultural differences. But don’t underestimate the cultural differences that are much closer to home. Cultural differences exist between payroll personnel and HR personnel, between Inside Sales Reps and Outside Sales Reps, and between middle managers and executives...you name it. Cultural differences can affect the amount of humor you employ in your program, the pace of materials, the amount and type of interactivity, and the kinds of remediation and feedback you provide, as well as other areas. A careful audience analysis at the front-end of your design phase can help you address these cultural differences in the learning materials.





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**#1 Help your users be better business people. Provide context and the big picture.**



So you're committed to transferring knowledge about the new technology and processes and you're sure your learners will be enthusiastic and accepting of the changes. But can they deliver the business results that you're looking for? Be sure that your knowledge transfer program helps users understand the business reasons for the implementation and the big picture of how their work impacts others in the organization. Without this context, you may be teaching people how to process transactions, but you won't be able to deliver the kinds of business results your organization undoubtedly seeks.

For more information on end-user training,  
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