Wainhouse Research

Application Brief

Shifting Training to Online Learning:
Extending Reach, Improving Productivity, and Keeping Learners Involved

Many businesses have harnessed the unique capabilities of web conferencing to move formal and informal training to the World Wide Web. Web conferencing extends reach, increases productivity, involves learners and subject matter experts not otherwise available, and helps an organization package training in bite size chunks. But do the benefits go deeper? What are the best approaches to using web conferencing for training? Are there particular tricks of the trade that can be replicated?

To find out exactly how web conferencing can work in practice for training and other applications, how one best implements, and what to expect for results, Wainhouse Research conducted a number of in-depth interviews with companies that use web conferencing every day. The findings provide direction to any business seeking to improve its training activities through best practices.

"Being able to take the talent we have in select offices and extend it across country without having to fly across is a big deal for me and others. I have a lot of certifications and specializations. I used to need to travel at a moment's notice to train customers, which made it difficult to do other things."
– Director of Technology Services, Consulting Firm

"We have a huge training issue for our software; web conferencing has solved that."
– Software Architect, Financial Services Firm

"Web conferencing reduces not just our travel costs, but the costs to our customers for training. "
– VP Technology, Consulting Firm

"Over the course of a day I can be in four different time zones without jet lag, it's fantastic."
– Sr. Business Development Specialist, Financial Services Firm

CITRIX | online

	In-Person Training	Online Training
Prepare	Create Training Materials	Create Training Materials
Schedule	Schedule / Pay for Customer & Employee Travel	Schedule Online Training Event (web and voice)
Deliver	Local / Remote "brick-and-mortar" event	Web Class / Seminar
Learner Practice	Demonstrations / Simulations Workbooks	Demonstrations / Simulations Application Sharing / Breakout Rooms
Test	Paper or Software Test	Online Test
Follow-Up	E-mail or Phone Contact	E-mail / Phone / Archived Material Review /Web Session Review
Measure	Satisfaction Survey	Online Sat Survey

In-Person vs. Online Training
Exponential Knowledge Transfer

Trainers and anyone responsible for knowledge transfer to internal and external audiences are all too familiar with the usual methods of delivering training: travel to one or more locations, ship equipment and/or training materials; hold a training event; test learners; and, if time permits, conduct follow-up after the class has ended. Traditional training frequently requires someone to travel, whether it is customer, employee, and/or trainer. The traditional approach to training requires a large investment of time and personnel and is not very scaleable. Brick-and-mortar events call for physical space, an extended training team, and significant loss of productivity based on travel time. Many companies find it a burden to deliver in terms of expense, and in fact may stint on training as a result. Ultimately the costs, challenges of measurement, and ability to get customers and employees up and running can be severely impacted.

Online training completely changes the mix in terms of training delivery. Online training takes a different approach by enabling the multi-tasker extraordinaire. It lets a business be wherever it needs to be. It allows just-in-time and scheduled delivery — by the subject matter experts who know best — of whatever a service or product needs to be effectively learned and understood. Some of the benefits of online training are obvious; the top three are saving travel costs, the ability to involve those who otherwise could not attend, and increased productivity through saving time away from the office. Other benefits uncovered in our interviews are more subtle. Greater sustained interactivity with learners over time, better service to customers, increased geographic reach are all benefits of using web conferencing for training. For many the benefits are so profound that the technology now plays a critical role in their overall workflow, touching not just training but also sales, marketing, and operations.

"Our training and help desk costs would be greater without web conferencing. For hard-to-use applications and complex subjects, we could lose the entire cost of a year of web conferencing in terms of our added overhead for training. We probably fly people less often now for major releases."
– Software Architect, Financial Services Firm

"We have 70 partners who resell our products. About 5,000 people use our website, such as insurance agents who use our products. We have once-a-month trainings and do webinars with expert guests every month."
– President, Financial Services Firm

Trainers can cover only so much physical territory by car (red) or by plane (blue) in one day …
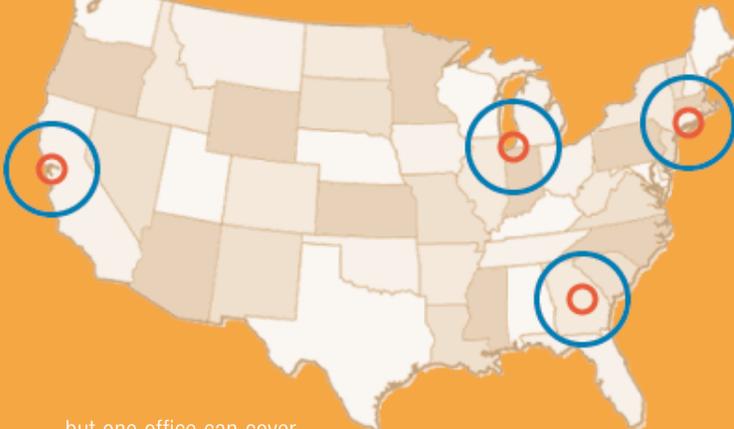
… but one office can cover the entire country using web conferencing.

"We set up customers for sales presentations and training. In our profession, it's unique. None of my competitors offer that same hands-on experience that I know of."
– Sr. Business Development Specialist, Financial Services Firm

"For any consulting engagement that is remote, NY or China, one of the first things we will do is use GoToMeeting for the kickoff. Then we schedule training sessions, all using GoToMeeting. It is the ONLY way we touch the customer. "
– VP of Technology, Consulting Firm

"We conduct internal training; it started with our software group doing custom in-house training on new releases. We conduct lots of 1-1 sessions."
– Software Architect, Financial Services Firm

Making the Transition
Tips from Those Who Have

When it comes to making the transition, our interviews revealed that there are two different strands of behavior as represented by two types of organizations. One group, which we call "Planners," takes pre-determined steps, both large and small, such as holding demonstrations and "train-the-trainer" sessions to ensure success. The other group, the "Divers," fearlessly dive in to applying the technology, quickly integrating it into the workflow by using it aggressively (and typically needing to get burned once before understanding the importance of practice). We believe neither approach is right for all situations, but that those involved in formal training roles will gravitate towards the "Planner' approach, while those who have informal roles conducting knowledge transfer will gravitate towards the "Diver" approach.

Most companies start small by obtaining a few licenses with the goal of gaining an understanding of how web conferencing will fit into their processes - and whether being a "Planner" or a "Diver" works for them. Early success is then built upon. Many users buy sufficient licenses to accommodate demand; you may need to purchase each trainer a unique license, if for no other reason because sessions often will be ad hoc as well as scheduled. Trainers need to be able to respond ad hoc to learners in need.

"We were training 1600 users of our software who are not technically advanced. It was a huge challenge as we used to go and visit them! We had to hire more people, travel more. Then we created on online university, with monthly topics, plus orientation classes for first time users."
– Director of Business Development, Software Development Firm

It is important to appreciate that web conferencing is a different communication medium. Know your audience: they are busy adult learners who are bringing you into their offices - thus they are in control. You may face "competition" from the phone, email, IM messages, and people dropping in. Thus it is essential to retain their attention by keeping lessons short, briskly paced, engaging, and to the point. Paying attention to the following details will also help: slide design (keep simple, use graphics instead of text bullets, do not read the slides – tell the story "behind" them) and use of

pointing and annotation to emphasize key points. Ask poll questions and encourage questions via text chat to engage the audience. Always maintain interactivity — the most essential ingredient to working with remote learners.

"Be aware - know what you want to say and keep it short (30-45 min max); learn the hints that indicate when they've become disengaged."
– VP Operations, Software Development Firm

"I appreciate webinars where there is some sort of interaction to the keep the audience engaged. We open up phone lines so people can ask questions. Normally people (are) in listen-only mode, but we have had to change to add a panelist number so people can speak to us. That's important."
– Marketing Specialist, Consulting Firm

Mastering the technology is the easy part. Appreciate that web seminars are "showtime." Just like a physical event, practice is critical. Script who will play what role, run through what they will present, and rehearse any presenter hand-offs.

"I should have practiced once or twice, but I didn't. Fumbling on practice time, not real-time is important."
– President, Consulting Firm

Work with your teams to encourage them to use web conferencing as a tool, and follow up. Web conferences are part of a larger interaction process with clients — they are a means to an end.

"It's nice to reach out to a client and help, but I encourage our team to have a client share the keyboard and mouse, and for us to show clients how to do steps, and make the client go through the motions to learn it. Passing control back and forth is important to teach clients how to fish on their own."
– Director of Technology Services, Consulting Firm

"Using web conferencing for training is an art and there is always room for improvement. Be sure to close the loop and, in the process, gather feedback. After every webinar we survey our attendees; we have them rank it, then ask for comments for improvement. For those who weren't satisfied, we try to dig in to see what we could do to improve. We also make sure it's valuable to our members, we survey to find out what they want help with."
– Marketing Specialist, Consulting Firm

What to Look For
The Features That Make a Difference

A Wainhouse Research survey of more than 500 trainers revealed that the most important web conferencing features are ease of use, reputation of vendor, and customer support. These findings were reinforced by our interviews.

"The performance of real-time screen sharing is very important for online demonstrations."
– Director of Business Development, Software Development Firm

"Often when customers call us, I right click, and within 2 seconds we're online. That feature is very nice. No need to log-in on a website."
– VP of Technology, Financial Services Firm

"Use a simple offering so that the users can train themselves."
– VP Operations, Software Development Firm

The ability to pass meeting control is important for multipresenter seminars, while remote control can help with hand-holding customers through a hands-on demonstration. In addition to the listed features, "all-you-can-eat" pricing that is charged on a per seat basis gives your trainers the ability to use web conferencing at any time without worrying about any additional cost penalty.

It's Not Just about Replacement

Web conferencing is not about simply "replacing" in-person training. It is a different tool — a supplementary tool — with its own set of unique advantages. Implemented correctly, it can supplement or replace traditional training — especially in the area of timeliness. This can result is increased customer satisfaction, more satisfied learners, and a competitive advantage.

"More important: We give better service to our customers – which gets the word around the industry. Satisfied customers get us more business."
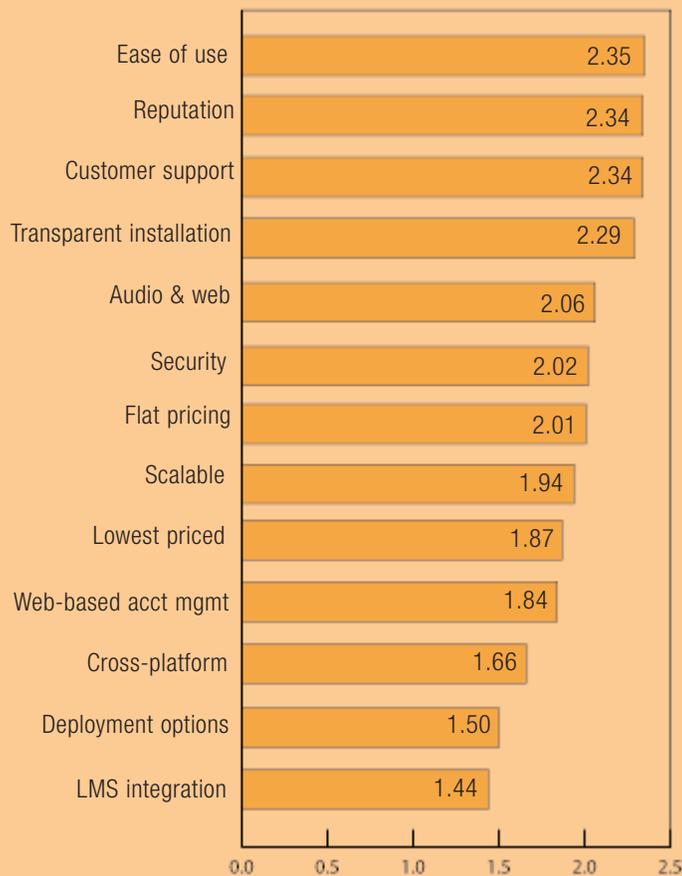*– Director of Business Development, Software Development Firm*

Feature	Value
Ease of use	2.35
Reputation	2.34
Customer support	2.34
Transparent installation	2.29
Audio & web	2.06
Security	2.02
Flat pricing	2.01
Scalable	1.94
Lowest priced	1.87
Web-based acct mgmt	1.84
Cross-platform	1.66
Deployment options	1.50
LMS integration	1.44

WR survey of over 500 trainers, December 2006