



Product Training – A Centralized Approach

White Paper from STAM Interactive Solutions



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Introduction

The growth in digital technology has made a gradual but substantial shift in product training possible: classroom has slowly been giving way to the online space. Its allure lies in being smart, effective and very economical. Though the process of transition has been on for a while, it's a mistake to think that it is a mere change in the mode of training. The change in space reveals many issues, which have been barely attended to so far. This white paper attempts to address these important issues.

Abstract

This white paper, after understanding the limitations of the classroom model and outlining the possibilities of online training and mapping the current scene in product training, proposes a "Centralized Learning Approach" in the field of product training. After substantiating the need to go for such a centralized but flexible development strategy for better effectiveness, co-ordination between different wings and offices across the world and for extreme cost effectiveness, this paper will go on to outline a systematic way in which the approach can be implemented as a scheme in a company detailing the learning content management system, interfaces and organizational angles.



What is ‘Product Training – A Centralized Approach’?

Current State of Product Training

- Most of product training is still done in the classroom environment. Imparting product training in a classroom environment needs a decentralized structure, meaning, the training needs to be available as close as possible to where the stakeholders are - this approach is only logical.
 - Each Country is responsible for the product training requirements in their own country. They develop their own content and deliver it to the market place.
 - In many large countries, the product training is further decentralized and the regional or state offices develop their own content and deliver to their stakeholders.
- Product training is further decentralized depending upon the type of stakeholders. Each department focuses on training their own stakeholders for the same product.
 - Sales Dept trains sales people
 - Installation Group trains installers
 - Repair center trains technicians
 - Help Desk trains tech support, call center staff etc.
- Providing product training in a classroom environment is so complicated and difficult that most organizations focus on providing training to their internal staff and immediate channel partners and usually ignore the end users. They expect their channel partners to provide training to their end users.

Findings

Based on the issues raised above, many of the limitations in providing classroom training can be summarized as follows:



Inflexibility -With hectic schedules and constant mobility, people want flexibility to undergo training at their own convenience. As training happens mostly at fixed locations and at predetermined hours, it leaves them little or no time for training. Even if they manage to attend the same, they are probably sacrificing an important business opportunity.

Heterogeneity - Another commonly encountered challenge is the lack of commonality in the training programs. Each decentralized training center develops its own training material; there is very little standardization and the quality can vary appreciably between different offices.

Duplication of Effort - The training programs are conducted by individual departments, divisions and regional offices. Each of these entities design and develop their own curriculum and delivery means. This leads to a high level of duplication of effort and resources.

Poor ROI - Decentralization, duplication of effort and inflexibility lead to the realization of a very poor training ROI. Apart from the training material and trainer fee, organizations incur huge costs in terms of logistics, travel and accommodation, and no shows.

The Online Training Upgrade

There is a definite trend towards moving from classroom training to online training. However this process is not very smooth and the approach is haphazard, confusing and inefficient.

Product Trainers doing classroom training all over the world are converting or upgrading their training material into an online course. Since the classroom training courses delivery is decentralized, therefore the development of the online training course is also decentralized. This means multiple development centers are mushrooming all over the world developing the online training courses for the same product. A multinational company's office in USA could have its online training initiative while its offices in Europe and Asia could be developing online training for the same product, not knowing what other parts of the organization is doing.

Different departments like sales or tech support conduct training courses for different stakeholders. These departments are also putting their classroom courses into online delivery. Here again there is very little co-ordination between different departments and each center has its own online training initiative. If you combine this with the earlier point, you can see



that the implementation of online training in a global organization is inefficient. There is too much duplication of effort, which is a great waste of money, time, resources and effort.

Some real world examples

- An Engineering and Support group in USA (for a multinational company) has developed an online training course for Product X. The Product Manager for the product is not even aware of the availability of this online course. If the Product Manager is unaware, it is obvious that all the other offices worldwide are also unaware and are unable to take advantage of this online training course.
- The Hong Kong office has undertaken the initiative of developing online training courses for a variety of product groups. The same product groups in USA also have their own initiative to develop online training courses for the same products. This is sheer duplication of effort, time, resources and money.

Findings

There is a short sighted and limited vision in the approach to online training for products. Enterprises are aware that the reach of online training is global but they are not making the time and effort to understand the issues involved and building the required infrastructure which will tap into this potential.

Online Product Training - A Centralized Approach

Unlike classroom training which *must be* decentralized, the development and delivery of online training *can be* centralized and this the fundamental change which must be understood properly at all levels in an enterprise. This will overcome most of the shortcomings explained in the earlier sections. This can be achieved by undertaking the online training development work at one location (maybe the Product HQ) and delivering the same online training to all stakeholders worldwide.

Point to Consider - If product development and manufacturing is usually centralized for country wide or world wide delivery, than why can't the product training function also be centralized? This way product development and product training can go hand in hand.



This centralized or unified approach is a radical shift from the decentralized delivery of product training and it has many positive benefits, which are listed below. We call this “A Centralized Approach to Online Product Training” and this method effectively addresses all challenges of Product Training.

- ✓ Worldwide Delivery of Product Training
- ✓ Centralized Development effort - means reduced duplication effort - Effective utilization of resources - Better ROI
- ✓ No Delay - Training Available When Needed Most
- ✓ Consistent Training Message Globally
- ✓ Ease of upgrade of training during product upgrades
- ✓ Use LCMS - provide global training with local control.
- ✓ Provide Training to all Stakeholders including End Users
- ✓ Training Available 24/7



Development of a Centralized Approach

This section will define the typical stakeholders in an enterprise who need product training. It will also try and understand the training needs of each of these stakeholders. Once we get a full understanding of the training needs we will explain how we can undertake the development of online training modules and finally we will show the mechanism to deliver this online training worldwide from a centralized location.

Stakeholders to Product Training

The stakeholders would really depend upon the type of product; some of the typical stakeholders are identified below.



Training Needs of Stakeholders

Each of these stakeholders has a different training need. Although the exact training needs will vary depending on the actual product (if it is a B2C or B2B or technical or non technical product), one can find below a typical list of training needs.

Stakeholder	Performance Goal	Training Needs
Sales Staff	Highlight the product USP	<ul style="list-style-type: none"> • Features/Benefit Training • Product Overview • Product Technology Training • Product Operation • Product Applications and Case Studies
Installers	Ensure the operational readiness of the product	<ul style="list-style-type: none"> • Product Overview • Equipment Mounting • Product Connections/Wiring • Configuration/Programming • Product Operation • Troubleshooting
Repair and Service Technicians	Improved pre and post sales processes	<ul style="list-style-type: none"> • Pre Sale Product Checks • Troubleshooting • System Level Repairing • Component Level Repairing • Firmware Upgrades
Technical Support	Improved after sales support	<ul style="list-style-type: none"> • Product Overview • Equipment Mounting • Product Connections/Wiring • Configuration/Programming • Product Operation • Troubleshooting
End Users	Realize the best benefits of the product	<ul style="list-style-type: none"> • Features/Benefit Training • Product Demo • Product Operations • Basic Troubleshooting • Installation • Basic Configuration/Programming



After reviewing the above table, it is important to note that there are many common training needs between the stakeholders; there is fair degree of overlap. This would mean that if some common training content is developed for a certain stakeholder, it can and it must be used to take care of the training needs of other stakeholders. This reusability of training content will help reduce the development cost, without compromising the training needs of the different stakeholders.

Key Factors - Online Training Development

If online training delivery is to replace classroom training effectively, then it is important to understand the course development methodology which will be used. There are no industry standards for this and this can cause a great deal of confusion.

There are many ways of making an online training course - from a power point presentation to an online text book. These may be cheaper but are not an effective training tool. For online product training we recommend an effective mix of text, audio, images, animations and interactive product simulations. This should give the learner a 'hands on' feel about all the aspects of the product.

Given below is a list of key factors which must be considered while developing effective online product training modules.

- High degree of Product Simulation - a Virtual Product
- High degree of Interactivity (two-way instead of one-way animation)
- Audio Visual Presentation
- Triple Play (Lesson/Practice/Test) for key Functions - to ensure effective learning
- Interactive Testing Modules with Certification
- Email Support with SME (if required)
- Blogging, Discussion Forums, Chat rooms and Wiki allow community support for effective product training



Learning Content Management System (LCMS)

The Learning Content Management System (LCMS) is a perfect centralized tool to provide global delivery which takes into account the needs for multilingual delivery and also provides targeted training needs for different stakeholders like sales people, installers, end users etc. In this section we will show how this can be achieved.

Learning Objects

The key element of a LCMS is developing a database of Learning Objects which are small self sufficient, self standing training objects. For example: 1) How to install a software program from a CD to a PC. 2) How to operate a function in a product, say print an image from a digital camera.

Step 1

The first step is to create a list of all learning objects, which will cover the needs of all the stakeholders. Once this is done, all the learning objects need to be developed. As mentioned earlier, to develop these learning objects to be effective and interesting to the learner, it is very important to create a virtual simulation of the process so that the learner gets a virtual 'hands on' experience.

Step 2

Once the learning objects are created you can add tags to them, so that common learning objects can be shared and used by multiple stakeholders. The types of tags which can be added are as follows:

- Stakeholder tag - Will the learning object will be used by one or multiple stakeholders like sales people, end users, installers, tech support etc.?
- Country tag - Which countries will use the learning object?
- Application tag - Will it be used for training, knowledge base listing or elsewhere in the website?

Step 3



The learning objects with tags will be stored in a database so that they can be called upon by different interfaces and programs like training, knowledge base listing etc.

User Interface

User Interface is part of the LCMS and allows a display of the learning objects for the users. What learning objects will be displayed would depend on the type of tags which have been added. One can find below some of the examples of User Interfaces which can be created along with the LCMS.

Training Interface

There will be multiple training interfaces depending on the type of stakeholders and the type of language. Depending upon the type of student, they can register and log on to the LCMS from anywhere in the world and they would view the training courses based on the learning objects which have been earmarked for them. This interface will allow the students to complete the online product training course. They will also be able to track the test scores, etc.

Application Interface

Besides training, the same learning objects can also be used for the knowledge base listing. Instead of being text based, these learning objects, which are a virtual simulation of the process, would be more effective. The Application Interface will pick up the appropriate learning objects from the database and display them appropriately. The user coming to the knowledge base will click an object and view its content.

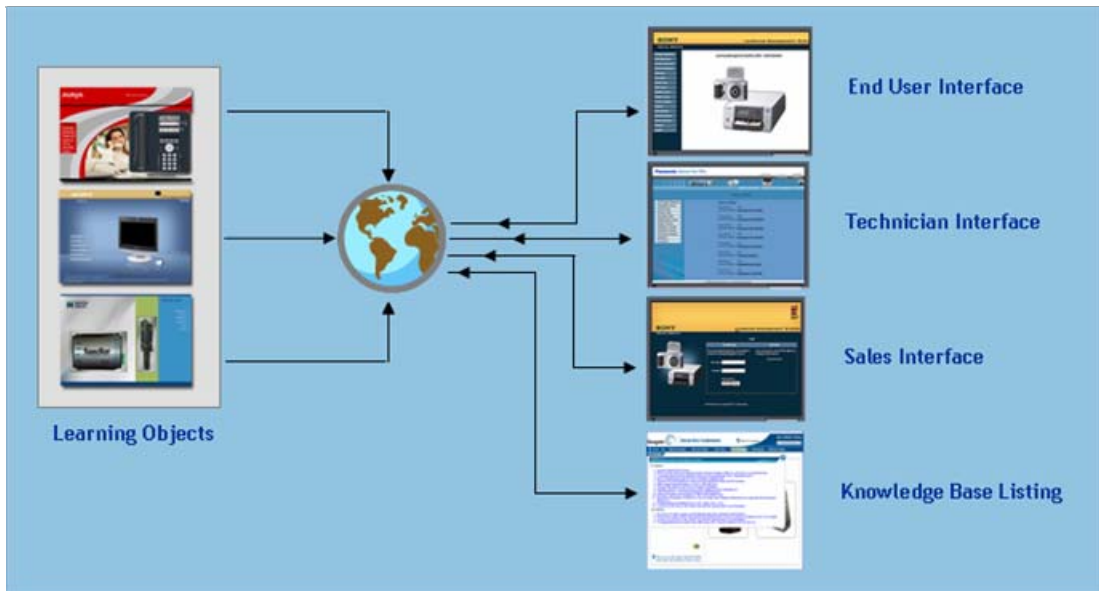
Web Interface

There are many learning objects which have been developed for the product that can be creatively and effectively used in the company website. Below are a few examples of how the learning objects can be used in the web page for the product:

- Product features/benefit
- Product Demo
- Product Applications



- How to use some key product functions.



Admin Interface

This interface will allow the administrator to control all the interfaces worldwide. If required, there could also be a Level 2 administrator who will only control their respective country interface or stakeholder interface. The admin interface is a robust tool that will allow tracking of student performance and printing a variety of reports including student registration, etc.

The LCMS is a very powerful tool and will allow a global implementation of the online product training initiative. As we have seen, besides training, if properly planned, the LCMS can also be used in many creative ways in an organization.



Deployment of Centralized Approach

To successfully implement the 'Centralized Approach to Online Product Training' within an organization it is important to create a proper organization structure. It is quite clear that the decentralized classroom delivery structure will not work for the Centralized approach. The 'Centralized Approach' will require a centralized organization structure. This is a radical shift in approach and companies need to come to terms with this changed environment if they want to successfully implement online training for their products.

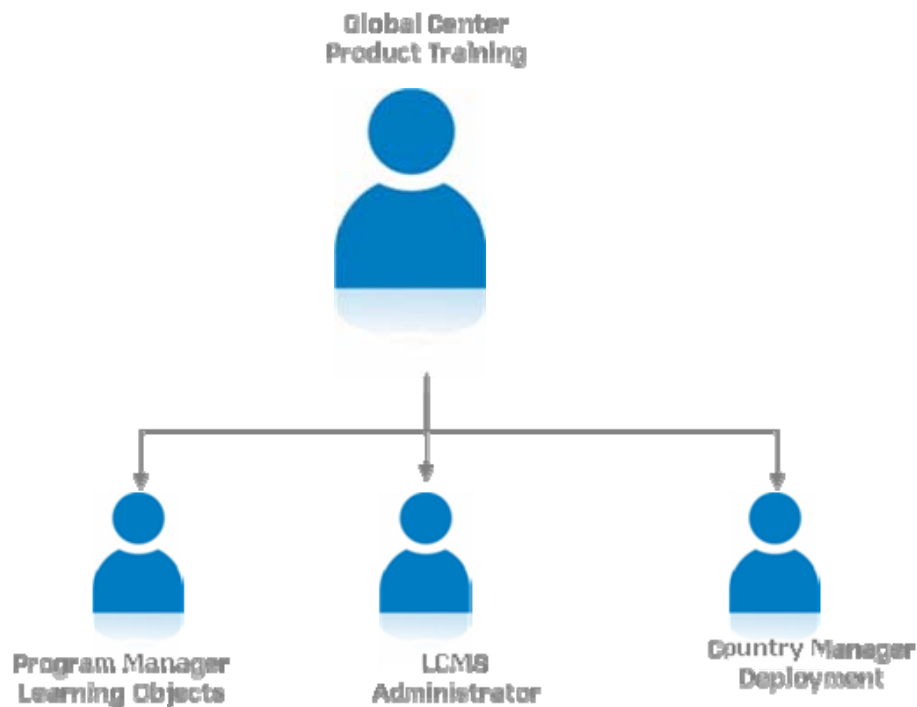
In this section we will discuss the organization structure which is required to deploy the centralized LCMS for global delivery.



Recommended Organization Structure

The Global Center for Product Training will have the following 3 departments

- ✓ Program Manager - Learning Objects Development
- ✓ Administrator - LCMS
- ✓ Country Training manager - Deployment



We will discuss the role and functions of each department in more detail.

Program Manager – Learning Objects Development

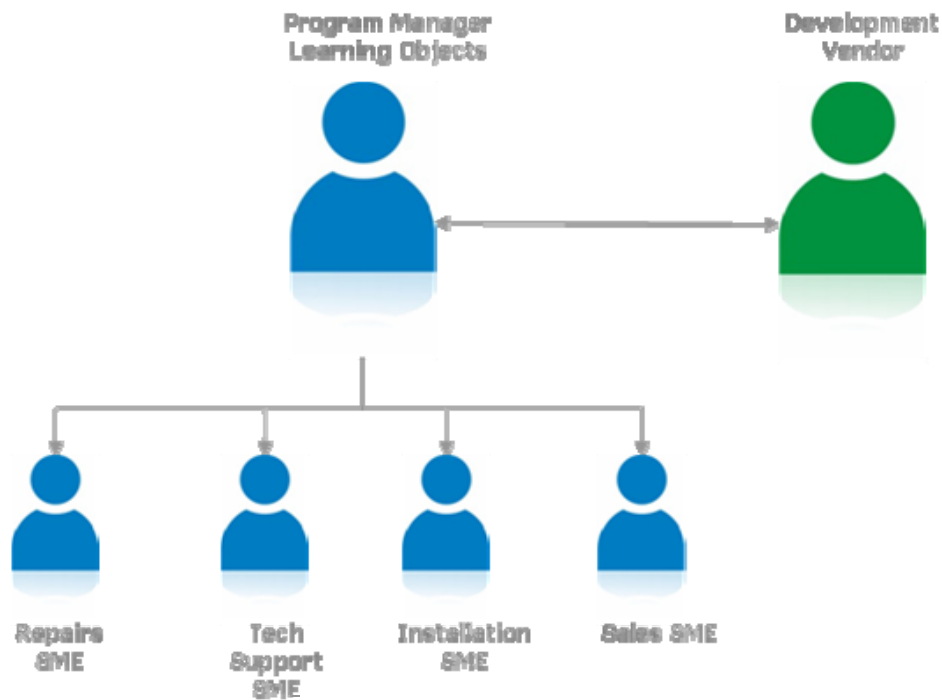
The main role of the program manager will be to prepare the list of learning objects needed for the online product training, and once this is complete, work with vendors to complete the development.

- ✓ In order to prepare the list of learning objects, the program managers will work with all the subject matter experts (SME) within the different departments of the



product group. The program manager will interact with the sales dept, installation group, repair center, tech support etc. and ascertain their training needs. Based on this, the program manager will prepare a detailed list of learning objects which need to be developed to take care of the training needs of all the departments.

- ✓ Once the RFP with the learning objects is complete, the program manager will work with the vendor and SME to ensure all the development is as per specifications and guidelines.
- ✓ Once the English version is complete, the program manager will also be responsible for the creation of different language versions of the learning objects.
- ✓ The program manager will also be responsible for the development of all product upgrades as and when required.



Administrator – LCMS

The main role of the administrator is to ensure the smooth functioning of the LCMS. This will include the following:

- ✓ Work with the Program Managers to ensure all the Learning Objects are included in the LCMS
- ✓ Work with the SME to ensure appropriate tags are added to the LO so that targeted training courses are created to meet the training needs of different stakeholders in different countries
- ✓ Work with the different Country Training Managers to make sure all the User Interfaces for their respective countries are working without any problems
- ✓ Work with the provider to sort out any issues on the performance of the LCMS
- ✓ Provide technical support to all students who are using the LCMS anywhere in the world

Country Training Manager – Deployment

Each country office will have its own Deployment Manager who will ensure that all the online product training courses which have been created by the global HQ are used effectively within their respective country. The following are the responsibilities of the Country Manager

- ✓ Be the focal point for the implementation of the online training courses within the country.
- ✓ Work closely with the Global Product Training Dept and keep track of the new updates taking place.
- ✓ Work closely with the Country Product Departments and stakeholders and inform them about all the new initiatives and updates on online product training.
- ✓ Prepare reports from the LCMS and share these with the different product groups to ensure the online training objectives are met.
- ✓ Building an effective LCMS is not enough, it is important to bring traffic to the LCMS and make sure students start using this tool. This would mean that a comprehensive marketing communication plan has to be developed so that all the targeted students are aware of the online training initiative. Also make sure the



students attend and complete the online training program. This would be a key function of the Country Deployment Manager.

It seems/feels the time is right for enterprises/organizations to have another look at how they are approaching the implementation of product training. Moving from classroom to online delivery will definitely save lots of money and it has a tremendous ROI. This ROI can further be enhanced by removing the inefficiencies and duplications, and centralizing the development and delivery of online training content with a global picture in mind.

Note

This radical shift in approach can only be implemented if the top levels of management are fully involved in this process and they ensure that the new infrastructure as suggested in this white paper is fully implemented. A half-hearted approach will not yield the full benefits



Conclusion

The current class room training scene is marked by inflexibility, heterogeneity, duplication of effort and poor ROI. Though online training has the potential to rectify many of these shortfalls, due to the short sighted policies and poor integration of training into the over all functioning of the company, and the global outlook is yet to emerge. Taking the training requirements of companies into account, it is proven that centralized learning approach can improve the transition from class room training to online training making it smoother and more cost effective, alongside giving online training the necessary global reach and co-ordination. The centralized learning approach recognizes various stake holders involved, while connecting all of them at the point of training. Through the development of a learning content management system that can be customized for the learning objects of various participants by tagging them as stake holders, countries and applications and by developing user interfaces categorized into training, application, web and admin, this learning approach can be deployed for the massive benefit of an organization.

About the Author

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About STAM Interactive Solutions

STAM Interactive is a decade old comprehensive learning solutions provider. STAM provides specialized online learning solutions for hardware and software products.

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