



## **Leveraging Business to Consumer Learning for Marketing, Training, and Support of Customers**

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## **1. Introduction**

Organizations are using internal corporate Learning and Talent Management software applications to provide training and development opportunities to their customers. Corporate learning systems were designed and configured initially for delivering required or mandated compliance training to office based knowledge workers. The typical learner accessing these systems was forced to make the time to learn the nuances of the delivery application in order to complete the training required.

When training customers and other learners in the extended enterprise, traditional learning systems have been challenged to deliver a suitable experience for customer learning. Customer training is a voluntary experience. Customers access learning systems infrequently and for specific, elective training on specific products. These may be products the learner is considering for purchase or has already purchased. Customers are looking for easy access to knowledge and will not invest time to learn the nuances of a delivery system in order to access training. Training the extended enterprise customer is a unique challenge for learning professionals.

Learning systems have evolved to meet customer training needs. Likewise organizations have adapted by offering many forms of learning using a variety of free and purchased training tools to meet customer's needs. By leveraging these tools, organizations are able to curate and deliver compelling learning content as part of their online presence in an interface that is easy to use and familiar to its customers. These same tools can be used to build a community or network of customers to support and train each other.

Organizations have found that training for customers can serve as an effective marketing tool, support resource, and community builder. In providing instruction on the benefits of their product(s), organizations are able to use training in the sales process. The same training developed can be referenced and used as a support resource. Lastly, the community allows customers to assist each other with best practices, solve each other's support issues, and tout the benefits of the products to others. Some of the customers emerge as instructors and experts in their local communities that can be used to training other customers. The best practices of these experts are then incorporated back into the learning developed by the company.

## 2. Track the Trends

Emerging and continuing trends in consumer purchasing activities are increasing the demand for easily accessible and targeting learning experiences. As the lines between marketing communications and customer training become blurred, providing product information in the form of learning is becoming important for companies to remain competitive and build their brand with consumers.

Following are some of the trends in consumer habits and product marketing that are driving change and increasing demand for customer training:

- Consumers seek information to make purchasing decisions. This information includes price comparison, product comparisons, product reviews, product demonstrations, and learning how to use the product.
- Consumers have access to information online at all times via mobile devices.
- Consumers need information and training at the point of purchase in both an online store or in a physical store. Consumers expect information and learning to be integrated in commerce applications online or accessible 'in the aisle' via URLs, barcodes and QR code scans.
- Consumers are not interested in product manuals or detailed specification sheets on products. Consumers would rather access product-how-to videos, tips and tricks in brief content pieces.
- Consumers are becoming increasingly self-sufficient and self-service oriented.
- Consumers are increasingly purchasing complex products and services without support and assistance from a salesperson and in some cases prefer a purchasing experience that does not have live interaction.
- Consumers want to socialize their purchase experience before, during and after the sale via social networks.
- Consumers trust reviews, how-to-advice, and product demos from other consumers.
- Consumers expect the seller to listen to them. Consumers want the company to be engaged in their product feedback and ideas for improvement.
- Consumers experience with best in class services for getting information (e.g. Google, YouTube, and Wikipedia) and purchasing (e.g. Amazon, Apple). Consumers expect that companies training experiences will be as easy to access and use as these services.
- Marketing communications and training are becoming more integrated.
- Companies are using training to reinforce the value of their products and influence customers usage of their products.
- Companies are looking to leverage existing delivery platforms (e.g. YouTube) and social networks (e.g. Twitter and Facebook) as key components of their customer outreach and training programs.

### ***3. Identify the Problem***

These consumer trends require that learning and technology professions, responsible for customer and product training, solve a series of key problems with their existing training technology and current content design methods in order to meet the needs of their customers. Traditional approaches used for training internal corporate knowledge workers do not translate well to training customers. The problems with the current approach are seen in two areas - the current learning management technologies and the current state of training design.

The current state of learning management systems (LMS) used in the corporate environment have been challenged with delivering content to customers. Following are some of the commonly cited issues with these LMS applications when used for customer training:

- Too many clicks to access training content
- Poor search functionality in the applications make it difficult to locate relevant learning content
- User experience and user interface is not designed for mobile access
- Lack of support for delivery of content to mobile devices
- Mobile apps developed by LMS vendors do not have all of the functionality of the web based application
- Lack of support for social learning and learner knowledge sharing
- Lack of support for the delivery of content to learner with and without system access (i.e. internal and external learners)
- Functionality of the LMS requires that users are logged into the LMS
- Lack of integrated commerce applications to purchase training content easily
- Inability to leverage the expertise of customers that are utilizing their products and services in creative ways
- Lack of opportunity to publish and promote the content outside of the company's environments
- Lack of a platform to support the creation of user generated content

In addition to the technology and system issues that need to be overcome, there are a number of issues with training design. Some common issues with training design are:

- Traditional training design methods for online courses do not lend themselves to consumption on mobile devices (e.g. a 15 minute structured course will not be used as effectively as a diagram that allows for zooming in and out with supporting videos)
- Company is now competing to be the source of product training versus information from other sources on the internet (e.g. customer uploaded reviews of product on YouTube or comments posted in an Amazon product review). The company training competes to represent the brand and the messaging the company wishes to deliver.

- Traditional training is not easily integrated into existing customer outreach in the sales, marketing and operations functions
- Structured courses are not easily shared via social networks and the training assets are locked into the structure of courses.

Learning professionals are learning to leverage a variety of platform tools and learning design approaches to overcome these challenges to customer training.

## 4. Define the Solution

To overcome the problems of training customers, companies need to approach the issues with a new solution and definition of success for customer training. The solution to these technology and training problems is to design, select and implement a learning experience optimized to deliver training to customers. In a well-designed customer learning experiences:

- Training is available to consumers at the point of purchase and integrated with the transaction process
- Training is easy to access, not requiring login to access
- Training is easy to consume on any device
- Training meets the immediate need of the customer
- Training is delivered in the right length for the right audience
- Training is a branded experience that reinforces the value of the product and message of the brand
- Content is relevant and fresh
- Content is well organized and searchable
- Content supports a diverse user base from novices to super users
- Content provided is both broad (many topics - shallow depth) and /or in deep (few topics - more in depth)
- System supports commerce transactions
- Integrated in the primary company web presence and marketing outreach programs
- Available on any platform (web, mobile devices)

In a learning environment that is optimized for customer training, the learning system:

- Serves as a tool to identify users that are really experts in the use of the company's product or services and leverage that knowledge to train other customers
- Supports building a group of trusted, volunteer users that self-identify through forum use, community participation and user rating. System then allows the user content to be used as training
- Supports any existing effective delivery of training including instructor led training
- Allows the company to identify and leverage local resources in communities (i.e. coaches, speakers, local experts) to deliver its product training
- Integrates the purchasing process into the existing online marketing presence of the company
- Supports all forms of learning

- Supports a flexible display of the learning catalog of resources organized by type, topics, categories, keywords, length and format.

Companies find that to create a solution that meets these requirements typically involves a learning management system, learning content, media assets and user generated content. Often the delivery of content and support for the social aspects of the learning design is supported by public media tools and social networking tools.

## ***5. Achieve the Benefits***

Well designed and effectively implemented learning systems for customers achieve benefits to the company that outweigh its costs. Some of the key benefits are increases in revenue (product sales and training revenue) and reduction in costs (support costs and training costs). Benefits of an effective customer training program and platform could include:

- Marketing and delivery of the brand of the company in the learning experience
- Marketing the value of the product or service throughout the learning experience
- Training reinforces the value points and advantages of the products to support the sales process
- Training makes a complex sell easier for the consumer to understand
- Company can use the training and user community to find expertise and product usage ideas and best practices that would not be identified otherwise
- Training reinforces the brand message and builds loyalty
- Training expands the use and adoption of other products from the company
- Company gathers intelligence and data about its customers
- Increase in brand loyalty
- Reduce support costs by training clients
- Enable community based support by other customers
- Reduce customer time to value and productivity with products

## ***6. Examples of Effective Customer Training***

Following are some examples of companies that have designed and implemented successful custom training experiences that met the solution requirements and achieved the benefits to the company. Some of the most innovative companies are using public and commercial tools to deliver customer education videos, produce on-demand eLearning courses, and provide customer learning communities.

**Company:**

Web Hosting Provider

**Training Objective:**

To orient the customer to the service, to provide support on the most used platform features, and to educate the learner on additional products and services offered by the company.

**Solution:**

The audience participation in all training is elective and on demand as needed. The learners have no time dedicated or requirement to take training and the only motivation to training is to support the use of the products.

To engage the audience, this organization used a variety of tools to deliver training and provide support. The company has an official YouTube channel that delivers product how to videos on the company's most used tools and support videos of the most commonly asked support questions. The channel features concise summaries of topics, high quality actors and animations, and contains clear messaging and company branding. A user can subscribe to the channel and receive updates with new videos are posted. These videos can be viewed on a variety of devices and are easily pushed to social networks.

Also, the company offers free webinars for new customer orientation using a commercial email marketing and online meeting product. These webinars are recorded and stored for future use as learning content. In the client support portal, the company provides over 40 how-to video tutorials complemented with step-by-step directions. Lastly, the company provides a knowledge base of frequently asked question and hosts a user support forum where clients can help each other with issues.

The company has determined that those learners that participate in the learning experiences use the platform more effectively, increasing the satisfaction with the platform, and increasing the likelihood that they would refer the company to others.

**Company:**

Online Email and Social Media Marketing Company

**Training Objective:**

To enable its customers to best utilize the online marketing product and services offered by the company. To engage the company's customers to share lessons learned and best practices with one another in a company hosted forum. To identify and qualify users in local areas that could lead client education classes and seminars on the use of the company's product offerings.

**Solution:**

This company uses technology effectively to train its users, but to also identify users that could serve as mentors and instructors to other customers. The company hosts an online learning center which is fully integrated with the company's online web presence. Both the website and the learning center support mobile device access. The learning section of the site is available to all users so a learner does not have to be registered to access the training offered.

The content offered serves as marketing for the service throughout the learning experience and the training 'sells' the advantages of the products. In the training experience there are options to click and purchase the products and services (i.e. the subject of the training) via a sidebar in the learning environment.

All resources are searchable and well tagged by type, selectable by categories then keywords, and sorted by Learn It (getting started quickly) or Improve It (more in depth). The courses offered include Getting Started Quickly (Product Guides, Infographics, Reference Documents), Video Tutorials, Webinars (Live and Recorded), and Podcasts (Audio).

The learning center includes support for both online learning and live instructor led courses. Many of the courses are free to the public, but the site also integrates a commerce engine and sells access to courses online and offered locally. There is a local learning focus to help learners find live, local experts on the product by attending seminars, boot camp classes, industry events, Chamber of Commerce meetings, and other presenters.

User generated content is blended with company generated content in user communities, blogs, and best practices / client success videos.

This client example demonstrates an excellent blend of company and user generated content, leverages customer success, uses local resources for delivery and provides many forms of learning that are easy to access without a login to an LMS.

## ***7. Learning Management System (LMS) Products for Customer Training***

The majority of learning environments will need a learning management system to bring together learning offerings, manage users, track training and provide data and reporting on learning events. While not required in a learning solutions, a quality LMS that focuses on training the extended enterprise will help the learning professional build a solid foundation for the company's learning infrastructure.

There are hundreds of learning management system vendors and applications in the learning software market today. As in other software categories, the products in the market have strengths for different markets and hold reputations of strength in areas based on the success of their clients. Following is a short list of LMS vendor products with strength in the business to consumer area.

Market Leading LMS applications with excellent extended enterprise support

- Saba
- Cornerstone OnDemand

Established LMS applications with a substantial base of users leveraging the platforms for customer training

- CertPoint
- OpenText
- Progreso

Next generation LMS applications focused on user experience and built for mobile learning that would be good choices for delivering customer training

- Absorb LMS (designed for mobile, built on HTML5)
- BlueVolt (designed for the extended enterprise, customer and partner networks)
- LearnDash (built using WordPress as the basis for the LMS)
- Litmos LMS by Callidus Cloud (focus on user experience, selling training)
- TalentLMS (quick deployment via self service)

## **8. Conclusion.... What's Next?**

Remember that when designing a learning system for customers, the learning professional must recognize the differences in training this audience as opposed to the corporate learner taking required training. Customers are volunteer learners and as such don't have the patience to learn a delivery system or sit through content that is not relevant to them or in a format that they cannot access easily. This learner is diverse in skills and needs. Thus, learning professionals should offer solutions that meet this wide variety of needs.

The content must be sized for the purpose and provide the learner with what they need to purchase of the product, learn how to use the product, or share their experiences. Focus on media formats and authoring tools that produce content that is bite sized and formatted for mobile delivery. Leverage public media delivery and social networking platforms to distribute and socialize your content.

The platform must be easy to access, mobile ready and offer the customers access to many forms of learning while supporting connections that allow to learner to socialize with other customers. Focus on LMS platforms that have been designed for mobile and have a strong client list of organizations training customers. Choose a platform that allows you to identify and leverage user generated content and identify learners that could become expert, instructors and champions for your product.

Building a learning solution for customers is different than training corporate users, but success comes by understanding the problems with current systems and training design, focusing on the requirements of these learnings, and designing a solutions focus on the needs of the customer.

### ***About Steve Owens***

Steve Owens has fifteen years of experience deploying learning and talent management technology solutions to large client organizations and twenty years of experience in information systems professional services, project management, and business development. His extensive experience in software life cycle leadership include requirements analysis, business process consulting, technical installation, data conversion, application consulting, user support, change management, marketing, and training. This experience provides our clients with an enterprise software deployment perspective for their learning and talent management technology initiatives.

Steve is responsible for the strategic direction of Rapid Learning Deployment's service offerings and the day-to-day operations of its consulting teams.

Prior to founding rapidLD, Steve was the Director of Professional Services for O/E Atlanta, Inc. specializing in the deployment of Learning Management Systems. Prior to O/E Atlanta, he was a Management Engineer for Emory Healthcare deploying enterprise software applications in a clinical setting.

Steve received his Bachelor of Industrial and Systems Engineering degree from The Georgia Institute of Technology. He is a Microsoft Certified Systems Engineer (MCSE), Microsoft Certified Sales Specialist and a Cisco Certified Sales Expert.

### ***About Rapid Learning Deployment, LLC (rapidLD)***

Rapid Learning Deployment, LLC (rapidLD) is a professional services company developed to help organizations improve their performance with complete, integrated, and flexible learning and talent management solutions. Our solutions are designed to meet the organization's immediate and evolving needs and goals.

rapidLD provides Learning and Talent Management consulting to help organizations identify products and services which allow organizations to integrate and enable their training and skills management programs.

Learn more about our services and how we can work with your organization to quickly implement successful Learning and Talent Management solutions.

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