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Next-Generation Customer Training

Intuit Adapts LMS to Meet Learning Needs of Multiple Audiences and Business Models

—**Chris Howard**, *Principal Analyst* | December 2009

▶ ## IN THIS CASE STUDY

The typical learning management system (LMS) is designed to address the needs of internal-facing employee development and training, which can lead to functionality issues for companies with strong customer learning programs. The standard LMS usually includes features designed for organizations that assign, track or approve the activities of learners. By contrast, customer-facing training organizations may require robust e-commerce shopping carts and payment systems.

At the same time, customer training can be as varied as the products being sold and the people who purchase them. Some companies take a "one-size-fits-all" approach and attempt to create a common online learning environment that suits the requirements of all customers. Other companies have strong business units, each of which implements separate technology infrastructures that coexist in unconnected silos.

Leading business and consumer software maker, Intuit, has taken a different route, implementing a single LMS with multiple portals to support different business models for customer training. For example, the accounting professionals division provides free training to tax and accounting professionals to grow its sales and base of influencers. Certification is offered to members of the QuickBooks

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ProAdvisor program[1]. By contrast, the QuickBooks® business unit collects a $99 fee for an online training and certification program for non-professional users. In a third model, the real estate software group offers only fee-based classroom and online training, with bulk pricing and subscriptions – and training is a significant source of revenue for the business unit.

This case study will examine:

- How Intuit sells and markets its products to small business owners and professional accountants, and uses learning to increase customer confidence in products and services;

- The structure of the learning organization of the accounting professionals division, and how it develops and delivers content through multiple channels and offerings;

- How customer training for professional accounting products has evolved from predominantly fee-based classroom instruction to a cost-free blend of self-paced e-learning, webinars, certification programs and social networking;

- Intuit's search for an LMS with a flexible, open platform that could be customized to remove unnecessary employee-training features, while integrating the functionality needed for an excellent customer training experience;

- Example of the multiple subportals created by various Intuit business units to address different learning audiences;

- How the Intuit real estate solution group (which has a wholly different business model and customer base from the accounting professionals division) leveraged the same LMS implementation to build its own subportal;

- Business impact of the LMS implementation and new blended-learning approach; and,

- Lessons learned and best practices. ❧

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[1] The ProAdvisor Program is a paid program that includes the certifications at no extra cost.

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Company Overview

Intuit Inc. is a leading provider of business and financial management solutions for:

- Small and midsize businesses;

- Financial institutions (including banks and credit unions);

- Consumers; and,

- Accounting professionals.

Its flagship products and services (including QuickBooks, Quicken and TurboTax) simplify small business management and payroll processing, personal finance, and tax preparation and filing. ProSeries® and Lacerte® are Intuit's tax-preparation offerings for professional accountants. The company's financial institutions division (anchored by Digital Insight) provides on-demand banking services to help banks and credit unions serve businesses and consumers with innovative solutions.

Figure 1: Intuit at a Glance

- **Year Founded:** 1983
- **Revenue:** $3.2 billion FY'2009
- **Total Employees:** 7,800 worldwide
- **Headquarters:** Mountain View, California
- **Stock Symbol:** NASDAQ:INTU

Source: *Intuit[2], 2009.*

Business Environment

The non-consumer side of Intuit markets software solutions to a wide range of business and professional audiences, including:

- Small business owners and bookkeepers;

- Accounting, tax and payroll professionals; and,

- Real estate management professionals.

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2   Source: http://about.intuit.com/about_intuit/profile.

The business units behind these solutions each have different product price points, market sizes and characteristics, as well as customers with different learning requirements.

Accounting Professionals Division (APD)

While as many as five different business units will ultimately share a common LMS platform at Intuit, this report will focus principally on the accounting professionals division and its APD Academy group. This business unit led the effort to implement a new technology infrastructure and is, by far, the largest user of the system at time of this report. The Intuit real estate solutions business unit will serve as an example of how this single LMS platform was extended through subportal technology to serve diverse customer training businesses.

The accounting professionals division exists because Intuit believes that accountants play a critical and unique role in the small business ecosystem. Accountants provide small business owners with accounting and tax services, and also provide individuals with tax services. Because data flows back and forth between accounting and tax software, accountants are viewed as trusted partners, with the authority to recommend or even specify the accounting software solutions used by the small business owner.

Training builds accountant confidence in using and recommending Intuit products and services. It also ensures that accountants who use Intuit products will provide a high level of quality in their service to small business owners. Those accountants who are already passionate about Intuit products get empowered by training and other tools that enable them to share their successes. For example, accountants regularly post unsolicited "how-to" videos on a YouTube QuickBooks channel.

The "halo effect" of training has been measured by Intuit, which finds that trained accountants will take the training they receive and share their new knowledge with at least three more people. Additionally, accounting professionals who attend Intuit Academy training tend to recommend Intuit products four to six times more than accounting professionals who have not attended Intuit training.

Different Business Models

Within the accounting professionals division, there are different business models and drivers for learning. The most basic version of QuickBooks for small business owners and bookkeepers is free. More advanced editions (like QuickBooks Pro, Premier, Enterprise and QuickBooks Premier Accountant, an Intuit ProLine Solution) are sold to accounting professionals and owners of larger, more complex businesses – and can cost several hundred dollars and up.

> ### 🔍 ANALYSIS
>
> Customer training is sometimes viewed as a marketing expense as it can produce additional revenue.

At a similar price point of several hundred dollars is the ProSeries Professional Tax software, an Intuit ProLine Solution, for sole practitioners or tax preparers within a small firm. Lacerte Professional Tax software, an Intuit ProLine Solution, which can cost several thousand dollars, addresses the tax preparation needs of mid- to large-size accounting firms that prepare large numbers of individual and business returns.

In addition to accounting and tax products, Intuit also offers a variety of payroll solutions for small businesses and accounting professionals. Pricing of these products is dependent on the number of employees paid through the service and the level of assistance Intuit provides to help manage a company's payroll function. Annually, the cost can range from less than $100 to several hundred dollars.

These varied customer audiences have different learning levels and practices. Due to cost and environmental concerns, Intuit no longer prints user manuals but, instead, distributes the step-by-step training guides via PDF or electronic distribution. Some of the QuickBooks training is product-oriented and "how to"; however, a large percentage focuses on helping accountants work better with their clients, grow their practices, learn how to conduct sales and marketing, provide additional client services, and more. The business unit offers free continuing professional education (CPE) credits, as well. All of this cost-free training for accounting and tax professionals is a way of gaining customer confidence and trust via supporting the professionals who recommend and use Intuit products and services.

Learning Organization

APD Academy for customers and employees is the learning organization for the accounting professionals division. Although APD Academy reports into the customer-facing marketing organization of the business unit, it also leads training and development for APD employees. The joining together of the customer and employee organizations is a relatively recent development within the accounting professionals division. About three years ago, Intuit hired the current leader of APD Academy and, in just the last year, business-unit leaders made the decision to consolidate two centers of excellence focused on skills in education. Today, the group manager / APD Academy leader leads a team of approximately 30 program managers, instructional developers and trainers, which is divided into four major groups (see Figure 2).

> ### ANALYSIS
>
> Informal learning on social networking sites can be harnessed to encourage customers to learn from each other – contributing to the collective knowledge of all stakeholders.

Figure 2: APD Academy Structure
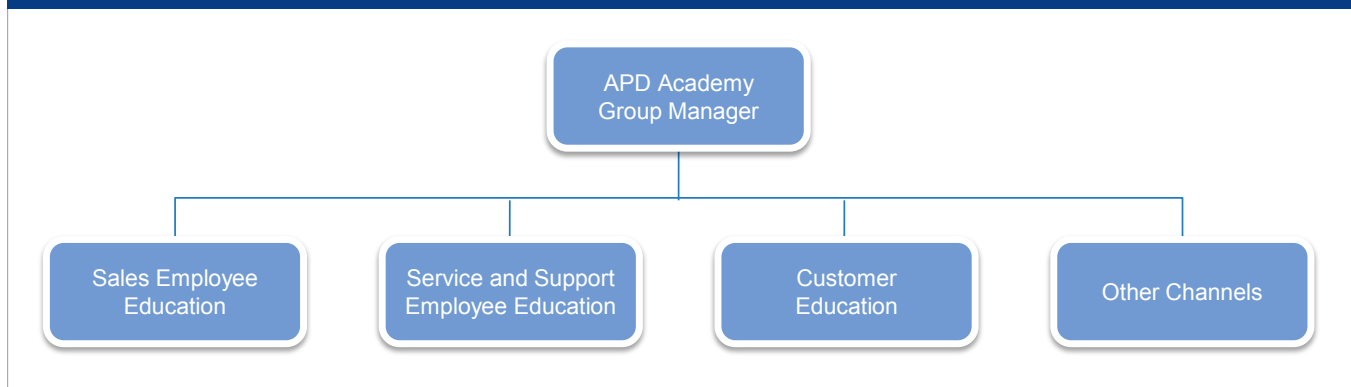
Source: *Intuit, 2009.*

Sales employee education is required for all APD sales and marketing personnel. The scope of this group includes:

- Whole firm messaging;

- Benefits / value proposition for accountants;

- Benefits / value proposition for clients;

- How it works (high level);

- Pricing, offers, et al;

- New hire onboarding;

- Sales skills;

- Business systems; and,

- Career development.

Service and support employee education is required for all APD technical service and support personnel. The scope of this group includes:

- How to use;

- Troubleshooting systems and tax;

- Web resources;

- New hire onboarding;

- Support skills;

- Service skills;

- Other skills (e.g., writing);

> **KEY POINT**
>
> The APD Academy leader leads a team of approximately 30 program managers, instructional developers and trainers.

- Business systems; and,

- Career development.

End-to-end experience supports the training department, enabling every aspect of the business to better serve customers. The scope of this group includes:

- Marketing and awareness of training;

- Support and service of training;

- Delivery and distribution of training;

- Tradeshows and new media;

- Training systems (including LMS);

- Operations; and,

- National Association of State Boards of Accountancy (NASBA) and continuing professional education (CPE).

Customer education is divided into two parts – training and other channels. Everything these groups do is free to customers and in service to education – with the ultimate goal of having customers confidently recommending and purchasing Intuit products. The scope of traditional **training** includes:

- Benefits / value proposition for accountants;

- Benefits / value proposition for clients;

- How to use;

- Troubleshooting systems and tax;

- Grow my practice.

The scope of **other channels**, which manages external influencers, includes:

- Social networking / word of mouth;

- Certification;

- Influencers and associations;

- Customer council; and,

- Onboarding new customers.

> **KEY POINT**
>
> The ultimate goal of customer education is to have customers confidently recommending and purchasing Intuit products.

Content Development and Delivery

Ninety percent of customer-facing content development is outsourced to accounting professionals – all of whom are members of Intuit's "Trainer-Writer Network." Subject matter experts (SMEs) are assigned to courses and compensated for their work. Accountants write the course materials, which are then edited and compiled into finished courses by APD Academy instructional designers; the entire process follows the ADDIE model[3]. In most cases, customers, not trainers, deliver the peer-based training to other customers.

Intuit believes there are two major advantages to this peer-based content development and delivery approach. Learning materials written by accountants have an air of authenticity, a pragmatic context and a depth of information that content developers (who are not accountants) cannot replicate. Instead of being sales-driven, the materials focus on confident use and understanding of products. The other advantage of the peer-based approach is that thousands of accountants want to share their knowledge and successes, so APD Academy can rapidly scale up content development as needed.

The vast majority of employee-facing content is developed in-house in a similar fashion by Intuit functional experts and APD Academy instructional designers. APD Academy trainers are deployed for face-to-face employee training.

Evolution of Customer Training

Customer training in the accounting professionals division of Intuit has evolved rapidly over the last three years. A few years ago, the goal was to deepen its relationship with customers through educational offerings, while also driving training revenue. APD Academy offered just two forms of training – webinars and seminars. Classroom instruction cost anywhere from $250 to $1,000. Metrics were as follows:

- Fifty percent fee-based education;

- Number of customers reached 18,000; and,

- Fifteen percent year-over-year growth.

Today, the goal is to leverage promoters to extend training reach and influence customer behavior. There are more than 10 forms of blended-

ANALYSIS

Blended-learning modalities can be used to give customers a range of learning options. Modalities can be offered at different price points to encourage various levels of training investment.

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3 "ADDIE" is a standard instructional design model that stands for analyze, design, develop, implement and evaluate.

Figure 3: Education Channels and Offerings

Channel	Social/WOM	U-Gen & Viral	Online	Evangelists & Influencers	Certs	Intuit F2F
Primary Offerings	• Facebook • LinkedIn • Twitter • Blogs, forums	• Nibipedia • Viral videos • CDs & PDFs	• SPT • Webinars • Podcasts	• Associations • IEP • TWN • Orgs	• QBFS • Adv • QBES • POS	• Seminars • Tradeshows • MeetUps

Source: *Intuit, 2009.*

learning modalities, including self-paced e-learning, live and recorded webinars, and social media (see Figure 3). Metrics are as follows:

• One hundred percent-free education;

• Number of customers reached 100,000-plus; and,

• Six hundred percent year-over-year growth.

LMS Selection and Implementation

A new technology infrastructure played a key role in the transformation of the customer learning at Intuit's accounting professionals division. The business unit was using an outdated LMS that was unable to scale up as the audience of QuickBooks, Lacerte and ProSeries learners grew. APD Academy also wanted to present accounting professionals with learning paths for university-style curricula. A final requirement was the need to track CPE credits in a format that can be audited.

The current leader of APD Academy was hired in 2005, and one of her first tasks was to select and implement a new LMS platform for customer training only; employee development training would continue to be administered and delivered by a separate corporate LMS.

The APD Academy leader developed a comprehensive request for proposal (RFP) to address the needs of customer training; achieving the best consumer experience was the primary goal. However, an initial investigation of vendor solutions revealed that most LMSs were tailored to employee development.

There is a significant difference in the dynamics of a manager telling an employee that he / she must complete required training for his / her job, versus a professional who decides on his / her own to take training for his / her own benefit. For employees, the LMS functions needed to:

★ **BEST PRACTICE**

The APD Academy leader developed a comprehensive request for proposal (RFP) to address the needs of customer training.

1.   Approve,

2.   Assign and

3.   Track learning

– which could interfere with the customer training model of:

1.   Shop / select,

2.   Purchase and

3.   Schedule.

The APD Academy leader found that many LMS applications use terms like "vILT[4]" and "ILT[5]," which makes searches and other LMS functions less friendly and useable for small business owners and accountants. LMS software also tended to be weak in the areas of e-commerce and online shopping, since those are not priorities for corporate training.

In the final analysis, the APD Academy leader was looking for the LMS with the least cumbersome employee-focused functionality that could be most easily and quickly reshaped into a customer-focused solution. According to the APD Academy leader interviewed for this report, LearnCenter from Learn.com was selected at that time – in large part due to its flexible approach, the ability to strip away employee-focused training functions and WSYWIG[6] editing tools that allow non-technical users to edit LMS pages.

Today, the LMS platform makes the customer learning experience easier by giving customers the option to take training wherever, whenever and however they want it. The LMS delivers self-paced e-learning, hosts webinars and live virtual classrooms, and automates the tracking of student registrations, CPE credits and certifications.

LMS Integrations

Learn.com performed a highly complex integration with Intuit's existing web-based shopping system. The goal was to give training customers the exact same shopping experience they get when shopping for Intuit products. For business units that sell training, this was critical; but even the accounting professionals division *(which gives training away for free)* wanted customers to perceive that they are receiving something of value. This meant providing them with a shopping cart and email purchase confirmation, even if the training course was free of charge.

> **🔑 KEY POINT**
>
> The LMS delivers self-paced e-learning, hosts webinars and live virtual classrooms, and automates the tracking of student registrations, CPE credits and certifications.

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4   "vILT" stands for virtual instructor-led training.
5   "ILT" stands for instructor-led training.
6   "WYSIWYG" stands for what you see is what you get.

A second major data-level integration involved creating a single sign-on experience for training customers. Intuit IT developers integrated the LMS with an external Intuit website user ID / password system. A training customer sets up his / her user ID / password at the store level when he / she purchases a course. The customer can then use the same user ID / password across all other Intuit websites, thus reducing the number of steps required to access any product or service.

Subportal Technology

The LMS platform allowed APD Academy to set up multiple customized subportals for different customer audiences and even for other business units. *(There is a separate LMS implementation for internal-facing APD employee training and development, which is housed on a different system that caters to employee training needs only.)* Currently, there are four customer training subportals for three business units (see Figure 4).

> **KEY POINT**
>
> One of the biggest challenges of the LMS implementation was getting the learning system integrated with Intuit's existing web-based shopping system.

Figure 4: Intuit Learn.com Portals and Business Units		
LearnCenter Subportal	**Business Unit**	**Products**
Intuit Academy	Accounting Professionals Division	QuickBooks, QuickBooks Premier Accountant, QuickBooks Payroll, ProSeries Tax, Lacerte Professional Tax
ProAdvisor Certification	Accounting Professionals Division	QuickBooks ProAdvisor – Certifications are available in: QuickBooks, QuickBooks Advanced, QuickBooks Enterprise Edition and Point of Sale
QuickBooks User Certification	QuickBooks Small Business	QuickBooks Pro
IRES	Intuit Real Estate Solutions	Real Estate Solutions

Source: *Bersin & Associates, 2009.*

The subportal technology provides a flexible common platform since each business unit uses the same customizations, integrations, software releases and technical support staff – yet each subportal has a completely different look and feel. In other words, the subportal technology accommodates and facilitates the differences in business models, delivery methods, et al.

Technical Support

Each business unit has a separate administrator for its subportal, but the company achieves major efficiencies on the IT support side. The LMS platform is serviced by customer training and certification systems (CTCS), an engineering group that handles all technical support, integrations, availability, et al. This technical group reports into the corporate IT organization, with dotted-line reporting into the business units that utilize the LMS.

APD Customer Training Subportals

Intuit Academy

The first APD Academy subportal developed on the LMS platform was Intuit Academy, a customer-facing site with 17,000 registered users. The mission of Intuit Academy is to get customers trained on a variety of professional products, including QuickBooks Premier Accountant, the payroll products and services, ProSeries Professional Tax, and Lacerte Professional Tax.

The main front page of the Intuit Academy portal (see Figure 5) provides users with easy access to the complete training catalog, videos and podcasts, and training guides. A simple four-step instruction for new users reduces the potential for confusion or feelings of intimidation by e-learning.

🔍 **ANALYSIS**

The concept of a learning portal is being used to augment the LMS as a "destination" site for formal and informal learning.

🔑 **KEY POINT**

A simple four-step instruction for new users reduces the potential for confusion or feelings of intimidation by e-learning.

Figure 5: Intuit Academy – Front Page

Source: *Intuit, 2009.*

ProAdvisor Certification

APD Academy also launched a subportal to host the ProAdvisor certification system, which allows accounting professionals to become certified on QuickBooks Premier Accountant, QuickBooks Enterprise Solutions and QuickBooks Point of Sale. There are approximately 55,000 ProAdvisors nationwide. Although the certification training is free, there is a $449 annual membership fee, which includes software, training and unlimited technical support.

Recognition of their expertise and knowledge provides accountants with marketing tools, such as the use of the official Certified ProAdvisor logo and new ways to generate leads. One of the benefits is a listing on Find-A-ProAdvisor.com, a referral website marketed actively to small business owners, and other QuickBooks and Quicken customers. The site gets 40,000 inquires monthly from people looking for a local certified accountant.

Accountants use the ProAdvisor program portal (see Figure 6) to view self-paced e-learning content and take online exams. Users can start and stop their learning activities anytime. They receive advanced training to more efficiently solve customer problems and get to view special simulations. By spending just one to two hours a day, they can get certified in less than two weeks.

Figure 6: ProAdvisor Certification – Front Page

Source: *Intuit, 2009.*

There are two levels of QuickBooks certification. The basic certification course consists of three sections, each of which is divided into six to eight modules; each module contains a range of five to 11 topical lessons.

The QuickBooks Advanced certification course is designed to deepen the expertise of ProAdvisors and to distinguish these QuickBooks experts as highly proficient. ProAdvisors must pass the QuickBooks Advanced certification exam with a score of 85 percent or higher, and complete a biannual continuing education requirement.

The LMS tracks the certifications that customers achieve and automatically moves them to different "groups" as they progress upward. The "group" function controls which certifications the ProAdvisor can see and take.
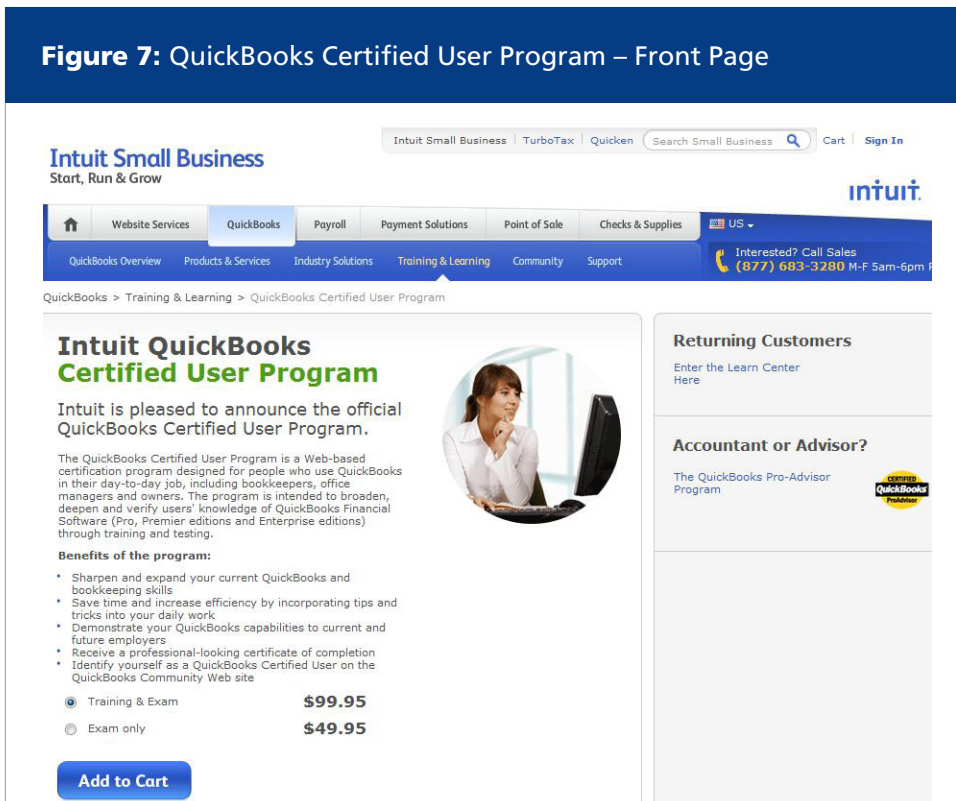
Intuit QuickBooks Certified User Program

A QuickBooks business unit focused on all customers outside the world of accounting professionals recently launched a subportal to host end-user certifications (see Figure 7). The QuickBooks certified user program is a web-based certification program designed for people who use QuickBooks in their day-to-day jobs, including bookkeepers, office managers and small business owners. The program is intended to broaden, deepen and verify users' knowledge of QuickBooks Pro through training and testing.

Figure 7: QuickBooks Certified User Program – Front Page

Source: *Intuit, 2009.*

Benefits of the QuickBooks certified user program are similar to the ProAdvisor Program. The learner gets to sharpen and expand his / her current QuickBooks and bookkeeping skills – and saves time and increases efficiency by incorporating tips and tricks into his / her daily work. Upon completion, the learner receives a professional-looking certificate of completion, which helps demonstrate his / her QuickBooks' capabilities to current and future employers. Learners can also identify themselves as QuickBooks certified users on the QuickBooks community website. Users have the option of taking the exam only for $49.95, or training plus the exam for $99.95.

Intuit Real Estate Solutions

Intuit real estate solutions (IRES), a division of Intuit that develops property management software for the global real-estate industry, is an illuminating example of how Intuit is extending a single LMS platform to multiple business units with widely varying customer requirements and market dynamics.

IRES Business Overview

IRES offers business management solutions to the property management industry, as well as to corporate real-estate managers. Offering both outsourced hosting and packaged enterprise software, Intuit real estate solutions strives to develop long-term, successful relationships with its clients. Currently, the business has more than 4,500 clients on five continents and in 41 countries.

Real-estate software customers typically make a significant investment in IRES solutions, so they are willing to pay for training. As a result, IRES has traditionally viewed customer training as a profit center. The business unit even offers bulk pricing plans and yearly subscription rates to entice large enterprises to train as many users as possible.

Evolution of IRES Training

Training is developed and delivered by the IRES learning solutions group, which reports into the IRES consulting organization. The group includes a learning solutions leader, two learning development program managers (who mainly perform instructional design functions), a learning solutions operations coordinator and approximately 60 consultants (who deliver training).

Classroom training was the most popular option for customers, until the recent downturn in the real-estate market. With customers slashing their

> **🔑 KEY POINT**
>
> In early 2008, IRES built a subportal and became the second Intuit business unit to use the customer-facing LMS implementation.

corporate travel budgets, the IRES business-unit's leaders wanted a way to develop, sell and deliver e-learning online. IRES had been tracking classroom training registrations in Excel spreadsheets, so reporting was another issue. Additionally, the business unit does not currently offer user certification, but it is planning to do so in the near future.

In early 2008, IRES built a subportal (see Figure 8) and became the second Intuit business unit to use the customer-facing LMS implementation. Although IRES had to pay for the cost of developing the portal pages and new e-learning content, there was no additional incremental cost for the LMS platform. Enrollment and classroom scheduling started in late 2008 and the learning solution group began delivering e-learning in mid-2009.

Figure 8: IRES Learning Home Page

Source: *Intuit, 2009.*

Today, IRES uses the LMS subportal to offer customers the following blended-learning approaches.

Classroom-Based – The most affordable hands-on classroom training option for a low number of learners is the programs taught at an IRES facility by instructors. Learning center courses are delivered from standard training agendas, participant guides and the training database. Classes are currently offered in New York Metro, San Diego and Cleveland on a preset, repeatable schedule.

Live Virtual Classroom – These courses help address point learning needs in a flexible learning environment. These programs are offered on a preset repeatable schedule.

Self-Paced e-Learning – This delivery method offers IRES customers the convenience of learning from their own desks. e-Learning provides the ability to train geographically dispersed employees more efficiently and in shorter timeframes; gives students a great primer before they attend classroom-based training; and, allows students easy access to topics for refresher training.

Custom and Onsite Learning Services – Customers with a large implementation and organizational rollout, or a unique training need, can engage IRES consultants to scope, plan, develop and deliver a custom learning program. These range from standard delivery at the customer's location, a custom learning program designed and developed, or custom virtual learning delivered just for a customer when it is needed.

Business Impact / Metrics

Since implementing the Learn.com LMS platform, the APD Academy leader has noted a 90 percent decrease in negative customer comments about training programs. The leader and her direct reports also receive weekly dashboard reports on a wide range of metrics, such as attrition rates, abandon rates on the website and customer satisfaction.

According to a recent internal analysis of training data, customers who attend training:

- Spend four to six times more money with Intuit;

- Call customer service and support 25 percent less frequently; and,

- Is 98 percent likely to renew (if a first-time customer).

According to an internal 2009 Intuit study, customers who attend training programs:

> **KEY POINT**
>
> Since implementing the Learn.com LMS platform, the APD Academy leader has noted a 90 percent decrease in negative customer comments about training programs.

- Recommend to their peers 26 percent more; and,

- Recommend to small business clients 30 percent more.

Lessons Learned and Best Practices

The leader of APD Academy shared some important lessons learned and best practices that can be used by any customer-facing training organization seeking to implement an LMS platform for multiple audiences.

Lessons Learned

The APD Academy leader advises companies to make sure that they understand their internal capabilities (e.g., staffing) before using the LMS. Each LearnCenter requires a dedicated administrator, compelling APD Academy leaders to reallocate headcount to make staffing accommodations that arise from the demands of keeping the system up to date and operational for customers. There is also a steep learning curve for new administrators who will require training.

APD and IRES learning leaders all agree that moving away from paper-based tracking and classroom-focused training is a huge "win" for the company. Accounting professionals in particular give very high marks to the self-paced e-learning, citing the ability to return anytime to get CPE credits and advanced certification.

Best Practices

Content reuse[7] is an important best practice at Intuit. Both APD Academy and IRES learning solutions group design every course, so that it can be:

Delivered online by an instructor in a webinar;

- Modified for self-paced e-learning, with the addition of exams and exercises;

- Modified for live instructor-led learning with the addition of audience participation activities; and,

- Adjusted for both internal and external learners.

> **ANALYSIS**
>
> Many of these problems encountered could have been anticipated and solved with a longer piloting process and a more gradual customer rollout.

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[7] "Reusable content" (also called "dynamic content") is discrete learning objects with no link to a specific course. These "discrete learning objects" can be a paragraph of text, a chart or diagram, or any individual piece of content that can be linked with other objects to create any number of training courses.

Intuit is known for its "Follow Me Home" user research program. This program brings members of product development teams directly into customers' home and work environments. The learning leaders use a similar best-practice approach to determining what new learning topics to develop.

Learning program managers start by looking at prior training evaluations to see what customers are telling them directly. They also look at what service and support issues are driving frequent call center activity, as well as what industry trends are driving the overall market. Online community discussion threads are reviewed for new ideas and to see about which issues customers are talking. Intuit supplements this with direct interactions and observations of customers as they are trying to learn how to use their products and services.

Conclusion

Implementing an effective LMS platform for multiple customer-facing training programs can be challenging. Intuit has successfully overcome the obstacles by first selecting an LMS that could be customized from a traditional employee-facing learning infrastructure into a customer-facing platform for building user confidence in products and services. Intuit's second strategic success was to build multiple subportals to address different customer audiences, training requirements and business models. This enabled the company to maximize its investment in the LMS technology platform.

Intuit finds that accounting professionals who are trained, certified and confident tend to recommend Intuit products to clients and peers more often. Other companies would be well-served by following Intuit's example of giving customers more and more opportunities to become smarter, better users of their products.

★ **BEST PRACTICE**

To determine what new learning topics to develop, Intuit's learning leaders look at prior training evaluations, and the service and support issues that are driving frequent call center activity, as well as online community discussion threads.

KEY POINT

The accounting professionals division provides free training to tax and accounting professionals to grow its sales and base of influencers.

Appendix I: Table of Figures

About Us

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