Plan your end-user training strategy before software roll-out
(Mar 06)

March 6, 2006

Takeaway:
Managers and IT departments often rush to deploy the latest and greatest software without considering the need to train end-users in its use. A scalable end-user training strategy will make your new software deployment both a more cost effective and a happier experience for everyone involved.

Companies of all sizes spend a significant amount of their IT budgets on software. New desktop operating systems can enhance security and run more sophisticated applications, and those new applications can automate tasks previously done manually or provide easier and faster accomplishment of tasks previously performed using older software, thus enhancing productivity. But you won't see the bottom line benefits of these upgrades unless the end-users of the software can successfully make the transition. That's why it's important to plan an end-user training strategy before you roll out new software, and make sure the plan is scalable so it can grow with your company.

Setting training goals

Your first objective in providing software training for end-users is minimizing any productivity losses associated with the software transition. This means you have to, as quickly as possible, get them up to the skill level required to do their jobs at least as quickly and accurately as they were doing with the old software (or manual methods). Then in the next phase, you want the software to help users do their jobs more quickly, accurately, and/or securely than before.

It's important to be realistic about the timeframes in which you expect to accomplish these objectives. These timeframes will be dependent on the complexity of the new software as well as the number of users who need training and their beginning skill levels. Upgrading to a new version of the same software already being used can present special challenges. Training might be expected to proceed more quickly because users are already familiar with a previous version. However, if there are many changes in the new version or it has a very different interface (such as the “ribbon” in Office 2007 that will replace the menus and toolbars users are familiar with in previous versions), users may actually find an upgrade more difficult than switching to a completely new software package because of their existing expectations.

Remember that all software packages aren’t created equal, and neither are all users.

Assessing end-user needs

An important element in creating your training plan is to evaluate the technical skill level(s) of those who will actually use the software on a daily basis. Some software, such as a new desktop operating system, may be rolled out throughout your entire organization. Some application programs may be installed only in a particular department (such as accounting software in the finance department or illustration software in the graphic design department) or only made available to employees with specific roles (for example, secretaries or department heads).

In many cases, software end-users are not particularly technically savvy, but you may have different technical skill levels within a group. It’s important in that case to provide different levels of training. Technical novices will need more focused, step-by-step instruction in basics, whereas more skilled computer users will quickly pick up the basics and benefit from more training that shows them how to use more obscure or advanced features of the software. Attempting to train the two
groups together will result in the novices being overwhelmed and confused and the more skilled
users wasting time that could have been spent doing their work.

Training delivery methods

The next step is to assess methods of delivering the necessary training. Again, there are several
factors to take into consideration:

- User skill levels as determined by your needs assessment
- Number of users to be trained
- Timeframe for rollout of the software (and whether you'll be doing it in phases or
  throughout the entire organization at once)

There are several different methods for delivering training, and you may want to use a combination
of these, especially in a large organization. The least effective is, unfortunately, the one used by
most small organizations and many larger ones: the IT equivalent of throwing the kid in the water
and letting him sink or swim. Suddenly the new OS or application appears on the end-user’s
computer, perhaps with a copy of the manual, and it’s up to the user to figure it out and the
company’s IT support desk to untangle the messes the user gets into. Some better training
methods include:

- Individual hands-on instructor--An instructor walks each user individually through the
  process of performing common tasks and answers questions. This is the most expensive
  method, although potentially the most effective.
- Hands-on classroom style instructor-led training--An instructor shows users how the
  software works and how to perform common tasks, with users performing the tasks
  themselves in a classroom/lab setting. Each user or pair of users has a computer on
  which to practice. Classes of 15 to 30 are often effective.
- Seminar style group demonstration--An instructor shows users how the software works
  and how to perform common tasks in a live demonstration. Groups of 20 to 50 are often
  effective.
- Computer Based Training (CBT)--CD-based or online (Web-based) self-paced training
  which allows end-users to complete interactive lessons that walk them through the
  processes of performing common tasks, and the software tests them on their
  performance and understanding.
- Book-based self-paced training--End-users complete workbook lessons in how to perform
  common tasks, often illustrated with screenshots.

Whichever delivery method(s) you choose, it’s helpful to first conduct a pilot training program of a
small, selected group of users that best represent your overall user base. This will help you to
identify problems and issues with various training methods before committing to one.

Creating a training program

End-user training is more effective and memorable if you tailor it to your own organization’s use of
the software, rather than generic lessons. For example Microsoft Word instruction should include
examples of actual templates that your users will be using for their documents. Some elements of
your lesson plan should include:

- The purpose of the software.
- Tasks the user will complete with the software
- How it differs from previous versions or products it’s replacing (if applicable)
- Common problems users may encounter
• Security issues related to the software

Making your training program scalable

A scalable training program is flexible enough to accommodate both small numbers of users (for example, when new employees join the company and need to be trained on the software) and large numbers (as is necessary in an organization-wide rollout of a new product).

You can get many of the benefits of individualized training without the high cost by using a combination of computer-based training and seminar-style training where users can ask questions and practice the skills with guidance from an instructor. CBT has the advantage of being able to scale up or down depending on the number of users you need to train, and users are able to proceed at their own pace, rather than having to keep up with or being held back by the rest of the class.

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