

Increasing the Lotus Notes ROI through Better User Training

How do you Measure Success?

See if you can identify which measure of success is incongruous with the other two:

- The measures of successful Return On Investment (ROI) for a business are added productivity, increased customer satisfaction, savings, and profit.
- The measure of successful Lotus Notes implementation is whether tangible business goals can be better met using this software tool, another tool, or no tool at all.
- The measure of successful user training is whether or not the students liked the class and can perform the commands necessary to operate the software.

Did you pick number three? You are right. Lotus Notes user training is typically conducted in a business vacuum, focusing only on mastery of the software. While this is not intrinsically a bad thing, it is doubtful that marching all users through standardized training materials promotes the company's overall business objectives. The recent movement to certify users on the software further widens the chasm between ROI expected by the business managers and the traditional measures of "successful" training.

This article:

- discusses the unique nature of collaborative software training for knowledge workers
- provides both a tactical and practical plan of action to increase the return on training dollar investment.

Training Needs of Knowledge Workers

Knowledge work is the ability to use information to make decisions, carry out processes, and meet business goals. Lotus Notes is billed as a tool to perform this work, and serves as a repository to trace the results. It increases the likelihood of repeat success by a community of knowledge workers.

When you consider what type training is appropriate for knowledge workers, it is important to remember that the true measure of competent users is not how well they use the software but how well they do their work *using* the software.

For reasons other than lack of software competency, the original business goals may go unmet NOT because the software training was inadequate in meeting its goals but simply because the training missed the point.

Priorities for Training

To align the goals of user training with business goals, the objectives of training must change. The *Training ROI Pyramid* in Figure 1 shows that although a base of software competency is still necessary, "training" objectives must also directly support the overall business objectives.

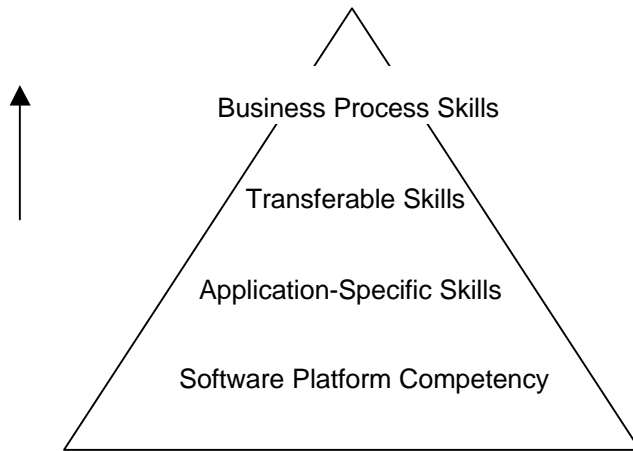


Figure 1: The *Training ROI Pyramid*.

Rather than focusing on one set of goals, training experiences for knowledge workers must build competence at all four levels of the pyramid:

- *Software Platform Competency*. Standardized vendor and third-party training programs target this first layer of skill, but this is as far as they can go.
- *Transferable skills* are those that are in common across a number of Lotus Notes applications as well as those that have parallels in other office productivity applications known by the user.

If, for example, users familiar with word processing software are shown that the rich text editor contains a number of typographic features, then it is not necessary to spend training time on how to do it in Lotus Notes. They can be shown how to open a properties box (common to all applications) and supplied a quick reference card with a table of how to use the features (a resource for future learning).

- *Application-specific skills* are those that are content-oriented and unique to a particular Lotus Notes application. Users can be shown the purpose of the application, understand why the data is important, be instructed on how to properly and efficiently use the application, and be given sufficient time in a coached environment to master the aspects of the application relevant to their job.
- *Business process skills* are related to how the application is used as a tool in the larger context of doing the work that meets the overall business objectives. With a Lotus Notes implementation, success in this area also includes the reshaping of a corporate culture to one that supports collaboration and rewards information sharing. Knowledge workers cannot instantly make this shift, and require both guidance and support.

Increasing the Return on Training Investment

How then do we design and conduct training in a way that supports the implementation of Lotus Notes, which in turn supports overall business objectives?

1. Identify the Desired Skills

In the same way that the business goals defined and measured using ROI tools, it is necessary to follow this method in planning for training. Be sure to cover these points, in sequence, as you develop your training plan:

- A. Outline the overall business goals. If these are not tangible and measurable, it will be tough to make a case that user training will have *any* ROI.
- B. List specifically how the Lotus Notes implementation is expected to help meet the business goals.
- C. Identify the job tasks that support these goals for each type of knowledge worker.
- D. Develop a list of skills at each level of the *Training ROI Pyramid* that enhance performance of the job tasks.

Using the *Training ROI Pyramid* as a guide, identify the skills you want users to master at each level. Decide which skills can wait, and which can wait for follow-up training experiences. Decide which skills each type of worker needs to effectively contribute to the overall business objectives. The mobile salesperson, for example, uses a client tracking application much differently than a marketing analyst at the home office.

- E. Identify the alternative delivery vehicles to train for each skill (see the section *Don't Rely on One Solution*, below).
- F. Provide the atmosphere following the training experience in which users can immediately apply skills at all levels of the *Training ROI Pyramid* in a supportive and rewarding environment. It does little good to teach the skills and value of collaboration in training and return workers to an environment that exclusively rewards individual achievement.
- G. Provide the necessary resources for ongoing learning and self-proficiency.

2. More Training is Not Better Training

How much of your last 1, 2, or 5-day course or 8 hour marathon session in front of computer based training did you retain? Given average short and long term memory retention rates, consider yourself lucky if you yield a 5% return on the training dollar investment. And what are the chances that the particular 5% you remember makes you a greater contributor to overall company goals?

Unlike office productivity software (word processing, spreadsheets), Lotus Notes is useless in and of itself without Lotus Notes *applications*. The basic skills on how to use Lotus Notes can be taught in an hour. The balance of most user courses is spent going further into the hundreds of details of how *Lotus Notes* operates without ever once opening the applications used at the work place.

This does not mean, however, that you forget foundational skills. As an application, Lotus Notes Mail, for example, requires basic Lotus Notes skills. As you plan for user training, create a skill map that shows which skills must be taught in sequence (you must create a memo document before you can mail it) versus skills that are not

dependent on others (you can change that font to 12 pt. Bold Helvetica using the status bar).

Most applications that can contribute to business objectives are content-intensive. At this point Lotus Notes as a platform loses its focus and the purpose of the application takes the forefront:

- Not so important – there are three ways to navigate to a particular piece of information.
- Important - what this information means and why it is important to be entered in a particular manner.

Even simple applications such as mail or a discussion forum require instruction on how to write an *effective* memo using Lotus Notes Mail or how to *appropriately* respond to a discussion thread so that more people benefit from the user's contribution.

Because the application is part of an overall business process, the greatest return on the training investment places the application in context, showing how the tool is used to facilitate the business process.

3. User Training is Not an Event

Users do not come to training experiences as blank slates, and they certainly continue learning after the formal experience ends. With the proposed emphasis of training off of the software features, it makes less and less sense to corral users into rooms for extended periods of time to “teach” them complete software competency all at once.

Instead, short, targeted, just-in-time follow-up training sessions can target a few key skills at a time. Small bursts of information followed by periods of practice in the real work environment has much greater impact than sitting through a single 2-day user training course.

Not only does this approach increase the impact of training from a learning perspective; it actually reduces overall training costs by replacing blanket/shotgun training for *everyone* with specific, targeted training experiences for those who really need them.

4. Don't Rely on One Training “Solution”

The more we know about adult learners in complex work environments, the more we realize that there is no one way to conduct a training experience that will guarantee user competence.

Adults are notorious not so much for being lazy learners, but for being practical learners. They learn best (which also produces the highest return for the effort) when they have a real problem to solve, have resources and alternatives readily available in a way that makes sense to the immediate need, and have the time to solve the problem. This type of learning boosts the competence and value of the employee, and is directly measurable using ROI measures.

How does this differ from most training events? Classroom training takes users completely out of their work context, blankets them with de-contextualized software-

oriented information, and gives them one or two artificial problems to solve. Computer based training takes them even further away from reality by *simulating* the software they will use back at their desks!

The differences in how people learn make a single solution impossible. We know that learning is dependent on:

- Individual learning style (auditory/visual/experiential).
- The type of information required (random/sequential/process).
- The Relevance of the information to immediate needs.
- The type of work performed (novel/routine).
- Where the work is performed (on the road/remote office/home office/headquarters).
- Having the motivation and reward to learn.

The complexity and geography of most work environments makes the logistics of group classroom training very difficult and expensive. But for some type of training for some types of learners, classroom training is the best way. So don't be so quick to rule this time-tested method of information delivery and skill practice.

Figure 2 outlines the spectrum of materials and technologies readily available for Lotus Notes user training.

	Real time	Any Time
Distance	<ul style="list-style-type: none"> • Chat • Shared Whiteboard • Electronic Classrooms • Satellite Broadcasts • Video Conferencing 	<ul style="list-style-type: none"> • Web Based Training • Collaborative Learning
Local	<ul style="list-style-type: none"> • Auditorium Lectures • Classroom Training (with or without computers) • Mentor sessions • JIT seminars 	<ul style="list-style-type: none"> • Multimedia/Computer Based Training • Video/Audio tapes • Documentation and 3rd party Books • Quick Reference Cards • Self-Study materials • Embedded Training/Performance Support

Figure 2: Lotus Notes training vehicles.

Your task is to align the strength of each delivery vehicle with your training objectives, taking into consideration the needs of adult learners, demands of the work place, location of the user, and the logistics of a particular delivery vehicle.

Remember that one vehicle that is effective for one user may be excruciatingly mind numbing to another.

Make several options available, and allow supervisors and users agree on the vehicle that best meets their requirements.

Regardless of which vehicle you choose to build software competency (the first level of the *Training ROI Pyramid*), remember that there are no ready-made solutions that support your applications or your business goals. You must be prepared to create these yourself.

If you don't have the developer or instructor resources to develop or conduct the training events, be sure that at least you control the objectives and content. Look for highly modularized and customizable training materials so you can quickly produce base-level skill training as well as have a place to start developing applied application-specific training.

5. Build Self-Evident Applications

“The perfect application requires no training” is a dream realized only by applications built to perform simple tasks, such as clicking hyperlinks on the Web. Most business applications are more complex than this consumer model, as they require intelligent *contribution* from the user.

But Lotus Notes applications can be designed to be *self-evident*. Self-evident applications are designed to be in sync with what users expect. In a Windows environment, for example, users *expect* to see a menu bar across the top with common actions common to all applications. In the Lotus Notes desktop, a menu bar across the top contains menu commands common to all applications. Because user expectations are met, they spend less time “figuring out” applications and can focus more quickly on their work.

But unless otherwise constrained, no two Lotus Notes applications necessarily look or operate the same. To make applications more self-evident and immediately increase the productivity of users, make sure that:

- All applications share a consistent design regardless of their purpose.
- Applications build on common metaphors found in everyday work life (books, recipes, day planners) as well as those in other types of office applications (spreadsheet, notepad, database).
- Applications look and operate the same for Lotus Notes and Web browser clients so no retraining is required as users move between platforms.

6. Embed Training Everywhere

Lotus Notes makes it a technically easy to embed several layers of electronic performance support for applications, whether in the form of:

- popup field help
- context-sensitive online help documents launched from a hotspot
- doclinks to expanded software and application help or to a mini-tutorial

- a ScreenCam file attached to the form
- a button to launch a computer based training course
- doclinks to FAQ, Application and Process Help, Expert and Mentor, and Job Aid databases
- one-click email generation for questions to application and process developers.

Remember that because online help must also support business objectives, it must also cover topics at all levels of the *Training ROI Pyramid*. You will need to develop electronic performance support not just on how to use Lotus Notes, but also on the application and how to conduct the business process using the application.

Self-learning and independence is inefficient only if the user cannot find relevant answers quickly. Building in performance support and training at every possible point will help users become more efficiently self-proficient.

Conclusion

How we got to the point of evaluating training strictly on the success of the user to perform software commands is probably grounded in the belief that training for training's sake is a worthy goal. Or perhaps we ourselves have become trained to expect nothing more than what software vendors and publishers have defined as successful user training.

Regardless of how we got to this point, the return on training investment can only be increased if we realize that software competency alone will not help us meet business objectives.

About the author

Kent Kurchak is the President of Courseware Source, a Lotus Business Partner that provides modular, customizable training materials for Lotus Notes users, application developers, and system administrators. Courseware Source also publishes a Knowledge Management application suite for Lotus Notes and Domino that includes modules to create online courses, job aids, and knowledgebases. Visit their web site at www.coursewaresource.com for more information.