Driving user adoption for innovation and greater ROI

ClickLearn has enabled the financial services provider Ascensus to effectively produce training material that saves time and hiring costs

"Adoption is a challenge at many companies regardless of industry vertical," says Dan Madden, CRM program manager at Ascensus. "It's a continuous journey to ensure business applications are routinely used to drive efficiencies and maximize return on investment. We always like to imagine everyone is going to love the solutions we deliver, and they will want to use them right away, but unfortunately, that's not what usually happens."

In response to this challenge, Ascensus decided to work with ClickLearn – a company that offers a solution for creating user instructions, e-learning, and process videos for business software – to produce training material.

BETTER TRAINING, QUICKER

"What would take a typical training resource an entire day now only take us two hours. This allows us to do more, while also creating better training experiences for our users.

Kylie Kyser, CRM Product Owner and MVP at Ascensus

"In just a year, we've created almost 100 training courses. This product is helping us focus on innovation while increasing our speed of delivery and adoption. It has enabled us to save at least two fulltime hires within the CRM program that would have been dedicated to training. By saving on headcount, we could hire development or frontend team members to help drive additional roadmap innovations faster."

"When there's a new, impactful feature rolling out, we want to get the word out as soon as possible and immediately begin supplying training materials," says Kiser. "Our team can proactively drive change management and empower our users to effectively embrace change. We're excited to continue to roll out additional features via ClickLearn and build the training content in the same development sprint. This enables users to seamlessly obtain training materials embedded within their applications, so they can quickly get up to speed and begin leveraging new technology wins much faster."

Ascensus is taking advantage of seven different learning formats – visual, aural, verbal, physical, logical, social, and solitary – identified in Neil Fleming's VARK model to offer the best overall training experience.

FACTS ABOUT ASCENSUS

- Headquartered in Dresher, Pennsylvania

- 3,300+ employees

- Founded in 1975

- More than $261 billion in assets under administration

- US largest independent retirement and college savings services provider.

- Needed a way to ensure end-user training while driving their CRM enterprise roadmap.

- In just over 3 months, 2 authors created 50+ training resources in multiple formats. Within one week of the project going live, they have had 80+ users in ClickLearn, 700+ pages viewed, 300+ Show Me videos watched plus comments and feedback submitted.

- The team has made great use of ClickLearn Replay feature to build out similar trainings.

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"It takes about two hours to create each training and that includes planning and recording as well as reviewing and testing to ensure it is perfect," says Madden. "This time also accounts for creating it in all the different formats, including web and video versions. We already have over 100 of those training courses and just two team members doing this as just a portion of their overall responsibilities."

Ascensus has had a custom help link embedded within its CRM environments so that users can engage with the portals and libraries. Training courses have also been embedded within the CRM so users can click on the help icon and go straight to the ClickLearn portal.

> *Any time users have a question, they can directly source training which we've designed specifically to support internal business processes. We're quickly evolving to a self-service training experience to minimize the need for in-person troubleshooting or service tickets every time there's a routine question, training need, or new onboarding.*
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> **Dan Madden, CRM Program Manager at Ascensus**

The company's Learning and Development team is also engaging with the ClickLearn solution to help with training initiatives.

"Initially when we engaged with ClickLearn, it was solely on the Microsoft Dynamics side to help our CRM program," says Madden. "Now, given the internal success that we've had, other teams are also working with ClickLearn so we can extend the offering across the enterprise and to our external partners in the future.

ACROSS PLATFORMS AND GEOGRAPHY

"We're beginning to work with web application connectors, the Microsoft Office and Windows connectors, and deeper within the Microsoft Dynamics platform such as Power Apps and Power BI solutions. In my opinion, this solution will continue to quickly grow and enhance our training delivery in an evolving world that is now more than ever stressing the need for intuitive training experiences to support a geographically diverse workforce," concludes Madden.

FACTS ABOUT CLICKLEARN

- Integrated with the full suite of Microsoft Dynamics including Dynamics 365 Finance and Operations, Customer Engagement, Business Central, Dynamics AX, Dynamics NAV, and Dynamics CRM

- Automatically produces seven different types of content such as narrated videos, PDFs, and live assistants

- Helps ensure user adoption

- Easy onboarding

- A customizable template-based system for compliance

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For further Information, contact Michael Randrup, Managing Director and Co-founder, at **mra@clicklearn.com** or visit our website, **www.clicklearn.com**