Embracing ClickLearn as a corporate Dynamics 365 training platform

Helping over 10 million Americans save for retirement, education, and healthcare, Ascensus is the largest independent retirement and college savings services provider in the United States, supporting approximately 106,000 retirement plans, 4.7 million 529 college savings accounts, and administering more than 1.7 million IRAs and health savings accounts.

Working with the Dynamics 365 Online, Unified Interface, as well as on-premise versions, the company has a need to retrain users on a regular basis to keep them up-to-date with CRM enhancements. However, going through and creating all the training material by hand takes a lot of time and represents a tedious task for the CRM team.

REVAMPING THE CRM TRAINING STRATEGY

In a recent cloud migration involving over 100 users, ClickLearn was the center of our training plan. It enabled us to launch the application faster while helping increase overall user adoption.

Dan Madden, CRM Program Manager at Ascensus

"We've been driving an aggressive CRM roadmap across the entire enterprise, and ClickLearn better enables us to deliver product innovations without the need to adjust our staffing model across training delivery. The only way to get in front of that was to think about a different training strategy," says Dan Madden, Ascensus CRM Program Manager.

"Owning the budget for the project, we realized we didn't have the funding to build out the frontend staff to train all our users. ClickLearn is our bridge to working smarter in a highly evolving product."

In just over 3 months, 2 authors were able to develop and publish over 50 different training resources, each of which provided the written documentation with screenshots (online or to export and save) as well as a Show Me video and two hands-on training exercises (Test Me, Try Me). This was released for all online users and the custom help link was updated to point right into the ClickLearn learning portal. With the integrated Office 365 login the users can quickly access the content they need.

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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Several of the Ascensus departments utilizing the Dynamics 365 environment are using the core entities of Accounts, Contacts, Opportunities, and Activities within different Apps and Forms. As Madden explains, this was a great use case for ClickLearn's Replay feature which allowed the team to re-record the exact same training on a different form or organization. "Replay greatly reduces the time to release training for new forms and fits in our Agile project methodology," he adds.

> *We have already seen the power of ClickLearn in bringing training materials to our users faster, giving us the ability to update more efficiently and provide multiple learning formats to offer the best possible learning experience for our organization. If someone asked me if we would be successful without this product, I'd just say 'Absolutely not'. We would have to hire dedicated training resources and also slow down our product roadmap to keep up with the pace of training*

Dan Madden, CRM Program Manager at Ascensus

Kylie Kiser, Ascensus CRM Product Owner, estimates that the time the team spends on creating one training is around 3 hours, including creating all the different formats, reviewing them, and testing them. "Compared to the time it would take to produce such training manually, being able to generate it in 3 hours at maximum, in all these formats, is just incredible for us."

SETTING THE STAGE FOR NEW TRAINING STANDARDS IN THE ORGANIZATION

> *When I first saw ClickLearn, it blew me away. But when I got into the contractual process, I realized this was a much bigger tool that has connectivity to Web applications, Microsoft Office products, etc. It can be used for anything and it's simply a smarter way to train.*

Dan Madden, CRM Program Manager at Ascensus

As Madden says, the CRM project team has certainly caught some attention in the larger (Ascensus) enterprise. "As of now, we're the only group using this new innovative way to train. I think there's a lot of people looking at us as a guinea pig to this, and so far, we've had a tremendous success. I believe ClickLearn will be adopted across the larger enterprise to help with a variety of different training initiatives crossing a variety of different products to help us keep pace with our strategic growth strategy."

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

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