

Ascensus has embraced ClickLearn as their corporate Dynamics 365 training platform



In just over 3 months, 2 authors were able to develop and publish over 50 different training resources. Each of these resources provide 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 our users can quickly get to the content they need.

Several of the departments utilizing our Dynamics 365 environment are using the core entities of Accounts, Contacts, and Activities within different Apps and Forms. This was a great use of ClickLearn's Replay feature which allows us 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.

In a recent cloud migration involving over 100 users, ClickLearn was the center of our training plan.

We developed a pre-launch marketing drip campaign which incorporated recommended trainings with direct links in the weeks leading up to the project. The CRM team also steered users to the larger ClickLearn portal and provided a list of the recommended trainings for their roles. Within one week of the project going live, we have had 80+ users in ClickLearn, 700+ pages viewed, 300+ Show Me videos watched plus comments and feedback submitted. 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.



Dan Madden (Program Manager, CRM Ascensus) will share all details on this Customer Success Story live on stage, moderated by D365 MVP Rick McCutcheon on:

OCT 16 at 11:00 AM in room SUN C
OCT 17 at 3:00 PM in room TAMPA 2/3

CLICKLEARN USAGE OVERVIEW SO FAR

- The team first discovered ClickLearn through User Group Summit 2018
- Recently launched for all Online users (nearly 500) to help us keep driving CRM enterprise roadmap initiatives instead of building out training materials the old fashion way
- Custom Help link directly to portal
- Office 365 login
- Feedback and ratings sent directly to the CRM team
- Replay feature to build out similar trainings
- Stats (as of Sept 30)
 - 750+ page views
 - 350+ Show Me Views
 - 50+ trainings created
 - 100+ unique users

The Ascensus project team

Kylie Kiser, Product Owner
Monica Stehr, Product Owner
James Giura, CRM Administrator
Amanda Germann, QA Analyst
Dan Madden, Program Manager

