

Solving the challenges of continuous software updates within large global organizations



An upgrade to an integral part of your business software can pose great challenges if you're a global company with thousands of employees. Like many organizations faced with a software upgrade project, Georg Fischer Piping Systems was looking for a solution to help them with training and onboarding to drive the success of the project and to ensure user adoption among their employees. With more than 1000 employees depending on the CRM system across seven different language versions, this was no small feat.

Georg Fischer Piping Systems decided to upgrade their CRM system by moving globally from Microsoft Dynamics 2013 to Microsoft Dynamics 365. By onboarding 34 countries with 7 languages, GF Piping Systems understood the need for a tool for CRM-embedded training content and user-friendly knowledge transfer.

GLOBAL REACH

Georg Fischer is a global industrial engineering company with more than 14,000 employees and three divisions. GF Piping Systems itself is located in 34 countries with more than 6,800 employees and generated sales of CHF 1.802 billion in 2019. With more than 60,000 products, GF Piping Systems can offer complete system solutions.

With Microsoft supplying updates to their software every six months, this results in a constant need for updates to the training material. At Georg Fischer, Anja Schmid, Junior CRM Community Manager, and her team use ClickLearn to produce their training material, which includes videos and user documentation. All their training is based on the content they produce using ClickLearn.

Without the Replay function and the multilanguage support, Anja and her team would never be able to stay on top of their training material, let alone have time to create the seven language versions to support the different languages of their CRM.

“ Every six months there is an update from Microsoft. That means that we must update our training material every six months. If we did this in the normal way, we would only be sitting at our desks, updating the training material. With ClickLearn we can use the Replay feature to replay our videos and then just continue working with them.”

Anja Schmid, Junior CRM Community Manager, Georg Fischer Piping Systems

ABOUT GEORG FISCHER PIPING SYSTEMS

- Global expert for the safe and reliable transport of water, chemicals, and gas with support through all project phases
- Headquarter in Schaffhausen, Switzerland
- Established: 1802 (Georg Fischer AG) in Switzerland
- 6,800+ employees

STATISTICS

- Over 25 training records in 7 different languages (plan to have around 80 training records)
- Since roll-out started in November with 800 users in the system:
 - Approx. 4.000 page views,
 - 750+ TryMe videos watched
 - 250+ Assists used



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HELP WHERE IT'S NEEDED

Although training is important for successful user adoption, it is also important to think about how you ensure continuous learning afterward. To get the most ROI on a software upgrade, having support for users when and where they need it can boost productivity and ensure user engagement.

As Anja explains, "We were searching for a tool to support our users with training material. We looked at different platforms and found that ClickLearn was the best solution because it is directly integrated into our CRM, so it's accessible for all our users whenever they are working in the CRM system."

The Georg Fischer employees are particularly happy with the ClickLearn Assist feature, which gives them support directly from within their system whenever they have questions.

LOCALIZED SOLUTIONS

With a global organization comes the need for localized software versions and that means localized training material, which is both time-consuming and costly.

"Our CRM is in several languages so our training material needs to support these languages too," says Anja. "It's a great help that ClickLearn supports all these languages and makes it so easy for us to produce it. We would never be able to have language versions of our training without ClickLearn, it would simply take too much time. This is where we gain a big advantage from using ClickLearn – we use the Replay to go through the different languages and adjust afterward."

So far, it's mainly the external sales employees benefiting from content created by ClickLearn, because they are the main users of the CRM system. However, based on the success of the ClickLearn project, Anja and her team are now planning to roll out ClickLearn-based training materials to the internal sales and marketing functions within the GF Piping Systems organization.

"We have just focused on external sales because that is mainly where our CRM is being used, but we also have internal sales using the system and they have never had their own, dedicated training material. In the future, we would like to build a platform for all types of users," concludes Anja.

ABOUT CLICKLEARN

- As part of an upgrade from CRM 2013 to CRM 365, implemented ClickLearn to create all user training.
- Team of 3 authors creating training (video and documentation)
- 1000+ users in CRM with direct access to integrated ClickLearn Help Portal
- Replay feature to keep up with Microsoft updates every 6 months
- Assist feature supports users directly in the CRM

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