



2021 Systems training guide:

How to implement high-impact remote learning journeys

Learn the most effective way to keep remote employees engaged, increase learning retention, and train users to maximize the ROI of your enterprise applications.

Contents

| | |
|--|-----------|
| Introduction | 3 |
| 1. Rethinking systems training in the age of remote work | 4 |
| <i>1.1 From reactive to proactive</i> | 5 |
| <i>1.2 From conversion to transformation</i> | 8 |
| <i>1.3 From piecemeal to holistic</i> | 11 |
| 2. The anatomy of a high-performance remote learning strategy | 12 |
| 3. How to implement a high-impact remote learning journey | 16 |
| <i>3.1 Create hyper-realistic simulations of your applications</i> | 17 |
| <i>3.2 Blend virtual sessions with self-paced modules</i> | 20 |
| <i>3.3 Add performance support to complete your learning journey</i> | 22 |
| Bottom Line | 23 |

Introduction

The pandemic and the surge in remote work that followed impacted workflows, business continuity measures, and of course - training methodologies. Fast forward to 2021, virtual training is now the default across L&D teams.


In some cases, the move to remote work was either business as usual or a fast-track for moving everything online. Organizations that were ahead in phasing out in-person training have gone relatively unscathed. On the flip side, some found themselves ill-equipped to deal with such a radical change.

In other words, this crisis was a litmus test. It forced L&D leaders, program managers, training managers, and line of business managers to take a hard look at their approach and ask themselves:

- How flexible and resilient was my training approach?
- Were our training programs suited for virtual training?
- Does this crisis highlight pre-existing flaws in our approach?
- What's the best way to implement a high-impact remote learning journey?

In this guide, we'll explore these questions. We'll also highlight principles to follow to create a learning strategy that's more effective, agile, and future-proof based on lessons we've learned from Fortune 500 customers.

By the end, you'll be equipped to identify and implement THE most effective way to keep remote users engaged, increase learning retention and drive end-user adoption on your CRM, ERP, HCM, or any other business-critical application.



1 Rethinking systems training in the age of remote work

With the initial shock of the pandemic behind us, this year is an opportunity for organizations to explore new options and fine-tune existing approaches. We suggest the following three bedrock principles to build an effective, agile, and resilient learning system:

- From reactive to proactive
- From conversion to transformation
- From piecemeal to holistic

1.1 From reactive to proactive

L&D teams were faced with a sudden spike in demand for virtual training last year that bottlenecked content developers. The learning fulfillment model built pre-COVID tended to be reactive. In fact, L&D as a function tends to be reactive which ultimately leads to inefficiencies. It was designed to work as lean as possible and to identify the optimal amount of content and areas for improvement to help the bottom line.

“Our training fulfillment is based on an FTE model. Our team would scope a certain amount of training curriculum broken down into several simulations. Each simulation would take around a week to deliver the content. We would create a timeline on how long each curriculum takes, based on how many resources available to meet that deadline. For instance, 25 modules would take 3 content developers to develop in X amount of months. With the surge in remote workers, the demand has increased exponentially”

Kevin Beach, VP Process Design Consultant for Bank of America

Although no one could’ve predicted the pandemic, you can proactively plan and identify potential business continuity impacts that pose a risk to your training programs.

From a project management standpoint, there are a lot of dependencies that need to be met or assumed to ensure that the target project state is optimal. You need to identify requirements, potential what-ifs, potential obstacles, dependencies for success, KPIs, success factors, contingency plans, and potential constraints.

Checklist for successful systems training

Here's a short list of variables that could impact your project success:

1. Subject matter expertise

- ☐ Do business partners understand the processes?
- ☐ Do we have the right subject matter experts from a learning and business perspective to help with the development of storyboards?
- ☐ Do subject matter experts fully understand the scope of training?
- ☐ Do SMEs have the required knowledge of the target application?

2. Content priority

- ☐ Which KPIs should I use to prioritize content? (i.e volume of transaction, level of risk, release versions)
- ☐ Which tasks have the highest potential to mitigate risks?
- ☐ Which tasks are the most complex for new hires?

3. Storyboard accuracy

- ☐ Does my process flow match the tasks and encapsulates all relevant scenarios that learners will encounter?
- ☐ Have I identified the most efficient path to execute the task?
- ☐ Did I validate that the storyboard meets policy and procedures?
- ☐ Have I missed potential regulatory requirements or audit issues?

4. Content developer resource alignment

- ☐ Do we have the developers with the skill sets to deliver high-quality and interactive products?
- ☐ Have expectations of roles and responsibilities been explained?

5. Effective communication

- ☐ Have communication channels been established between end-users, SMEs, training teams and stakeholders?
- ☐ Can the training and content development team quickly respond to end-users needs?

6. Accessibility

- ☐ Delivering multiple avenues to access content is critical to creating awareness, driving adoption, and ultimately maximizing the employee experience. It is also critically important that the lessons are repeatable, versus one-and-done.

7. Employee feedback

- ☐ It's important to capture employee feedback. Consider a quantitative measurement system as opposed to a broad-based feedback mechanism tool.

8. IT infrastructure

- ☐ Has IT been informed that systems training-related help takes priority over other tickets?
- ☐ Are your systems training demands going to clash with the IT infrastructure? (e.g. extra security measures causing long hold-ups)
- ☐ Has IT been involved in important meetings right at the beginning?



Key takeaway

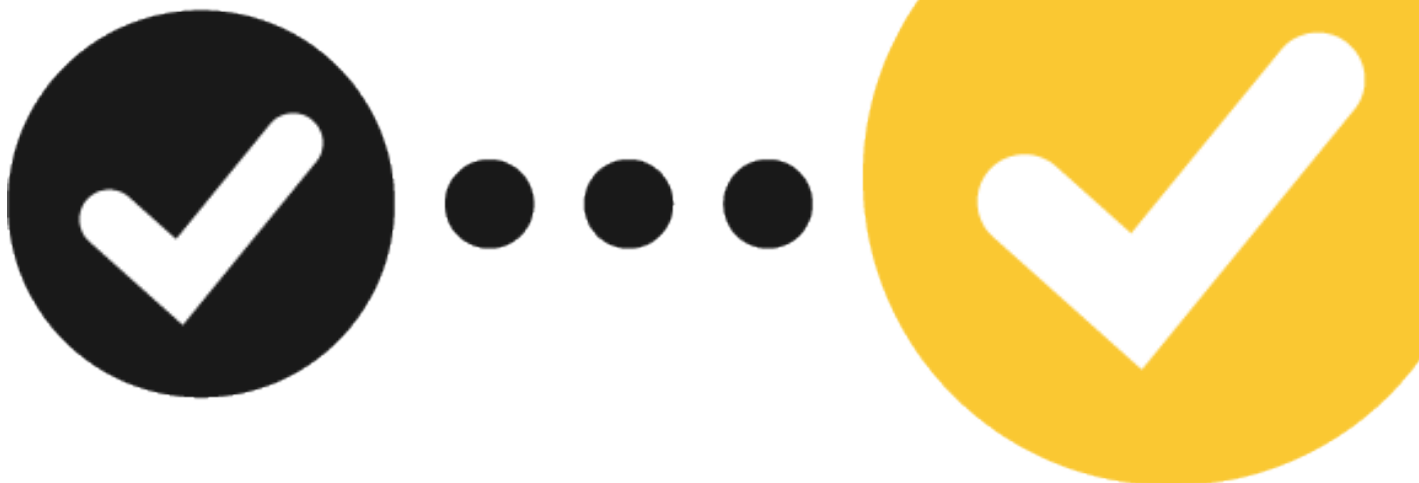
The better you plan, the less reactive you'll be. You're being proactive by outlining obstacles and identifying alternative solutions to business continuity issues before they occur. Being reactive is a symptom of poor planning. Without alternative plans in place, you'll be forced to figure it out on the fly if something happens.

1.2 From conversion to transformation

The sudden switch to remote work forced learning professionals to replace in-person training with virtual training. This had mixed results depending on **what the training looked like before going remote:**

- What training modalities were used?
- Were the lessons effective to start with? Were learners engaged?
- How versatile was the training content? Could it be easily adapted to remote learning?

A simple “copy and paste” approach - where traditional classroom training is converted into virtual classrooms was the first instinct of many given the time crunch.



However, it fails to consider that virtual instructor-led training (VILT) is a different universe than classic instructor-led classrooms. It brings a host of new challenges and exacerbates old ones:

Challenges of virtual instructor-led training (VILT)

It takes longer to set up

Trainees have to get on a conference line. Some might be late. Once everybody's ready and on the same page about the sessions' learning objectives - 15 minutes could have already passed.

It depends on a reliable internet connection

It's almost expected to experience internet connection issues during a video call. People get disconnected, the audio gets choppy and people have to repeat themselves.

This is especially true for large organizations distributed across regions and countries. Someone based in a smaller town won't have the same connection as someone living in a metropolis.

It's harder to gauge active participation

Remote learning using video conferencing removes instant feedback for trainers. It's easier in-person to identify who is paying attention, who's asking questions, who's multitasking, who is having difficulty etc.

It's more difficult to assess retention

With thousands of users working from home, it's more difficult to make sure that the training is effective, that users are retaining the right information and that everyone is applying it correctly every day.



Key takeaway

Remote training causes frictions if delivered using the wrong format and method. Ideally, video conferencing would be kept to a minimum. This points to self-paced training replacing or complementing virtual instructor-led training.

Training conversion vs transformation

This *Conversion vs Transformation* of virtual learning theme has been expounded by renowned instructional design expert, Dr. Jim Guilkey. It describes two approaches to replacing in-person training with virtual training. Here's what it means:

Conversion

Duplicate what you were doing in the classroom.

If you were using Powerpoint slides, PDFs, or screenshots, simply deliver it online.

It's ineffective because it fails to take account of the different contexts, modalities, and training formats between instructor-led classrooms and virtual sessions and their influence on learning outcomes.

Transformation

Training is redesigned to maximize learning outcomes instead of just being a duplicate of traditional classrooms.

Training modality and content take account of the new context and challenges of remote training.

Combines multiple modalities including self-paced modules, interactive virtual sessions, and performance support to maximize engagement and learning retention.



Key takeaway

Training methods aren't created equal for remote training. If your training wasn't effective and engaging from the get-go, converting it for virtual distribution would only be a stopgap.

If you've been looking for advice on how to make virtual sessions more effective and more interactive - most of it will fall under the category of "tips and tricks" for virtual facilitation. These fail to realize that **redesigning training content to be naturally conducive to a virtual setting is the greatest lever to improve learning outcomes.**

1.3 From piecemeal to holistic

Learning should be viewed as a holistic journey, not a series of one-off sessions. Here's why:

- Memory is fallible. People forget details and processes shortly after they've been introduced. Even with the best training possible, perfect learning retention for all users isn't realistic.
- To save time and costs, formal training should cover 80% of use cases with the remaining 20% taught on-the-job. The learning journey needs to take account of this context switch.
- Some scenarios are performed so rarely that you can't expect users to remember them once the situation presents itself. Performance support is required.
- Applications, regulations, and processes are changing faster than ever. Training should reflect these changes ASAP. But users can't be interrupted and pulled away from their work each time for retraining. These updates should be relayed at the point of need, thus, introducing a new component in the learning system.

The importance of building a system for continuous learning is twice as important in a remote context. Because users aren't able to walk to a colleague and ask questions, they need to be autonomous. On top of that, without the usual face-to-face communication and feedback, learning has to be repeated in various contexts and spaced out over time to stick.

In practice, learning should be embedded into the users' workflow with performance support tools (PST). This allows employees to receive answers on-the-job, at the moment of need.



Key takeaway

Performance support tools are an integral component of an effective remote learning journey by acting as a safety net for learning gaps, by delivering training at the point of need in an easily digestible, bite-sized form, and by empowering users to become self-sufficient.

A man with dark skin and short, curly hair is sitting on a grey couch, leaning forward and working on a silver laptop. He is wearing a teal button-down shirt over a light grey t-shirt and light-colored trousers. His hands are on the keyboard. In front of him, on a low wooden table, are some papers with colorful diagrams and a white pen. The background is a blurred interior space with white architectural elements. The entire image has a semi-transparent dark overlay.

2

The anatomy of a high-performance remote learning strategy[®]

Here's what we've established so far. The best systems training method for remote work would fulfill the following requirements:

Criteria #1

Training has to be hands-on and immersive.

Underlying reasons:

- Systems training is about practice, practice, and more practice. Users learn by doing. You can't expect people to perform business processes, remember guidelines, and apply best practices after passively listening to a few lectures or watching videos.
- Employees need room to make mistakes without fearing costly mistakes. They also need a structured learning path that won't leave them aimless unlike training directly in the live environment or a training sandbox.

Criteria #2

Training has to include a self-paced component.

Underlying reasons:

- The logistical challenges and time required for virtual instructor-led training mean that video conferencing should be kept at a minimum.
- The asynchronous nature of communication and learning imposed by remote work makes it inefficient for trainers to share their screen and follow every trainee one by one as they repeat each action. Instead, provide real-world challenges and ask trainees to problem-solve them on their own.

Criteria #3

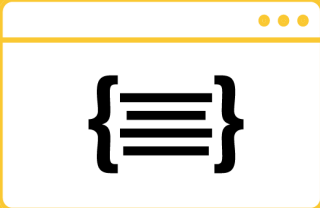
A portion of the training needs to be delivered at the point of need.

Underlying reasons:

- Users can't remember everything in perfect detail. Without the usual face-to-face interaction and water-cooler moments, providing answers on-the-job cuts down onboarding time, reduces help desk calls, and eliminates retraining.
- There are constantly new regulations and compliance changes. Plus, applications update fast. You can't expect to interrupt employees and impose a training session every single time. By pushing crucial information at the point of need, users can learn in the flow of work and ask trainees to problem-solve them on their own.

Our recommendation

Combine the following three components to create a holistic learning journey to fulfill all the above criteria:



Hyper-realistic simulations

Provide a safe environment for users to practice, make mistakes and build confidence. Users perform actions over and over and build muscle memory until it becomes second nature. This ingrains the training into their minds. Once live, they can focus on helping customers and solve problems instead of being lost in the application.

Self-paced modules

Avoid tedious Zoom and Webex calls. Rather than having trainers show employees how to solve problems step-by-step and expect everyone to copy them, users can jump on a short kickoff-call, receive instructions, and practice on their own anytime, anywhere.



Performance support

A performance support tool like Assima Digital Adoption Platform can help your team never waste a second look for “how-to-do things”. Personalized step-by-step guides and change management notifications are delivered at the point of need - allowing every employee to perform at their best without depending on colleagues.

Overview of a blended approach for high-impact remote training

1. Self-paced module:

Learning objective

Provide foundational knowledge i.e. introduction to processes, an overview of products, etc

What it's not

Reading slides and taking a quiz.

What it should look like

Engaging and problem-based. Trainees have a chance to apply the knowledge instead of memorizing (and then forgetting) facts.

2. Interactive virtual classroom:

Learning objective

Instill a solid baseline familiarity with the application.

What it's not

Traditional lecture format

What it should look like

Learners complete exercises and solve problems. Trainer relay experiences and provide guidance.

3. Performance support tools:

Learning objective

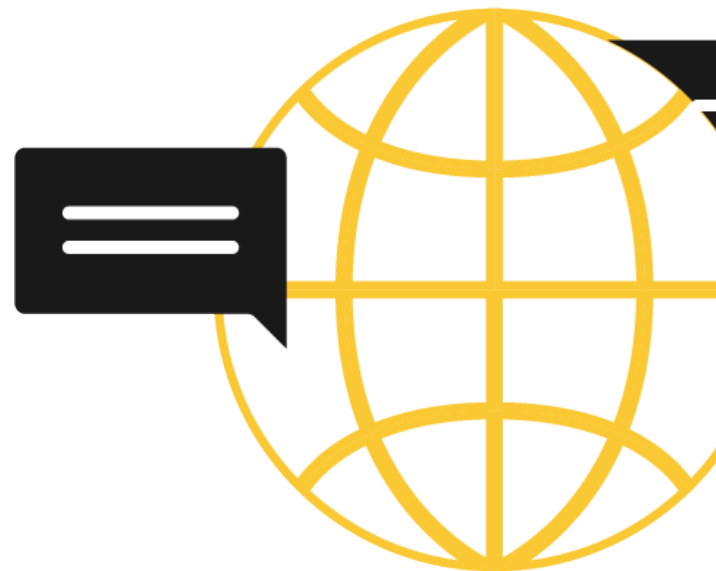
Provide answers at the moment of need and plug learning gaps.

What it's not

A replacement for formal training. It should be used in conjunction with interactive virtual classrooms and self-paced modules to enhance learning.

What it should look like

Communicates information beyond application training i.e. where to click on in the application. It should indicate all relevant things such as regulation, compliance, and the steps the user has to take outside of the application.



A man with short brown hair and a light beard is sitting at a desk, looking at a laptop. He is wearing a dark grey sweater over a light blue collared shirt. His left hand is on the laptop keyboard, and he is wearing a dark watch. The background is a blurred office setting with a window and some plants.

3

How to implement a high-impact remote learning journey

Here are the steps that our Fortune 500 customers have used to train remote users in record time, stay one step ahead of workplace changes and establish a continuous learning system.

3.1 Create hyper-realistic simulations of your applications

Step 1

Capture applications screens as editable objects

The first step to create interactive simulations is to capture screens from your application. The ideal output should be as close to the live system as possible. Buttons, scrolling, dropdowns should all be active to let users interact with the training intuitively.

Traditional e-learning simulation will only give you basic “click for more information” interactions. They give off the illusion of interactivity but are merely static screenshots with hotspots layered on top of them.

This presents several problems:

It traps users into rigid, linear process flows.

If the user doesn't do things exactly as intended, an error message pops up. This breaks the immersion, increasing frustration and resistance.

It increases rework exponentially for content developers.

Every time there's an update or a mistake to fix, they have to re-record the entire process flow from scratch, retake a new set of screenshots and edit them one by one.

Assima does things differently. Our patented authoring tool is the only solution in the world that captures application screens as editable objects. That means everything you see on-screen - text, colors, buttons, fields are captured as manipulable objects that can be selected, modified, copied and mass replaced.



Here's a quick summary of the advantages:

| | Assima's patented authoring tool | Traditional e-learning simulations |
|-------------------------------|---|---|
| <i>Quality of output</i> | Users can click, scroll, input data into fields, just like they would in the real system. | Rigid process flows riddled with error messages. |
| <i>Maintainability</i> | Simulating multi-step processes takes only a single capture. This reduces screens to maintain by 90%. | For every update, you have to recapture screens and edit them. |
| <i>Scalability</i> | Data can be reused for different types of outputs, different countries, and departments, as many times as you want. | Translating and anonymizing content takes a lot of manual work. |
| <i>Content delivery speed</i> | Capture from systems under development and mock-up any changes after. This extends the time to train users by delivering content before the system is even ready. | You have to wait for IT to hand over the latest software before starting to create content. |

Step 2

Anonymize and localize content

Next, to make your training content compliant with privacy laws, you'll need to replace sensitive information (PHI, PII data) from your training material with risk-free data. Normally, this part is painstakingly slow. It involves manually going over slides, editing them one by one to remove names, addresses, etc.

With Assima, you can sanitize data from your lessons in a few clicks thanks to our bulk find and replace feature. What's more, the same can be said for localization for quick translation. Everything from data, instructions, entire user interfaces can be mass translated in a few minutes in any language.

| Data Anonymization Edit properties | |
|---|---|
| ENGLISH (UNITED STATES) ▼ | REPLACEDATA1 ▼ |
| 1 - opportunity is "Train for PEGA" - close date is today - it is in the prospecting sta... | - opportunity is "Train for Salesforce" |
| 2 "Jackson" | "Doe" |
| 3 "Train for Pega" | "Train for Salesforce" |
| 4 \$0 | \$1 |
| 5 \$0.00 | \$9.99 |
| 6 %Leads | |
| 7 (0) | |
| 8 (1) | |
| 9 (404) 555-1211 | (770) 333-5555 |
| 10 (404) 555-1212 | (770) 333-4444 |
| 11 (978) 555-3322 | (770) 333-7777 |
| 12 © 2020 salesforce.com, inc. All rights reserved. | |

Step 3

Deliver simulation outputs via any LMS

You've created your simulations. Now's the time to make them available to users so they can access them 24/7 for self-paced learning.

Assima is SCORM compliant and lets you publish simulations through any LMS. You can create content using Assima and upload a dynamic link to your LMS. This will instantly synchronize all future updates, saving you the trouble of reuploading content and giving you peace of mind that users will always have access to the latest version.

Step 4

Track content usage

A learning journey is only as strong as its weakest link. You need to keep track of what users are doing inside your lessons, what content they are digesting, and where they are having trouble. This will allow you to pinpoint where training can be improved.

Assima's native tracking lets you track actions and content usage inside interactive simulations in real-time - down to every click and input field. No extra coding is required.

3.2 Blend virtual sessions with self-paced modules

Step 1

Deliver guided simulation practice

The key here is to let users practice in a structured and process-driven environment where they can make decisions and solve real-world scenarios. Users must be shown not just what to do - but why they are doing it. That's because tasks inside an enterprise application are inherently tied to business processes. Being familiar with the application screens and where to click isn't enough.

That's why each simulation exercise should be framed as a business scenario. The lessons should tell users exactly why one selection has to be made over another. Because users aren't just going through the motions and memorizing steps, but instead **understanding the reasons behind each action - they can apply their learnings to other contexts, and retention increases.**

Here are 2 options on how to use guided interactive simulations:

Option #1: Self-paced training

Guided practice simulations are available to all users via the LMS. From what we've learned from clients, Assima guided simulations are used primarily as self-paced training - allowing you to cut down on virtual sessions and eliminate virtual instructor-led training.

That said, the advantage of simulations is their flexibility. You can also use them to complement virtual instructor-led training.

Option #2: Virtual led instructor training + Self-paced training

Step 1

Deliver short walkthrough videos before the training sessions as an introduction.

Step 2

Give a gentle tour with high-level information during the virtual training session followed by a few talking points.

Step 3

Adopt a "show me, now you try it" method. Show users first how to perform a series of tasks, then have them try it. You can run scenarios and have them fill the blanks. Make them think instead of spoon-feeding them all the information.

Step 4

Switch to self-paced training and send trainees to the guided simulations to practice on their own from anywhere, anytime.

2 tips for virtual instructor-led training:

- ★ You can block training modules using your LMS and only allow access to users on the condition that they pass the initial quiz.
- ★ For ILT virtual training, Assima lets you deliver simulation in what we call “sandbox mode”. This simulation mode removes the distraction of instruction notes. This way, trainees can focus on what’s happening on the screen while the trainers are demonstrating. When it’s their turn to practice, guardrails are put in place so that users aren’t clicking left and right and wandering inside the application.

Step 2

Generate process documentation

Your users will need a cheat sheet to use as a reminder for processes that involve too many steps. Make sure that process documentation outlining these steps with associated screenshots are readily available.

Assima’s patented authoring tool autogenerates this process documentation. You don’t have to lift a finger.

Step 3

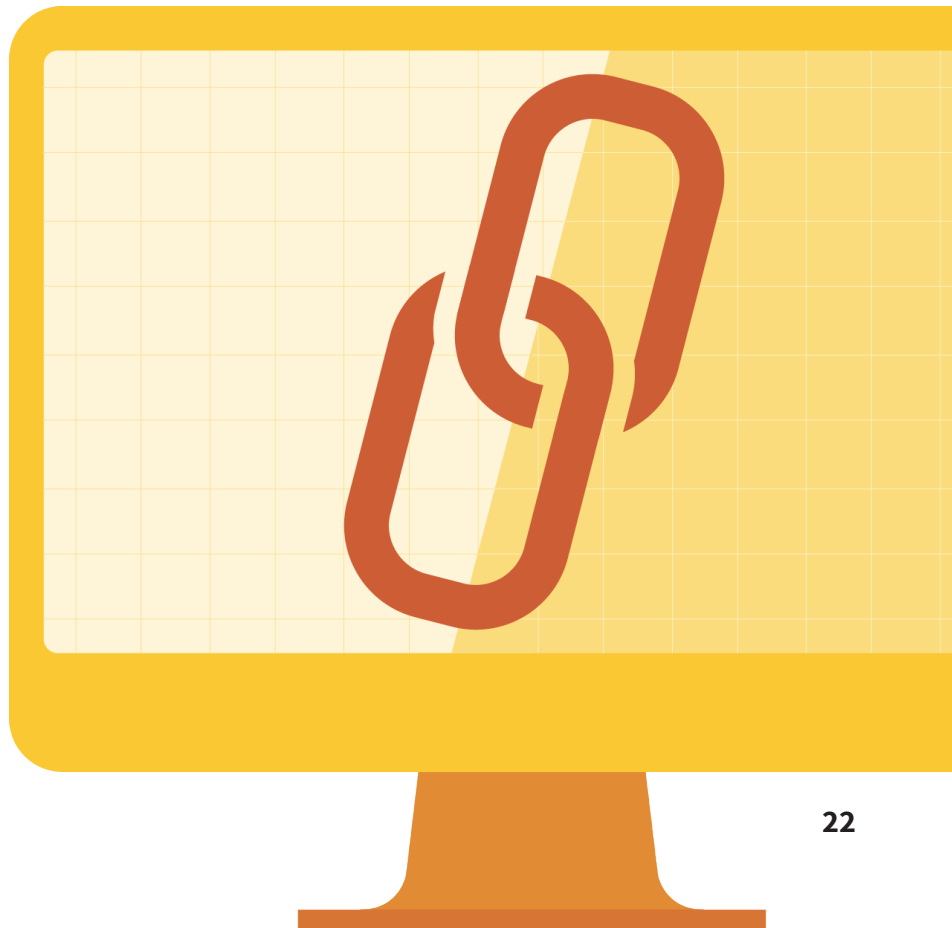
Evaluate performance

You need to make sure that every user mastered processes according to guidelines. You’ll also need a way to prove to management that every trainee practiced, is now competent and that training paid off.

Run evaluations to prove that each user understands the process by making them run through a scenario-based simulation with a set of instructions on what to do, but this time, without the steps on how to do it. Assign a pass or fail score and show where they got it wrong.

3.3 Add performance support to complete your learning journey

- Step 1** Call your support desk and ask them what are the most common support questions. These are issues that need to be reinforced after formal training.
- Step 2** Partner with SMEs, lines of business managers, IT, and other stakeholders to identify new procedures, regulations, process changes, software updates, etc.
- Step 3** Create change management notes and step-by-step guides according to Step 2. These guides should be both contextual and personalized based on the application screen, business context, and user profile.
- Step 4** Deliver this new content via an intelligent in-app layer that sits on top of your application like Assima Digital Adoption Platform.



Bottom Line


By now, you've probably realized that you have a great opportunity to use hyper-realistic simulations, self-paced modules, and a Digital Adoption Platform to make systems training and your organization more resilient, agile, and future-proof.

Let's recap on what you need to do to implement this learning strategy:

- 1** Create hyper-realistic simulations of your applications.
- 2** Blend virtual sessions with self-paced modules.
- 3** Add performance support to complete your learning journey.



In this guide, we've given you a step-by-step process for how you can create a high-impact remote learning journey to keep employees engaged, increase learning retention, and reduce training costs.



Assima helps you deliver high-impact remote training with the world's most effective way to create and maintain hyper-realistic simulations for software training.

Empower remote users with hands-on experience to grow revenue and delight customers.



Patented Authoring Tool

Create simulations that look and feel like your live system. Provide hands-on experience without any risk to your customers or data.



Assima Digital Adoption Platform

Help users get answers on-the-job, prevent mistakes, and work at peak efficiency every day.