The Why, What, & How of Transitioning to Virtual Training
These are trying times. With the global COVID-19 pandemic, we’re all learning to adjust to the new normal, and to our new world of work. This is also an important time to be present and supportive in addressing your customers’ needs, and in helping them get through this difficult time. Customer Education and training programs can be an essential mechanism for developing and delivering this support.

We’re hearing from many of our customers that recent events are causing them to move even more of their training to the digital, on-demand format. Making the transition from in-person to virtual training can seem daunting, especially for organizations that haven’t previously offered training modalities online, but it doesn’t have to be. In this guide, we'll walk you through the ins and outs of on-demand, virtual training, and share how-tos and tips for getting started. Let’s dive in.
Why offer on-demand, digital training

While in-person training has a place in your education strategy, it can also be challenging to schedule, and, in light of recent events, impossible to attend. Over the past several years, we’ve seen increased interest in the use of on-demand training to equip customers with the knowledge they need to be successful. Self-paced, on-demand programs can give students access to the information they need, exactly when they need it.

In this guide, we’ll explore the key characteristics of on-demand training and delve into the benefits of this method for students.

What is on-demand training?

On-demand training, also referred to as just-in-time learning, is education that’s available to customers anywhere and anytime. There are no restrictions on time zones, locations, room capacity, or availability of instructors, and learners can access content immediately and at their own convenience. This has typically been a top priority for adult learners, and all the more so today.

On-demand education includes a mix of content types and typically involves video, interactive simulations, and downloadable guides. Some other resources commonly included are recorded webinars, infographics, slideshows, and blog posts. This format of training can be optimized for both desktop and mobile devices, and its ease of access means that geography no longer presents a barrier to knowledge acquisition.

By providing the opportunity for workers to learn when and where they want, educators increase both the likelihood that learners will engage with training, and that they will be in the best frame of mind to retain the information.
Four Key Characteristics of On-Demand Training

1. Instant Access

With an instructor-led training model, the onboarding process can be prolonged or delayed due to the volume of resources needed, as well as scheduling logistics. An on-demand approach empowers customers to start learning how to use your product immediately and at their own convenience.

2. Consistent

On-demand content isn’t subject to fluctuations due to instructor interpretation. Customers around the world all receive the same high-quality training experience, no matter where they are located or when they participate in training.

3. Bite-sized content

This technique is becoming increasingly popular. Instructor-led training tends to cover larger amounts of material within a single training session. In contrast, on-demand training is the perfect format to deliver bite-sized training. The content is easier to consume and easier to fit into a customer’s schedule, whether they are at the office, on the road or at home.

3. Convenient

Customers and accounts can easily re-onboard by training new users when there is turnover. Additionally, on-demand training offers a solution for people who simply missed previous training due to scheduling constraints or need a refresher.
Advantages of on-demand learning for voluntary learners

_Faster Time to Value_

A self-service customer training option means that your customers can get started right away. There's no need to schedule live sessions or fly an instructor across the country. This is particularly true for software-as-a-service (SaaS) products, where accelerating the time to value means your customer is more likely to adopt, engage, and renew. With well-designed training, your customers will also appreciate having diverse training options, and reward you with higher satisfaction ratings.

_Increased Training Effectiveness_

Self-paced training is the format that most adult learners prefer today. It enables your customers to pick up and resume training at their own convenience and review the material as often as they like. You can also easily assess their knowledge with interactive quizzes. Self-paced training is a valuable option for customers who have scheduling conflicts or just prefer to learn on their own terms. Building out specialized role-based training and advanced topics also gives customers the ability to self-select into exactly the areas they want to learn. Designing a Customer Education program for users to work independently greatly increases the chances of participation and content absorption.

_Remote/Mobile Learning_

Whether students are on-the-go or work remotely, on-demand training ensures that learners have access to the information and solutions they need. Given the difficulty of gathering employees, customers, and partners in one room for training, skills assessments, or new product onboarding, organizations need an alternative solution for ensuring that these audiences have the information they need to be successful. To this end, companies need to prioritize on-demand training options that are not restricted by time zones, geographies, room capacity, or instructor availability.
Best Learning Experience

By offering coursework that can be completed in a self-paced and on-demand manner, organizations also reduce the pressure on learners to “squeeze in” training. In turn, this flexibility encourages learners to complete courses when they feel they are in the best frame of mind to learn.

As we’ve now seen, with the creation of on-demand, self-service content, organizations can ensure that their employees, customers, and partners are enabled with the skills and knowledge they need to be successful in their roles, regardless of where they are in the world or when they have questions.

How voluntary learners are different

One of the most critical considerations when building a successful on-demand Customer Education program is developing content that addresses your learners’ knowledge needs and presents the information in a format that is engaging and valuable. While it is common knowledge that different formats appeal to different learning styles, it’s easy to overlook one key factor: the way that busy, modern adults learn is fundamentally different from traditional learning models that were developed for classroom-based formal school instruction. It may seem obvious, but adults do not learn the same way as children. It’s important to keep in mind how adults learn best when developing content.

Nearly 40 years ago, Malcolm Shepherd Knowles, a pioneer in the study of adult learning, identified five principles that guide how adults learn best, outlined in his now-classic work: Andragogy in Action: Applying Modern Principles of Adult Learning. In his research, Knowles found that adults learn best when:
1. They understand why something is important to know or do;

2. They have the freedom to learn in their own way or preferred method;

3. Learning is experiential and is directly applicable to their needs;

4. The time is right for them to learn (there’s a specific impetus); and

5. The process of learning is positive and encouraging.

Back in 1985, Knowles acknowledged that “most teachers still do not know how adults learn, and that policies in most educational institutions are inhospitable to the philosophy and process of andragogy [adult education].” So how do we ensure that our Customer Education programs are truly addressing the needs and learning styles of adults? We’ve outlined a few methods below.

**Offer self-paced, on-demand courses**

We’re all busy and it’s more than likely our users are juggling a slew of work- and life-related commitments. By offering coursework that can be completed in a self-paced and on-demand manner, we reduce the pressure on learners to “squeeze in” training. This approach also encourages learners to complete courses when they feel they are in the best frame of mind to learn.

Self-paced formats also reduce the feeling of being micromanaged. As children in school, we required high levels of guidance and supervision when learning because so much of the information was new to us. However, as adults, we often find such attention stifling at best, and discouraging at worst. Designing a Customer Education program for users to work independently greatly increases the chances of participation and content absorption.
Ensure content is highly relevant

As children and young adults, much of the content we learned was based on theory. As adults, we need practical results to make training worthwhile. Because adults will put more effort into something that has a payoff, learning should achieve one (or more) of the following goals:

- Make their job easier or more efficient;
- Help them develop and move towards a promotion;
- Assist them in completing a high-profile task.

Remember, many learners are voluntary engagers so the best content will accelerate users’ time-to-value and equip them with the information they need to be more successful.

How to get started with virtual learning

Transitioning from a largely (or entirely) in-person training program to a digital format doesn’t have to be an overwhelming process and there are a number of quick-start steps your team can take to help move your training into the digital sphere.

1. Define your objectives

With virtual education, it’s much easier for students to leave or simply “check out.” Adult learners require you to provide context and the tools with which they can take charge of their own learning. This starts with a clear outline of your learning objectives and what you’re hoping your learners accomplish.
2. Determine how and where you want to host content

Transitioning to a digital platform doesn't mean your in-person training is rendered worthless. Trainers can record their lessons on video and then post them to a hub – like YouTube or Vimeo – or an LMS (learning management system) for users to watch on-demand. Alternatively, if you already have a schedule of training that needs to be honored, take advantage of live webinar technologies like Zoom or GoToWebinar to offer the same training in a virtual environment. And don’t forget to record those live events for later use or to distribute to students who were unable to attend. These videos will also serve as a great starting point for building up a more comprehensive library of resources for your target audiences.

3. View this period as an opportunity (and perhaps the push you needed)

Change is uncomfortable and it can be all the more challenging to enact change in your organization when others (particularly executives) don't see the value in that change. While the current state of world events is far from ideal, consider using this “new normal” as a forcing function. Digital is already the way of the world and now it is even more clear why going digital is a business imperative.

4. Focus on a minimum viable product (MVP), rather than perfection

It’s easy to get caught up in the desire to make content perfect, but when it comes to making the transition to digital content, think about the smallest steps you can take that will have the greatest impact. Some information is always more important than others, so as you’re making the transition, strive to equip your customers with the top need-to-know information, rather than trying to give them everything they might normally receive in live training.
5. Set up your program for success from a technical perspective

- **Optimize your audio quality:** Poor audio is really distracting. Investing even just a little bit in good sound equipment or a high-quality USB microphone makes a huge difference for your learners.

- **Use your camera:** It may be uncomfortable at first, but people relate to people. Consider turning on your camera to make the session more engaging and give your audience someone to connect with. Test your camera angle and lighting first.

- **Control your environment:** Pick a quiet place where people aren’t walking back and forth, and space is not cluttered, etc. Minimizing external distractions will help maintain learner engagement.

- **Stay calm:** Technical difficulties happen to everyone. Take them in stride. It’s often helpful to have another person in the room with you to help troubleshoot with students and assist if needed. Register for it without intervention from you or your training team.

6. Spread the word

All of the digital content in the world is useless if people don’t know it exists. As you’re building out your content, make sure to partner with your Customer Success and Marketing teams to ensure current customers, prospects, and other audiences are made aware of your new resources. Consider email campaigns, social media touches, website banners, and/or other methods to drive engagement.

Don’t be afraid to start creating now and optimize later.
Tips for engaging virtual learners

When it comes to virtual learning, it can sometimes be challenging for learners to stay engaged and attentive. While many courses turn to polls and quizzes as a method of ensuring that learners are acquiring the necessary knowledge, there are also a number of other ways to engage your audiences. Read on for three unique engagement techniques to try with your students!

1. Add Kahoot!

Consider adding Kahoot! to your session. Kahoot! is a free game-based learning platform in which teachers can create learning games or trivia quizzes on any topic. The games encourage friendly competition, use a colorful, engaging design, and offer a fast-paced (and fun!) way to test learners’ knowledge. To learn how Asana uses Kahoot! in its workshops, check out our webinar with Daniel Quick: Creating Delightful Customer Education Programs that Drive Business Outcomes.

2. Use a prompt, then ask for participation

Ask learners to complete a thought exercise and set expectations that they will be contributing their ideas to the group. Effective, imaginative prompts to consider include:

• “Think of a time when...”
• “Take a moment to consider...”

Alternatively, you can create a more detailed prompt or activity. One example may be “Take a look at the items on the screen. Which one is most important to you and why?” You can then ask learners to contribute their answers verbally, or via the chat box, depending on the technology you’re using.
3. Encourage real-time application

Oftentimes, especially with software training, there are real-world, in-product applications for the skills and knowledge learners acquire during virtual training sessions. Don't be afraid to take a few minutes to pause and ask participants to apply something that they've learned. Giving them the time to try things out will often prompt interesting questions and help them recall what they've learned. If you are using learning labs, this may be a larger part of your training session, but even if you're not, it pays to give people a moment to process a lesson by performing the relevant action.

When it comes to engaging both virtual and voluntary learners, it’s important to think outside the box and consider how different techniques can help drive (and maintain) focus. And remember, there’s no “right” way to engage your learners. Take the time to try different techniques and don’t be afraid to ask for feedback at the end of the session.

Technology requirements for virtual learning

As you build out or accelerate your on-demand training program, we recommend that you keep the following capabilities in mind:

1. Ease of Access

Since your learners are voluntary, it’s essential that you remove as much friction as possible for them to access, find, and consume relevant training. Ensuring easy, intuitive access to training options is a critical driver of engagement. We recommend that you have the following enabled for your on-demand training program:

- Single sign on (SSO): Provide a seamless experience for students who already have a login to the product itself. This way, they aren’t required to create a new username and password for product training.
• **Self-registration:** With this method, students first visit the course detail page. Once they click the register button, a registration page will display, where they can sign up with their own login credentials. This allows for customers and partners to find your training and register for it without intervention from you or your training team.

• **Access codes:** Limit access to your course catalog. Content will only be visible after users sign up using the code you give them.

2. **Learner Experience**

Consider using tools that can be tailored to fit your existing brand guidelines and the look-and-feel of your current training program. By maintaining a consistent style across your digital properties, you signal to customers that they can expect the same high level of expertise in the virtual realm as they currently do with their in-person training experiences.

3. **Integrations with Business Systems**

Because education programs have a far-reaching business impact across a variety of internal teams, it's important that training can also be integrated with other tools like marketing automation systems, sales enablement, and a CRM like Salesforce. With a CRM integration in place, training teams have the ability to understand the true value of their program. Insights include:

• How training affects customer health scores, churn, renewals, and expansions

• The impact of training on product adoption

• Reach and response to promotional training activities

Teams can then surface these results to relevant stakeholder teams – all without switching between disparate systems.
As you evaluate embracing the on-demand model, a Customer Education Platform can give you the tools you need to onboard, engage, and retain customers at scale. We at Skilljar would love to help you do this. To schedule a consultation and see a demo of Skilljar in action, please contact us here.

**Additional Resources**

- [eBook: 3 Reasons to Prioritize On-Demand Customer Training](#)
- [eBook: Choosing the Right Technology for External Training](#)
- [eBook: 4 Tips for Marketing Your Customer Education Program](#)
- [On-Demand Webinar: Building a Customer Learning Destination with Video](#)
About Skilljar

Skilljar’s award-winning customer training platform enables you to successfully onboard, engage, and retain your customers and partners. Our cloud learning management system (LMS) makes it easy to create courses, distribute to web and mobile devices, and track results.

Skilljar helps you accelerate product adoption, automate onboarding workflows, reduce support costs, and increase long-term customer satisfaction.

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