Global Leader of Cloud Services

Rapidly Scales Partner Channel Engagement & Performance

CASE STUDY

Company builds first self-service certification program using the ExpertusONE LMS to let partners learn at their own pace, when and where it's most convenient

SECTOR: Telecommunications software and cloud computing development

DESCRIPTION:

To Create World's Leading Omnichannel Customer Experience Solutions Company

LEARNER TYPES:

Partners

CHANGEMAKER:

DIRECTOR OF OPERATIONS
Cloud Computing Development

CHALLENGE

The global leader of cloud services already had a core set of partners successfully selling their on-premises CIC (Customer Interaction Center) and hosted CaaS (Communications-as-a-Service) products. Now launching their first cloud-based product, PureCloud, they needed to:

- Quickly educate partners on the new product for successful implementations and support

- Rally partners to sell PureCloud

- Find an LMS solution that supports the rapid iteration of a cloud product, and offers self-service, automated training plans

Because they recognized PureCloud as the future of their business, they needed to ensure partner effectiveness. The best way to achieve this was through required training—creating the need for a partner certification program.

"We chose a partner implementation model to quickly scale PureCloud. We wanted to get as many people using the service as possible. With the help of our partners, we can implement PureCloud faster, to more people, and deliver high quality support with a flexible model."

DIRECTOR OF OPERATIONS, EDUCATION & PRODUCT ADOPTION

It was the company's goal to recruit customers and then pass them off to partners that had met their certification and enablement requirements. "Basically, we wanted to make them as autonomous as possible—where they could implement and support PureCloud with minimal vendor assistance," Worland continued. "This would save us time and money and speed the adoption of PureCloud."

A New Self-Service Model, Designed to Scale

What made this certification program unique and innovative for them was that while they already had numerous certification programs for partners and customers, this was the first to be offered as self-service.

"In the past, all of our certification training was in-person (ILT) or virtual (webinars). The shift to a completely self-paced, self-service model was primarily driven by scale—how quickly we wanted to get partners certified in implementing and supporting PureCloud, and the sheer number of partners we wanted to reach," said the Director of Operations. "We also wanted to give our partners the flexibility to take this training on their own time. The better it fits into their schedule, the more likely they are to take and complete it. So being self-paced was key."

One other core reason for self-service delivery was PureCloud's rapid development cycles. Unlike with their on-premises products, a cloud model requires weekly, sometimes daily, updates. And the best way to effectively communicate these changes in certifying partners was to use a delivery platform that could accommodate rapid content changes.

"We quickly realized that the in-person model for delivering certification training was not going to be feasible for a cloud product," commented the Director of Operations. "The self-paced model, however, allowed us to adopt any changes into our training as soon as they happened."

About the company

A leading global provider of software and services designed to improve the customer experience. The company's 6,000-plus customers worldwide have benefitted from its cloud and on-premises solutions for contact center, unified communications and business process automation.

It has received a Frost & Sullivan Company of the Year Award for the last five consecutive years. The company was founded in 1994 and employs more than 1,800 people worldwide.

The company—At-a-Glance	
Headquarters	Indianapolis, IN
Year Founded	1994
Revenue	$390M+
Employees	2,000+
Global Scale	America, EMEA and APAC
Industry	Technology business software and services

The telecommunication software company chose to offer a self-service training model that responds to their partner channel's needs.

To support the program's delivery, the company chose the modern, cloud-based ExpertusONE LMS to: manage content with flexibility and control, offer progress visibility to all stakeholders and create a positive learning experience.
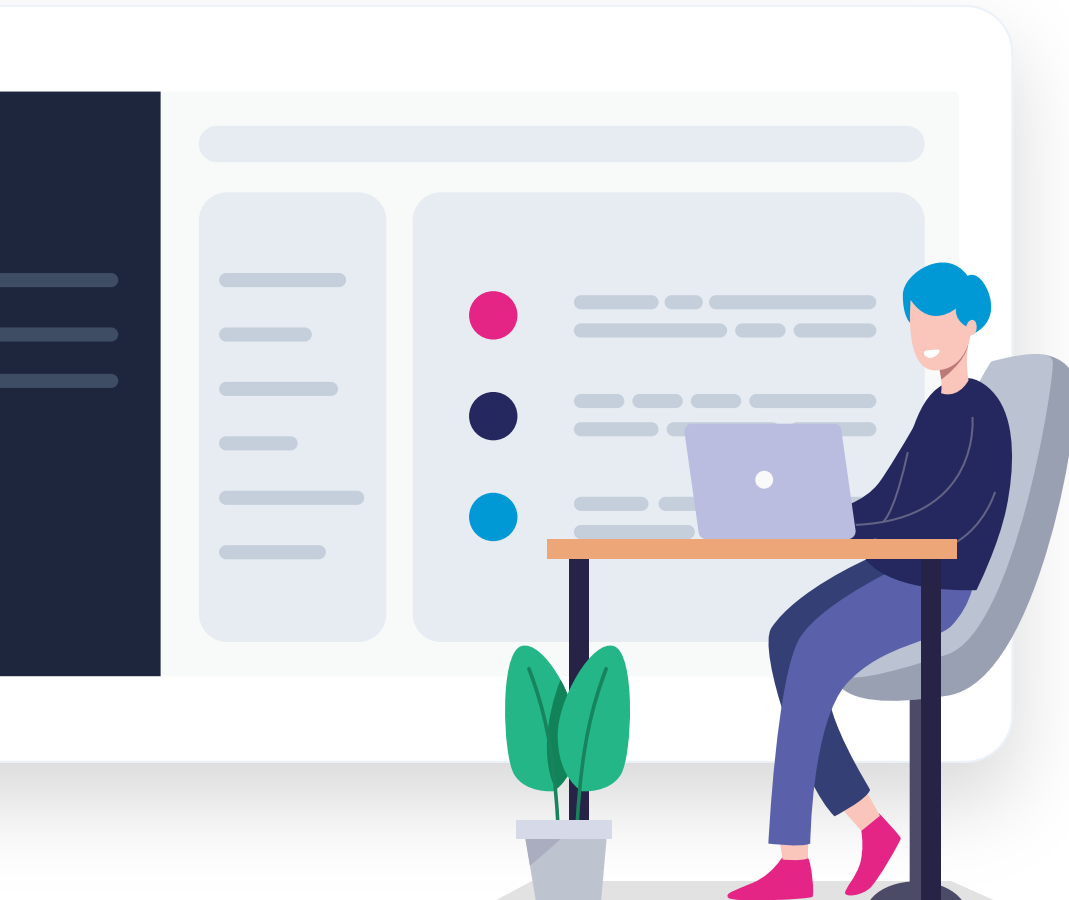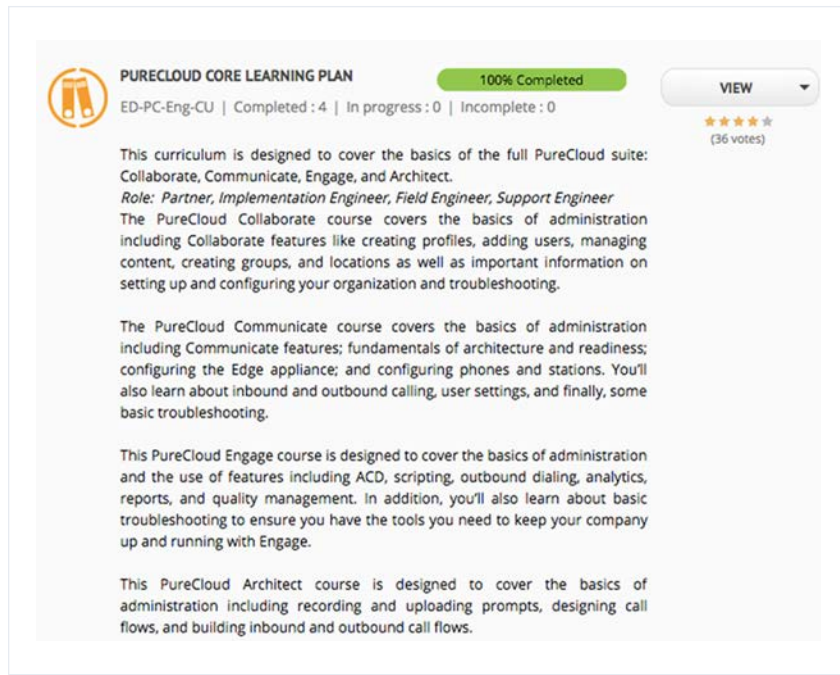
About the ExpertusONE LMS

ExpertusONE is a powerful and intuitive LMS for training any learning audience. The enterprise-class system engages and empowers learners and admins, enhances learning effectiveness and enables distributed learning at scale.

Optimized for learning, ExpertusONE is built on a modern, cloud architecture for continued innovation. Customers can train multiple audiences with the benefits of advanced gamification, mobile, social collaboration and reporting, and use the ExpertusONE API library to extend learning to Salesforce and other systems.

Seamless Salesforce & Workday Integration

After rebranding ExpertusONE as "Interactive University", they created a PureCloud Core Learning Plan curriculum comprised of four mandatory courses—each with multiple modules:

- Collaborate

- Communicate

- Engage

- Architect

Entirely self-paced, the program takes an estimated 17 hours to complete. And once an individual completes the learning plan, he or she can request a voucher to take the exam. Note: The company uses a third-party for this exam, which then uses Questionmark to post all exams and ProctorU to proctor them.

"Right now, we're entering all of the Questionmark and ProctorU data into ExpertusONE," said the Director of Operations,. "Soon, we plan to automate this process using ExpertusONE's APIs, which will be a huge timesaver."

When exam data is entered into ExpertusONE, the company, and the partners themselves, have full reporting visibility into partner progress (enrollments, in-progress training, fails and completions). This helps the Director of Operations, and her team continually improve the program's success, and helps their partners monitor their teams' progress.
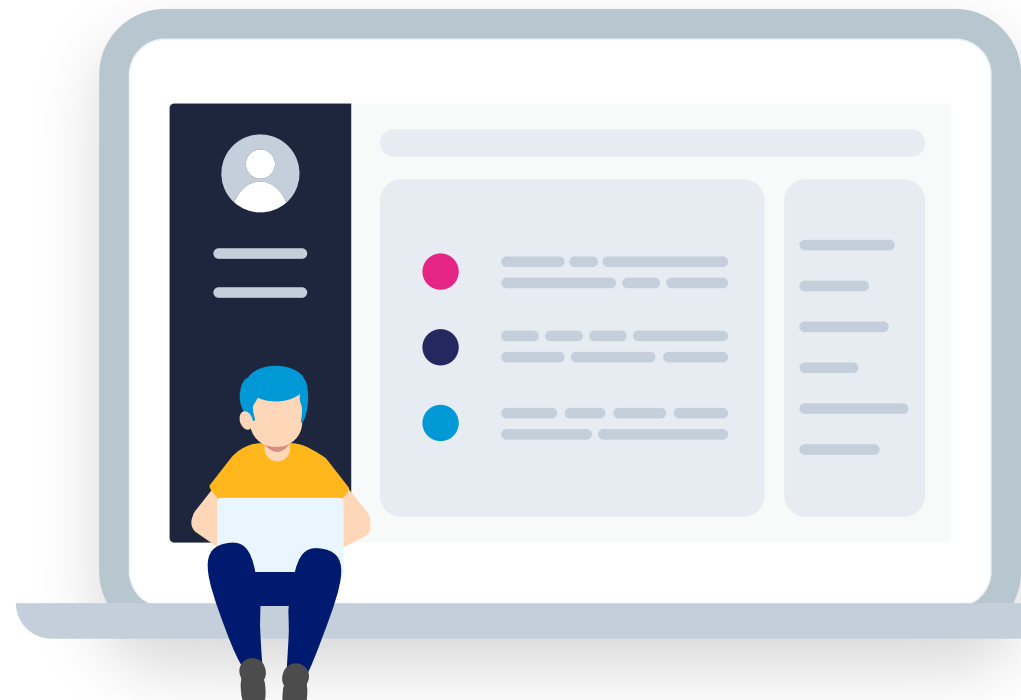
About ExpertusONE Reporting

ExpertusONE's reporting and analytics offer visual learning for a quick snapshot of learner status, progress and engagement:

- Fast, easy report generation—in five clicks or less—for managers, learners and admins

- Business-critical intelligence accessed on-demand, in real-time, on mobile or the desktop

- Replaces third-party reporting tools and saves time and money with built-in reporting

Program Impact—Big Expectations

The PureCloud Core Learning Plan made a major impact in a few months and continues to grow daily with expectations for significant gains.

"We already have two incredibly successful products that have propelled us to be the market leader," explained the Director of Operations. By now offering a completely cloud-based product, we can rapidly reach thousands of untapped customers with the support of our partner network.

"The possibility to scale our business and success is limitless, yet very attainable. And that's why this certification program was so critically important. Without the enlisted help, and buy-in, of our partners, we wouldn't have been able to keep pace with this immense opportunity."

Program Content—A Focus on Partner & Customer Success

For the PureCloud introduction, the cloud services company set out to determine what type of training its partners, and customers, needed to be successful.

In the past, for their well established, on-premises products, the company worked closely with partners to gather feedback and suggestions for ongoing course adjustments. But since PureCloud was a new cloud product that would change continuously, they needed to find another way to ensure the product's training effectiveness.

"Ultimately, we became very involved with PureCloud's development, product management and implementation teams," said the Director of Operations. "We worked with them hand-in-hand to determine what key features to cover, and precisely what our partners would need to know to successfully implement and support the product.

"Our implementation team is in the field daily, working with customers to identify what's working, what's not and any new challenges or obstacles. They then let us know what we need to change, update or remove in our training. So they're vital to ensuring that our PureCloud training is up-to-date and designed to help our partners and customers succeed."

"Essentially, our implementation team is doing the same thing (implementing and supporting PureCloud) that our partners will be doing. So their feedback is highly valuable."

IThe global leader of cloud services spent one year developing the PureCloud Core Learning Plan's courses based on input from their internal teams—then they moved on to program design.
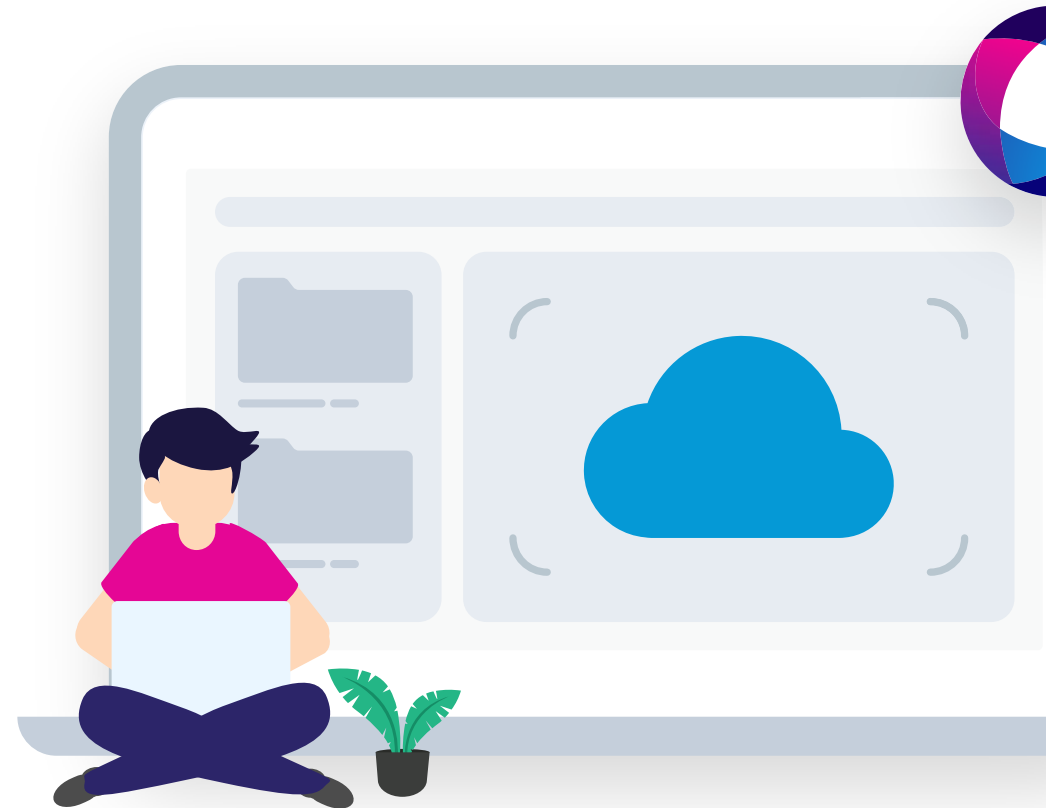
PureCloud Core Learning Plan—Budget &Timeframe	
Overall Budget	All of the company's training programs, including certification, are built to meet identified needs without defined budget guidelines. However, their training organization is tasked with generating $5-10 million in annual training revenue.
No. of Employees Involved	7
No. of SMEs Involved	12
Timeframe to Implement	The course creation took nine months. Program implementation took three months and involved: creating the curriculum in the LMS, writing and testing the exam and developing the metrics needed to test and track the training plan.
Program Start Date	Jan. 8, 2016

Program Design—Convenient. Intuitive. Engaging.

"We already had a lot of input from our internal team members about our training. We had also been listening to our partners who had already been implementing and supporting our CIC and CaaS products, and knew they wanted a self-paced program because of the sheer convenience of it. Additionally, they wanted something that was interesting and easy to use—intuitive," explained Worland.

The solution was to create a self-service program with a built-in Articulate Storyline, supported by multiple quizzes, videos, voiceovers, PDFs, links to step-by-step instructions in the Resource Center and games—every available tool to make the learning exciting and stickier.

"Thanks to our LMS, we could, for the first time, include games and quizzes in our training to drive home knowledge," commented the Director of Operations.

Examples of Quizzes & Games in the PureCloud Core Learning Plan

Quiz #1

Quiz #2

Games/Matching

The PureCloud Core Learning Plan's quizzes, offered in several different formats, are a big hit since they allow learners to assess their knowledge without feeling like they're taking a test.

They have also added interactive puzzles (drag and drop), scenarios and simulations to keep their certification program's content fresh and entertaining.

Multiple Choice

Just a QUICK QUESTION

The time zones in a contact list or callable times entry must be specified in Tz database notion. Each location is identified by _____ or _____ and then by the name of the largest _____.

○ Continent, ocean, city
○ Continent, ocean, country
○ Ocean, continent, country
○ Country, continent, city

Simulation

"Basically, we tried to make the training as interesting as possible so our partners didn't feel like they were taking training. People learn in many different ways, and our program delivered as many of them as possible to appeal to all," concluded Worland.

After completing the program design, the company invited select partners and customers to take the training in advance to make sure that it was helpful and entertaining. And they used this information to adjust it.
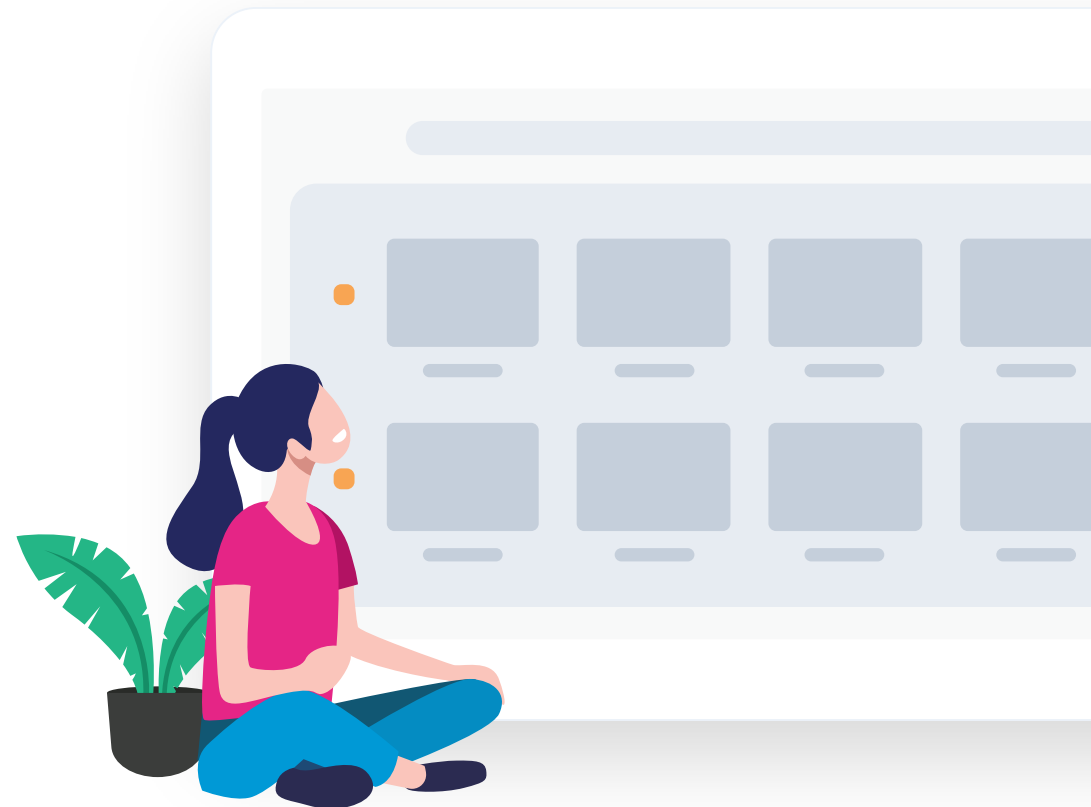
Self-Service Delivery Empowered by a Modern LMS

As mentioned earlier, the global leader of cloud services determined that using a self-service delivery model was the optimal way to rollout their certification program quickly, and to keep pace with ongoing product updates.

To ensure training retention, they decided to crystalize learning with one final step—having certified partners shadow the implementation team to experience a real-life implementation before they began servicing customers.

The next step for the company was to select an LMS that could support external learning audiences, scale on-demand and provide an intuitive user experience, in addition to supporting their internal training needs. ExpertusONE fit the bill.

"We selected the ExpertusONE LMS because it put training right at our learners' fingertips. Everything's integrated with great visibility," said Worland. "So far, we've had excellent feedback on how streamlined and easy Interactive University (ExpertusONE) is to use. ExpertusONE definitely plays a big part in the successful delivery and adoption of our partner certification program."

Impactful Promotion via Internal Buy-in

Once the training was ready to launch, they promoted it through their own internal PureCloud team, their partner channel managers and via webinars where partners could learn what the certification program was all about. They also highlighted it in their Resource Center.

"This certification program came at a good time. It was really driven by our partner channel without much marketing," said the Director of Operations. "What we did instead was make a big push internally to get all of our own PureCloud technicians certified, so they'd be more engaged with the training. They now understand it, communicate it and want to promote it on their own. So they've naturally socialized the program with our partners."

Quick, Measureable Success

Even though it's still in the early stages of the PureCloud program's launch, the telecommunications software company has already scored tremendous success in achieving their primary goal—getting partners certified.
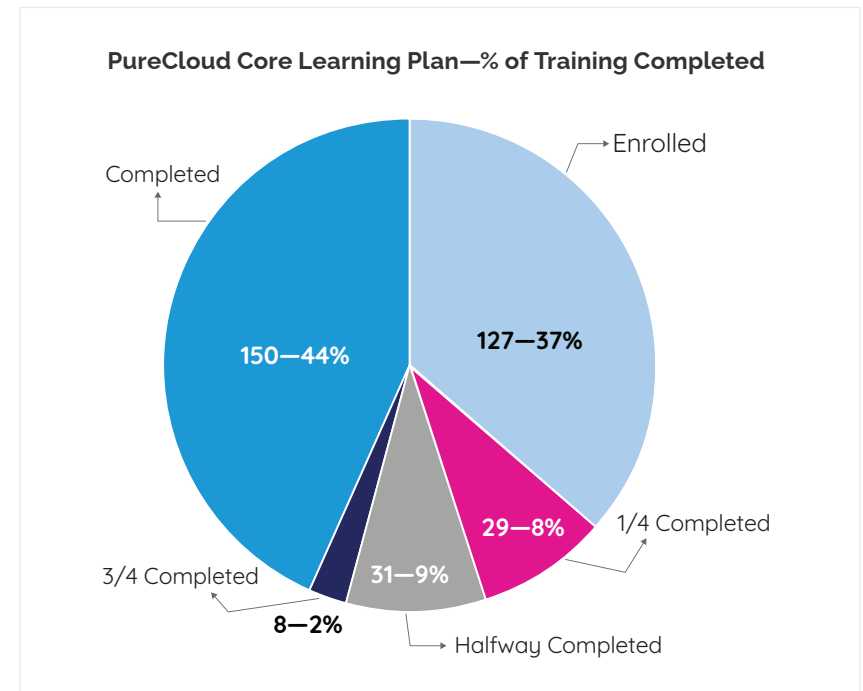
PureCloud Partner Certification Program Results

Timeframe	# of Partners Certified
Day 1—Jan. 8, 2016	0
Day 7—Jan. 15, 2016	5
Day 98—April 15, 2016	81

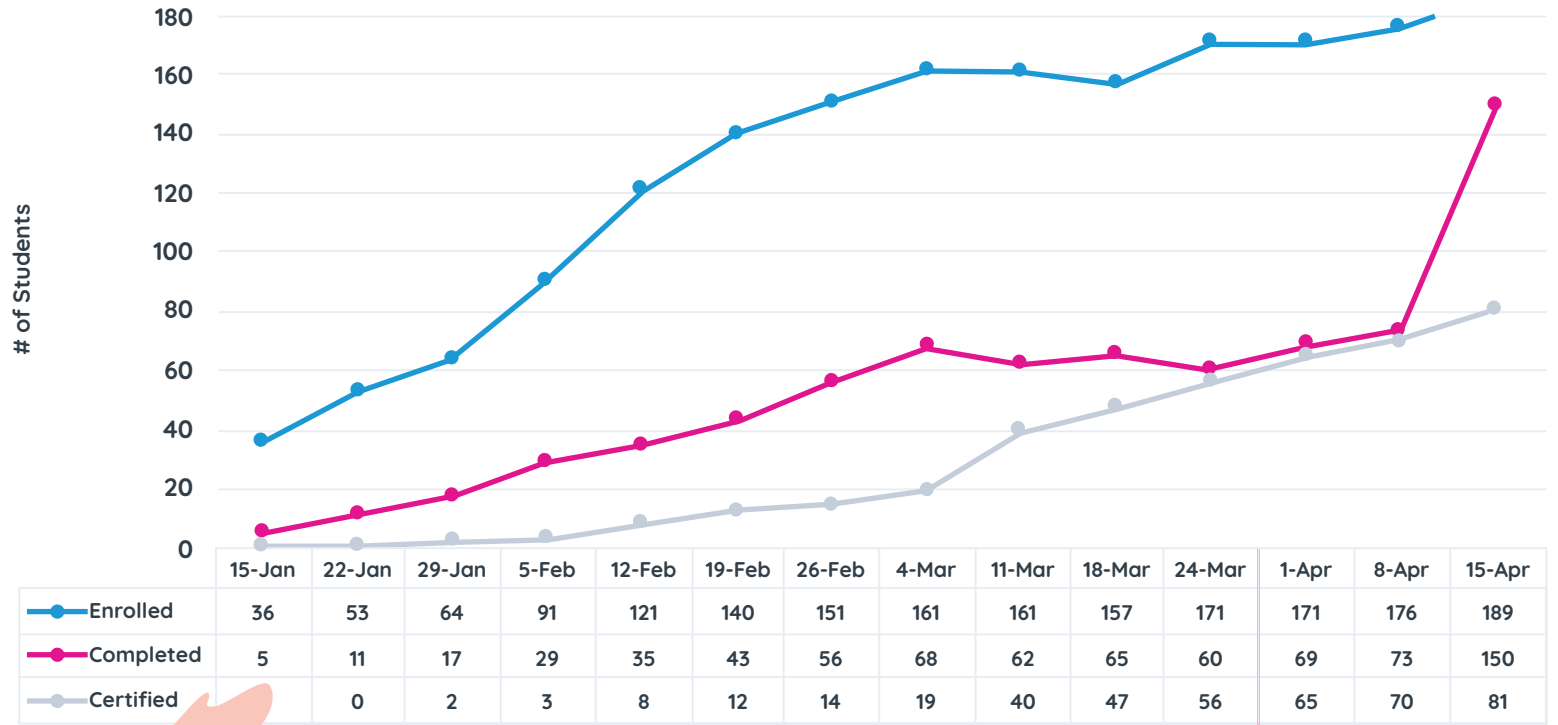| Timeframe	# of Partners Enrolled
Day 1—Jan. 8, 2016	0
Day 7—Jan. 15, 2016	36
Day 98—April 15, 2016	189

In just three months, 81 partner participants completed the certification training and 189 enrolled. This means the company will undoubtedly meet their 2016 goal of bringing on 40 new partner organizations, each with two certified people, well ahead of schedule.

"Every week the numbers are going up!" commented the Director of Operations. "We're pleasantly surprised by the immediate success and uptake in training. We expected it to do well because of how much time and effort we put into the program design and the planning that was involved for its delivery. But these numbers are outstanding."

PureCloud Core Learning Plan—% of Training Completed

Completed 150—44%
Enrolled 127—37%
1/4 Completed 29—8%
Halfway Completed 31—9%
3/4 Completed 8—2%

Partner Students Trained Over Time—Enrolled, Completed & Certified

	15-Jan	22-Jan	29-Jan	5-Feb	12-Feb	19-Feb	26-Feb	4-Mar	11-Mar	18-Mar	24-Mar	1-Apr	8-Apr	15-Apr
Enrolled	36	53	64	91	121	140	151	161	161	157	171	171	176	189
Completed	5	11	17	29	35	43	56	68	62	65	60	69	73	150
Certified		0	2	3	8	12	14	19	40	47	56	65	70	81

Tina Shibue, PeopleONE' Product Marketing Director, agreed saying, "The self-paced training fits the convenience people need; to take training on-demand on their schedule, which aligns with their busy lifestyles. Lori and her team heard what their partners wanted and are seeing the rewards of that successful certification delivery."

Prior to PureCloud, partners had to go through two weeks of certification training to implement and support the company's products. Now, in (typically) 17 hours or less, they can get a full certification, and do it in their own time.

"For this type of industry, it's something that people have been begging for. They want to do certification on their own time. Plus, our program is a different kind of training…it's not boring!" remarked the Director of Operations. "Our courses are visually interesting, all scenario-based and very well done."

Other Success Factors—Automated Program Design & Robust Reporting

Another reason for the program's success was that it was all automated, thanks to their LMS.

"ExpertusONE guides learners through the program step-by-step. As soon as they login, they see their 'My Programs' page which shows what they've completed, what's up next and how much further they have to go. That convenience makes a big difference in completions," explained Shibue.

PureCloud Core Learning Program My Programs Page
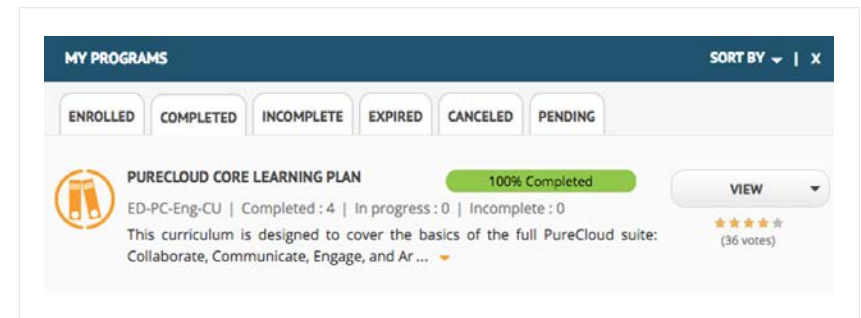
"Our LMS allows us to control the training, but makes the leaners feel like they are directing it—which sustains engagement," said Worland.

The cloud software company also chalked up its success to their LMS' robust, yet easy to use reporting tool.

Example Report from the PureCloud Certification Program

"We can see our partners' progress in real-time, which for a training organization is huge," remarked the Director of Operations. "We analyze all of the questions… 'Did they progress all the way through?' 'How much time did they spend?' And so on. We look at all of these metrics and can then evaluate the course work to see what needs to be fixed. 'Is it bad information?' 'What's the problem we can solve?'"

Ongoing Improvements for Enhanced Program Success

The company has already made updates to all four courses in the PureCloud Core Learning Plan based on LMS data, exam analysis, implementation team feedback and new product features and functionalities.

"Our goal was to get partners empowered to provide the best PureCloud implementation services and ongoing customer support," said the Director of Operations. "The more partners that are certified, the more we can sell directly… and we're already meeting this goal in a big way!"

Lessons Learned

The Director of Operations says that they're still learning because their program was recently launched. However, one lesson learned is to provide training in a guided curriculum versus independent course listings in a catalog.

"Initially, we had the four required courses listed separately in the catalog. The problem was that learners did not know which training to take first and they couldn't see their progress in completing the courses necessary to prepare for the certification exam," commented the Director of Operations. "By providing a curriculum in a guided format, learning is pushed to individuals—and this makes their progress faster and their satisfaction with the program higher.

"When you build a certification program, you don't want people jumping around; you need their learning to be progressive—understanding one subject before another. A guided curriculum is a great way to direct learners down the correct, proven training path and help answer their questions along the way, which reduces help desk calls and costs."

To create this curriculum, the Director of Operations and her team used ExpertusONE's built-in curriculum management capabilities that allowed them to create a curriculum storyline, offer training plans, set course sequencing and even flag courses for targeted learning groups as Mandatory or Optional.

Example of PureCloud Core Learning Plan Curriculum Design in ExpertusONE

"The flexibility of ExpertusONE gives learners the option to extend their knowledge to areas that may be helpful to know, but are not essential to their certification—again, making learners feel more empowered and in control of their training," explained the Director of Operations.

As for other learning organizations planning to do a similar self-service certification program, the Director of Operations offered this advice:

1. Be sure to create the learning in small chunks and incorporate as many different methods to fully optimize and reinforce learning

2. When creating a certification program, it is vital that training SMEs, implementation and support engineers, product managers and developers are engaged in the creation of the content and the exam questions to ensure the features and functionality that are important in the product are sufficiently covered in the training

The global leader of cloud services wants to further streamline the program's process by integrating Questionmark and ProctorU with their LMS. Right now partners are sent to a different site to take the certification exam and the company manually enters results data into ExpertusONE.

"Our goal, which is doable in the near future, is to make the entire certification process seamless," concluded the Director of Operations. "This will only ramp up the number of completions, certifications and, ultimately, empowered partners who are successful. Knowledgeable partners equal successful customers."

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