

# Software Training: A Pipeline Model for Growing User Proficiency and Loyalty

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October 19, 2006

# Facilitator Introduction

- **Jennifer De Vries, MA, CPT**, President and Chief Solutions Architect for BlueStreak Learning
- Over 15 years of experience in the e-learning industry
- Managed e-learning programs for Joint Commission, IBM, Motorola, Galileo International and Thomson/NETg
- Researcher, writer and speaker at major training industry events
- **BlueStreak Learning** helps organizations start and grow e-learning programs that meet business goals.

# Participant Introductions



- Name
- Organization
- Software Training Responsibilities

# Session Objectives

You will be able to:

- Describe the four phases of software use
- Discuss key learning strategies for each phase
- Create plans for transitioning users to the next phase
- Institute usage monitoring and reporting methods

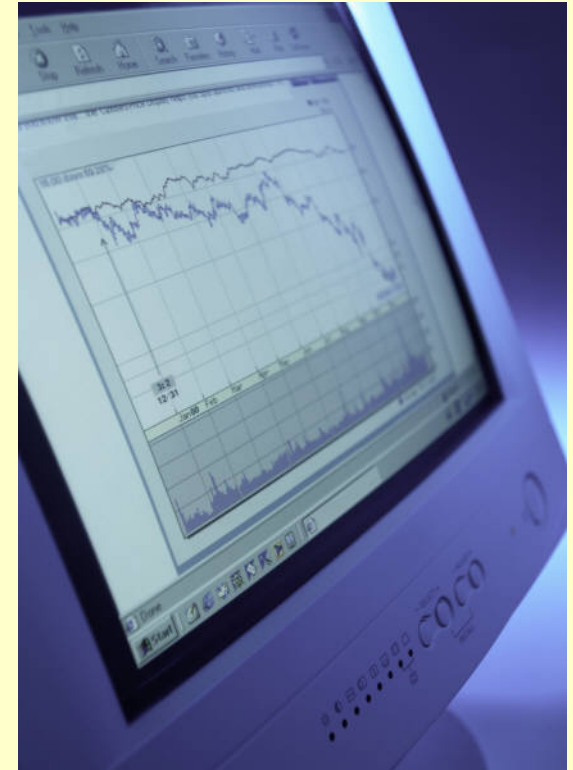
# Agenda

- Case study introduction
- Four phases of commercial software use
- Learning and transition strategies by phase
- Reporting software usage and conversion rates



# Case Study

- Large software company
- Their type of technology is gaining acceptance in marketplace
- Losing mindshare and market share to competitor
- Training products are instructor-led and classes often cancelled due to lack of registration
- Product certification has limited value in the marketplace
- Limited number of trained product resellers

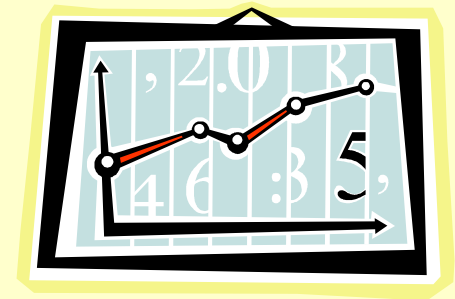


In the software industry, people buy what they know how to use.



Mind share = Market share

Do you agree with this statement?  
Why or why not?



# Has anyone worked in sales?

Did you use a pipeline model to track your leads, close rate, etc?



# Skills Pipeline Model

The four C's of  
mind share

## Curiosity

Is there  
a better  
way?

## Comprehension

Is it really  
going to  
be better?

## Conversion

How do I get  
everyone on  
board with this  
new product?

## Commitment

How do I make  
the most of my  
software choice?

More in = More out

# Phase I: Curiosity

## Questions to answer

- Is there an easier way?
- Can I save time, money or effort by using a your product?
- If I use your product, will it play nice with other products in our extended enterprise?
- Do I have the latest, greatest, best technology available?

## Methods to Use

- Free Webinars
- Road shows
- White papers
- Analyst reports

**Solution:**  
Educational  
Marketing

# Phase II: Comprehension

## Questions to answer

- Will it work for us?
- How easy is it, really?
- Does it do everything I need it to do?
- Will it screw up something else?
- Is it better than what we have?

## Methods to Use

- Free trials
- Quick start guides
- ROI analysis
- Case studies
- Online help

**Solution:**  
Trials and JIT  
Material

# Phase III: Conversion

## Questions to answer

- How do I teach my organization about this new product?
- How much time will this transition take?
- Can you provide me with a plan or help in making the transition?

## Methods to Use

- Classes
- E-Learning courses
- Performance Support Systems
- User Groups
- Technical Support
- Consulting

**Solution:**  
Training and  
User Support

# Phase IV: Commitment

## Questions to answer

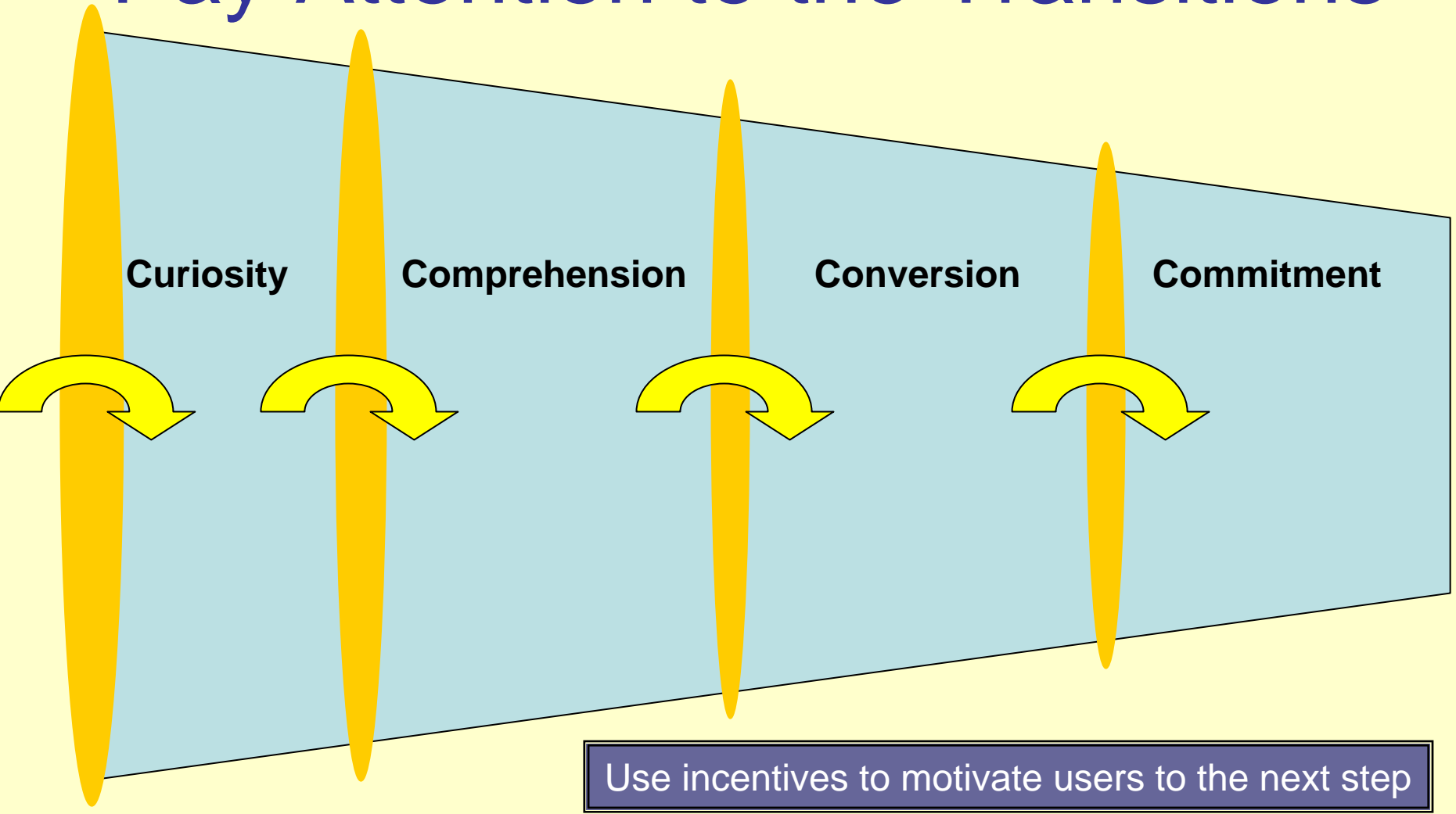
- How can we capitalize on our use of this software?
- How can we ensure that we have appropriate software skills?

**Solution:**  
Partnerships  
and  
Certification

## Methods to Use

- Professional certification
- Formal partnerships
- Best practices, white papers, case studies
- Special support desk and/or database

# Pay Attention to the Transitions



# Discussion

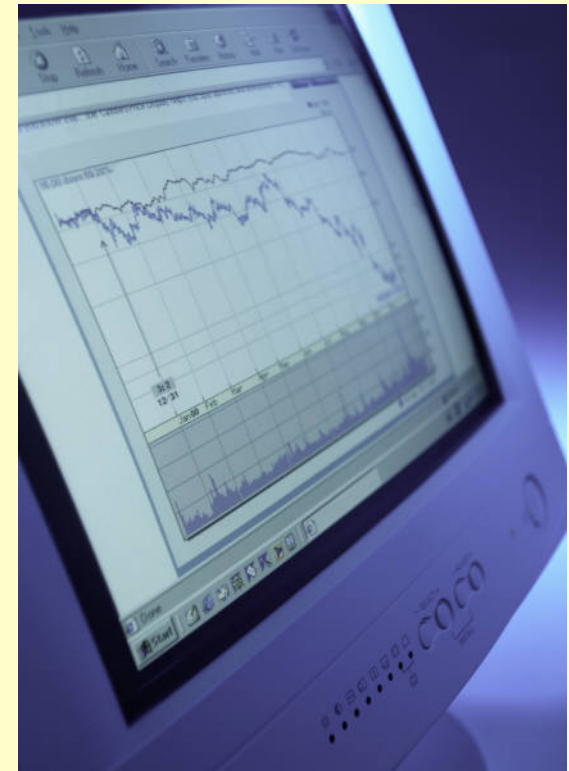


What do you think might motivate users to move to the next stage?

- Curiosity to Comprehension?
- Comprehension to Conversion?
- Conversion to Commitment?

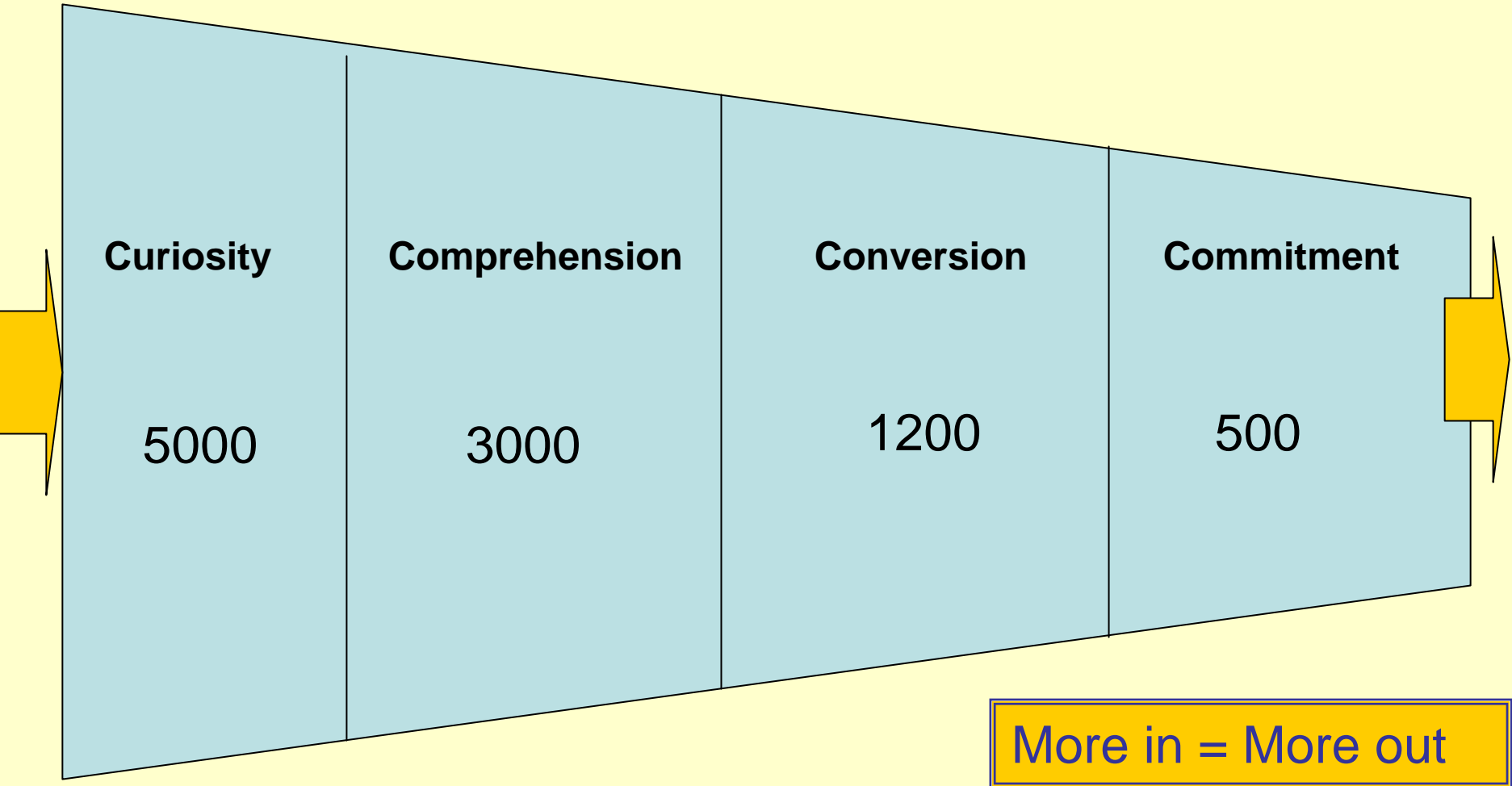
# Case Study: Conversion Plan

Curiosity	<ul style="list-style-type: none"><li>• Road shows</li><li>• Webinars</li><li>• White Papers</li></ul>
Comprehension	<ul style="list-style-type: none"><li>• Free trial</li><li>• Quick start guide</li><li>• Online help</li><li>• Email support</li></ul>
Conversion	<ul style="list-style-type: none"><li>• E-Learning courses</li><li>• Public/Private classes</li><li>• User groups</li><li>• Phone support</li></ul>
Commitment	<ul style="list-style-type: none"><li>• Professional certification</li><li>• Special support line</li><li>• Partner marketing</li></ul>





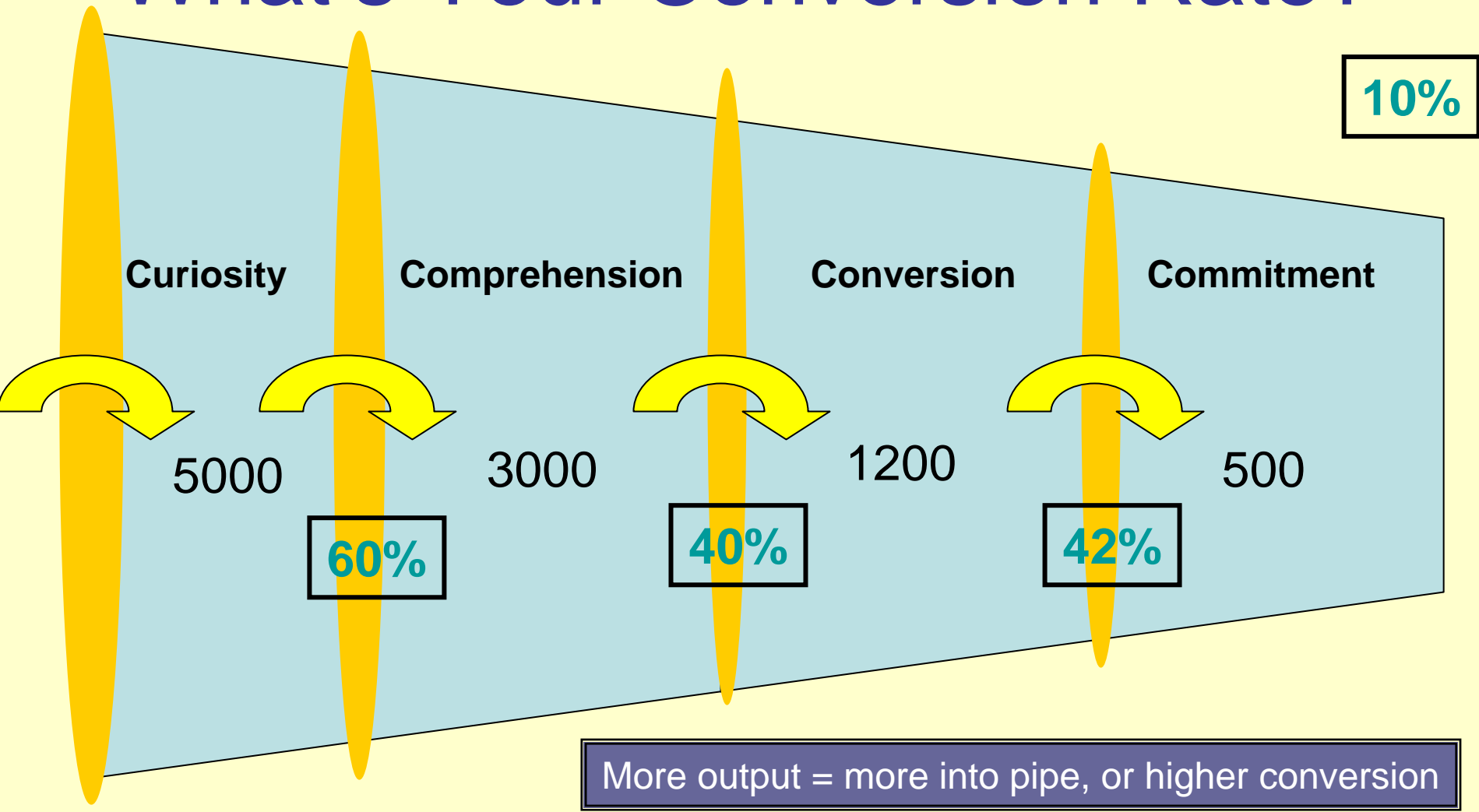
# Measuring the Pipeline



# Pipeline Measurements

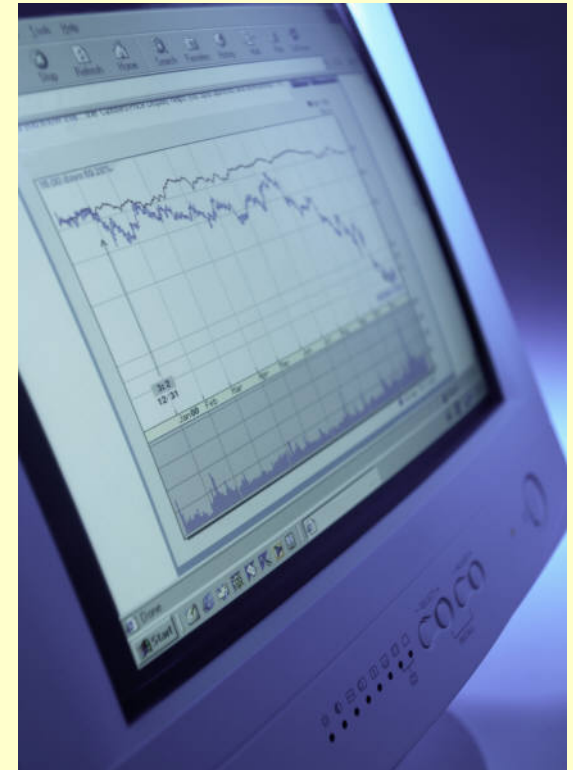
Curiosity	<ul style="list-style-type: none"><li>•Number of Webinar attendees</li><li>•Number of road show attendees</li><li>•Number of white paper downloads</li></ul>
Comprehension	<ul style="list-style-type: none"><li>•Number of free trials downloaded</li><li>•Number of supporting documents downloaded</li></ul>
Conversion	<ul style="list-style-type: none"><li>•Number of attendees in classes</li><li>•Number of e-learning courses purchased and completed</li><li>•Number of user group members and/or postings</li></ul>
Commitment	<ul style="list-style-type: none"><li>•Number of professional certifications</li><li>•Number of official partners</li></ul>

# What's Your Conversion Rate?



# Case Study Conclusion

- Executives reviewed pipeline monthly and made strategy adjustments as necessary.
- Over 20,000 people were exposed to the software product in one year. (curious)
- 1,000 people were certified, 20 companies joined partnership program. (converted)
- Over a one year period, software company experienced a 8% gain in market share.





# Questions?

What questions do you still have  
about software training?

Or e-learning?

# Contact Information

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