

Software Training and Upgrading Strategies that Work

Let your employees know that you expect them to actively participate in the learning game, and to take partial responsibility for their own learning and training.

Meet Kelly. Kelly works for one of my clients, and over the years, she has learned numerous software packages. Usually, she is the first one in the organization to tackle a new product. Sometimes this necessitates classroom training; other times she receives one-on-one instruction. Occasionally, she just has to puzzle it out herself. This woman, who was originally hired as a data entry clerk, has mastered more software faster than any other computer user I've worked with as a consultant.

People like Kelly share many similarities with highly skilled athletes: They study all aspects of their game. They learn, practice and use the tools that will make them better players. And, more than anything, they want to be in the game; so they channel their intensity into study and practice.

Attitude is Key

The right attitude spells the difference between success and failure. In my role as a consultant, I have the opportunity to observe computer users at many different organizations. And training is a challenge wherever I go. Complaints come from management and staff about how some training techniques waste precious time. Returning from the class, most trainees chat about how good or how bad the class was, toss the workbook and diskette into a drawer and return to old, familiar practices. Eventually, they forget about all the nifty things they learned.

The Kellys of this world are different. They maintain their level of excitement for learning new programs and techniques, and share their discoveries with others in the company.

How do they do it? How do they keep up with the growing number of business software programs, and use them with skill, while the rest of us struggle? Here are some ideas that can help:

- Find a resident expert who already uses the product and ask questions. If no one

in your company has the expertise, look elsewhere.

- Assess how the product can simplify your job.
- Compare it to other products you're already using.
- Install the software on your system.
- Glance through the manuals.
- Take the tutorial, if there is one.
- Identify several simple, specific tasks and attempt to complete them using the software.
- Make a list of questions to ask in class.
- Attend the class with questions in hand.
- Ask questions and get the instructor to commit to finding answers.
- The day after training, try the simple tasks again.
- Print sample screens, review notes from class, organize and file them, and follow up outstanding questions with the instructor.
- Review the manual again, make notes, and make tabs in the manual for key points.
- Use the product right away.

Now you're probably thinking, "How can I expect my staff to do all those things?"

Not everyone will be as motivated as Kelly, but there are some things that can be done to help make your employees participants, rather than observers, in their own training. The most important one is this: Let your employees know that you expect them to actively participate in the learning game, and to take partial responsibility for their own learning and training. The result will be a staff energized by its newfound skills.

Commonly Held Myths About Training

There are a few popular myths about training that need to be debunked. The first is that

information services staff should provide training. In reality, IS staff members rarely have the patience or in-depth applications knowledge required for effective training. The next myth: everyone should go to the same class. People have different learning styles and levels of knowledge. Some users will need more repetition than others. Some may be interested only in concepts, while others need to master specific key strokes.

The third myth is that training should be provided before a product is available for use. If you want your employees to be successful with new software, it needs to be available and installed on their computers so they can explore it before the training class and practice with it immediately after the class. In addition, going to class is never enough. Staff members need to know they're expected to set aside time before and after the class to reinforce the training. If the product is entirely new, schedule a short session to provide an overview of the firm's anticipated use before the formal training.

The fourth myth is that managers should dictate who receives training, and how they'll be trained. Success will depend on employee participation in the process. Employees must take responsibility for learning, and that, logically, starts with their involvement in decisions about which classes they need to take.

Is it Time to Replace Your Software?

There's another important issue troubling us all: The question of when, or whether to upgrade software. Some products are obvious - tax software must be upgraded each year without question. Accounting and time and billing software are critical applications and must be upgraded regularly. Office applications - word processing and spreadsheets—are not as critical, but affect more staff members when upgrading.

The smaller the firm, the easier the upgrade decision. With larger firms or companies, upgrading can be extremely costly, in dollars and time. Regardless of company size, increased use of the Internet to transfer documents makes software upgrades essential.

While the life cycle for computers is generally considered to be three years, with software it's only about 18 months. Upgrading is an ongoing

issue and timing is critical. Upgrade too early, and you're finishing the quality assurance process for the vendor. You also may encounter compatibility problems when sharing documents. Upgrade too late, and you'll encounter compatibility problems with everyone, including your staff, who also work on home computers. There's a broad span of time in the middle when it's the right time to upgrade. You can recognize it if you watch the trade journals, keep in touch with colleagues and notice compatibility problems.

Is there ever a time to skip a release? Yes, if only a few users are affected, if documents are not shared, and if regulatory changes are not an issue. People are still happily using the DOS version of some popular products. They can continue as long as their hardware is compatible. At some point, many of the DOS programs become unstable on computers running Win95 or NT. When that happens, it will be necessary to upgrade.

When you do decide to upgrade, make sure all of your computers are upgraded. You'll find a few diehards who don't want to change, but it's much easier for support and training if you standardize on a particular release. With any upgrade, you'll want to schedule a little internal training session to introduce everyone to the new features.

Training Options

Hands-on training, on-site classes, books, CDs, tutorials - there are so many kinds of training offered. How do you know which is best? They all work well in certain situations, and fail miserably in others. Here's a brief summary of each type of training, along with the pros and cons:

Hands-on classroom setting: Users should have some exposure to the product before attending class. Determine class level - don't send experienced users to a basic or general class. Pros: there are affordable hands-on training facilities; user attention is focused on the task; interaction allows users to get specific answers. Cons: there will be a scheduling challenge; courses are not reusable; users are out of the office for training; there is lack of control of material; and the class is often slowed down to accommodate the slowest person in the group.

Hands-off classroom setting: Best used as an introduction to entirely new concepts, when users need to understand the why before starting on the how. Users may need a follow-up with a hands-on class. Occasionally, these classes are useful for advanced training for products like spreadsheets - if the workbooks provide enough detail to allow users to duplicate results. Pros: less expensive than hands-on. Cons: users may not retain as much information.

Reference books: Best for users familiar with the product and terms. Pros: inexpensive; reusable; always available. Cons: requires self-directed user.

Tutorials: Appropriate for new and upgrading users. Use before going to training class. Pros: inexpensive or free; reusable. (For an upgrade from a previous version of the software, this may be all the training required.) Cons: tutorials rarely provide enough depth for new users.

Interactive CD-ROM: These are appropriate for users who need repetition. A clever training CD provides interaction that keeps users involved in the learning process. Pros: the user controls the pace of the lessons and can return to lessons as often as needed; cost can be spread across several users; training is easy to schedule. Cons: requires CD-ROM drive and sound card.

Videos: Videos are appropriate for teaching new concepts or as an introduction to complex systems, such as accounting. Pros: very inexpensive; videos can be re-used; scheduling is easy. Cons: lessons must be viewed in sequence; it is difficult to return to specific lessons; no interaction; and students may be napping or daydreaming.

Formal one-on-one: This is the best method for learning more complex products like accounting systems, when only one user needs training, when the product must be tailored to your needs, or for mission-critical applications. Pros: training is tailored to the specific requirements of one trainee; training is available on your schedule and at your location; this can be the most effective training option. Cons: this is the most expensive solution.

Internal one-on-one: If someone on staff already knows how to perform a task - such as mail merge in a word processing program - training others can be simple. Pros: it's relatively inexpensive; no complex scheduling required; training can be tailored to the user's specific requirements. Cons: with untrained teachers, bad habits may be perpetuated.

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