Published on *University of Colorado* (https://www.cu.edu)

Enablement & Training [1]

Enablement helps users harness the full potential of technology. It involves embedding the product within the organization and making sure everyone knows how to use it to a point where it not only makes people's lives easier but it also becomes integral to daily operations.

The **five basics of enablement are establishing expertise, creating content, fostering community, collecting feedback and ongoing education**. While the fundamentals are the same, the methods to achieve these enablement objectives vary by project (based on the specific programs needs/goals and available resources).

The eComm program, UIS' most mature CRM-related services, has the most robust training resources which are highlighted below. Other programs [2] will prioritize valuable resources to replicate and promote them when available.

Ongoing Education



Collect Feedback

Establish Expertise

- Subject matter experts require an in-depth technical understanding and knowledge of use cases, with the ability to answer questions from a savvy audience.

eComm's Approach

- **Specialists and 'Super Users':** We provide well-defined roles and permissions based on user expertise. These individuals are early adopters who help define best practices and share success stories, both of which are an integral component of successful adoption.
- **Projects:** Each project has defined 'experts' who collaborate for success. This collaboration generally involves at least one technical team member and at least one business team member. ?The same experts should be involved in the following:
    1. Defining the user story/collecting requirements
    2. Conducting user acceptance testing
    3. Establishing launch timeframes and documenting implications
    4. Creating resources for ongoing training and enablement
    5. Communicating to relevant users and hosting educational sessions on specific topics
    6. Monitoring adoption, collecting feedback, and being involved in changes or enhancements

Create Content

- **Creation**
    - Training and enablement content should be easy to find and access (i.e., a single page to bookmark with an index of all resources).
    - Recordings are key to scaling training. Host one session and make the recording available soon after. Take it to the next level by highlighting important parts of the video and turn them into tip-and-trick communications.
        - Hate the sound of your own voice? It's not uncommon. The best way to become more comfortable is to understand why your own voice makes you cringe [3].
- **Delivery**
    - Maintain a current list of all users for easy communication and outreach
    - Promote new resources to existing users
    - ??Create onboarding emails focused on ongoing skill development (first 6 months)
    - Create continued education outreach for established users (6+ months and beyond)?**?**

Tips to Execute

- **On-demand training** is the most scalable and efficient way to educate users. Host one live session and post the recording.
- Include specific, **relevant use cases** or best practices.
- **Tailor content** for users with different roles/responsibilities and use-cases.
- Include **knowledge checks** and quizzes to build user confidence and validate understanding.
- **Leverage external resources, but ensure they are accurate**. Even irrelevant examples can present a barrier to users learning technology or processes.
- **Recurring expert(s)** should have access to create and publish resources and communicate to users (or a process to do so).

eComm's Approach

- eComm Wiki [4]
  - Wiki Creation & Best Practices [5]

Foster Community

- Maintain a current list of all users for easy communication and outreach.
- Build a user community based on both **virtual and in-person** interactions.
- **Host user groups and training sessions** for new and recurring topics or problem areas
- **Share success stories**
- Connect users and **encourage peer-to-peer support** (especially within virtual communities)
- Identify **'super users'** to:
  - Be involved in **product enhancements or roadmapping**
  - Participate in **user acceptance testing (UAT)** or **early adoption**
  - Identify **success stories that motivate others** to adopt the technology

eComm's Approach

- Communications
  - **eComm Specialists:** Bi-Monthly Digest [6], Salesforce Chatter Groups (for notifications and collaboration)
  - **Super Users:** Salesforce Chatter Groups (for notifications and collaboration)
  - **Users:** Monthly newsletter (including new features, tips and tricks, best practices), training and enablement session invitations, Salesforce Chatter Groups [7] (for notifications)
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Training/Meetings
    - **eComm Specialists/Super Users:** Monthly Specialist Meetings, Training Sessions
    - **Users:** Campus User Groups [8], Training Sessions
- eComm Wiki Success Stories [9]

Collect Feedback

- Make sure that users' voices are heard and ensure a feedback loop aligns the product roadmap with their wants and needs. Understand users’ goals and use cases and suggest ways to change processes and configurations to make sure the product and solution meet their needs.

eComm's Approach

- eComm Help Ticket [10]
    - Conditional formatting is used to display relevant resources throughout the submission process, potentially eliminating the need for assistance.
    - Automatic emails notify relevant parties based on the issue.
    - The analysis allows for trend identification in tickets and creates opportunities to broadly remedy those items. This might involve creating new wiki resources, updating the help ticket, hosting sessions, changing processes, implementing tech solutions, hiring new personnel, etc.
- Monitor Salesforce Chatter Groups (used for collaboration) for successes and opportunities.
- eComm Specialists escalate user and super user feedback to the CRM eComm team collected via:
    - Campus User Groups [8]
    - Tickets/Inquiries

Ongoing Education

- Product education isn’t a one-and-done experience. Ensure there are educational resources that users can rely on no matter what they are doing with your product or how knowledgeable they already are. Resources should be easily accessible, but don't forget to constantly promote materials to relevant users.

eComm's Approach

- eComm Wiki [4]
- eComm Help Ticket [10]
- Communications & Meetings/Training
    - **eComm Specialists/Super Users**

        - **?**Bi-Monthly Digest [6]
        - Salesforce Chatter Groups (for collaboration)
        - Quarterly meetings
    - **?Users**
        - **?**New user journey (month 2-7)
        - Bi-monthly newsletter for recurring topics
        - Session invitations and training
        - Salesforce Chatter Groups for notifications [7]
        - Campus User Groups [8]
    - **Stakeholders**
        - ?Coming soon...

Groups audience:
CU CRM

Source URL:https://www.cu.edu/crm/overview/enablement-training

Links
[1] https://www.cu.edu/crm/overview/enablement-training [2] https://www.cu.edu/crm/current-state/projects [3] http://The discomfort we have over hearing our voices in audio recordings is probably due to a mix of physiology and psychology. For one, the sound from an audio recording is transmitted differently to your brain than the sound generated when you speak. When listening to a recording of your voice, the sound travels through the air and into your ears – what's referred to as "air conduction." The sound energy vibrates the ear drum and small ear bones. These bones then transmit the sound vibrations to the cochlea, which stimulates nerve axons that send the auditory signal to the brain. READ MORE: Why do old people hate new music? However, when you speak, the sound from your voice reaches the inner ear in a different way. While some of the sound is transmitted through air conduction, much of the sound is internally conducted directly through your skull bones. When you hear your own voice when you speak, it's due to a blend of both external and internal conduction, and internal bone conduction appears to boost the lower frequencies. For this reason, people generally perceive their voice as deeper and richer when they speak. The recorded voice, in comparison, can sound thinner and higher pitched, which many find cringeworthy. READ MORE: Shhhh, they're listening – inside the coming voice-profiling revolution There's a second reason hearing a recording of your voice can be so disconcerting. It really is a new voice – one that exposes a difference between your self-perception and reality. Because your voice is unique and an important component of self-identity, this mismatch can be jarring. Suddenly you realize other people have been hearing something else all along. Even though we may actually sound more like our recorded voice to others, I think the reason so many of us squirm upon hearing it is not that the recorded voice is necessarily worse than our perceived voice. Instead, we're simply more used to hearing ourselves sound a certain way. [4] https://www.cu.edu/blog/ecomm-wiki/need-help-start-here [5] https://www.cu.edu/blog/ecomm-wiki/drupal-content-creation [6] https://www.cu.edu/blog/ecomm-wiki/category/ecomm-specialist-digests [7] https://www.cu.edu/node/242851 [8] https://www.cu.edu/blog/ecomm-wiki/category/campus-user-groups [9] https://www.cu.edu/blog/ecomm-wiki/category/success-stories [10] https://www.cu.edu/ecomm/submit-help-ticket