THE TRAINING PLAN
PLAYBOOK

Lessonly

Training Plans Are Hard Without Questions

"Go create a training program for our team!"

That can seem a little abstract, right? You might think "Where do I start? What will they learn? What won't they learn?"

A great way to reduce such anxiety is to ask questions; the trick is asking the right questions. Each of the following sections lays out steps for building a comprehensive training program for your team.

By the end of this playbook, you will be left with—at the very least—a draft of a team training plan that should reduce your training anxiety and prepare your team for growth.

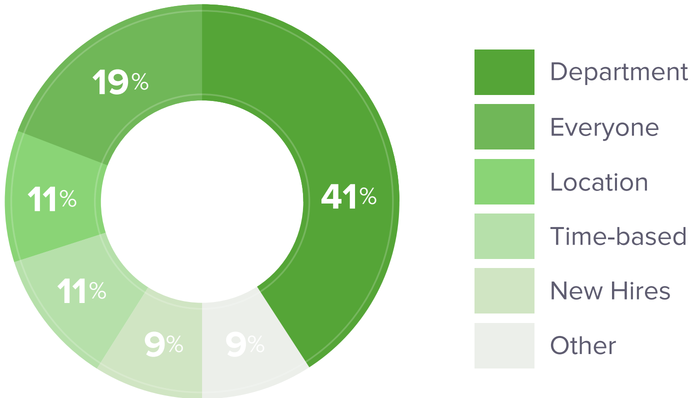
!

Before We Begin

Please download the Team Training Plan Worksheet and complete it as you work through this Playbook.

DOWNLOAD

WHO ARE YOU TRAINING?



The first, and most important, question to ask when preparing your team training plan is this: **what does the organization of my team look like?**

Examples:

- All new employees
- Customer Service Representatives
- Inside Salespeople
- Outside Salespeople
- Employees with a tenure greater than one year

List the roles that exist on your team in the first column of the Team Training Plan Worksheet, each in their own row.

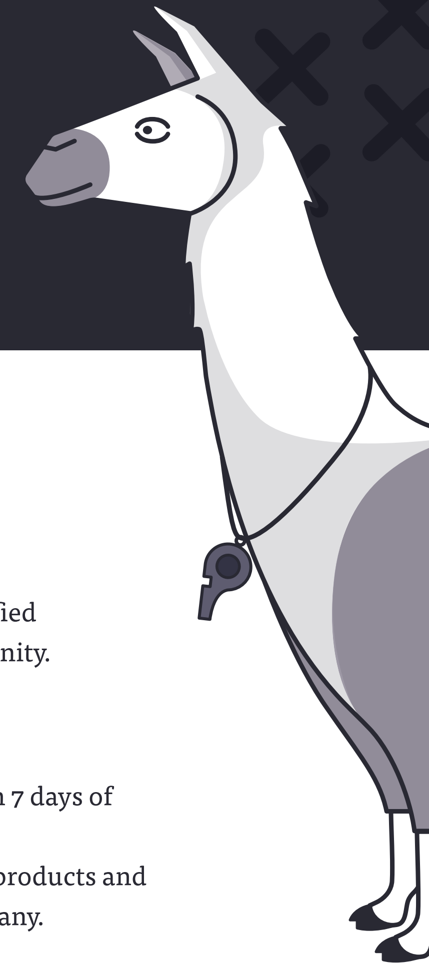
BEST PRACTICES

Common Ways to Categorize Your Groups

After evaluating over 1,500 Groups in Lessonly, we found that of those with more than 20 people, 41% of Admins categorize their Learners by department. Of the department-related Groups, over 15% were customer support team oriented.

Companies also group Learners in all-encompassing buckets for general Lesson assignments (11%). From there, Groups are often based on team locations, such as “San Francisco Call Center,” on time-based markers, like “June 2015,” or hire status like “Sales Class 3.”

WHAT DOES YOUR TEAM NEED TO DO?



Now that you've listed the roles on your team who need to learn certain information to succeed in their jobs, the next piece of the puzzle is to explicitly define what they need to do in their jobs.

We find that the most successful team training is tied closely to each role's key performance indicators (KPIs). Further, the more objective and measurable the goals are, the better.

Examples:

Customer Service Representatives

- Be able to handle 10 support requests per day while maintaining a support survey rating of 8 or above.
- Handle support requests without the regular assistance of their managers.

Inside Sales

- Be able to source one deal every month worth $10,000 in annual revenue.
- Consistently set two new appointments every day.

Outside Sales

- Be able to close $40,000 in annual revenue each quarter.
- Learn how to close 20% of marketing qualified leads within 60 days of opening an opportunity.

General Onboarding

- Learn all basic company information within 7 days of joining the company.
- Have an expert-level understanding of our products and services within 30 days of joining the company.

Take a minute to think through the most important goals for the role you're training and record them in the second column of the Training Plan Worksheet, each in their own row, corresponding to the role.

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WHAT ACTIONS WILL ACHIEVE THOSE GOALS?

With roles defined and goals set, you're well on your way to building a rock star team training plan.

Let's keep up the momentum and define what actions your team needs to take to be successful. What actions does each role need to perform well to achieve the goals you have set for them?

As an example, let's look at a **Customer Service Representative** with the training goal of handling 10 support requests per day while maintaining a support survey rating of 8 or above.

Here are some actions that would be required to do so:

- Receive notifications of new support requests
- Respond to a support request using ZenDesk
- Handle angry customers
- Manage time appropriately to stay on pace
- Log any relevant information in Salesforce
- Create delight in support

Now think through all of the specific tasks that are required to complete each goal for each of roles you're training in your team. A great way to build this list is to interview current team members, and sales managers.

Record each action in the third column of the Team Training Plan Worksheet, each in their own row, corresponding to the relevant training goal.

WHAT KNOWLEDGE IS REQUIRED FOR THOSE ACTIONS?

Next, ask yourself, “what does the team need to know in order to complete each action on this list?”

Let’s take a second to dissect that question by talking about what that question is, and what it isn’t.

What it is—what do they **need** to know? Specifically, for the actions they **need** to complete.

What it isn’t—what are **all** of the things someone in the role could know? Ever?

This is the most important principle to keep in mind when you’re designing your team training plan. Fight the instinct to think of all of the possible things that anyone in the sales department has ever learned. This is incredibly overwhelming for trainers and less effective for Learner success. Prioritize the most important skills in your learning material and you’ll see a greater impact.

> “Keep it to the requirements and grow from there.”

Here’s an example for a Customer Service Representative, specifically for the example action of “**Respond to a support request using ZenDesk.**”

- Common issues and their solutions
- How to communicate effectively
- How to login to ZenDesk
- How to communicate in ZenDesk
- How to close out the issue in ZenDesk

Record each piece of knowledge (we’ll call this a “Lesson” going forward) in the fourth column of the Team Training Plan Worksheet, each in their own row, corresponding to the relevant action from the previous step.

WHAT KNOWLEDGE IS REQUIRED FOR THOSE ACTIONS? *cont'd*

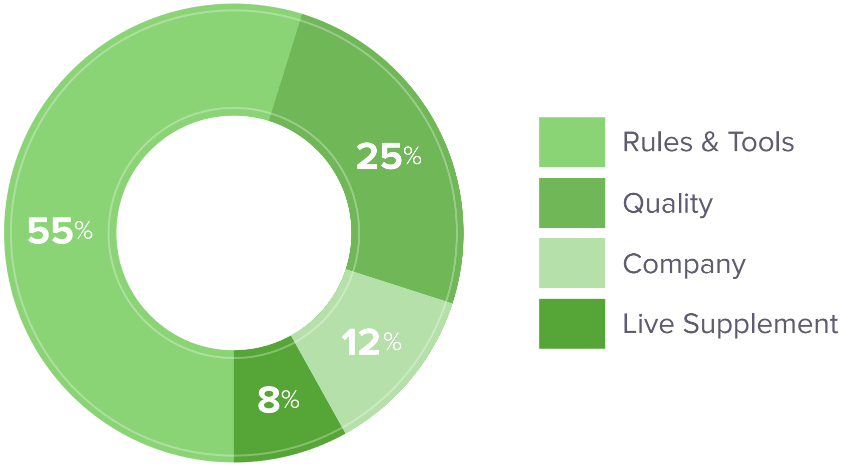
BEST PRACTICES

Common Categories to Structure Your Learning

After analyzing around 64,000 Lessons, we discovered that, of the content assigned more than 100 times, 55% of those Lessons teach what we call “Rules and Tools.” These are Lessons used to teach company policies (rules) or systems (tools). Rules Lessons are like “What to say to a complaint about feature X.” Tools Lessons are like “How to add a new contact in Salesforce.”

The next largest bucket of Lessons is “Quality” training. The purpose of these Lessons is to make employees better at the soft skills in their job. They include topics like “How to be proactive to our customers” or “Our take on managing your time.” Many of these quality Lessons are used as fundamental refreshers for both veterans and new employees alike.

Finally, we found 12% of Lessons are about the company itself, as in mission and vision-focused training. And 8% of Lessons are used to supplement live training sessions.



WHEN SHOULD LESSONS BE LEARNED?

Now that you've outlined each piece of knowledge that should be communicated, it's time to give each of those Lessons a deadline.

Relative deadlines work really well. Try assigning these anywhere from one day after a new hire begins work, or two months after they attend an introductory session on a complex topic.

For our earlier example:

- How to communicate effectively (Day 1)
- How to login to Salesforce (Day 1)
- Logging the correct information in the correct spots (Day 2)
- How to mark a deal as "Closed/Won" or "Closed/Lost" in Salesforce (Day 2)

Run through each of the Lessons in your Team Training Plan Worksheet and record a timeframe in which each should be completed.

BEST PRACTICES

Allow Learners to Learn on Their Own Time

After reviewing hundreds of thousands of Lesson assignments, and nearly the same number of Lesson completions, we found that Learner engagement is highest on Fridays and stays relatively even across the other days of the week. Who would have thought Saturday and Sunday engagement would be so high? You simply can't activate that timeframe with classroom-style training.

We are thrilled to see this, because it shows that Lessonly admins are allowing their teams to learn when and where they want to. That's one tremendous benefit of online learning.

WHEN SHOULD LESSONS BE LEARNED?

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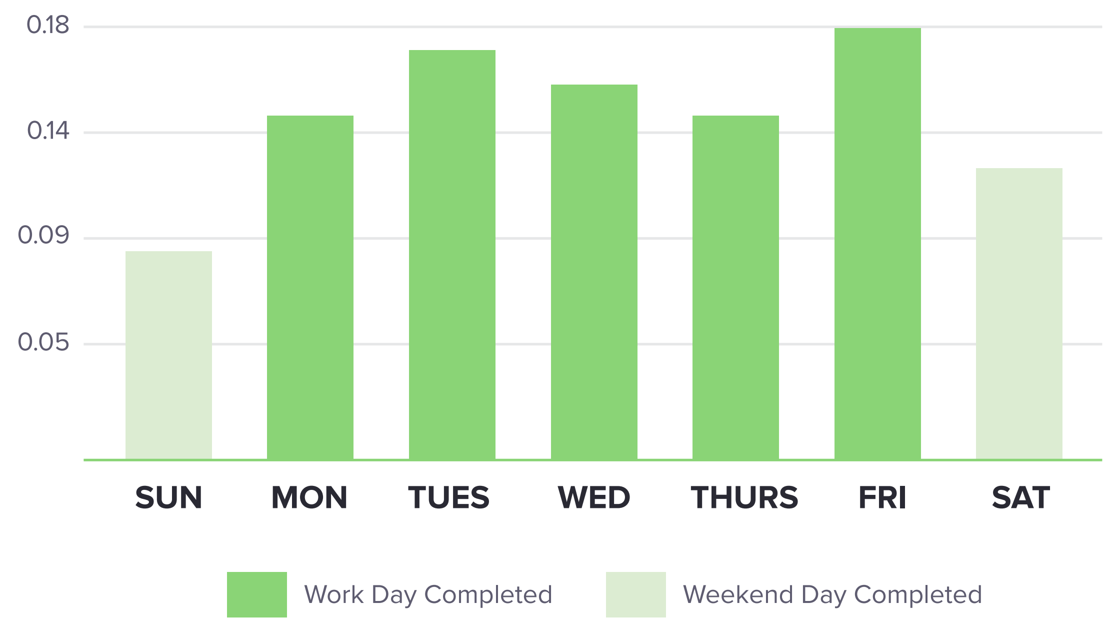

> "Your users are enabled to take their Lessons on their own time."

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HOW WILL LESSONS BE DELIVERED?

> “The medium is the message.”
>
> *- Marshall McLuhan*

As with many communications, the medium through which you communicate team training will affect the way it’s perceived and remembered.

For each of the Lessons in your team training plan, consider and write down how each will be best delivered.

Here are a few of the most common ways:

- Lessonly Lesson
- Classroom-style presentation
- One-on-one shadowing
- Ongoing mentoring
- Role Play
- Activity
- Document Review

We recommend leveraging online learning for fundamental tasks that are better experienced in a self-paced and measureable format, while saving more personal approaches for one-off and strategic material that requires real-time discussion. This hybrid approach to team training balances online flexibility with dedicated in-person time that is key to reinforcing key sales concepts.

For the final step of completing your Team Training Plan Worksheet, add the format for each Lesson in the last column.

BEST PRACTICES

Images Increase Completion Rates

We have grown to love images in Lessons. Whether they are fun or informative, it offers a visual relief and stimulates a different part of the brain. While we knew images were a great way to break up text, we didn’t realize it would be so impactful on completion rates.

After reviewing 64,000 Lessons, and focusing on those completed more than 100 times, those Lessons that are completed 90% of the time, or more, have 9.7 images on average. (Hint: You can probably just use a smaller image for that .7 image.)

And when a Lesson has fewer than 5 images, people are much less likely to complete it. Lessons with a completion rate of 60% or below only offer their Learners 4.7 images. The next time you prepare a Lesson, spend some time finding GIFs, JPGs, or PNGs to bring your content to life, and your completion rates will reflect your effort.

HOW WILL YOU MEASURE SUCCESS?

In order to truly know whether or not your team training plan has been a success, you'll need to measure the results.

We find that there are two ways to track training success: quantitative and qualitative metrics.

Quantitative Metrics

Quantitative data is objective and typically numbers-based. This type of tracking will allow you to understand how training is impacting your revenue or Net Promoter Score and will show you where to objectively improve. These will help answer questions like:

- How long did it take Joe to complete his training?
- Did Joe score higher than 80% on graded quizzes?
- Did revenue increase when Joe took XYZ lesson?

Qualitative Metrics

Qualitative data is subjective and typically word-based. This tracking will allow you to know how deeply someone understands your team training as well as provide insight into different people's individual styles. These will help answer questions like:

- Is Joe really understanding this stuff?
- How would Joe respond to XYZ problem?
- Is Joe communicating professionally?

We highly recommend that you define and track multiple metrics, having some that are quantitative and some that are qualitative, in order to gain the most insight into the strengths and opportunities in your team training process. By regularly reviewing these metrics, you will help your team get up-to-speed faster and understand who learns what, when, and how well.

HOW WILL YOU MEASURE SUCCESS?

cont'd

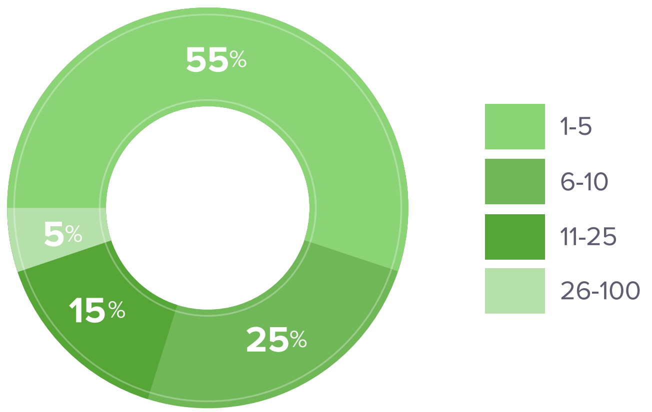
BEST PRACTICES

Ask The Right Amount of Questions

While analyzing around 10,000 Lessons within Lessonly, we learned that people aren't playing 20 questions with their employees very often — at least not within Lessonly.

Of Lessons with questions, 55% have 1-5 questions. Lessons with 6-10 questions made up 25%, while 11-25 questions and 26-100 questions comprised 15% and 5% respectively.

Interestingly enough, different numbers of questions did not have a statistically significant variance in completion rate. Many Lessons with over 25 questions are likely required training for either certification or compliance. However, if you are using Lessonly for compliance training or certification, you do not need to break up your training into 20 separate Lessons just to you can keep each one under six questions. If you are building a general lesson or update to your team, try to keep it between one and five questions.



Final Thoughts

Comprehensive team training plans are always evolving. Over time, you'll change things, test better ideas, and even fail a few times along the way. That's okay.

The most important action is to just start. Simply get something out there and grow from there.

Ready to put your training plan into action? Take the next step with a self-guided tour of Lessonly's team learning software today.

TAKE THE TOUR

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