

Training Magazine Technology-in-Action 2008 Winner

Electronic Performance Support, Mobile, & Workplace Learning Project of the Year

Realogy Corporation (Vendor: Christensen/Roberts Solutions)

Project: Salesforce Coach

Challenge: Salesforce, a customer relationship management application, was being rolled out to the Realogy Franchise sales force. In a previous attempt to roll out the Salesforce application, adoption was unsuccessful partially because the training, conducted via virtual classroom prior to use of the application, was not effective. By the time the salespeople went to perform particular tasks in the application, they had forgotten much of what they had learned. And much of the knowledge users needed to do their jobs competently could not be covered in the training because of time restrictions. For this second attempt, the initial request was for on-site training, thinking this would be a more effective way to train users, and, therefore, increase the likelihood of adoption. But this approach would be costly, due to the expense of delivering nationwide on-site training, and would cause considerable loss of sales productivity. Plus, there was no evidence it would lead to more effective use of the application. Consequently, the Learning Services team, its performance consultants, Christensen/Roberts Solutions, and Franchise Sales leadership decided to build an electronic performance support system for Salesforce users, one that would both improve on-the-job performance and reduce the amount of training users need to achieve competence.

Solution: A hybrid combination of an electronic performance support system (EPSS) and distance learning. The performance support system, called the Salesforce Coach, was developed using the ActiveGuide Studio and Toolbar from Rocket Software. This enabled Realogy to create, deliver, and maintain synchronized support for a Web-based application, Salesforce, and to do so without touching the underlying application code. The EPSS provides on-demand, just-in-time guidance for all the tasks the sales team needs to perform within the Salesforce application. For each page in the application, immediate step-by-step instructions explain how to complete the task they are working on. At the same time, the system provides best practices and business rules relevant to the correct performance of those tasks. The hypertext structure of the content enables easy access to browser-based resources to help users understand what needs to be done and how to do it. The EPSS offers additional support for those pages in the application that require extensive data entry by embedding rollover "tooltips" for key fields. At no time are users more than a quick click or two from the guidance they need in a form they can immediately apply. The existence of the performance support on each user's PC enabled Realogy to reduce the training time usually spent trying to get users to master the procedures they want to, or have to, perform in the application. Consequently, the company needed to rethink the role of training, using it more to establish how the application will impact the way in which sales people do their jobs rather than focusing on how to do the tasks.

Results: Making the EPSS available to each user enabled Realogy to reduce the amount of training required from an estimated two days to a little more than three hours, an 80 percent reduction of non-productive training time that the sales force can better

spend on selling. Realogy also can deliver training via WebEx rather than in face-to-face training lab experiences. Since classes no longer focus on data entry and task completion, extensive hands-on training is no longer necessary. This saves considerable money in travel and related costs. The project also increases Realogy's reach by supporting users, such as new sales people, who may not have immediate access to training and instantaneous support. Early indications are that user acceptance has been positive, and calls to the help desk have been reduced. The company expects additional operational efficiencies such as reduction in errors and accelerated adoption time.

Judges Comments:

- Very good example of EPSS.
- Integration of disparate technologies without requiring access to source code or placing burden on learner/performer.
- Reduces complexity.
- Established goals in the task context.
- Immediately enables task completion, in spite of application complexities.
- Delivers training at the point of need—previous training was not effective.
- Time/cost benefits.
- Easily updated, always available, and met the needs of the user

- **Lessons Learned:**

- Strategic buy-in from key decision makers--in this case, the CIO's support for the use of "disruptive" innovation--is essential when rolling out an unconventional solution.
- Performance support content must be precise and requires close coordination with subject matter experts.
- Make sure all technical decisions are taken care of upfront rather than left to the last minute.
- Expanding your training solution to include an electronic performance support system (EPSS) makes training that much more effective.
- Look to develop a hybrid EPSS/training methodology that you can repeat with other applications.