

# CASE STUDY

## You've Installed New Software...Now What?

### *Develop End User Training Materials*

A common scenario: an organization purchases a new software program and then relies upon the IT support personnel to train employees how to use it. The IT folks don't understand how the software will be used by your staff, they just know about the functionality and how to make it work on your computer or system. The staff becomes frustrated because they are expected to jump right in and use the new software. IT says it's easy...so why can't we make it work? What are some issues?

#### **The Challenge:**

A construction manufacturing organization purchased a new software program that was designed to manage their detailing, customers, manufacturing and delivery functions of the business. This system could do so much. The organization divided its employees into users based upon function: contract management, detailing, manufacturing, transportation, etc. Each user would only access a small portion of the software package. How can you create training materials that are appropriate for each job function? Here are some steps to consider:

#### **1. Document workflows.**

One great tool to begin to document the workflow of each function is to create a process map. Analyze the way the work is done. Identify the steps of the process that require using the software, the steps that do not.

#### **2. Use screen capture software.**

Our favorite software for creating pictures of the computer screen is SnagIt. The pictures can be saved in a variety of formats and are easily inserted into your training documents. Camtasia is a software program that allows you to create videos of someone actually using the software, complete with audio recording. These programs are easy to use and are reasonably priced.

#### **3. Create documents.**

Learning to use new software is much easier if you create a step-by-step guide that is specific to an individual or job function. Incorporate the non-computer steps as well as all the screens and field definitions for each job function.

#### **4. Pilot your documents.**

Be sure to have someone walk through the documentation before you publish it. It is amazing how easy it is to leave out steps, use jargon that users don't understand, or forget to define critical fields for users.

Have someone new to the process test out the documentation. If they can perform the tasks then great! If there are places that cause problems, make changes and retest.



#### **As a result of this project:**

- Workflows for each process were developed.
- Procedural manuals and Quick Reference Cards for the new software were developed for each job function.
- Training was developed and delivered by job function.