



Duthie Learning

Learning that lasts.



Why Train
Your Customers'
Employees...
Consistently



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Summary: *Customer dissatisfaction with your product or service can often be attributed to fear of the unknown. If your customer is trained about your service and how best to use it, you can support your customer's decision to buy, and you can dispel their employees' fears of the unknown. Because they will understand your service better, your support staff will be able to focus on more interesting problems brought to them by informed users. Also, when you make customer training available on demand, you can help them retain knowledge that would be lost through employee turnover, maintaining their long-term satisfaction. Consistency is important here: it means that you have to offer the same training message to everyone, and it also means you have to offer the training consistently: not on your schedule, but when your customer needs it.*

Why Train Your Customers' Employees... Consistently

By Andrew Duthie, June 2008

The Problem

Have you ever lost a customer because they simply didn't know how to use your service or product? Have you worked to keep such a customer by performing an "emergency training session" – that is, a last-minute consultation advising them on how to use your service? Have you provided such training at no charge, considering it a necessary hit to your profits?

We're going to use the term "services" throughout this discussion, but you can replace "services" with "products" as appropriate: we'll be talking specifically about complex services and products that cannot be figured out by the average person without assistance. Examples of such services include financial products, employee benefits programs, and

health insurance. Examples of physical products include certain models of industrial and agricultural equipment.

Let's take a look at how your new customers' employees may see things. Imagine yourself as an employee at a company that has just changed its health insurance policy. All too often, this big decision is presented to employees via a stack of new physician directories, plus maybe a pamphlet that says what the features of the plan are, and possibly a chart of what their copays, deductibles, and out-of-pocket maximums will be. In other words, a lot of information gets dumped on them – often with the implication that, since the plan is already a done deal, it would be preferred if no questions were asked, since the employees will have to “grin and bear it” regardless. Someone might explain how the new plan saves the company money, and maybe they'll say “and it will save you money, too,” but without offering any reassuring specifics.



“Please let this be the right decision.”

Doesn't this sound scary? Now, put yourself into the shoes of the buyer – the person who made the executive decision to change health plans.

Supporting the Decision to Buy

In the corporate environment, the person who makes the decision to buy your service is the same one who has to convince their entire company that they made a good choice. This decision maker, initially relieved at having made the choice, will quickly grow afraid.

Customers frequently buy a complex service and then are left to figure it out themselves. Whether by neglect or forgetfulness, the seller fails to follow up and make sure that the service is truly understood by the individuals who will use it. The results are a severe case of buyer's remorse, negative feelings in general, and the eventual loss of a bitter

customer. Worse, that bitter ex-customer may go on to dissuade others from doing business with you.

What buyers want from you after they purchase your service aren't congratulations and thank-you notes. They want sufficient support to make them feel good about the decision to buy. Telling them what the next steps are is key, and one of those steps should be, "We'll train your employees on how to use our service." If they ask, you should be able to hand over either a copy of your training materials or a web link for accessing them. (Really, they shouldn't have to ask.) Long-term satisfaction will improve as well, although the quality and effectiveness of your service will remain the primary driver of this.

A real-world example: Creative Manager, Inc. sells software-as-a-service that helps manage the schedules, projects, and staff of creative firms. For most of Creative Manager's clients, signing the first contract represents a relatively big financial and operational decision. When that signed contract is received at Creative Manager, their new customer receives an e-mail response within an hour or two that lays out the on-boarding process for the next several weeks. A big part of that e-mail is a document with the agenda for the first several training courses, along with the "homework" the customer will have to do beforehand. By responding to an order with a training agenda, Creative Manager puts the new customer (especially the decision-maker) immediately at ease.

Dispel the Status Quo

By the time you've made a sale, you've probably done a fair amount of training for the buyer already. You might have called it "presenting your value proposition" or something like that, but it was in fact a form of training – the buyer knows a lot more about your service than they did before you met them. With the help of that high-level training, they've weighed the options and determined your service to be their best option. Their employees, on the other hand, frequently have only rumor and myth to run on at the time of the sale. To make it sound nicer, let's

call this condition “the status quo.” In the health insurance example, the status quo is well-known: employees were used to the old plan, and they figure the new plan is just a way for the employer to save money while leaving the employees with weaker coverage. With an operational software system, they were used to the old system, and although they have hope that the new system will solve all their old problems, they are also afraid it will be difficult to use.

What’s needed next is to dispel those pre-existing fears. Providing training for the employees takes care of this. By giving them the tools to learn at their own pace and figure out the service for themselves, you will help their fears evaporate, leaving way for them to form well-reasoned questions instead. The training might or might not answer these questions immediately, but the important thing is that the torches will be extinguished and the pitchforks hung on the barn wall again. You’ll be able to respond to concerns founded in reason rather than in rumor and fear.

A real-world example: Bernard Health specializes in Health Savings Account-based (HSA-based) health insurance for small and medium-sized businesses.

HSAs are a relatively new invention, and because many companies who became early adopters selected HSAs strictly for the company cost savings, there has been a rash of negative word-of-mouth from the employees of those companies. Bernard Health’s first action for new customers is to train all the employees as a group, comparing very specifically the employer’s old plan to the new, HSA-based plan, allowing each employee to input their own information into a form that shows what they are likely to save with the new plan. In most cases, 100% of the employees choose to go to the HSA-based plan, even when given the option to stay with their old, traditional plan.



Uninformed and afraid of the new health care insurance

Customers' Employee Turnover

This is a big one. Let's say you trained a twenty-employee group immediately after they signed up for your service. Now fast-forward a year and ask yourself, "How many of those twenty individuals are still with the company?" Depending on the company, the answer will likely be somewhere between zero and eighteen, and there will be new employees who took over the responsibilities of the ones who left. Even if their turnover is impressively low, your customers may be bringing on additional employees to handle their growth. In either case, the new employees weren't there a year ago to receive your training.

This is where consistency matters. Consistency means two things here: making the training available when it's needed by your customer, and keeping the training basically the same every time. It may change as your service evolves, but two people taking the training at different times should receive the same overall message from you.



This time only two of them forgot to show up.

Ideally, your training will be integrated into your customer's new employee orientation plan. If new employees are expected to use your service immediately, your training needs to be available immediately. If they can wait a few weeks, you will have more flexibility in terms of what types (or modes) of training you can offer.

This is a good place to mention that the timing of training is very important. If your customer receives the training right after signing on, but they don't use your service for three more months, they'll remember very little from that up-front training. Ideally the training will be offered

exactly when they need it, so that they can go directly from learning to applying what they've learned.

A real-world example: A captive finance company that we'll call "ABC Credit" was established decades ago to support sales of its parent company's equipment. The machinery is sold exclusively through a network of privately-owned independent equipment dealers. For most of their customers, the decision to lease or purchase expensive equipment is as much about the timing of the impact to their cash flow as it is about machine configuration.

For this reason, it is critical that the dealers' salespeople understand the basics of equipment financing. ABC Credit developed a training program to train dealer sales personnel on how to gather customer data and interpret that data to design the most attractive financial package tailored to their customers' needs. The program began as a classroom-based session delivered by the ABC Credit salespeople who work with dealer sales staff. ABC Credit has also developed a self-paced version of the training to continue to support dealer personnel. The course is delivered as needed to balance the effects of turnover at the dealership and increase the depth of knowledge on current financial merchandising products. ABC Credit has learned that training the personnel who support the dealers has improved communication and efficiencies within the product chain.

Improve Your Support Staff's Quality of Life

If the individuals using your service have received training and understand how to use it, they're going to have fewer "newbie" questions for your support staff. Not only does this mean your staff can be smaller (or more "scalable" as your customer base expands), but also it means the support staff is going to get much more interesting questions. Having worked in technology support in college for two years myself, I can say that the complex questions asked by informed technology users were far more enjoyable than the questions we got

from uninformed users who'd been thrown in the water without life preservers. Your support staff can spend their newfound quiet time writing up great answers to frequently asked questions, further reducing the number of calls they field about the same old questions. By the way, if you have support staff who really love working with brand-new users most of the time, it's likely they'll enjoy becoming trainers.

Summary

When buyers complain about a service, it's often because their employees are afraid of it, not because the product is poor. If you proactively make an effort to train your customers' employees, not only will you minimize this risk, but also you'll create significant opportunities for good relations and future profits.

Investing in the development of good training resources will ultimately result in savings for both you and your clients, allowing you and them to focus less on "clean-up" chores and more on the enjoyable, satisfying aspects of your work.



About the Author

Andrew Duthie is the owner and President of Duthie Learning. His experience with the tools used to create interactive media dates back to 1985, when he spent his copious free time exploring the new Apple Macintosh computer. He gradually taught himself World Builder and HyperCard, two early authoring programs. Before joining Duthie Learning, Andrew had a career in automotive engineering, first as a gasket designer in Detroit, then as a supplier quality engineer in Chrysler's engine plants. When the opportunity to return to Nashville to work with interactive training presented itself, Andrew gladly accepted. The warm weather and smooth roads of Tennessee offered a better environment for his car and motorcycle habits, though his vehicular interests apply to most anything with wheels.

About the Company

Duthie Learning is a leading creator of on-demand customer training. We help organizations communicate and enhance the value of their products and services, strengthening their customer relationship through training. Founded in 1989, the firm combines extensive business experience with expertly designed computer and communications technology. Since its inception, Duthie Learning has completed over 600 projects.

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