

## Transform your Service Desk to a Learning Desk

Performance support tools . How these tools can help you drive down your call volumes and increase user self sufficiency.

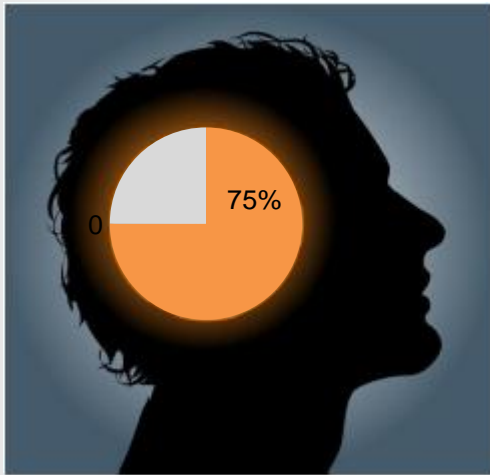
### Key Learning Objectives:

- Understand what performance support is and how it can be implemented
- See how learning at the moment of need can drive down call volumes and increase user self sufficiency
- Hear a Case study example and a Sample Business case



# The Truth About Knowledge Retention

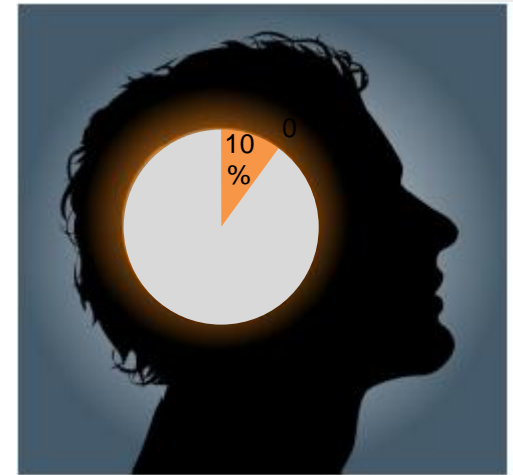
What percentage of the knowledge you need to do your job is stored in your mind?\*



1986



1996



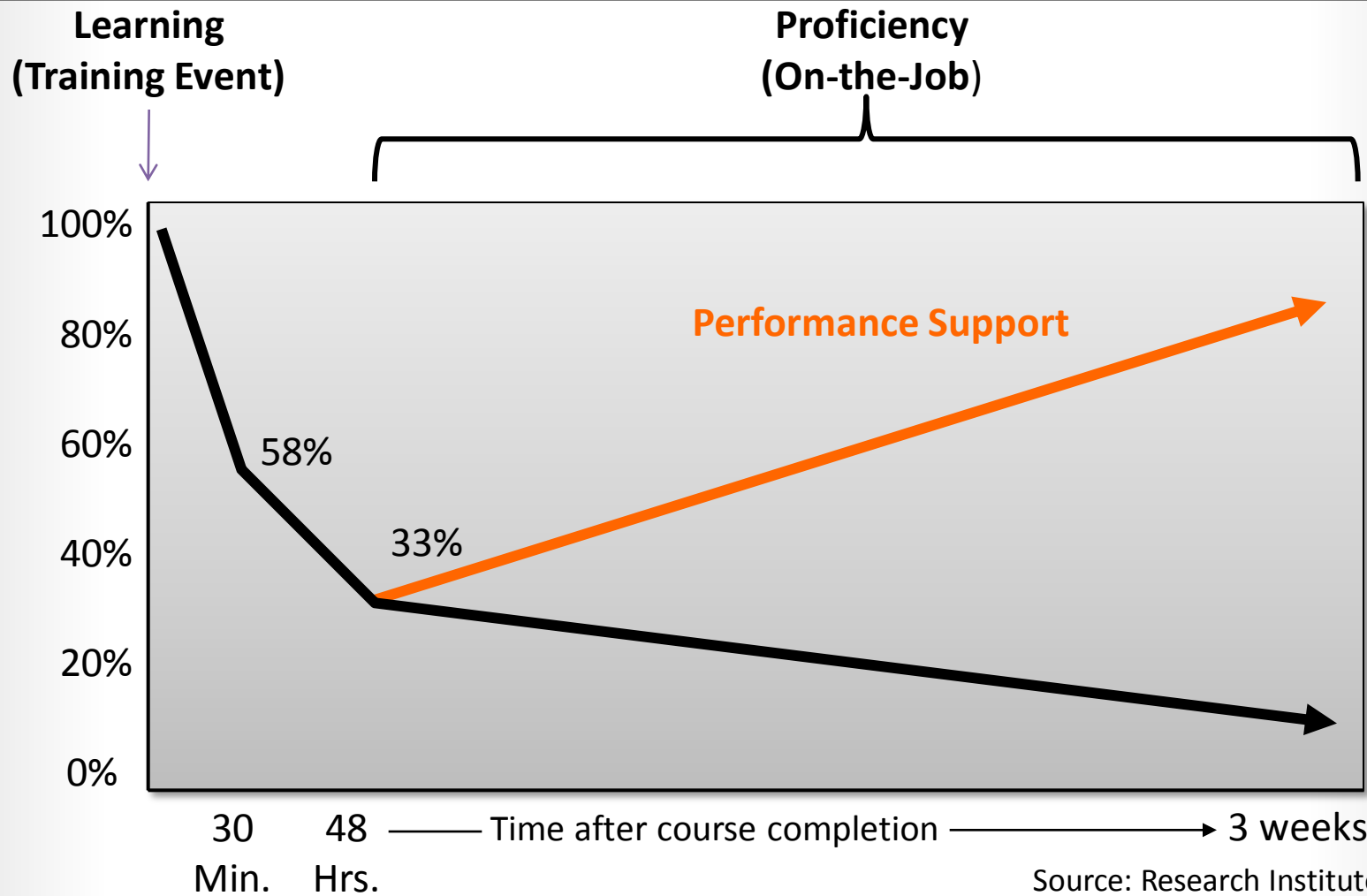
2006

**“It is usually a better strategy not to learn... – and simply search and find the correct information when you need it.**

- Charles Jennings, CLO Reuters

\*Robert Kelley, Carnegie-Mellon University 20 Year Longitudinal Study of Knowledge Workers

# The Truth About Knowledge Retention



# The Five Moments of Need™

1. When Learning for the First Time
2. When Wanting to Learn More

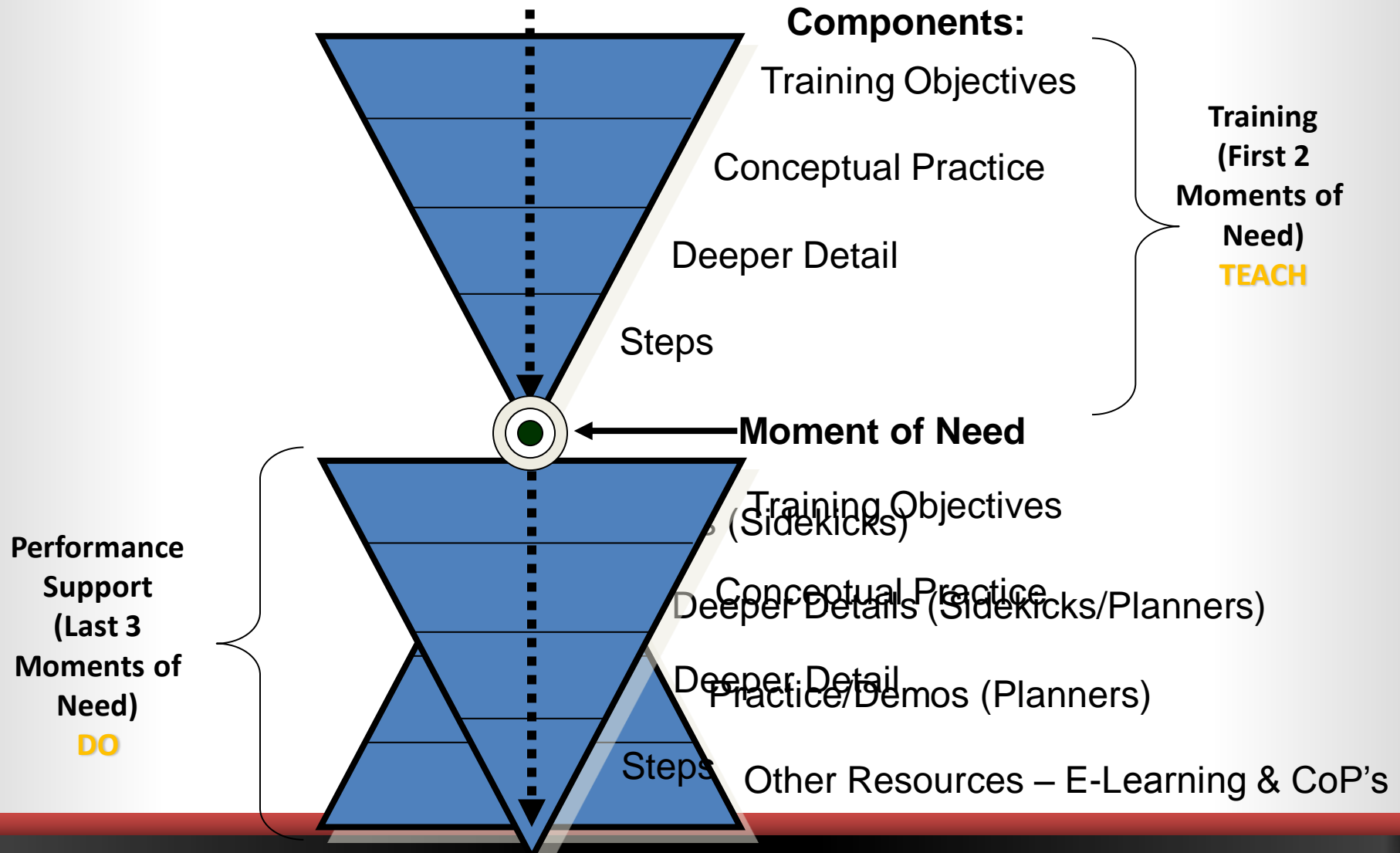
Traditional  
Learning

3. When Trying to Apply  
and/or Remember
4. When Something goes Wrong
5. When Something Changes

Performance  
Support

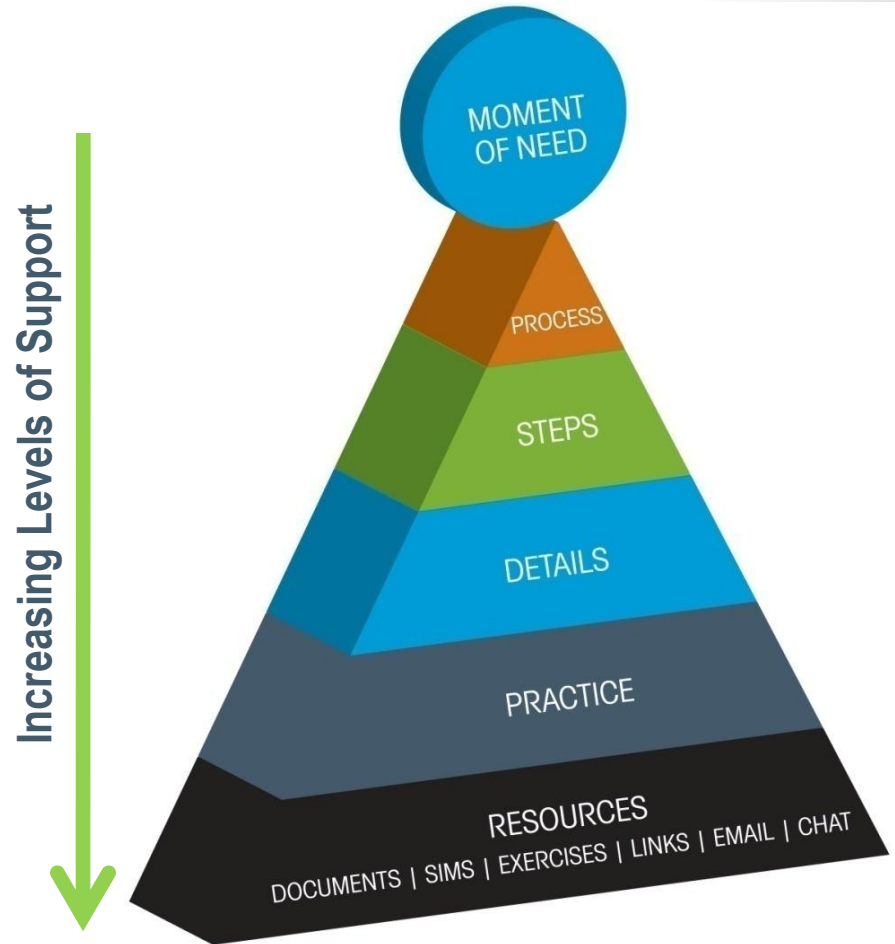
Trademarked LearningGuide Solutions 2011

# Traditional Classroom and eLearning vs. Targeted Performance Support



# A Closer Look at the Performance Support Framework

- ❖ **PROCESS** – Overlay business process to direct instruction
- ❖ **STEPS** – Concise quick reference instructions
- ❖ **DETAILS** – Robust and detailed Job Aids
- ❖ **PRACTICE** – Real-world exercises in the application
- ❖ **RESOURCES** – Link to existing resources (learning assets, knowledge management, portals, etc.)



# Business Value

## **Implement Performance Support Solutions (PSS) that solve business problems:**

**Help Desk & Call Center Efficiency**

**Sales Productivity**

**Regulatory Compliance**

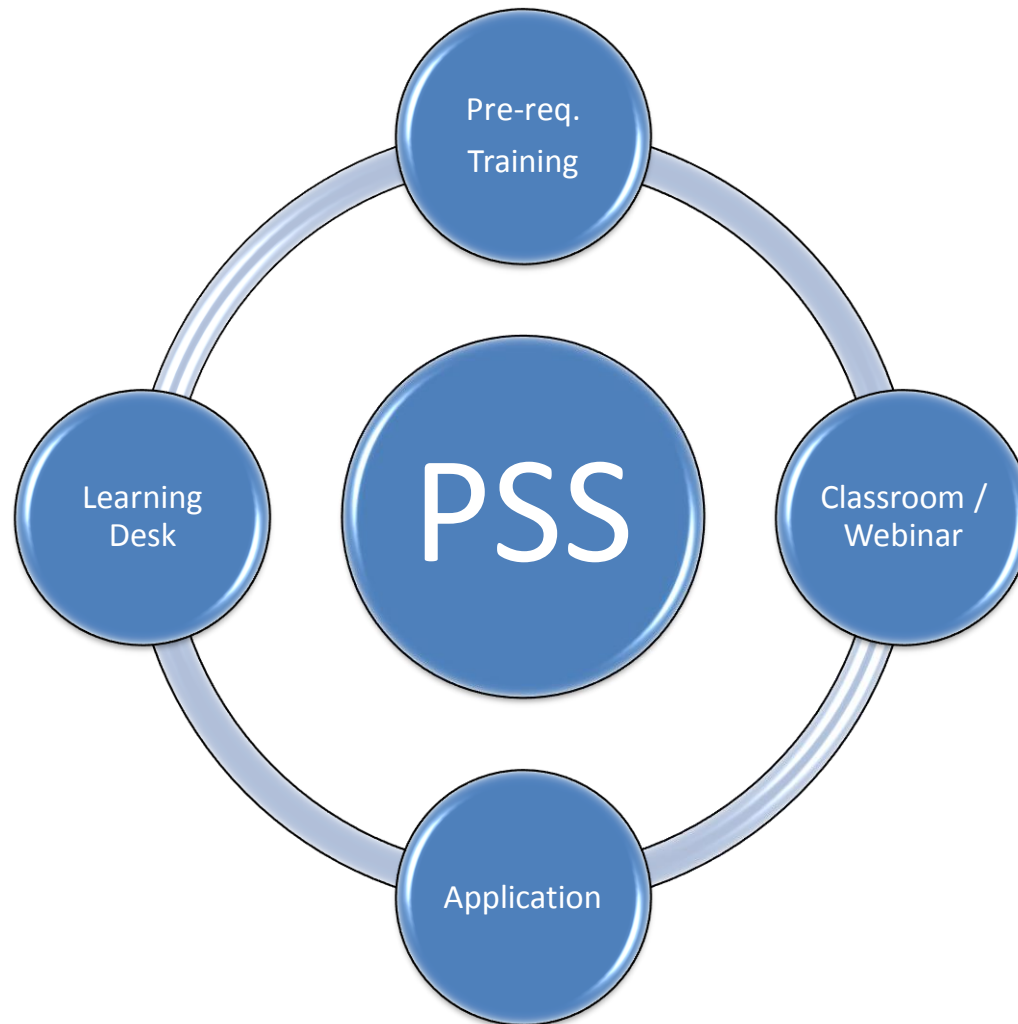
**Enterprise Application Change**

**Business Process Change**

**On-boarding New Employees**

**Executive Training Program Support**

# Knowledge Life Cycle

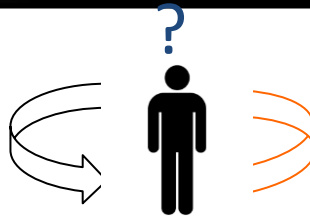




# Implementing P.S.S.

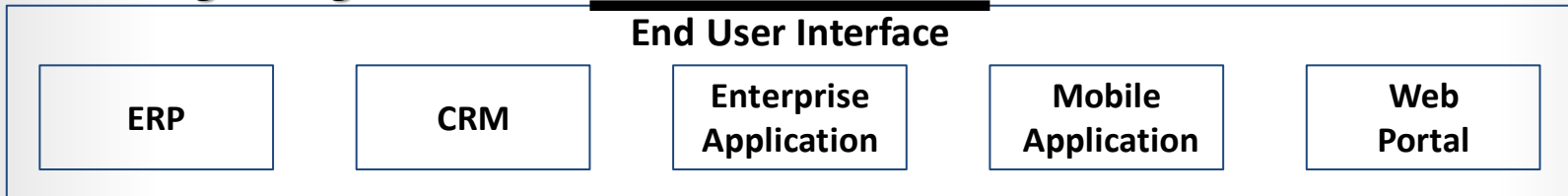
**Time = 0**

*Trying to Remember  
Something Goes Wrong  
Something Changes*

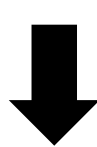


**Time = 1-10 seconds**

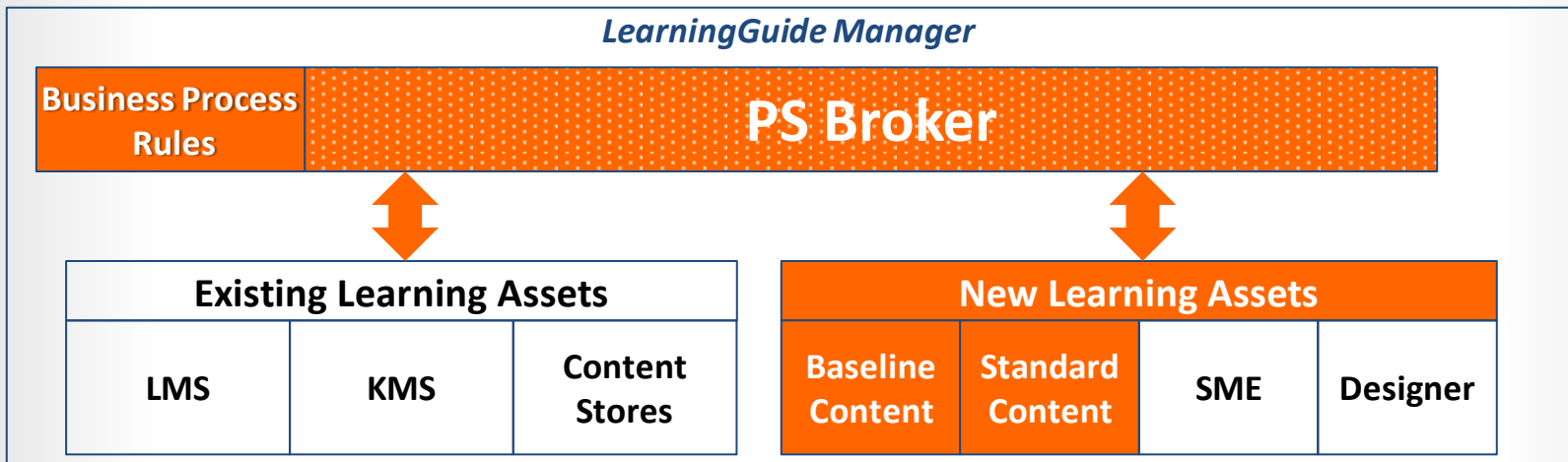
*Just the right amount of learning  
At the moment of need  
Productive work continues*



**User Context:** Role, Workflow, System state



**Most Appropriate Learning Asset**



# Performance Support ROI for Help Desk: Global Systems Integrator Case Study

## **Background:**

Global Systems Integrator

13,500 employees

Supported by single IT Help Desk

## **Business Challenges:**

Onboard 1,000+ end users and help desk staff every year

Frequent launch of new applications and system upgrades

Rapidly increasing help desk costs due to increased call volume/duration

## **LearningGuide Solution:**

LG Standard Content for MS Office 2010

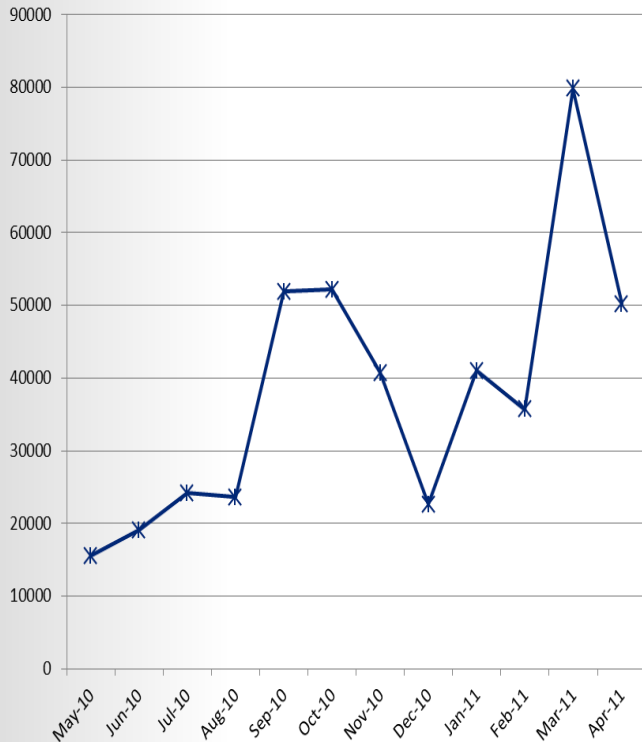
LG Baseline Content for SharePoint

LG eSigns for help desk operations

LG Mgr for remote worker support processes (VPN, aircards, smartphone, etc)

LG Mgr for internal operations (HR, Document Management, ERP)

# Performance Support ROI for Help Desk: Global Systems Integrator Case Study



## LGS usage statistics:

- Monthly average “hits” ~ 50,000
- Peak ~ 80,000 “hits”

## Sample Results:

Year-over-year reduction in call volume by 12.5% (10k+) while on-boarding 500+ new employees

Call durations for “standard” call types reduced significantly (but not specifically measured)

Office 2010 rollout training resources reduced from 10 FTE to 2 FTE

Office 2010 rollout end user classroom time reduced by three hours per employee

Nominated internally for Innovative IT award

## Calculated Savings:

Call center:  $10,000 \times \$40 \times 12 = \$4.8\text{M}$  per year

Office 2010: training FTE = \$650,000

Office 2010: end user productivity ~ \$2M

# Performance Support for SFDC CRM: Healthcare Insurance Payer -- Background

## **Background:**

One of the largest private healthcare insurers in the US

Insures 12.5M individuals

30,600 employees

## **Business Challenges:**

Ongoing training and support for CRM migration

Regionally diverse sales processes used in formerly independent sales organizations

Growing national sales organization

## **LearningGuide Solution:**

LG Baseline Content for SFDC

Baseline content customization for CIGNA's SFDC implementation

Custom LG content documenting CIGNA's Sales SOPs

Application embedded learning content linked to from SFDC based on user's context

Single-source authoring enabled publishing to PS and PDF

# Performance Support for SFDC CRM: Healthcare Insurance Payer -- Results

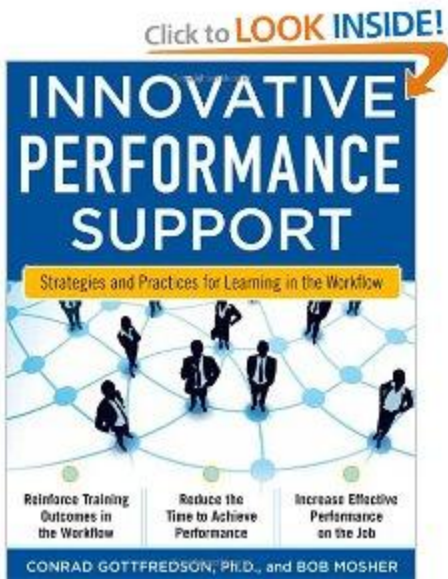
## Business Drivers

- Introducing a new CRM into an existing sales model
- Concern over the sales reps ability to integrate the technology into their selling practices and processes
- Bring together multiple standard operating procedures
- Establish a sustainment strategy to keep information current and users collaborating

## Results (client measured)

- 84% of enterprise sales force uses the solution DAILY
- 6% increase in DAILY work productive (i.e. – finding correct information, waiting for answers, etc.)
- 2.4 hours saved per week
- 454K saved based on an audience of 104 respondents of 3,000 users

SE Regional Presale Manager, called it a “quantum leap” for CIGNA in terms of how process information is organized and easy to use. “LearningGuide will be a great help for new hires learning the presale process.”



Amazon

# Samples

# CRM Embedded Learning and Support

The image shows a screenshot of a web browser displaying a Salesforce CRM interface. The browser has multiple tabs open, including 'Opportunities Menu', 'Locate Opportunity', and 'SFDC Support - Contacts.pdf'. The 'Locate Opportunity' tab is active, showing a help document titled 'Locate Opportunity' with a 'Quick reference' section. The document provides instructions on how to locate an opportunity, including a 'Use search function' section with a numbered list and a diagram of the search interface. The diagram shows a search box with a dropdown menu set to 'Opportunities', a text input field, a 'Go!' button, and a 'Limit to items I own' checkbox. The search results section of the document includes three numbered steps: 1. In the Search section of the Sidebar, in the dropdown list box, select the Opportunities option. 2. In the text box, type the name of the Opportunity that you want to locate. Multiple words entered are treated as an exact phrase that must be matched. 3. Click the Go! button.

**SFDC Support - Contacts**

# Business Process Support

The image displays a screenshot of a computer desktop with two windows open. The left window is a Windows Internet Explorer browser showing a website titled 'Middle Market SOPs'. The website has a navigation menu with 'Home', 'Middle Market Process Flow', '1: Assess and Submit', and '2: Outsource and Strategize'. The main content area is titled '2: Outsource and Strategize' and includes a 'Review State Legislation' section with a 'Process' button. Below this, there is a list of resources: 'iComply', 'Benefit Summary Leg Grid', 'FUSE 8182: Product Availa', and 'Dental/Vision Regulatory'. The right window is Adobe Acrobat Pro displaying a PDF document titled 'Regional SOPs.pdf'. The PDF content is centered and reads: 'Regional Standard Operating Procedures Sales Proposal Process'. The Acrobat window shows a zoom level of 64.5% and page 1 of 43.





**Thank You For Attending The Webcast!**

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**We'd Love To Hear From You!**

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