



Article

## Tips for Getting the Most Out of Software Training

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Busy professionals often make the mistake of pushing software training down their priority list. This may be due to costs associated with training, time commitment (especially in environments where billable time plays a factor), or just plain convenience. No matter what the reason is behind the reluctance to train, here are tips for painless software training so productivity goes up and frustration goes down.

### Timing is Everything

Whatever the application—an accounting application or a time recording system, data entry or journaling, it is most cost effective to receive training on an application just before the software is rolled out. Or better still, some applications may only require installation, and then a very brief orientation because the software is so good. Providing training opportunities saves valuable time that is typically lost in trying to figure out software on one's own. Alternatively, focused training would have taken a fraction of the time allowing you to be immediately productive. Unfortunately, scheduling a time for training is rarely within the trainer's control. For those busy professionals, we have found that it helps to deliver training in short sessions, which is easier for professionals to fit into their busy schedule.

One more thing—don't schedule training to take place more than a week before the trainee has an opportunity to use the application in a live environment. Because studies have shown that the more time passes between the training and opportunity to apply what was learned, the more likely it is that the training content will be forgotten before they even start using the application. Needless to say, this creates frustration and impacts productivity.

### Tailor the Training to the Tasks

Relevant learning is essential. There's no point in training a lawyer to produce detailed, weekly reports from the time recording system, when all they may really need is a summary related to their weekly timesheets. Match the feature in the user interface that is directly on point and provide only the information needed. Most trainees, and in particular those who charge by the hour, will see anything outside their immediate needs as a waste of time. Therefore, creating a training needs analysis for each job position is critically important so that an accurate training

requirements profile is established for each individual role. This will generally start with analyzing the job position's daily workflow.

### Use Recognizable Data

There's little point in training people using data they don't recognize—they will quickly lose interest. Using data that they can relate to will help keep them engaged. In fact, using nonrelated data may result in the trainees not fully understanding the relevance of a process or how it relates to the corresponding task to be accomplished with the new software tool. The trainees need to understand how the new software fits into the entire process associated with accomplishing a task, since use of software is typically only part of the big picture. Building in relevancy to the training criteria requires some investment of time, but it is certainly effective when it comes to improved retention.

### "Hands-on" Training is More Effective

Time and again it has been proved that hands-on training is one of the most effective ways to learn. Presentation-style training where the trainees are passive learners have limited effectiveness, but can be used for non-complex training requirements where the training sessions can be kept short. The use of visual aids is helpful in either scenario, keeping in mind that whiteboards should only be used for delineating concepts or illustrating calculations. Ideally, trainees should learn on equipment that is configured similarly to the computers they use on a daily basis.

### Minimize Group Size

One-on-one training always works the best, but it is also the most expensive form of training. For classroom hands-on training, try to keep the training group size small—around a half dozen people, if possible. Smaller classroom sizes ensures individual attention so that the classes proceed on schedule and that individual needs/requirements can be addressed. And as mentioned above, shorter sessions are much easier to schedule and increase the likelihood that more people will make the time to attend training class. Another advantage of small group training sessions—disruption to the overall office workload is minimized.

### Use Trainers Who Can Relate to the Trainees

A trainer must be able to understand and relate to a trainee's job responsibilities, including the tasks they need to accomplish. Knowing a software package well is not enough if a trainer cannot understand how the software fits into the workflow process. Training needs to include an

understanding of what the trainee needs to accomplish with the tool as well as how that tool fits into the overall workflow process. This will allow the trainer an opportunity to tout the benefits of the software and how using it will benefit both the user and the company as a whole, ideally generating excitement for the new application, improving morale, and increasing attendance at classes.

### Trainer Authority

As well as knowing the software exceptionally well, the trainer must be able to command respect and be seen as a subject matter expert. Many senior professionals work under pressure and have Type "A" personalities. They may even make it clear to the trainer that they do not want to be in the training session. Handling of these personality types requires a high level of tact and expert interpersonal skills on the part of the trainer.

### Conclusion

It is a widely accepted "rule of thumb" that within the first 48 hours of attending a traditional training class or learning event, a person's related knowledge retention drops by 60-70%. Periodically adjusting training to include new methods to reach broader audiences will help optimize retention level and keep them coming back for more.

### About PayneGroup

PayneGroup provides training globally and specializes in training busy professionals and high-end IT people with unique software needs. Training services include executive, one-on-one training, software upgrades and migrations, project management and high end training for IT trainers and support staff. The Master Series is our signature class. As authors of 13 books on Microsoft Office, we are known for our expertise, and for sharing our knowledge with others.

PayneGroup also has a products division that offers security products for protection when collaborating with others on documents, email and redaction. Workflow products solve the problem of applying complex paragraph numbering in seconds, and creating common documents through an automated template package system.