Kalleid

Customer Training Program for an R&D Data Cloud Company

PROJECT OVERVIEW

A major software company that helps many of the top global pharmaceutical and life science companies unlock siloed R&D data with a cutting-edge, cloud-based data platform wanted to transform their customer experience to promote increased customer retention, expansion of use, and differentiation from other tech firms.

Due to Kalleid's extensive experience and successful track record in developing customer training programs for software companies, the company hired Kalleid to drive the maturity of their training capability through development and implementation of a robust and flexible training program.

BUSINESS CASE

At the start of the engagement, the company's customer training program lacked maturity in a number of areas:

- **Training model did not scale**
- **Response to client requests was reactionary**
- **Ill-defined learning paths for expertise progression**
- **Little to no self-paced training options for customers**
- **Lack of standardization in the customer training experience, from onboarding to deployment and after go-live**

To address these issues, the company contracted with Kalleid to transform their training program and customer experience to a more desirable future state:

- **The training model scales as the company grows**
- **Training is a key differentiator that drives retention and expansion of the platform**
- **Learning paths are defined for personas and content can be accessed in a variety of formats (instructor-led, videos, eLearning, etc.)**
- **Training is promoted at various points in the customer journey to encourage expertise progression and expanded use**

SERVICES PROVIDED

This project was conducted using a phased approach. Kalleid provided the following services for the first two phases of the project:

Phase 1 Services

The company had an urgent need for introductory courses on their platform. Unfortunately, due to a combination of GxP restrictions and audits that were in process, Kalleid was not able to obtain access to the data platform. As a result, Kalleid worked with subject matter experts (SMEs) to obtain screenshots and receive trainings that detailed platform functionality. Kalleid also had access to online product documentation. Using these assets, Kalleid successfully developed introductory courses on the customer's data platform, ranging in duration from 45 to 90 minutes, that were designed to support the learning paths of four different user personas. Given the urgent needs of the customer, these four courses were designed, developed, and delivered over the course of just one month.

Deliverables for Phase 1 included:

- **Course descriptions and a course catalog suitable for use with clients**
- **Learning objectives and outcomes for each course**
- **A slide deck containing annotated screen shots of platform functionality for each course**
- **A course manual containing appropriate knowledge checks and practice exercises for each course**
- **A vision for the learning path for each persona**

Phase 2 Services

After Phase 1 was successfully completed, the company granted Kalleid access to the platform and Kalleid designed and delivered Phase 2 of the project, which involved the following:

- **Supporting the implementation of a Learning Management System (LMS) that was chosen by the company**
- **Updating the training materials from Phase 1 to feature a new version of the platform**
- **Designing and finalizing the learning paths for the different user personas**
- **Developing eight advanced courses to complete the various learning paths, with each course containing learning objective and outcomes, an annotated slide deck of platform functionality, and a course manual with practice exercises and knowledge checks**
- **Developing eight explainer videos detailing key functionality in the customer's data platform**
- **Developing job aids/infographics for the different learning personas**

RESULTS DELIVERED

Both the client, and the client's customers, are very pleased with the new training materials. The client expects the program to make a big impact on customer retention, reduction in customer's need for support, and sales.

245 Main Street, Cambridge, MA 02142
+1 617-366-2656 or info@kalleid.com
Twitter: @kalleidinc