

Landen Consulting Case Study: Change Management Strategy, Training Design & Development with Flexible Delivery Model including Web Conferencing

The Challenge:

The client was preparing to implement its first wide-scale CRM (Customer Relationship Management) customer contact program, with an accompanying online CRM software system, to its countrywide sales force. Since this was an important new initiative, dynamic learner/trainer interaction was a necessity. Due to the volume of events occurring within the client's business operations, the field training staff was already at near-capacity, so a formal "train-the-trainer and cascade down to the end-user" training initiative was not a possibility.

The challenge: Develop a change management strategy, and the training materials/deliverables, to allow for flexibility and multiple delivery options based on local trainer capacity, with ample on-the-job resources for learners.

The Solution:

The resulting change management & training strategy included a mix of learner/trainer interaction and on-the-job support materials, which allowed the content to be delivered in a variety of ways:

- A formalized and carefully coordinated communication plan using multiple touchpoints & channels
- Instructor-led classroom training session
- Live web conference
- A recorded web conference (for learners who could not attend the live sessions)
- One-on-one coaching, allowing for hands-on practice
- Self-paced learning

The training materials provided comprehensive support to the field trainers and the end-users:

- Web conference presentation materials
- Trainer support materials for conducting a session via web conference
- A recorded version of the web conference, highlighting "FAQ" types of items that received extra attention during the live sessions
- A comprehensive set of on-the-job support materials, including a visual reference guide to the new CRM system, job aids for key system processes, and additional "tips & tricks" information to help learners take full advantage of the new CRM program

For More Information:

For more information on the services available from Landen Consulting, call us at 847.604.8697, or visit us at www.landenconsulting.com.