



# How to implement a high-impact remote learning journey

# Contents

<b>Section 1</b> Impacts of the COVID-19 pandemic on L&D teams	<b>4</b>
<b>Section 2</b> Rethinking user adoption in the age of remote work	<b>6</b>
<b>2.1</b> From reactive to proactive	<b>6</b>
<b>2.2</b> From conversion to transformation	<b>8</b>
<b>2.3</b> From piecemeal to holistic	<b>11</b>
<b>Section 3</b> How to implement a high-impact remote learning journey for business-critical applications	<b>12</b>
<b>3.1</b> Deliver immersive learning experiences using simulations	<b>12</b>
<b>3.2</b> Transition to a blended mode	<b>15</b>
<b>3.3</b> Complete your learning journey with performance support tools	<b>15</b>

COVID-19 has brought upon a “new normal” in the learning and development world. Virtual training is now the default across L&D teams. This impacted workflows, business continuity measures, training approach and delivery, etc. The full extent of these ramifications is still unknown.

Some organizations have embraced the switch to remote work with gusto while others are still on the fence. In some cases, the move to remote only accelerated established trends or was already business as usual. Organizations that phased out in-person training have survived relatively unscathed. In other cases, L&D departments found themselves ill-equipped to deal with such a paradigm shift. In other words, this crisis was a litmus test. It forced learning professionals to take a hard look at their approach and ask themselves:

- How flexible and resilient was my training approach?
- Were our training programs designed to be conducive to virtual training?
- Should we have been more proactive to transition to remote?
- Does this crisis highlight pre-existing flaws in our approach?
- What’s the best way to implement a high-impact remote learning journey?

Exploring these questions is the goal of this handbook. Its purpose is to help content developers, instructional designers, learning & development managers and Chief Learning Officers **focused on application training** adapt their learning journeys to the realities of remote work. The insights presented have been distilled from interviews we conducted with Fortune 500 companies.

## What you will learn

- How COVID-19 impacted L&D teams - especially content development.
- 3 shifts in thought, process and technology to facilitate continuous learning in the age of remote work.
- A 3-step plan to implement a high-impact remote learning journey.

# Impacts of the COVID-19 pandemic on L&D teams



## Not all lines of businesses were impacted the same

The effects of switching to virtual training on a large scale not only vary between companies, they can vary within the same organization. Business areas that already made a complete or partial switch to remote training had processes set in place. They've experienced a relatively smooth transition. Lines of businesses that were dependent on in-person and leader/coach-led training have experienced significant disruption.

## There is an excess demand for virtual training

A sudden spike in the demand for virtual training has bottlenecked content developers. The learning fulfillment model built pre-COVID tends to be reactive. It was designed to work as lean as possible and to identify the optimal amount of content and areas for improvement that help the bottom line.

## There's a shortage of qualified content developers

As a corollary of the sudden demand for virtual training, there's a lack of qualified people to create the training. Creating training content requires a unique skill set including patience, attention to detail and expertise with the specific suite of tools used within an organization. Senior leadership has tried to fill the gap with personnel from other lines of business regardless of qualifications. They are realizing doing so can have downstream impacts including workload increase.

**The common thread is that L&D as a function tends to be reactive which ultimately creates inefficiencies and negative user experience.**

*Our training fulfillment is based on an FTE model. Our team would scope a certain amount of training curriculum broken down into a number of simulations. Each simulation would take around a week to deliver the content. We would create a timeline on how long each curriculum takes, based on how much resources available to meet that deadline. For instance, 25 modules would take 3 content developers to develop in X amount of months. Now that COVID hit, the demand has increased exponentially*

**Kevin Beach,**

VP Process Design Consultant for Bank of America

# Rethinking user adoption in the age of remote work



The pandemic underscored the need for learning professionals to be resilient, agile and prepared for uncertainty. It's also an opportunity to explore new options and fine-tune existing approaches. To help you future-proof learning and improve learning habits in your organization, we suggest the following three bedrock principles to keep in mind:

- From reactive to proactive
- From conversion to transformation
- From piecemeal to holistic

## 2.1 From reactive to proactive

Although no one could've predicted the pandemic, L&D professionals can proactively plan and identify potential business continuity impacts that could deter a project. From a project management standpoint, there are a lot of dependencies that need to be met or assumed to ensure that the target project state is optimal. You need to identify requirements, potential what-ifs, potential obstacles for failure, dependencies for success, KPIs, success factors, contingency plans and potential constraints.

Here's a short list of variables that could impact your project success:

## 1 Subject matter expertise

- Do business partners understand the processes?
- Do we have the right subject matter experts from a learning and business perspective to help with the development of storyboards?
- Do subject matter experts fully understand the scope of training?
- Do SMEs have the required knowledge of the target application?

## 2 Content priority

- Which KPIs should I use to prioritize content?  
*i.e volume of transaction, level of risk, release versions*
- Which tasks have the highest potential to mitigate risks?
- Which tasks are the most complex for new hires?

## 3 Storyboard accuracy

- Does my process flow match the tasks and encapsulates all relevant scenarios that learners will encounter?

## 4 Content developer resource alignment

- Do we have the developers with the skill sets to deliver high quality and interactive products?
- Have expectations of roles and responsibilities been explained?

## 5 Effective communication

- Creating beneficial awareness to the incumbent population, not solely new hires is an ongoing opportunity in this matrix environment.

## 6 Accessibility

- Delivering multiple avenues to access content is critical to creating awareness, driving adoption and ultimately maximizing the employee experience. It is also critically important that the lessons are repeatable, versus one-and-done.

## 7 Employee feedback

- It's important to capture employee feedback. Consider a quantitative measurement system as opposed to a broad-based feedback mechanism tool.

## 8 Technology enablement

- Technology has multiple avenues that users can drive down and reach the same destination but it might not be efficient or accurate.

## When writing storyboards and building content in simulations

1. Identify the most efficient path to execute the transaction.
2. Validate that it meets policy, procedures, standard guidance and ultimately ensure that you are not missing any potential regulatory requirements or audit issues.

### Key takeaway

If you are planning properly, you are being proactive. The better you plan, the less reactive you will be. You've already outlined obstacles and identified alternative solutions to business continuity before they occur. Being reactive is a symptom of poor planning. Without alternative plans in place, if something happens, you will be forced to figure it out on the fly.

## 2.2 From conversion to transformation

The sudden switch to remote work forced learning professionals to move their learning programs to virtual mode. This can have mixed results depending on **what the training content looked like before going remote:**

- What was the effectiveness and quality of the training before the transition?
- How engaging and versatile was the training material? Could it be easily adapted to remote learning?

A simple “copy and paste” approach - where traditional classrooms (and the training formats that come with them) are simply *converted* into virtual classrooms, is fast, seemingly efficient and the first instinct of many given the time requirement. However, it isn't optimal for all training formats. This is because virtual-instructor led training is a different universe than your classic instructor-led classroom. It brings a host of new challenges and exacerbates old ones:

### Challenges that come with remote training

#### It takes longer to set up

Trainees have to get on a conference line. Some might be late. Once everybody's ready and on the same page about the sessions' learning objective—15 minutes could have already passed.

#### It depends on a reliable internet connection

It's almost expected to experience internet connection issues during a video call. People get disconnected, the audio gets choppy and people have to repeat themselves.

This is especially true for large organizations distributed across regions and countries. Someone based in a smaller town won't have the same connection as someone living in a metropolis.



### It's harder to gauge active participation

Remote training with video conferencing takes away that instant feedback. It's easier in person to identify who is paying attention, who's asking questions, who's multitasking, who is having difficulty etc.

### It's more difficult to assess retention

With thousands of users working from home, it becomes more difficult to make sure that the training is effective, that users are retaining the information and that everyone is applying it correctly every day.

## What do these challenges point to in terms of the ideal remote training format?

- Keeping trainees engaged in-person wasn't exactly easy. Now with remote learning and its lack of immediate feedback, training has to be intrinsically immersive and interactive to maximize engagement and retention. This takes passive formats such as Powerpoint slides and PDFs out of contention.
- Remote training can cause frictions. Ideally, video conferencing would be kept to a minimum. This points to a blended learning approach, where virtual-instructor led training is complemented by self-paced training and/or microlearning.

## Training conversion vs transformation

This [Conversions vs Transformation of virtual learning idea](#) has been expounded by renowned instructional design expert, Dr. Jim Guilkey.

### Conversion

- Duplicate what you were doing in the classroom.
- If you are using Powerpoint slides, PDFs or static screenshots, simply put it online.
- It's ineffective because it fails to take account of the differences between instructor-led classroom and virtual classroom and all the remote training challenges that they entail.

If you've been looking for advice on how to make your remote training more effective, more "interactive"—most of it will fall under this category. You'll hear "tips and tricks" for virtual facilitation that might be helpful, but fail to realize that **redesigning the content to be naturally conducive to virtual distribution is the greatest lever to improve learning outcomes.**

### Transformation

- Training is redesigned based on the fact that virtual training is a new medium with its own context i.e trainers do not have the instant feedback that face-to-face interactions provide anymore.
- Training material is naturally interactive and immersive.
- Uses a blended approach to produce highly effective virtual learning.

In short, not all training is suited for remote. If your training wasn't immersive or interactive from the get-go, converting it for virtual distribution would only be a stopgap. It won't be enough—you'll have to transform it.

# Overview of a blended approach for effective virtual learning

## 1. Self-paced module

**Learning objective:** Provide foundational knowledge i.e. introduction to processes, overview of products etc.

**What it's not:** Reading slides and taking a quiz.

**What it should look like:** Engaging and problem-based. Trainees have a chance to apply the knowledge instead of memorizing (and then forgetting) facts.

## 2. Interactive virtual classroom

**Learning objective:** Instill a solid baseline familiarity with the application.

**What it's not:** Traditional lecture format.

**What it should look like:** Learners complete exercises and solve problems. Trainers relay experiences and provide guidance.

## 3. Performance support tools

**Learning objective:** Provide answers at the moment of need and plug learning gaps.

**What it's not:** A replacement for formal training. It should be used in conjunction with interactive virtual classrooms to enhance learning.

**What it should look like:** Communicates information beyond application training i.e. where to click on in the application. It should indicate all relevant things such as regulation, compliance and the steps the user has to take outside of the application.

## Our advice

- When it comes to training users on applications remotely - simulations are the best option. They are naturally immersive, interactive and fit into a blended approach. (For more details, skip [here](#))
- Simulations are very well suited for a blended approach. An initial virtual-led training session can be used for a quick rundown of the application. The users can then switch to self-paced training and practice from anywhere, anytime.
- Adopt a “show me, now you try it” method. Show users first how to perform a series of tasks, then have them try it. You can run scenarios and have them fill the blanks. Make them think instead of spoon-feeding them all the information.

## 2.3 From piecemeal to holistic

Learning should be viewed as a holistic journey, not a series of one-off sessions. Here's why:

- People forget and there are always learning gaps. Even with the most immersive and interactive training, 100% assimilation of knowledge is impossible.
- Formal training might cover 80% of scenarios with the last 20% learned on-the-job. The learning journey has to take account of that last 20%.
- Some tasks on applications are done so rarely that it's unreasonable to expect users to remember how.
- Training material should change as the application changes. Some of the updates might be minor and don't warrant a new round of training. It would be more efficient to relay them to users at the point of need.
- Application training isn't just about where and what to click. It's inherently tied to business processes that are subject to everchanging compliance and regulations. These important changes have to be notified to the right users quickly. This should be done immediately without disrupting the users' workflow.

**As a corollary, learning has to be reinforced over time to maximize retention. In other words, training isn't done as soon as users are in the live application. Learning has to be continuously repeated in various contexts and spaced out over time.**

### What does it look like in practice?

The learning is embedded into the users' workflow with **performance support tools**. This allows employees to receive answers on-the-job, at the moment of need. It's especially important for remote work. Users used to be able to walk to a colleague and ask questions. Without face-to-face communication, they have to be empowered to become autonomous.

That said, a holistic learning journey includes both formal training and performance support.

- **Formal training:** gives users a solid baseline familiarity with the applications.
- **Performance support:** Gives users the ability to apply what they learned in training while working offsite—without any slump in productivity.

The addition of performance support tools creates a bridge between knowledge acquisition and knowledge application. This translates into faster onboarding time for remote users, increased employee performance and less time wasted on re-learning.

### Key takeaway

- Performance support doesn't replace formal training. It enhances the impact of formal training and enables learners to apply the learning on the job.
- User adoption without performance support is incomplete. Training is not a one-off event. Performance support tools are required to reinforce and perfect learning over time.

# How to implement a high-impact remote learning journey for business-critical applications



## 3.1 Deliver immersive learning experiences using simulations

We've established that virtual training introduces new challenges, namely:

- **There's a psychological distance between instructor and trainee and between user and tool.** This makes training and learning more abstract and less engaging. It can exacerbate anxieties from employees fearing that they are not ready and will inadvertently make a costly mistake. Plus, instructors might doubt that they did everything in their power to equip users with the knowledge to perform at their best.
- It's harder for instructors to assess active participation.

As a result, for training to be highly-impactful in a virtual context, it has to be intrinsically *immersive* and *interactive*.

Simulation-based training fits these descriptions to a T.

## Immersive

Inside simulations, users are exposed to a life-like recreation of the application. This lets them explore, make decisions and solve real-world scenarios. They can make their own discoveries without being spoon-fed everything. There won't be any surprises once they go live. This is a huge confidence booster.

## Interactive

- **Simulations provide a risk-free environment for users to make mistakes early on.** They can see the results of their actions without suffering any consequences. This removes a ton of anxiety.
- **Users can perform actions over and over and build muscle memory until it becomes second nature.** This ingrains the training into their minds. They are getting hands-on experience even while working from home. Once live, they can focus on dealing with customers and solve problems instead of being lost in the application.

## Who is it ideal for?

Any organizations looking to maximize the potential of their CRM, ERP, or any business-critical applications. A risk-free training environment is especially useful for industries dealing with sensitive data such as finance, insurance and healthcare.

## Are simulations the same as training on the live application?

No, the big difference is that training directly on the live application is very risky:

- It's a trial-by-fire approach that can lead to costly mistakes i.e trainee makes a wrong transaction followed by damage control.
- It exposes your confidential information and could lead to security breaches and legal issues.

## Are simulations the same as a training client (sandbox)?

Not quite. Simulations confer a lot of benefits over a sandbox.

### Sandbox

- Hard to maintain, costly, and takes a lot of bandwidth from the IT department.
- It's a security risk if the training data isn't anonymized properly.
- For virtual training, you have to reset data constantly. New dummy data has to be created for every trainee.
- Trainees can't edit data in the sandbox at the same time without interfering with each other.
- Training is unstructured and could leave users overwhelmed with choices. It's also harder to make them learn the content in the right sequence.

### Simulations

- Unlike a sandbox, simulations put guardrails in place to structure your training. Users are not left aimless in your application. You can guide them along a path and teach them how to perform tasks from A to Z in the most efficient way.
- You can be sure that every user trains with the same scenario and with the same data every time. Training is consistent and scalable.
- Users get hands-on experience from home, without any risk to your production data or confidential information.

## In short, simulations are a more focused, consistent and risk-free approach to remote training.

Conducting a virtual training session using a sandbox or within the live application share similar problems. In both cases, it involves a lot of screen sharing while trainees watch. This makes training passive instead of interactive. It's a result of not having a training environment free of confidential data.

In the case of training in the live application, users can't follow along ("Don't click this button until I tell you to"). Since real data is involved, someone jumping the gun could cause a costly mistake. In a sandbox, trainees can't edit data at the same time without interfering with each other. Simulations reduce the need for trainees to follow each user one by one. This makes training sessions smoother and more efficient.

## Are all simulations created equal?

Most simulation-based training for applications are based on static screenshots consisting of very basic "click for more information" interactions. Content developers and instructional designers will recognize its flaws:

- Updating content is very time-consuming. You have to capture a ton of screenshots for the simplest actions. Every time there's an update or a mistake to fix, you have to re-record your entire process flow from scratch and retake a new set of screenshots.
- The process flow is inflexible. If the user doesn't do things exactly as intended, an error message appears. This breaks the immersion since users are not interacting with the training in an intuitive way.

## Assima's game-changing approach to content creation and maintenance

Assima's patented technology allows content creators to deliver hyper-realistic simulations as easily as taking screenshots, without depending on IT. It's the only technology of its kind that captures application interface as editable objects.

Benefits of Assima's patented object capture authoring tool:

- Update content from a single source file, without capturing screenshots, and roll it out globally in a few clicks.
- Edit elements of the user interface directly without any risk to your production system.
- The number of screen captures needed for updates is reduced by a factor of 10.

Unlike screenshots, these hyper-realistic simulations create a truly interactive learning experience. End users train in a guided simulation that look and feel like the real thing. They can click, scroll, enter data into fields, just like they would in the live system.

## 3.2 Transition to a blended mode

Simulations-based training naturally lends itself to a blended approach. That's because there's a learning-by-doing aspect built-in. This implies a self-paced component that complements instructor-led virtual training.

The advantage of simulations over training in the live application or a sandbox is that the **transition from instructor-led virtual training to self-paced training is seamless**. Since trainees have access to a structured learning path in a risk-free environment, trainers do not have to share their screen and follow every trainee one by one as they repeat every action. They can follow these simple steps:

1. Deliver short walkthrough videos before the training sessions as an introduction.
2. Give a gentle tour with high-level information during the virtual training session followed by a few talking points.
3. Send trainees to the simulations to practice on their own.

**This keeps videoconferencing at a minimum making training much more efficient.**

## 3.3 Complete your learning journey with performance support tools

Performance support tools serve as an integral part of a remote learning journey. Here's why:

- They help users perform tasks on their own without depending on colleagues.
- They deliver training at the point of need in easily digestible, bite-sized form.
- They serve as a safety net for learning gaps.
- They inform users about new system updates, new regulations and process changes without disrupting their workflow.
- They save time by reducing the need for virtual-led instructor training.

**This creates a bridge between knowledge acquisition and knowledge application.**

# Assima helps you deliver high-impact remote training by providing the most efficient way to create simulations that feel and react like your system.

Empower remote users with hands-on experience without risking your customers and confidential data.

## Immersive applications training

Create hyper-realistic simulations as easily as taking screenshots

## Performance support

Empower users to become self-sufficient using a Digital Assistant



Learn more at [assima.net](https://assima.net)