SKYLLFUL

How Your Systems Training Is Failing Your Field Workforce & How To Do It Right

1

It's not hands-on

"A **simulation, or demo** might be a better tool to learn from."

"There is nothing better than **hands on training**."

Your field technicians don't learn the other skills of their jobs by sitting. Before they're sent out on their own, there is always an element of hands-on learning, whether those are controlled environments that simulate real-world activities, or ride-alongs with more experienced employees.

The same approach should be applied to learning the essential technologies they need to use – providing simulated, interactive experiences for workers.

2

It's in hard-to-consume formats

"I found the **PowerPoints and videos hard to learn** from."

"It was **a lot of information to remember**."

Today's business workflows that field workers have to complete using their apps are complex, covering multiple steps. Additionally, field service applications often contain dozens of workflows that your mobile workers need to remember. Static content - consumed all at once – results in poor retention. A micro-learning approach, allowing learners to complete training in bite-sized chunks, has been shown to improve long-term retention.

3. It takes too long to complete

"I'm very busy and **can't find the time to complete** this training."

"I was personally frustrated to **spend so much time on training, only to have to change things a couple of weeks later.**"

The pressure on the business to maximize the effectiveness of your operations means that work is tightly scheduled. Your workers are already under stress to complete their daily scheduled tasks. Naturally, training winds up being the last priority.

So what happens? Your employees try to get through training as fast as they can, when they can – instead of actually learning.

4. It doesn't create a safe space to practice

"**I do not believe I am ready** to use of this application without doing actual work orders in **practice sessions.**"

"The application **very challenging** to use **without some level of practice.**"

Maybe you're learning a new cooking recipe. You go to YouTube and watch a "how-to" video. How will it turn out the first time you try to make it? Probably not like Jacques Pepin's version.

Your field technicians are human; and like most humans, they're afraid of making mistakes. And they know they're bound to make mistakes as they learn. But when they do it in their production application, they also know there are real implications to the business and your customers. Having a safe space for them to practice alleviates anxiety and avoids costly errors.

5. It's out-of-context

"Training should **flow & follow the events of a service call.**"

"The **training feels unstructured.** It feels like I'm **learning bits and pieces instead of an actual guide.**"

The term "systems training" is actually a bit of a misnomer – or at a minimum out-of-date.

You're not teaching your employees how to use your systems; you're teaching them how to do their jobs with an important technology tool.

Your field workforce doesn't need to know the features and functionality of the application. What they need to learn is how to execute their workflows correctly and efficiently. Technology training has to be put in context; how and when and why should your employees use their app workflows.

6

It's not delivered in the flow-of-work

"I think the **material will be much more helpful when I am actually using** the application."

"It's **hard learn a new system** when not actively using it."

Here's the catch – effective systems training isn't really just about up-front training.

What happens when one of your employees forgets how to do a step in a workflow? What happens when they're presented with a task or customer scenario that haven't had to do in weeks or months?

Effective tech adoption and usage also needs to include learning in the flow-of-work, so your employees have access to reference content when and where they need it.

The bottom line: You and your team is spending significant effort and resources creating training that lacks effectiveness and doesn't achieve the desired results for the business
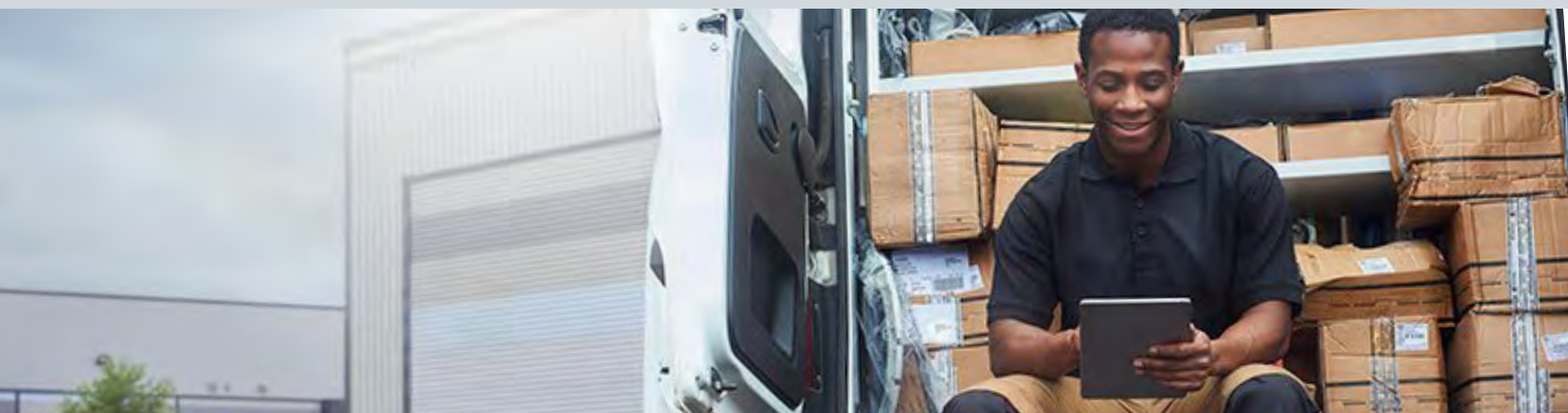
Why It's Not Your Fault

Not all learning technology is created equal

Your company has already made investments in several different learning technologies, which might include an LMS, an LXP, and authoring tools. You and your team may have spent significant time and effort learning these different technologies. Naturally, you're expected to use what you have available to develop systems training. It's the old "when you're a hammer, everything looks like a nail" problem. And as we've seen above, field service systems training requires a different approach. You might be doing things for the right reasons, but you're getting the wrong results. If you're not using the right tool for the job, then you're wasting time and money.

Most e-learning experiences were not designed with field servie workers in mind

It's easy to fall into the trap of thinking everyone is like us – they learn the same way, they use the same tools & tech. But field service workers have different needs than so-called "knowledge" or "information workers" do. They work in very different environments. They use different applications and devices. Their work is far more tightly scheduled and organized.

It's forgivable. Most of us don't have the boots-on-the-ground experiences with frontline workers to understand their realities. But we have to put ourselves in their shoes. How much time do they have for training? What devices do they use to access information? How do they want to learn? All of these things dictate the type of learning they need, and the type of learning technologies that are appropriate to create and deliver that learning.

The bottom line: Creating effective systems training for field service workers doesn't have to be a problem. You just need the right tools for the job.

The Good News: There's A Better Way

**There is a path towards better field service systems training.
What does that look like?**

- ## Mobile-First Learning

  Field service workers are typically deskless workers. But the way most e-learning content is delivered today is via desktop or browser, which don't work well on mobile devices. Your frontline e-learning content should be designed with mobile in mind first. Additionally, they don't have the time to sit through long modules and lessons.

  They need micro-learning content that can be consumed in the flow-of-work, where and when they need it.

- ## Interactive and Contextual

  Field service workers are hands-on workers, and often hands-on learners. And systems training should be hands-on as well. And that means true, high-fidelity simulations that allow learners to get comfortable with their applications in a safe, sandboxed environment.

  More importantly, simulations and lessons should be contextual. That means designing content that allows them to train on their apps how they are used within their business workflows.

- ## Authoring Tools Optimized for Field Service Systems Training

  This includes the ability to easily capture app screens and workflows; edit and change screen text; create high-fidelity simulation experiences; and produce multiple modes of learning including videos, walkthroughs, practices and knowledge checks. Finally – and most importantly – the content needs to designed for consumption on different mobile devices and form factors.

The bottom line: Effective systems training for field service workers requires a different approach. One that combines interactive training, mobile delivery, and micro-learning content.