



Brandon Hall Group
**EXCELLENCE
AT WORK**

Executive Interview

with **Frances Kleven**,
Director of Enterprise Customer Success
LearnUpon

and **Aisling MacNamara**,
Senior Learning & Development Manager
LearnUpon

Extended Enterprise: Bringing Training
to Multiple Audiences

About LearnUpon

[LearnUpon LMS](#) makes learning simple, so its impact can be big. By championing learner-centric experiences and results-focused support, LearnUpon makes it easy for global businesses to centralize and build learning strategies that drive real business results.

Recognition

A Brandon Hall Group Platinum Preferred Provider, LearnUpon LMS earned five Brandon Hall Group HCM Excellence Awards in 2022.

EXCELLENCE IN HCM AWARDS



| | | | |
|--------------------------|---------------|----------------|----------------|
| Learning and Development | 2 Gold Awards | 1 Silver Award | 1 Bronze Award |
| Talent Acquisition | | | 1 Gold Award |

The Brandon Hall Group Preferred Provider Program is specifically designed as a single source of truth that can validate your technology selection decisions.

[Learn More](#)

About Frances Kleven



Frances Kleven manages LearnUpon's Customer Success team. With over 15 years of experience in technology and education, she has worked with some of the world's biggest organizations, helping them to develop and implement comprehensive training strategies.

About Aisling MacNamara



(Ashlin) Aisling MacNamara is a Senior Learning & Development Manager at LearnUpon. She has designed and led the implementation of innovative learning solutions for hundreds of learners through her experience in fast-growth technology companies. Aisling is passionate about creating learner-centered programs that help drive company objectives.

About Rachel Cooke



Rachel Cooke is Brandon Hall Group's Chief Operating Officer and Principal HCM Analyst. She is responsible for business operations, including client and member advisory services, marketing design, annual awards programs, conferences and the company's project management functions. She also leads Advancing Women in the Workplace and Diversity, Equity and Inclusion initiatives, research and events. Rachel worked in the HCM research industry for 20+ years and held several key management and executive positions within the Talent and Learning Research, and Performance Improvement industries.

Q

RACHEL

What is the state of extended enterprise learning?

A

FRANCES

Training our customers is almost the equivalent of new student orientation at universities. Thirty years ago, new student orientation didn't really exist as the full-fledged program that it is now. We need to make sure our students have the right introduction to this and that they have the right support training to be successful over the next two or four years. We're no longer at a place where we're asking, do we need to train our customers, partners or members? We know that we do but now a tick-box. Do we have a plan to train our customers? Is that virtual? Is that in-person? It's a requirement. It's not a nice-to-have, it's not an experiment anymore; we just have it. So, now we train our customers, but so what? What results are we delivering to our business? Are we reducing costs? Are we driving revenue? Are we driving our brand and our reach? The most exciting training programs are doing that; they're not just a tick-box exercise.

When COVID happened, we had people thinking about different ways to train out of necessity. What were the most effective ways to reach people and connect with them? I now see a trend

of going back to in-person, but it was easy and we know how to do it. We have some belief that it's somehow better or higher value. I'm disappointed that we haven't continued the conversation around all the different ways of training people and finding the most effective ways to do it. It makes you think that we don't measure the efficacy of our programs very well.

A

AISLING

We need to move into a more impact-driven mindset, which mirrors a lot of what's happening on the employee side. We know that we need to make employee training really effective and should link to our objectives. Employee training is a bit more advanced in terms of linking to impact, using an LMS and all the right features for it. With customer training, there's an education process that some of our customers are going through in terms of the real value of having online training available and all the opportunities that it opens up for them.

Q

RACHEL

How do you articulate the benefits of training to attract your audiences?

FRANCES

A We work with customers in a high-touch way. We spend a lot of face-to-face time with our customers but we also ask that they complete on-demand training on our product. The reason for that isn't to spend less time with them; we want to have meaningful conversations with you. It requires that we share a baseline level of information and understanding of the product. It's a bit of a challenge, but it also articulates why you're asking your customers and partners to do a particular training in a particular way. They see what they can get out of that, but also what they can do next. I can watch training sessions and think, this is not an effective way of learning. This is just staring at someone walking through software on a screen. With that, there's no interactivity and very little conversation. If we're being honest with ourselves, there's maybe 50% attention because we're all so distracted. However, we tell our customers that if they spend 30 minutes with the interactive training, they'll be doing things, asking questions and assessing their knowledge. If they can do that, then the time we spend together can be focused on conversations about business objectives and strategy. That's the most high-impact way we can spend time together.

Learners want in-person training, not because it's more effective, but because it's easier to not do anything. If you've ever been in a training session, you've asked people to do something interactive, to get into groups and to do an interactive assignment. They don't enjoy it. We have a lot to do about educating our customers about the value of the training and holding ourselves

accountable. We expect our training programs to deliver a level of results for you. We expect that if you take this course, you will be able to use our platform more effectively and not need to call our support team or spend hours on emails to our customer success team.

RACHEL

Q What challenges did you experience?

FRANCES

A One of the most common is around support tickets. The question I'm more interested in isn't, are they less likely to contact our support team? For us, we care about the quality of the questions that come to our support team. Does that improve based on the training we've provided? Instead of people coming to our support team asking, "where do I find this button or how do I do this basic functionality?", their question may be, "I'm looking to set up an integration. Can I get some advice about best practices for doing that?" When we started our customer training program, we were looking at time-to-value. How long did it take a customer to launch our software? We looked at revenue metrics around churn and expansion to hold our training programs accountable.

(continued)

People who use our software effectively should not only stick around with their subscriptions but they also should continue to grow because they become more and more effective. Our most successful customers are looking at business results. They're not looking at completions, which should be secondary. If we have a course that everyone loves and says this is five stars but you see no change in business metrics, then you're on the chopping block when they're looking to cut costs on software.

Q **RACHEL**

Do you have similarities in developing your employees versus your partner teams?

A **AISSLING**

There are a lot of similarities. The main difference with your internal training audience is you have some natural engagement. They're maybe coming in to onboard and they're excited. One thing I'm most interested about in terms of extended enterprise is how Frances and I can share resources to deliver the best type of training to employees, customers and our partners. As

an internal training team, how can we scale our resources in an easy way to our partnerships team who might be under-resourced to deliver training and can we link that back to a business goal? If you're an internal training team and you're not connected with your customer training team, this is a really good time to start having those conversations for next year.

A **FRANCES**

If you think about those metrics — revenue, growth, support tickets — we have actual LearnUpon employees who work on those functionalities. Our sales team and customer success team are responsible for growing revenue. Our support team is responsible for tickets. We're all working on the same product. If our team is better informed about our product and new features, along with our customers, that's going to drive the reduction of support tickets or increase revenue. Obviously, we need our customers to understand how to use our product effectively but we also need our sales team and our customer success team to know that as well. The opportunity there is so massive and if I look at it, I think, "why have we not been more aligned in the past because it's the same product, it's the same content and we're measuring toward almost the same things, just from different stakeholder groups?"

AISLING

A We started apart and now we're trying to come back together because we realized the synergies that we can have. If you can just start having some conversations now around thought leadership and sharing things, that can be a productive way to start to connect those teams.

FRANCES

A When I asked customers what was on their minds for 2022, integrations were top of mind. These are people who worked with a variety of different audiences in their company. There's this need to integrate tech stacks that feed into the metrics. There is such a massive challenge that organizations have with siloed teams. When people tell me they don't have the data, I tell them they actually do, you just don't know how to access it. It's almost worse when it's there but you don't know how to pull it all together.

RACHEL

Q What do integration and technology requirements look like?

FRANCES

A It's rare that we will get an internal training team and a customer training team to come together. The business side and the customer success team are using the same platform but are still very siloed. There's not a joint conversation about selecting the right product or even how to use it. There's a gap as one team uses it effectively and one team struggles. LearnUpon integrates with Salesforce. We're able to pull data into Salesforce to track our customer performance: Who engages with our training program? What's the relationship to retention or NPS? Now, we can pull in employee information so we can see the relationship between the training that the LearnUpon employee took and how it's helping customers expand their business. The goal is not just integrating your systems for efficiency, but driving your strategy. We make the argument that you're losing money by not investing in this integration.

AISLING

A From an internal perspective, it can be harder to get buy-in for integration. If you can link it to both employee impact and customer impact, you can make a compelling business case. If you're leading internal training and you're finding it harder to get resources, this can be a way to scale just a little bit more and work smarter with what you have.

FRANCES

A Is the integration the thing that is preventing me from measuring, tracking or delivering results? If we're being perfectly honest, it's not. It's a strategic, important tool but I see so many people say we can't move forward because this can't be integrated, whether it's your LMS, CRM or your support tool. The data exists in those places; you can do a lot with it. All that data is in your learning system — start there.

RACHEL

Q Are there any final insights you'd like to share based on strategies for success?

FRANCES

A I look at customers who have won Brandon Hall Group awards because it's important to have inspiration. It's important to look at someone who is doing this very effectively and is celebrated for it. Is there a model that you can look at from someone who is driving the reach of their brands because of their customer training program or driving new business revenue through their training program or increasing employee retention through their training program? I would not discount how difficult it is to do that and how much time goes into building those types of metrics. If you can look at those examples and

say that is the pinnacle, that is what best looks like and that's what I'm building toward, you can then challenge yourself and say the tick-box is boring and uninspiring for yourselves, your teams or your customers. If you can just say that's not going to be good enough. We're going to look at what the best looks like and we're going to try to build there and innovate up into that and then become an innovator or someone in that space. I think it's important to recognize this is fun stuff. This is inspirational, this is transformational stuff.

If you're leading from an internal training perspective, a great first step is just to connect with other people in your company who might do training to drive cohesion, break down silos and bring those teams together.

Here are some ways to listen to the interview on Brandon Hall Group's Excellence at Work Podcast:



**Brandon Hall Group
EXCELLENCE
AT WORK**

About Brandon Hall Group

With more than 10,000 clients globally and 28 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

Membership

Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

Advisory Offerings

Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.

Excellence Awards

Two annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

SOME WAYS WE CAN HELP

ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM

recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

SMARTCHOICE® PREFERRED PROVIDER PROGRAM

uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.