

# ***You've Installed New Software...Now What?***

## Developing End User Training Materials

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We see it all the time...organizations purchase new software programs and then rely upon the IT support personnel to train employees how to use it. The IT folks don't understand how the software will be used by your staff, they just know about the functionality and how to make it work on your computer systems. The staff become frustrated because they are expected to jump right in and use the new software. IT says its easy...so why can't we make it work? What are some issues?

### **The Challenge:**

A construction manufacturing organization purchased a new software program that was designed to manage their detailing, customers, manufacture and delivery functions of the business. This system could do so much. The organization divided its employees into users based upon function: contract management, detailing, manufacturing, transportation, etc. Each user would only access a small part of the software package. The new software also required a change in the way each staff person worked. How can you create training materials that are appropriate for each function? Here are some steps to consider:

1. **Document workflows.** One great tool to begin to document the workflow of each function is to create a process map. Analyze the way the work gets done. Identify what steps of the process require using the software, what steps do not.
2. **Use screen capture software.** Our favorite software for creating pictures of the computer screen is SnagIt. The pictures can be saved in a variety of formats and are easily inserted into your training documents. Camtasia is a software program that allows you to create videos of someone actually using the software, complete with audio. These programs are easy to use and are reasonably priced.
3. **Create documents.** Learning to use new software is much easier if you create a step-by-step guide that is specific to an individual or function. Incorporate both the non-computer steps as well as all the screens and field definitions for each job function.
4. **Pilot your documents.** Be sure to have someone walk through your documentation before you publish it. It is amazing how easy it is to leave out steps, use jargon, or forget to define critical fields for users. We like to have someone new to the process use our documentation. If they can perform the tasks, then great. If there are places that cause problems, you can make changes.

*Deborah Miller, a Project and Process Specialist, has more than 25 years consulting and coaching experience. Deb believes in sharing her expertise with her clients so your staff learns how to manage and coach others—becoming self-sufficient and proficient. Deb is a Six Sigma Black Belt and Lean in Healthcare certified.*

- Process & Value Stream Mapping
- Technical Documentation
- Project Management
- Process Reengineering
- Change Management
- Lean Facilitation