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Training on your Software: Square peg, round hole?

By David Felix-Davies

The most successful implementations start with the software provider and the IFA practice working together to ensure your business proposition and objectives are understood and how the software will be best installed to support your specific needs and resource availability.

Right from the very first meeting, which may be face to face or remotely, the IFA practice needs to have confidence in both the software supplier's competency and the product. So, having made the decision and investment to proceed, what helps to ensure the implementation is successful?

Plum Software has over 25 years of working closely with IFA practices and here are just some of our suggestions.

Being realistic

Setting out a realistic timetable for data transfer, installation and training is essential if you want to ensure a smooth transition to its full use.

Using time wisely

Software training on the agreed implementation is the key. Historically a trainer would either train a group of new users at the premises of the software supplier or the trainer would visit the IFA practice. This often proved to be ineffectual as many users find a full day of training to be too much of an impact on their normal work schedule and moreover, information overload for just one session.

Modern training techniques favour training to be given in short, sharp sessions using many forms to suit a client's varying needs as they progress through the journey. They can be conducted remotely using audio visual software with the sessions tailored to the exact requirements of the attendees. This way of training allows the trainer to accurately target the areas that the trainees need to learn. An added benefit is that the trainees can then practice the routines they have just learned before progressing to the next stage.

They allow better retention since they are shorter, more relevant and provided at the appropriate time for the attendees. A full, onsite training day generally lasts for about 5½ hours with 30 minutes for lunch. Remote training typically has a duration of 30 minutes up to 2 hours, so three remote sessions that are tailored to the exact requirements of the business will enable new users to learn much faster and to gain maximum benefit.

Your business, your trainer

Initial training on implementation should always be given on a one-to-one basis, i.e. one trainer working with one company. There are many ways to complement initial training and support ongoing training. Having an accessible library of these will allow users to view at their leisure and even share the experience with colleagues! These can include: -live and recorded webinars and videos breaking the new software down into many small component parts together with quick reference guides - which are also excellent aids.

Ongoing commitment

Your account manager should personally contact you to discuss how the training has progressed to date. Together you can discover areas of weakness, uncertainty and its potential. The software provider is there to advise how further training will maximise the use of your new software in your business it should not be a one stop service!

Moving with the times

Finally, as the software is enhanced with new functionality or updated to conform to changing regulations, it is essential your users are aware of these changes and how they work. At Plum, we have introduced a 'What's New?' webinar ensuring that all users are fully aware of any enhancements and its capability, thereby a continuous culture of using your software to its maximum potential.

By being client focussed has allowed Plum to have over two decades of success delivering software solutions to the IFA marketplace. – A pedigree we are proud of.

If you would like to discuss how we could support your business please call us on 0203 873 5566 or email sales@plumsoftware.co.uk

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