End User Education Planning Workshop

Overview:

This workshop is designed to cover the material necessary for your training team to conduct training sessions to educate professional, administrative and secretarial staff. Key aspects of the course are the review of client training plans, documentation, messaging and delivery mechanisms. In addition, the workshop will cover the benefits and features associated to different types of users within the organisation to further strengthen the training.

Recommended Attendees: Trainers and CRM Team

Optional Attendees: None

Duration: 1 Day

Pre-Requisites: Knowledge of InterAction Fundamental Concepts or Project Team End User Training.

The client will provide the training facilities, environment and training data.

Maximum Number of Delegates: 7

Location: Customer Site

Learning Outcomes:

- Understand end-user tasks in the Web Client and InterAction for Microsoft Outlook (IMO)
- Complete InterAction end-user tasks in Word (optional)
- Understand the benefits of using InterAction for the various groups of users
- Identify tips for teaching users of varying job roles
- Understand the framework of developing InterAction courses
- Understand where InterAction fits in with your organisations strategy for CRM

Course Content:

- Understanding the CRM and training objectives of the organisation
- Understanding what a successful rollout of InterAction would mean
- Understanding the of benefits and requirements for the different types of user
- Best practices for users
- Planning content of training courses
- Planning scenarios into courses
- Linking benefits of InterAction features and functions into courses
- Attendees walk-through outline of courses
- How to engage positively with the firm and promote InterAction
- Follow-up actions and next steps