

Managing diverse CRM training requirements with ClickLearn



QGate, a UK-based Microsoft partner serves a diverse set of clients. The company is a leading implementer of Microsoft Dynamics, specializing in delivering Dynamics 365 for Customer Engagement solutions to small and medium enterprises customers across the UK. But QGate is also an independent software vendor (ISV) reaching customers around the world.

To help continually meet the training and documentation needs of both of its customer bases, QGate adopted ClickLearn and incorporated the platform into their ongoing support and training delivery processes.

IMPLEMENTING CLICKLEARN

Although documentation requirements are significant across the business, there were two key objectives for adopting ClickLearn:

- 1 *To provide customer specific training and user help materials quickly and efficiently*
- 2 *To enhance QGate's own product documentation and guided assistance available on a 24/7 basis*

Rowland Dexter, Managing Director of QGate, explained.

The prime driver for adopting ClickLearn was a requirement to support a role out of around 900 global users. Traditional training and support methods just would not work.

The trouble was that from the customer perspective, they couldn't afford the training time and investment with the inherent geographical challenges.

Having found ClickLearn, we explored the other use case examples and saw it as a way to enhance the development and delivery of training and support across a number of areas.

We have lots of materials for supporting our own intelli-CTi and Paribus products, and we saw ClickLearn as a way to not only speed up the production of the support materials but also enhance the types of materials we can offer. Having functions like the feedback and translation in-built are key enhancements.

FACTS ABOUT QGATE

- Leading UK-based CRM implementation partner focused on Microsoft Dynamics 365.
- Needed a way to train customers on evolving Microsoft products and its ISV solutions.
- Bringing a solution from the UK to the world by using ClickLearn language translation functionalities.
- Giving partners and customers a boost by expanding documentation and training capacity.



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We needed a cost-effective way to deliver training and documentation to meet these different audiences. I looked at other solutions that purport to do this, but they were either expensive or not very feature rich. ClickLearn offers great value with excellent features.

QGate moved ahead with adopting ClickLearn's training software and, as part of its dedication to delivering high quality training, added a professional trainer to their staff.

"We trained him in the toolset, which he picked up very quickly. Now we offer a great platform and a great level of content," said Dexter. "The results that we have are very impressive. It's amazing how quickly he can edit, modify, and update the training. Now we offer a very cost-effective ClickLearn as a Service solution for the online 24/7 availability that our customers have been asking for."

During its first deployment, ClickLearn worked seamlessly for a QGate client with 900 users worldwide. "This was the only sensible, realistic way to support their users with this digital assistant platform. We've been able to offer customized content to users," he noted.

ACHIEVING A GLOBAL REACH

For QGate, having both in-house product and training excellence is a key differentiator in both its home market and abroad. The company is starting on multilingual capabilities to extend the reach of its ISV solutions globally, with full availability of the new multilingual content coming soon.

"As a ClickLearn Service Provider partner we are able to roll out multiple portals very cost effectively. We have now also become an Authorized Partner for ClickLearn, the first in the UK, which means we can also resell the ClickLearn product, and provide additional supporting services.

We have created some core content which we continually enhance. Having it in every required language is very useful. With our ISV products, we are migrating our documentation into ClickLearn to make it more accessible in other geographies. Having that multilingual content for in-stall and use and guidance helps to drive customer adoption," Dexter said.

"We're big fans of ClickLearn. We want to very proactively take this out beyond our own customer base and support other customers and partners with the platform customers and partners can take our ClickLearn as a Service offering of ClickLearn and embed it. Over the next few months, taking ClickLearn even further will be very exciting."

Rowland Dexter, managing director of QGate, explained.

FACTS ABOUT CLICKLEARN

- Integrated with the full suite of Microsoft Dynamics including Dynamics 365 Finance and Operations, Customer Engagement, Business Central, Dynamics AX, Dynamics NAV and Dynamics CRM
- Automatically produces seven different types of content such as narrated videos, PDFs and live assistants
- Helps to ensure user adoption
- Easy onboarding
- A customizable template-based system for compliance

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