

Benefiting from the challenges of documentation and software updates



For partners and customers historically, one of the great challenges customers struggle with when working with earlier versions of Microsoft Dynamics software is outdated or nonexistent documentation. Several years ago, documentation for Microsoft Dynamics NAV became less of a priority as Microsoft began transitioning to the new architecture in preparation for releasing Business Central. In fact, no official documentation exists for NAV 2017 or NAV 2018.

“It felt a bit embarrassing to tell people we didn’t have anything newer,” explains Kerry Peters, Microsoft MVP and CEO of New View Strategies, a dedicated provider of Business Central and NAV training and consulting. “We also hear that the official documentation is often very textbook-like and doesn’t include real-world tips and tricks adopted by professional users.”

EFFICIENTLY ADAPTIVE

With the global nature of software and the different business processes that different countries have, there is no way you can possibly include everything in your system documentation, unless you dedicate significant resources to constantly updating it.

Kerry Peters, Microsoft MVP & CEO at New View Strategies

“Companies don’t typically allocate a lot of money on documentation. There can be a big budget for implementation, but money for training and documentation sometimes gets left behind. Often, though, when the business goes live and the consultants go away, they realize that they don’t know how to use the software – that’s when they come to us,” Peters says.

Even with a full complement of training, research has shown that most learners forget 80 percent of what they have learned within 30 days. To mitigate this “forgetting curve”, New View Strategies focuses on reinforcement, practice, and refreshing knowledge. As a result, they needed a way to be adaptive to frequent software changes and offer continual refreshers for end-users.

To meet the diverse training needs, New View Strategies saw potential in ClickLearn’s multiformat and multilingual features. While New View Strategies quickly received interest in the advanced multilingual capabilities, for Peters the basic features are some of the most valuable parts of ClickLearn’s offering.

ABOUT NEW VIEW STRATEGIES

- American Dynamics training provider specializing in NAV and Business Central
- Needed to keep up with rapid product changes and the learning styles of adults
- Major improvements to training and go to market with adoption of ClickLearn
- Able to provide new value for customers throughout North America

ABOUT KERRY PETERS

- Microsoft MVP for Business Applications, | Microsoft Certified Trainer | Dynamics NAV and Dynamics 365 Business Central
- Owner, trainer, and consultant for New View Strategies
- Experienced Corporate Controller with a specialty in Microsoft Dynamics NAV and Business Central



For further information visit our website, www.clicklearn.com

FAST, CONCISE AND CONSISTENT

ClickLearn for Business Central is incredibly fast, improving efficiency and allowing us to move at the pace we work as we document. People working on documentation love that.

Kerry Peters, Microsoft MVP & CEO at New View Strategies

With ClickLearn's ability to condense instructions into shorter texts, New View Strategies offered a customer to document a process for free, distilling a 30-page document down to just five. The customer was amazed and as a result, requested help with a substantial project of converting their documentation of over 500 processes, many of which were up to 30 pages.

According to Peters, another key feature with ClickLearn is the common language that it imparts to the documentation, regardless of who is contributing. ClickLearn sets a common grammar and voice so that multiple contributors can work on documentation, creating a consistent and professional end product.

"The ability to revise and update is key. How many times do we build documentation, roll it out, and it's immediately obsolete? With how quickly software is updated, we need only to replay it, run it through, and pick up whatever the difference is," Peters says. The Replay feature not only automates the process of updating content but it also helps New View Strategies catch easily overlooked changes to the software, ensuring a higher degree of accuracy.

NEW OPPORTUNITIES

As an essential communication tool with customers, ClickLearn enables New View to provide quick documentation of newly developed processes, and to provide refreshers.

Being able to speak our clients' language is a big connection point. If we don't understand our clients' business, we won't be that trusted advisor that we need to be. Using a tool that works within their systems and includes all their special processes, customizations, and terms makes the connection deeper.

Kerry Peters, Microsoft MVP & CEO at New View Strategies

New View Strategies also uses ClickLearn to provide valuable reference materials to supplement their classes. "By taking advantage of the multiple formats, the software expands our classroom offering to also include custom reference material for students to take home with them." Peters says.

Clicklearn is a way to provide new service offerings to customers. "Two years ago, I wouldn't have pitched documentation as part of our service offering, because the number of hours required would have resulted in a ridiculous quote to the customer. Now my people don't need to dedicate all their time to documentation and my experienced consultants can easily provide input. It adds so much value to our services. How do we put a number on that?" Peters concludes.

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 ensure user adoption
- Easy onboarding
- A customizable template-based system for compliance

www.clicklearn.com



For further information, contact Michael Randrup, Managing Director and Co-founder, at mra@clicklearn.com or visit our website, www.clicklearn.com