

Ascensus Enabled Faster Content Creation in Record Time

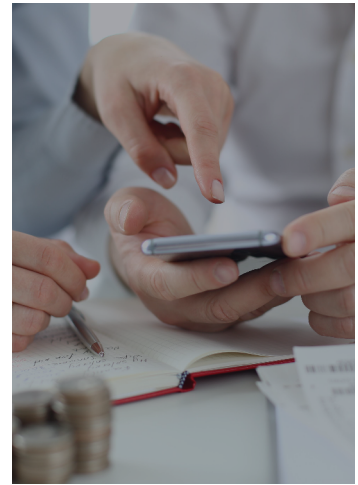
Ascensus used ClickLearn to create a portfolio of user training, supporting them in revamping their CRM strategy towards efficiency. The solution helped them increase overall user adoption.

50+

Training resources created
in just 3 months

300+

ShowMe videos watched



Challenge

Bridging the gap between workflows and adoption

Ascensus was struggling to create training materials for key workflows and roles at its organization. The company chose ClickLearn for its Dynamics 365 training platform because it needed a way to ensure intuitive end-user training while driving their CRM enterprise roadmap forward.

“ When I first saw ClickLearn, it blew me away. But when I got into the contractual process, I realized this was a much bigger tool that has connectivity to Web applications, Microsoft Office products, etc. It can be used for anything and it's simply a smarter way to train.

Dan Madden
CRM Program Manager, Ascensus

When Ascensus evaluated ClickLearn, three capabilities stood out:

- ✓ Easy support in revamping their CRM training strategy towards efficiency
- ✓ Easy-to-use features and interface that accelerates the creation of training materials
- ✓ The ability to create training content in multiple formats in minutes

Solution

Dynamic creation of training materials

In just over three months, two authors were able to develop and publish over 50 different training resources, each of which provided written documentation with screenshots (online or to export and save) as well as a Show Me video and two hands-on training exercises ('Test Me' and 'Try Me'). This was released for all online users and the custom help link was updated to point right to the ClickLearn learning portal. With the integrated Office 365 login, users could quickly access the content they needed.

“We've been driving an aggressive CRM roadmap across the entire enterprise, and ClickLearn better enables us to deliver product innovations without adjusting our staffing model across training delivery. The only way to get in front of that was to think about a different training strategy,” says Dan Madden, Ascensus CRM Program Manager.



Company Name
Ascensus

Industry
Financial Services

Headquarter
Dresher, PA, USA

Company size
3,300+ employees

Year founded
1975

Integrations
D365 F&O / AX, D365 CE /
CRM, D365 BC / NAV

Website
ascensus.com

“ In a recent cloud migration involving over 100 users, ClickLearn was the center of our training plan. It enabled us to launch the application faster while helping increase overall user adoption.

Dan Madden
CRM Program Manager, Ascensus

Several of the Ascensus departments running a Dynamics 365 environment are using the core entities of Accounts, Contacts, Opportunities, and Activities within different Apps and Forms. As Madden explains, this was a great use case for ClickLearn's Replay feature which allowed the team to re-record the same training on a different form or organization. "Replay greatly reduces the time to release training for new forms and fits in our agile project methodology," he adds.

Results

Keeping pace with a strategic growth strategy

Kylie Kiser, Ascensus CRM Product Owner, estimates that the time the team spends on creating one training is around 3 hours, including all the different formats, reviews, and tests. "Compared to the time it would take to produce such training manually, being able to generate it in 3 hours at maximum, in all these formats, is just incredible for us".

In Madden's words, the CRM project team has caught attention in the larger Ascensus enterprise. "As of now, we're the only group using this new innovative way to train. I think there's a lot of people looking at us as a guinea pig to this, and so far, we've had a tremendous success. I believe ClickLearn will be adopted across the larger enterprise to help with a variety of different training initiatives crossing a variety of different products to help us keep pace with our strategic growth strategy," he says.

“ We have already seen the power of ClickLearn in bringing training materials to our users faster, giving us the ability to update more efficiently and provide multiple learning formats to offer the best possible learning experience for our organization. If someone asked me if we would be successful without this product, I'd say 'absolutely not'.

We would have to hire dedicated training resources and also slow down our product roadmap to keep up with the pace of training.

Dan Madden
CRM Program Manager, Ascensus

About Ascensus

Ascensus is the largest independent retirement and college savings service provider in the United States, serving more than 15 million people across 150,000+ retirement plans, 529 college savings accounts, and administering more than 1.7 million IRAs and health savings accounts. The service provider has helped millions of Americans save for retirement, education, and healthcare.