

A photograph of two men sitting at a table in a meeting. The man on the left is wearing glasses and a blue button-down shirt. The man on the right is wearing a white shirt and is holding a blue pen. They are looking at a laptop screen. There is a white mug on the table. The background is a blurred office setting with bookshelves.

Case Study: Implementing an LMS in SharePoint 2013

CorVel: A National Provider of Innovative Risk Management Solutions

Many organizations have significant investments in SharePoint. If you are already using SharePoint as a corporate intranet portal, it makes sense to consider an LMS with strong integration points to SharePoint.

CorVel has a well-developed intranet portal in SharePoint and had previously implemented a home grown LMS using InfoPath, out-of-the-box SharePoint capabilities, and some custom code to administer and report on courses.

After several years of operation, additional requirements, including tracking continuing education credits for our staff, tracking attendance at training webinars, and awarding continuing education unit (CEU) credits for watching recorded videos, led CorVel to evaluate the LMS market for SharePoint-friendly solutions.

Key Findings

"We went into [ShareKnowledge] expecting a fully integrated SharePoint product and it is. There are no surprises. ShareKnowledge did just what it was supposed to do."

Matthew Smith, Documentation & Training Manager, CorVel Corporation

ShareKnowledge delivered on its promise for Corvel, in the following ways:

- **Rapid time to value** - CorVel installed ShareKnowledge and was fully operational in one year, retiring its original LMS with minimum hassle and no surprises
- **SharePoint and Active Directory Integration** - Integration with existing SharePoint content, reuse of SharePoint network, and complete reuse of existing approved personnel profiles, organizational structures, and related SharePoint metadata
- **WebEx integration capability** - WebEx integration is extremely useful, works perfectly, and allows 24/7 training delivery
- **SCORM-compliant courses** - CorVel now offers SCORM-compliant courses, which it could not do with its original LMS
- **Ease of use** - ShareKnowledge's ease of use, and familiar SharePoint-like administration meant trainees and administrators, and the Documentation & Training team experienced few issues
- **Lifelines ready for action** - Tools are at our disposal for monitoring training success. We can reach out and help in cases where trainees didn't quite succeed at the training.

Business Conditions and Business Needs

CorVel's homegrown learning management solution (LMS) was based on Microsoft SharePoint, InfoPath, and additional customization. This solution worked for several years but additional business-critical requirements overwhelmed it. CorVel, a worker's compensation claims administration organization, was motivated to acquire the new learning technology by the following requirements.

- **Integration with existing SharePoint environment** – From a business investment and efficiency standpoint, CorVel needed the new solution to fully integrate with their existing SharePoint network. CorVel depends on SharePoint for content management and organizational knowledge management features. Furthermore, CorVel wished to eliminate duplication of effort by managing content across multiple applications. For these reasons, SharePoint integration was a key factor.
 - **Compliance and Security Training** – CorVel wanted to offer company-wide courses to satisfy compliance and security requirements with audit trail and digital signature capabilities. Handling critical education and testing needs for thousands of employees was beyond the capability of the homegrown solution.
 - **Training and Testing Results Tracking** – CorVel staff are required to complete certain trainings and the organization wanted to track attendance at web training and give credit.
 - **Short Learning Curve** – CorVel looked for ease of use to ensure their new LMS became effective quickly.
- Future Vision** – CorVel anticipated a move to comprehensive on-board training and elimination of a costly, lengthy, and disruptive annual in-person training session. CorVel needed an LMS that would make this type of training easy to deliver.

CorVel's training constituents included

- **The entire 3,000+-employee base** for HIPAA, HR Compliance, and Security training.
- **Internal operations team of 100s of workers** requiring training on CorVel's unique internal enterprise applications for worker's compensation.
- **Account managers** and sales staff who need regular product training.
- **Internal client account services teams (50-100 members) for large clients** - CorVel must provide specific instructions to account services teams on special handling for specific individual clients. This training is highly specific to a particular customer.

Client-specific training example:

CorVel handles large private employers and public entities. Customers expect claims to be handled in their own particular way. CorVel strengthens its business relationship with our customers by demonstrating the competence of its operations team with specific customer claims handling requirements. Using ShareKnowledge, CorVel's trainers

- Host training calls for the CorVel operations team assigned to service specific customers;
- Target the right team members to ensure they are aware of the call and attend;
- Record the call, for training refresh and new-employee training;
- Administer and record a follow-up quiz to attendees to ensure knowledge transfer;
- Demonstrate to customers that their CorVel operations team has been trained and tested.

Goals Established through Implementing Learning Technology

CorVel established business and technology goals for their ShareKnowledge implementation and achieved those goals, as described following.

CorVel's key business goals were to

- **Ensure CorVel's whole team stays trained and current** on handling HIPAA compliance and security issues;
- **Target client-specific training, testing, and client-specific competence** for selected adjusters, at a granular level;
- **Enable rapid on boarding** and effectiveness of new hires by title or job role (in addition to other options including department, business unit, job duty, region or other customized groups or training paths);
- **Eliminate training delays, high costs, and work disruption** caused by an annual two-week in-person training regime;
- **Encourage participation in weekly training webinars** with easy registration and attendance;
- **Emphasize follow-up training and review** by publishing webinar recordings for trainee review or missed-training catch up;
- **Measure and track training webinar attendance** and after-training quiz results to ensure satisfactory knowledge transfer;
- **Motivate team members** by offering Continuing Education Units (CEU) to training webinar attendees who successfully completed training and passed the associated tests.

CorVel's key technology goals were to leverage their commitment to SharePoint with deep SharePoint-LMS integration that would

- **Use the experience and training of their existing SharePoint administrators** to best effect;
- **Provide familiar SharePoint-like interfaces and behaviors** to the CorVel user community already comfortable with SharePoint;
- **Maximize the use of existing Active Directory metadata** including organizational structure, groups, and individual credentials already established in their Microsoft Active Directory;
- **Ensure seamless web conferencing integration** for effective training delivery;
- **Enable a smooth transition from their existing home-built LMS** to the LMS they would acquire.

CorVel achieved its business and technology goals for its new LMS within one year of acquiring, installing, and implementing ShareKnowledge.

With ShareKnowledge, client-specific procedural training is now a regular occurrence. Procedural training includes client-specific requirements for medical cost approvals, allowable times for dealing with problems, geographic considerations, and other specialized concerns. This type of training includes a combination of instructor-led course work, written material reviews, and quiz follow-ups.

CorVel implements client-specific instructor-led training with the account manager. A learning-management team member acts as the moderator. This kind of training involves 50-100 CorVel professionals at one time.

Design and Implementation

The design of ShareKnowledge as a SharePoint-based LMS had several advantages for CorVel. These advantages include:

- **Increased utilization of existing SharePoint technology investment** and elimination of duplication of effort. The CorVel IT team benefits from one technical infrastructure. Employees benefit by having a single environment where all types of shared content and organizational "knowledge" are now stored and managed. The training team benefits by having a single place to store and manage content without duplication of effort. ShareKnowledge LMS integrates with SharePoint workflows, version control, and SharePoint libraries.
- **Integration with Microsoft Active Directory (AD)** – Re-use of all authenticated user profiles, titles, and groups already set up in Active Directory. This avoided data duplication and additional labor that would have been necessary to establish a redundant set of employee records
- **Assignment of trainings based on employee title and current manager** – Already established criteria in AD profiles form the basis of targeted training assignments, instead of force-fitting employees into arbitrary LMS hierarchies or categories. Training assignments can be made dynamically based on organic CorVel roles
- **Offering CEUs and recurring trainings** – CorVel's account executives must obtain 50 CEUs per year and must complete all their required e-learning courses. CorVel hosts about 100 webinar trainings per year, and attendees to live webinars earn two CEUs. Those who miss the live webinar access a recorded version of the webinar and earn one CEU for watching the recording. Account Executives also earn CEUs by participating in a mentorship program. ShareKnowledge hosts information about the mentorship program, including how to participate satisfactorily and earn CEU credits.
- **Training tracking and accounting "safety net"** – Especially in the first 6 months of ShareKnowledge operation, a serendipitous side benefit was the ability to track webinar-based training attendance, even if the trainee joined the webinar directly, instead of through ShareKnowledge. This ensured that all trainees received training credit and offered insight into which individuals might have needed additional mentorship outreach from the Documentation & Training organization.
- **Engagement of CorVel's existing IT resources already trained, experienced, and comfortable** with supporting SharePoint. The degree of integration between SharePoint and ShareKnowledge was and remains the key to maintaining CorVel's confidence in ShareKnowledge and its support
- **Integration with web conferencing solutions** – ShareKnowledge offers out-of-the-box WebEx integration. *"The fact that our employees can get onto a web conference for training and have it operate seamlessly is huge for us,"* stated Matthew Smith, Documentation & Training Manager at CorVel.

The design of ShareKnowledge directly supported the IT support team, and Documentation & Training department at CorVel, and by extension, CorVel's many clients.

Delivery of the Program

CorVel experienced a successful, straightforward, and smooth installation and rollout of ShareKnowledge. There were no technical, organizational, or social impediments to adoption, and CorVel's distributed work force received the additional benefit of increased connectedness to CorVel. The installation and rollout proceeded as follows:

- **Simple Beginning** – Four months before ShareKnowledge's implementation, CorVel gave regular reminders of ShareKnowledge's arrival during monthly calls. The Documentation & Training department developed simple documentation on how to interpret the user interface, ready for ShareKnowledge's launch.
- **Seamless Transition** – For the CorVel operations team, the adoption and launch of ShareKnowledge was completely transparent. Operations team members were encouraged to "simply visit the CorVel intranet and take your necessary training." Trainees never knew they were leaving the intranet and entering ShareKnowledge. This provided a seamless experience for the trainee. As the entire organization accesses the intranet on a daily basis, seamless access to ShareKnowledge sustained familiar intranet traffic patterns.
- **No Operational Issues** – After ShareKnowledge's deployment, the feedback was positive. They obtained training through ShareKnowledge without issue.
- **Enhanced Connectedness** – CorVel is widely distributed across the United States and in the past, some employees may have lacked a feeling of close connection to the company. The availability of ShareKnowledge via their familiar intranet has helped associates feel more connected to CorVel. Though initially unintended, this has had a positive impact on morale and teamwork. In the future, CorVel will offer training to external partners, including underwriters and hospitals, through ShareKnowledge.
- **Maximized SharePoint Reuse** – From a technical perspective, ShareKnowledge is an in-house implementation and directly uses existing SharePoint content and metadata. ShareKnowledge uses SharePoint's storage and infrastructure so CorVel's SharePoint administrators enjoyed a simple installation process using their existing SharePoint skill-set. The administrators installed ShareKnowledge in less than a day. They integrated ShareKnowledge to the Active Directory and their Intranet within a month. ShareKnowledge was fully configured and live, delivering training within three months of installation.

Change Management Efforts

The implementation and rollout of ShareKnowledge was simple and trouble-free, requiring minimal change management.

CorVel's Documentation & Training team provided colleagues with basic information on how to use the system and a simple "cheat sheet" on how to navigate in and use ShareKnowledge. The concept used was to avoid "over-thinking" about the new learning management solution (LMS).

ShareKnowledge rolled into operation in four steps, using a "soft takeoff" approach.

- A single training course formerly run through the old LMS was moved into ShareKnowledge. Course takers who took training after this move "wandered" into ShareKnowledge, and took the migrated course with no difficulty.
- A single brand new course received its release in ShareKnowledge, and all course takers visited ShareKnowledge and took their training. As in step 1, there were no issues.
- The Documentation & Training team revised additional courses, placed the revisions in ShareKnowledge, and modified the access portal to point trainees to the new location. Course by course, trainees continued using ShareKnowledge with no issues.
- With all courses updated and moved to ShareKnowledge, on January 1, 2014, the old learning management solution was retired for training purposes. It remains operational solely to support historical inquiry.

The homegrown CorVel LMS did not handle SCORM-compliant courses, but ShareKnowledge does. For new SCORM-compliant courses, some trainees needed a SCORM course review.

Example: *A non-SCORM quiz is a set of questions, the answers to which the quiz-taker submits en masse. However, in a SCORM-compliant quiz, the quiz-taker submits each answer individually, receiving an immediate response. Then, at the end of the quiz, the quiz-taker submits the entire answer set. Some trainees benefited from a walk through the new process, and the Documentation & Training team changed their instructional template to explain SCORM-compliant courses.*

Despite the ease of historical records transfer into ShareKnowledge, CorVel elected not to transfer their historical training records. As old certifications expire within one year, CorVel timed the rollout of ShareKnowledge to coincide with certification expiry. The historical record is still available in the homegrown LMS, but has little relevance today.

CorVel implemented ShareKnowledge smoothly, with a minimum of stress for trainees, SharePoint administrators, and the Documentation & Training team.

Measurable Benefits

CorVel measured the return on investment (ROI) of ShareKnowledge monetized benefits, soft benefits, and expected future capabilities.

Monetized Benefits of approximately \$500,000 during the first year of operation

- **IT Infrastructure Savings** – Estimated savings is \$250, 000.00
- **New Training and Development Requirements** – Estimates savings is \$150,000.00
- **Reduced Travel**

CorVel has already made considerable investment in implementing Microsoft SharePoint as an internal communications and collaboration platform. ShareKnowledge directly integrates with SharePoint, so CorVel had no need to invest in additional infrastructure, equipment or IT staff. Instead, we were able to deploy using tools with which we already have deep familiarity and expertise.

CorVel's wished to start a continuing education program for employees. ShareKnowledge's integration with Web conferencing services such as Cisco WebEx allowed us to host CEU eligible training events remotely and automatically assign the CEU credits to participants. ShareKnowledge is the only LMS vendor to my knowledge that offers SharePoint and web conferencing integration. We would not have implemented this program if ShareKnowledge had not been available.

CorVel has a widely distributed workforce with employees in all 50 states. Historically, new sales staff would gather approximately once a year for several days of training. Now we channel all new hire sales training through ShareKnowledge.

Additional areas of savings due to increased efficiency

- **Reduced IT expert resource consumption** – ShareKnowledge eliminated the need for custom software development, allowing reallocation of technical resources that maintained and enhanced the homegrown LMS.
- **Retraining costs avoided** – The deep integration of SharePoint and ShareKnowledge meant CorVel avoided the cost and disruption of retraining their IT administrator team. In addition, the "Soft Takeoff" adoption approach for CorVel staff meant no specialized training time and cost for the user base.
- **On boarding pace increased and time to productivity reduced** – New account executive hires come onboard quickly and receive immediate training through ShareKnowledge. They become productive within weeks. Before ShareKnowledge, those hires that missed the annual sales training meeting suffered reduced productivity and effectiveness until the next annual meeting occurred.
- **Increased efficiency of Documentation & Training team** – This team has been able to expand the set of training offerings significantly without any expansion of the team.

Soft Benefits

- 1) **Improved team building and morale for distributed CorVel staffers** – ShareKnowledge-delivered training enhances the feeling of connectedness to CorVel by keeping training information available and current.
- 2) **Training material stays fresh and highly available** – Today, training is available for account executives and all CorVel employees on a 24/7 basis. In addition, edits and enhancements to training material occur in near-real time allowing the training to stay fresh and current.
- 3) **Increased executive confidence** – The consistency and availability of training addresses a strong cultural norm for service excellence, and executive mandate for 100% staff training. Executives now receive regular feedback on the completeness and effectiveness of their team's training based on ShareKnowledge training tracking capability.

CorVel achieved positive ROI for its ShareKnowledge acquisition within the first year of operation, and has identified additional near term and medium term goals for future improvements.

Future Outlook & Expected Benefits

- **Short term goal** – Expansion of Documentation & Training's reach to additional groups within the CorVel organization
- **Medium term goal** – Extension of the instructor role to qualified individuals in CorVel who are not part of the Documentation & Training organization. This would facilitate informal training sessions by CorVel thought leaders and operations experts.

Good Luck!

We hope you have found this resource helpful. Selecting an LMS can be daunting...but it doesn't have to be .

To speak with a consultant today, please contact us to see if ShareKnowledge is right for your business.

