



Team Training Done Right
**Preparing the workforce for
customer service excellence**

PulteGroup: A national multibrand homebuilding company, providing the American Dream of homeownership for more than 60 years

What started as a single home built and sold through the entrepreneurial spirit of an 18-year-old Bill Pulte, has grown into a multibrand homebuilding company with the ability to serve customers in all phases of life. PulteGroup is dedicated to providing superior consumer-inspired products and are proud of their home designs — a result of listening to customer feedback, conducting dedicated research and creating home plans specifically for the way their customers want to live. PulteGroup is comprised of over 3,500 employees based in Atlanta, Georgia.

At the center of PulteGroup is their commitment to customer engagement, so when a new Customer Relationship Management (CRM) software was acquired, it was imperative to provide thorough training for their salesforce distributed throughout 50 US markets.

PulteGroup's existing learning management system was quite cumbersome and lacked functionality needed for that specific training project. With this in mind, they began evaluating the market for a SharePoint-based LMS that would provide a seamless training experience for their sales team, reduce travel time, provide self-directed learning, track learning progress and fully integrate with their new CRM system.

The following case study will demonstrate how PulteGroup benefited from ShareKnowledge Learning Management System to ramp up their national sales team on CRM software through personalized learning paths, user-friendly administration features and comprehensive team training reports.

Challenge

PulteGroup began with just a single home built and sold by founder Bill Pulte in 1950. Since then the company has grown by leaps and bounds and has a portfolio of brands including Centex, Del Webb, Divosta and lending services, Pulte Mortgage that spans across 50 markets in the United States.

Pulte operates in a highly cyclical homebuilding industry that is also very competitive. New home construction, home prices and new home sales volume are heavily dependent on job growth, interest rates and the business cycle at large.

According to The U.S. Census Bureau, the average homeowner stays in their home over 13 years with this length of tenure increasing with the economic uncertainty of the last few years. In order to build long-term loyalty that will be reflected in repeat home buying and a strong referral base, builders, including Pulte, must ensure their customers are happy with not only the initial quality of their home but also with the speed and quality of customer care that the buyer receives.

With over 60 years of experience as a leading homebuilder, Pulte knows how to stay ahead of the game with superior customer service. After purchasing a brand new CRM software system, a new initiative was put in place to train the entire salesforce as quickly and efficiently as possible.

PulteGroup already had an existing LMS which had plateaued in functionality. "We needed a user-friendly LMS that could help our sales team hit the ground running," states Kim Cole, Training Lead at PulteGroup. "Our goal was to keep the sales team out in the field and away from the classroom as much as possible. A self-directed learning approach was ideal and ShareKnowledge provided the tools for us to do this successfully."

PulteGroup was driven to find a new learning management system that would provide the following:

1. Ease of use. PulteGroup was concerned with getting their salesforce up to speed with the new CRM system so they needed an LMS that was straightforward and easy to use by a wide range of people.
2. Ability to refresh training materials quickly and effectively. With the fast paced nature of sales, it was important for Pulte to be able to upload the most up-to-date training materials in a timely manner.
3. Comprehensive progress reporting. Pulte wanted the sales team to be able to learn independently however it was important to have the tools available to track their teams to see learning progression.
4. Integration with existing SharePoint environment. From a business perspective and efficiency standpoint, PulteGroup needed the new solution to fully integrate with their existing SharePoint as well as CRM system.

Pulte's training constituents included

A national network of approximately 1,000 sales people.

Goals

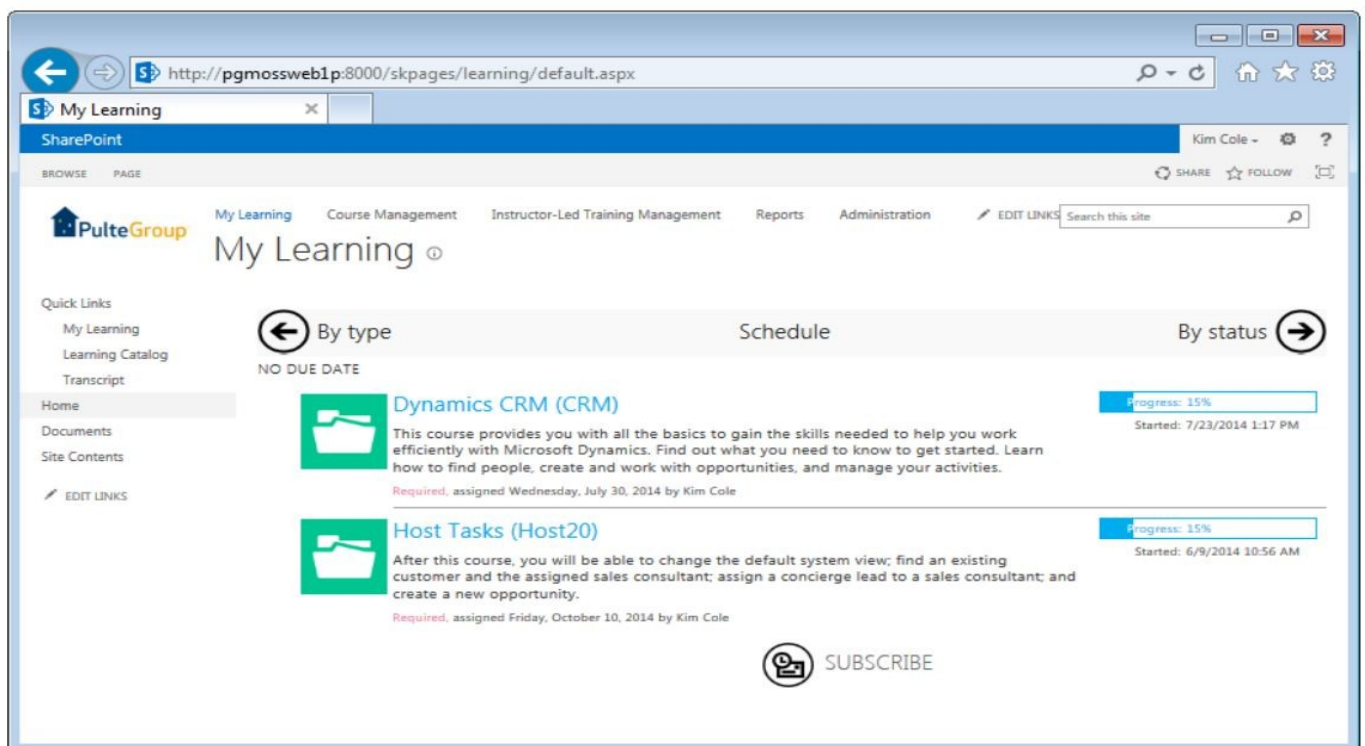
PulteGroup established key business goals for their ShareKnowledge implementation and achieved those goals as described in the following.

1. Reduce travel, increase time in the field for sales team by creating a blended learning program that would allow training to happen at their own pace.
2. Ensure Pulte's learning and development administrators could quickly and easily refresh training content.
3. Provide centralized training content and flexible access to learning materials for sales team members to go back and review material as needed for refreshment.
4. Target role-specific training so that learning materials are assigned based on employee title and current manager. Already established criteria in active directory profiles form the basis of targeted training assignments.
5. Enable rapid onboarding and effectiveness of new hires by title or job role.
6. Avoid data duplication and additional labor to add users to the LMS with Microsoft Active Directory integration. Re-use of all authenticated user profiles, titles, and groups already set up in Active Directory.
7. Training tracking to ensure that all trainees receive training credit and provide insight into which individuals might need additional mentorship.

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Solution

After close consultation, the learning management system ShareKnowledge was selected as the platform to deliver the new CRM training for PulteGroup. ShareKnowledge was configured for the client to create a unique learning experience for their training administrators and sales team – centralized content management, intuitive job-related learning paths and powerful analytics.



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Planting the ShareKnowledge seed - One month before going live, PulteGroup's IT training team provided announcements about the new CRM software and accompanying training in ShareKnowledge through kick-off meetings and company email.

Phased beginning – Pulte implemented a soft approach for rolling out the ShareKnowledge system, first with a small group of 100 users and then quickly introducing the system to the remaining sales force team via live webinars as well as an LMS Quick Reference Guide.

Because ShareKnowledge is built on top of SharePoint, which hosts a familiar Microsoft Office-type interface, Pulte's salesforce were able to quickly adapt to the new system. ShareKnowledge provided a foundation for Pulte to take a more sales-directed learning approach and engage in their own specific independent learning paths in order to save time and money – letting them do what they do best, which is sell.

The screenshot displays the ShareKnowledge LMS interface within a web browser. The address bar shows the URL: http://pgmossweb1p:8000/_layouts/ShareKnowledge/Assignments/CourseAssignment/Show/eb552d59-b275-4a62-a68. The page title is "Dynamics CRM (CRM)". The interface features a navigation bar with links: "My Learning", "Course Management", "Instructor-Led Training Management", "Reports", and "Administration". The main content area is titled "Dynamics CRM (CRM)" and includes a "Description" tab. The "Description" tab is active, showing a list of assignments. The assignments are organized into two sections: "Finding People" and "Creating an Opportunity or REA". Each assignment includes a description, a progress bar, and a status indicator (e.g., "Complete (100)"). The interface is designed to be user-friendly and intuitive, reflecting the familiar Microsoft Office-style interface mentioned in the text.

Assignment	Description	Progress	Status
Exploring the System Views - Views Criteria.xlsx	Shows Microsoft Dynamics system views for each area, including filter criteria, default sort configuration, and columns on display. You can modify a system view and save it as a personal view.	Complete (100)	Submitted: 10/11/2014 11:18 AM
Finding an Real Estate Agent Using Quick Search	Interactive video tutorial on using quick search to find a real estate agent.	Complete (100)	Submitted: 10/11/2014 11:18 AM
Finding Recently Viewed Opportunities	Interactive video tutorial on how to access your recently viewed opportunities from the Nav bar.	Progress: No data	Started: 10/11/2014 9:48 PM
Microsoft Dynamics Quick Search Overview.pdf		Complete (100)	Submitted: 7/24/2014 8:33 AM
Using Quick Search to find an opportunity.	Interactive video tutorial about using quick search to find an opportunity.	Progress: No data	Started: 10/11/2014 9:48 PM
Creating a New Opportunity with No Match - Call In & Event, Off-site a	Interactive video tutorial on creating a new opportunity when a lead calls in or attends an offsite event.	Progress: No data	Started: 10/11/2014 11:18 AM
Creating a New Opportunity with No Match - Walk-In & Event, On-Site	Interactive video tutorial about creating a new opportunity when the prospect walks in or attends an onsite event.	Progress: No data	Started: 10/11/2014 9:50 PM
Creating a New Opportunity with Exact Match	Interactive video tutorial showing how to create a new opportunity when the system returns one exact match (contact and an opportunity).	Progress: No data	Started: 10/11/2014 6:09 AM
Creating an Opportunity for a current Homeowner			

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Over 80 different SCORM compliant learning modules were uploaded to the system that covered topics ranging from “how do I add a customer” to “how to log a phone call.” No matter how fast training needs changed, Pulte administrators can easily and efficiently upload content in one central system.

In addition, Pulte was able to utilize one of the biggest trends in e-learning — interactive, video-based learning. Studies show that learners retain information at a much higher rate when they can see and hear it. In fact, Forrester Research reports that when it comes to training retention, one minute of video is equal to about 1.8 million written words.

With ShareKnowledge LMS, Pulte administrators could simply embed video content from any source including YouTube and Vimeo or include it within a compound course.

Bite size content has been proven to be easier to digest, understand and remember. The addition of short videos was a huge advantage for Pulte's sales team who were now able to get the information they needed in a quick and efficient manner.

Results

“ShareKnowledge allowed us to roll-out CRM training to our sales team in half the time with lower training costs. Team members were able to learn at their own pace while staying productive on the sales floor, which is a huge benefit for us.” Kim Cole, Pulte Group, Training Lead

Since Pulte launched ShareKnowledge in 2014, their salesforce of 1,000 employees has experienced a better, more streamlined approach to CRM training. No longer must they sit through mundane classroom training but rather a centralized, easy-to-use training system is at their disposal to learn what they need, when they need it - providing the ultimate flexibility in learning and development.

Training administrators can easily upload content in a timely manner without any fuss – to date they have uploaded over 80 different SCORM-compliant learning modules with dynamic CRM material. Comprehensive reporting features has also given them the flexibility to provide CEU credits to learners as well as a detailed summary of those that need additional mentorship.

Pulte is able to stay one step ahead of the customer service game by providing a comprehensive onboarding program for new sales hires with ShareKnowledge. From the get go, new employees are directed to their own personal learning page where they receive immediate training on the CRM software.

To date, Pulte has saved over 2,600 hours in classroom training. As a result, the onboarding process is much quicker and time to productivity has increased exponentially — ultimately resulting in a positive impact to their bottom line.