



# The Beginner's Guide to Creating an Online Training Program: Step 1 - Define

*Power operations and supercharge growth with online training*

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## Step 1: Define

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Today, more than ever before, online training is at the heart of a business' success. Here's why:

1.

The rise of the subscription economy means companies live and die by consumer lifetime value and churn, and the sharing economy's meteoric rise adds yet another layer to the CLV equation: employees, contracted workers and client-partners must be successful in representing the brand and acting as evangelists in order to garner repeat business.

2.

The consumer-in-control standard means the consumer is more empowered and knowledgeable than ever before. That means the brand you've created needs to be involved in important conversations consumers are having even sooner, through your delivery of relevant, informative content. Empowering your workforce and client-partners using online training can help your brand seamlessly enter those conversations and shape decisions – and foster trust sooner.

### 3.

In a world where products are created quickly and cost effectively, companies need to differentiate themselves through service excellence and service uniformity, not just through product value propositions. Doing so creates a consistency in your consumers' experiences with your brand, which allows them to know what to expect when receiving your product, communicating with a member of your modern workforce, or interacting with your brand to any extent.

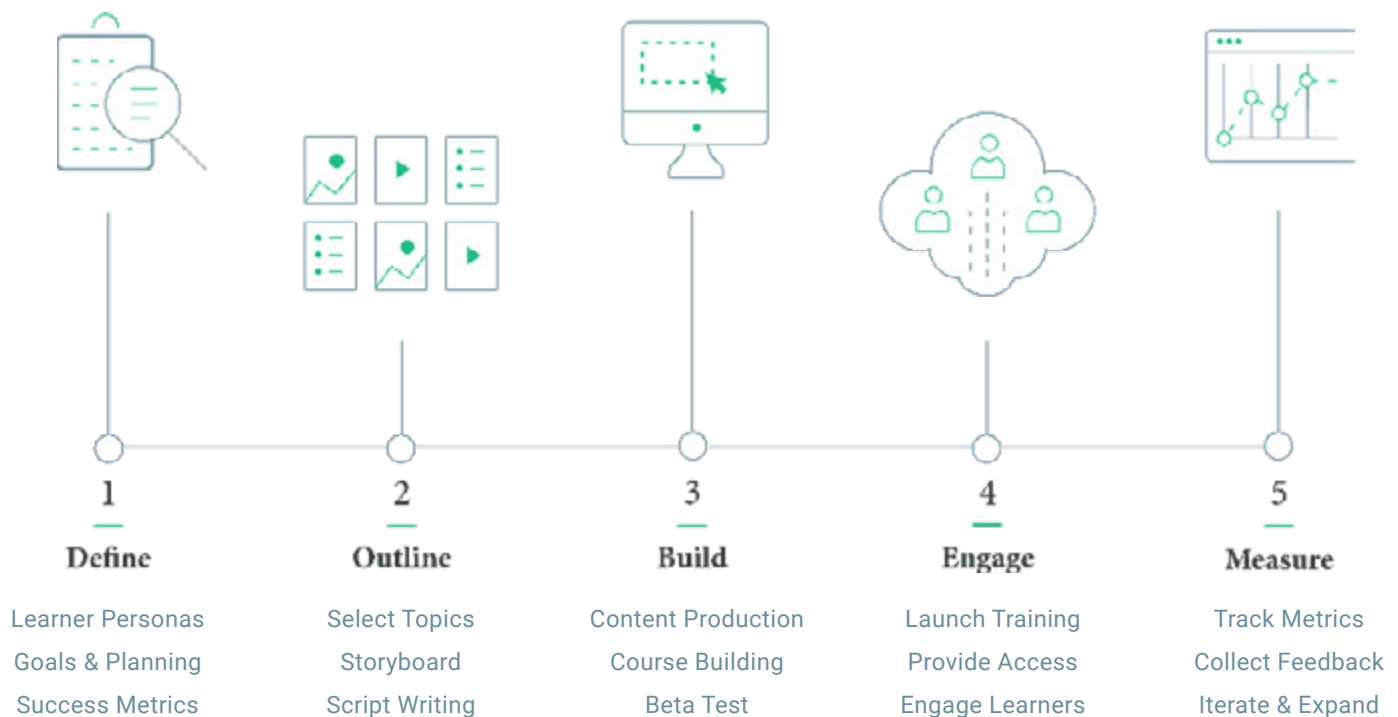
## The Beginner's Guide to Creating an Online Training Program

In an economy where consumer satisfaction with the way your

worker or client-partner operates will directly drive or hinder your brand growth, quality online training is no longer an option, but a standard.

To promote consumer satisfaction using a system for online training, you'll need to develop a plan. Plus, starting with knowing where you're going makes the going easier.

Consider following a framework. In this beginner's guide, the development and execution of your plan occurs in the following order to ensure your modern workforce is ready to best represent your brand and give your customers the best possible experience: Define, Outline, Build, Engage, Measure.



## Why Define?

Whenever you embark on a new online training initiative, laying a foundation for your program should be your first move. Clearly defining your learner personas, your business goals, your engagement strategy and, finally, how you will measure the success of the initiative, is the best way to ensure the foundation is strong.

This ebook focuses on the first of the five-part guide for online training success. You'll learn the steps for defining your program and becoming ready to move on to part 2: Outline.

## Define Your Learner Personas

In the inbound marketing methodology, buyer personas are the crux. Buyer personas are semi-fictional representations of an ideal customer based on a combination of market research and real data about an organization's existing customers. Defined buyer personas give a company's marketing efforts structure, context, and insight.

The same is true for learner personas. Except that in this exercise, you'll be looking at your external partners, contractors and workforce instead of your customers. Constructing detailed profiles of your prototypical learners is a multi-step process that will help you create more effective and engaging training modules and give you something to reference throughout the guide to keep your program on track.

Think of the process as one of information gathering and analysis, followed by the profile write-up. Through research of your target audience, interviews with sample users and supervisors, and surveys you conduct throughout a user's training, you'll be able to derive fully conceptualized personas to drive your program.

## Where Do You Start?

Start with the basics: demographics. Even without any current training recipients, it's possible to develop an understanding of the demographics of your target. Using the sample interviews and what you know about your target already, define their age, family structure, location, gender, etc. For example, if you expect that your contractors are primarily millennials, that classification

**Think of the process as one of information gathering and analysis, followed by the profile write-up.**

would be an important aspect of their profile.

Also, consider the problems you might help these users solve — problems like lack of interest in materials, no time for understanding complicated product training, or performance inadequacies. Dive deep!

More importantly, refine your persona by addressing how each persona likes to learn (especially when it comes to the engagement strategy step). Use interviews and survey questions to find out more about their learning styles.

Offer your sample user some options. Ask: Do you like to be trained to perform tasks via video, audio, text or simulations? Do you prefer audio or text for product information? Ask for their feelings on instructor-led training, and on how much time they'd like to spend engaging in training per week. What about per month? Per year?

Discovering these things about your target audience can help shape your training before you roll it out, saving everyone valuable

resources and ensuring your users are getting the most from your initiative.

Other things to consider here: How will you reach your target audience? How will you position your online program? (Or how digitally aware are your personas?) Include elements of your user's story that involve engagement and training to ensure your persona profiles remain relevant to your cause, and, more importantly, that your cause remains relevant to your personas.

## Define Your Business or Department Goals

What goals are you trying to achieve by leveraging online training? Defining these is exceedingly useful to the development of your program strategy.

Consider whether you are trying to:

- Onboard new workers or client partners with training content
- Improve your brand experience across new markets
- Attract and nurture new leads with educational content
- Increase your employees, 'partners' and contractors' success with your product/s or service/s
- Reduce churn and boost retention across your ecosystem of customers, partners and service providers
- Streamline support and reduce the number of support tickets your team receives
- Overcome lack of pre-existing skillsets and maintain high brand consistency
- Measure the ROI of your online training initiatives

Or do some combination of the above.

Then keep these goals at the forefront of your strategy as you

move through the guide.

## Define How You Will Engage Your Audience

One of the more challenging aspects of developing an online training strategy is defining what type of content will



best serve your target audience, and how, when and where it can do that. In this step, type, format, testing and delivery all come into play.

The goal of content is to deliver and land your messaging at the right times, to train your user, and to deliver incremental, relevant knowledge. You should not be using content to simply create volume in your training efforts, or to check boxes. Every piece of content should be helpful to your users somehow.

## What Content Will You Deliver?

Will you deliver only product training? Only customer interaction training? A combination? What will be useful to your users?

It's always important to consider your learner personas' preferences or needs, and where each content type and format best fits in their training journey. For instance, a high-level video overview of a product's benefits won't work for someone who is already familiar with all of the benefits, but needs to know exact specs. In that case, a spec sheet might be a better format.

With these examples in mind, explore content formats to help you define how you'll engage your audience. Consider building a list of pros and cons, including factors like time or cost to develop, current assets and ease of deliverability.

Define a plan for testing the training. How will you come to understand your content's performance through leveraging your training platform's analytics capabilities? Planning to test at certain points or after the introduction of certain content, or choosing a quiz-based testing format, could help you find your strategy's points of strength or weakness.

Imagine your platform tells you that only 10 percent of users score over 60 percent on quizzes distributed after live training. You may be able to conclude your live training needs to be more engaging. Or perhaps shorter. Or both. Choosing how you will react to your analytics is an important component of the Define stage.

### How Will You Deliver It?

Define whether or not you are interested in offering online, asynchronous training options. Because asynchronicity allows your users to learn on their own schedules and in locations that work for them, delivering content this way is appealing from an engagement standpoint. Synchronous learning may be used when necessary, but shouldn't be your primary method of content delivery.

Review of Content Approaches:

Micro-learning is a bite-sized approach, where learners take in short, focused modules, one at a time. This training strategy is based on the idea that we retain information more easily when we can ingest it in small parts. Not only is this training format in keeping with the macro trend of designing courses

**Micro-learning can also be a beneficial approach when beginning an online program, as it allows you to start small now and expand later.**

based on [neurological truths](#), but it also corresponds with your user's lifestyle: a recent study by [Bersin by Deloitte](#) reveals the average worker may have fewer than five minutes a day to set aside for professional development and training activities.

Micro-learning can also be a beneficial approach when beginning an online program, as it allows you to start small now and expand later.

The [Ignite!](#) presentation format<sup>1</sup>, which leverages micro-learning, can be a great way to make a quick point to users and ensure they gain the info they need.

The Learning Path approach, in which you determine a clear path to proficiency and set a course sequence, is lauded by andragogues around the world. With proven success and an established methodology, Learning Paths are an excellent choice for content delivery.

<sup>1</sup> Ignite! refers to fast-paced presentations that typically consist of 20 slides, each presented for 15 seconds by a speaker.

Synchronous options include live instructor-led training (ILT) and MOOC — Massive Open Online Courses. Traditional MOOC formats allow you to release certain content on certain dates, and could correspond with a Learning Path initiative. GoToTraining and GoToWebinar are other popular synchronous content delivery options.



If you are looking to establish a learner community, where employees, partners and contractors learn together and discuss training together, releasing content in the synchronous fashion may benefit your cause. Conversely, you could also create discussion forums for community focused, asynchronous learning.

## Define How You Will Measure Success

You've defined your engagement strategy. Now is the time to define how you'll measure its success.

Do this in three parts. Define how you'll measure engagement, how you'll assess user knowledge and, finally, how all of this can tie into your business goals.

### How will you measure engagement?

A robust training platform offers no shortage of metrics. Choosing which are relevant to your strategy and goals is imperative. At Northpass, we believe in setting criteria for success based on completion of course activities in the Milestones app, which allows you to define the criteria for training module completion.

You could also choose to include any number of metrics to inform your insights, such as:

- [Video analytics](#) from Wistia
- Login count
- Page views
- Clicks
- Number of enrollments
- Quiz submission count
- Learner progress in a given training module

Some metrics are hyper-relevant, such as the aforementioned completion of activities. Others, like time spent on page, are common, but in this case, not entirely useful. Ditch any metrics that don't give you an accurate portrayal of a user's engagement.

### How will you assess learner knowledge?

Developing meaningful assessment questions is key to



determining engagement and knowledge retention. You may use quizzes (either multiple choice or short answer), a practicum submission in your product (like [HubSpot](#) does), or individual assignments for each program. The Milestones app enables you to choose which criteria will indicate completion (such as a learner must score over a 75 on course A for it to be considered complete), and should be built into your assessment strategy.

Another excellent way to evaluate competence and engagement is to build assessments that require users to apply knowledge gleaned from the content to a real-world situation.

### How will you tie this to business/department goals?

Remember when you defined your business goals? Defining how you'll measure success is one effort in which knowing those goals will be useful. If your training platform can integrate with your marketing automation software or Salesforce, you're in a great spot.

You can look at whether or not you've attracted new leads with your training content, at how your program has reduced churn and boosted retention, or at the ROI of your online training initiatives. Whatever your business goals, a simple integration can be important to understanding your initiative's contribution to the realization of those goals.

### What's Next?

You've defined your learner personas, business (or department) goals, engagement strategy and how you'll measure results. You're ready for the next step in the Beginner's Guide to Creating an Online Training Program: Outline. In this step, you'll flesh out your ideas formed during

the Define stage, moving even closer to achieving employee, partner, contractor — and ultimately brand — success through your training process.



[Request a demo](#) to get an inside look at Northpass, a modern platform for helping tech-enabled companies streamline and scale partner and modern workforce training programs.

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