

Developing Sustainable Training Solutions for a Specification Management Software Company

The client, a software company specializing in specification management, developed a system designed to serve as a single source of truth for companies to manage their specifications. Specifications are critical in industries such as food service and packaging, where accuracy and compliance are paramount. The company's software was designed to streamline these specifications by providing a database that could be accessed by all necessary employees across the organization.

The platform provided features like tracking ingredient lists, packaging specifications, and compliance with sustainability initiatives, allowing companies to ensure their operations are up to date and in line with regulations. Its reporting capabilities were powerful tools to track overlaps in specifications, reducing redundancy and ensuring the accuracy of the company's data. Additionally, the software had the ability to monitor sustainability practices, which was becoming an increasingly important focus in many industries.

Despite the value the software brought to clients, our client faced the challenge of a small, lean team. While their technology was robust and sophisticated, they lacked dedicated training staff - a critical gap when it came to supporting large-scale implementations. This was particularly evident when they signed on a major new client: a global packaging manufacturer servicing large food service chains.

The client had no formal in-house training department, which created a gap in how they could support the rollout of the new system. Given the scale and importance of the implementation, they reached out to Clarkston for help. Our task was to create comprehensive training materials, documentation, and a strategy to ensure that the new software was adopted effectively, across multiple locations and teams.

Recognizing the unique needs of the client and their large-scale implementation, we worked closely with the software company to develop a training strategy that would be sustainable and easy to execute. The goal was to create a solution that would empower the client's team and their global client with the knowledge they needed to make the most out of the software, without requiring the software company to maintain a constant, hands-on role in training.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Specification
Management Software

PRIMARY OBJECTIVES:

- Create training documentation that can be used to train users across many teams worldwide and effectively instructs those users on a brand-new software and process
- Develop training materials that not only served immediate needs but were also sustainable over time, ensuring quick access and ongoing relevance for future use
- Structure the training materials in a way that allowed a super user to effectively deliver the training to all teams and end users, ensuring scalability and ease of implementation

RESOLUTION:

- Assisted the client with training documentation creation and delivery best practices for the client's implementation project at their client
- Developed training courses for eight different teams for the business processes
- Created seven supplemental walk-through training demonstrations
- Provided training documentation and train the trainer insights to the client's team who does not currently have training staff

KEY BENEFITS:

- End user client received training content that will be sustainable for the long term and in a modern, easy-to-digest format
- End users will have quick references, such as videos and job aids, to assist with their knowledge after training
- Client was able to focus on build and delivery of the system and hand off training to our training resources for completion

KPIs

- Eight training courses developed to support six different global teams, both internal and external to the company
- Seven supplemental training videos created to support independent learning
- Over 50 users trained worldwide

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