HOW TO

# DELIVER COMPLIANCE TRAINING

A guide to building an easy, affordable and effective online compliance training strategy

Tribal Habits

Hello and thank-you for downloading this guidebook. We've designed this guidebook to help you build the case for compliance training in your organisation. You'll review compliance risks and costs to organisations which do not approach compliance with a plan, followed by the benefits and steps involved in implementing an online compliance training platform.

As we begin, let's start by setting the scene. At Tribal Habits we divide the journey organisations take in managing learning and training into three phases.

## Phase 1 – Induction & Compliance

In this phase, organisations are focused on establishing a solid foundation for learning. This phase often also includes the initial implementation of a modern learning platform to reduce the effort of managing training and ensure a single-source-of-truth for learning data. The two key activities in this phase are:

- Being proactive in with compliance to protect staff and boost the bottom line.
- Improving induction to reduce churn, engage staff, reduce rework and accelerate productivity.

## Phase 2 – Processes & Skills

In this phase, organisations can move onto more aspirational learning objectives. With employees well versed in compliance procedures and initial tasks, the organisation can now use training as a strategic advantage: to help employees acquire the skills and knowledge to achieve organisastional goals.

- Capture internal processes to ensure internal consistency and efficiency in all teams.
- Share interal expertise – skills, knowledge, tips – to make 'best practice, common practice'.

## Phase 3 – Customers & Stakeholders

In this phase, organisations can expand their training horizons beyond employees. For some organisations, this phase may be less relevant. However, for many organisations, this is the aspirational goal – providing training for customers, volunteers, contractors, board members or supporters.

- Providing training for both internal (employee) and external (other stakeholders).
- Sharing (or selling) training content to customers –product support or valuable knowledge.

In this guidebook, let's **focus on Phase 1 – Induction and Compliance**. In reality, most organisations just can't hire compliance managers or implement expensive compliance suites. With the advent of cloud-based learning platforms, however, any sized organisation can address compliance training and align individual employee performance with organisational goals.

Of course, I believe the solution these challenges is Tribal Habits – a unique online learning platform which combines lawyer-approved compliance training with the ability to easily capture and transfer your internal policies and processes. Through-out the guidebook we also outline how Tribal Habits practically addresses the challenges raised and solutions we recommend.

However, let's not jump to conclusions just yet. For now, I invite you to enjoy our guidebook!

David King
Founder | Tribal Habits
david@tribalhabits.com


Copyright © 2020 Tribal Habits | 

# Contents


Welcome ..... 1
Part 1 – Why do you need compliance training? ..... 4
The challenges in staying compliant ..... 5
Benefit: Reduce risks of non-compliance ..... 7
Benefit: Build a positive compliance culture ..... 8
Benefit: Create a powerful audit trail ..... 9
Benefit: Training helps attract talent ..... 11
Summary: Key reasons to move compliance training online ..... 12
Part 2: How do you implement online compliance training? ..... 14
Planning a compliance training program without the hassle ..... 15
Using a compliance training framework ..... 19
Pillar 1: Values Checklist ..... 20
Pillar 2: Policies checklist ..... 21
Pillar 3: Behaviours Checklist ..... 22
Making compliance a continuous process ..... 24
How can we easily implement a new online compliance training platform? ..... 26
Case Study: Madison Technology and delivering effective online compliance training fast ..... 29
What is Tribal Habits? ..... 32
What are the top features of Tribal Habits? ..... 33
What problems can Tribal Habits help solve? ..... 34
How does Tribal Habits boost online training? ..... 36
What ready-made training can we access? ..... 38
How affordable is Tribal Habits? ..... 39
How secure is Tribal Habits? ..... 40
How easy is it to implement Tribal Habits? ..... 40
How can I get started with Tribal Habits? ..... 41
Other Tribal Habits Guidebooks ..... 42
References ..... 44

# Part 1 – Why do you need compliance training?

Let's begin with the business case – why does your organisation need to address its compliance risks? We can review some of the risks and challenges with compliance management, followed by the benefits in ensuring your compliance needs are met.

# The challenges in staying compliant

In highly regulated industries like resources, financial services or healthcare, larger organisations can hire a dedicated compliance team to ensure compliance requirements are met. They can use sophisticated governance software which helps them assess and mitigate risk.

However, in small and medium-sized organisations, leaders and managers struggle to understand legislation and regulations. They often do not transfer regulations into standard operating practices which meet compliance requirements.

Then there's a growing disconnect between a leader or manager's confidence and ability to manage regulatory compliance, compared to the reality of keeping up with ever-evolving requirements.

## Is your feeling of compliance just an illusion?

Consider these two statistics.

- ✖ 30% of medium-sized organisations reported increased expenses - fines, lawsuits, penalties - due to noncompliance with basic government workforce and payroll regulations.[i]
- ✖ 80% of these same organisations were confident they were able to meet requirements.[ii]

## The cold hard reality of compliance management

The truth is that most organisations do not make the necessary effort in compliance. They may make some efforts in some areas at some times, but they are exposed on a range of issues on a regular basis. Consider these statistics from a range of compliance surveys, which show how widespread the problem is – and then ask how compliance-ready your organisation really is?

71% OF ORGANISATIONS REPORT THAT THEY DO NOT ASSESS STAFF COMPLIANCE PROFICIENCIES AND SKILLS ON AN ONGOING BASIS.[iii]

44% OF ORGANISATIONS DO NOT MEASURE THE EFFECTIVENESS OF THEIR POLICY MANAGEMENT PROGRAM.[iv]

68% OF ORGANISATIONS FEEL THAT THEIR COMPLIANCE DEPARTMENT IS "INSUFFICIENTLY RESOURCED FOR THE DEMANDS MADE ON IT".[v]

23% OF COMPANIES DO NOT HAVE A FORMAL COMPLIANCE TRAINING PLAN IN PLACE.[vi]

The situation isn't any better with employees. There is ample data available to show that employees struggle day to day with compliance, regulatory standards and changing legislation.

> ALMOST 20% OF EMPLOYEES OBSERVE BRIBERY AND CORRUPTION-RELATED MISCONDUCT.[vii]

> CORRUPTION CASES COST A MEDIAN LOSS OF $200,000 AND OCCURRED 35.4% OF THE TIME.[viii]

> 60% OF 200 SECURITY LEADERS SURVEYED INDICATED THAT THEIR ORGANISATIONS WERE VICTIMS OF AT LEAST ONE SOCIAL ENGINEERING ATTACK IN THE PAST YEAR. EMPLOYEES' CREDENTIALS WERE COMPROMISED IN 65% OF THE CASES.[ix]

> 22% OF AUSTRALIAN WORKERS REPORT BEING PHYSICALLY ASSAULTED OR THREATENED BY PATIENTS OR CLIENTS. 37% OF WORKERS REPORT BEING SWORN OR YELLED AT IN THE WORKPLACE.[x]

> 20% OF WORKERS SAY THEY HAVE EXPERIENCED DISCOMFORT DUE TO SEXUAL HUMOUR.[xi]

As you can see, the risks of poor compliance management are real, prevalent and expensive.

As a result, organisations are increasingly turning to online compliance training as a solution. Distributed workforces, combined with the rise of mobility and virtual working, have made online learning an attractive alternative to costly face-to-face sessions.

In addition to cost reductions, online learning provides course consistency – employees receive the same knowledge, the same way, to the same standard in every location. For compliance training, this consistency is critical. Finally, an online system can also track who has taken which courses toward certifications and provides a built-in audit trail.

> 63% OF ORGANISATIONS BELIEVE THAT THEIR POLICY MANAGEMENT PROGRAM HELPS REDUCE THE LEGAL COST AND RESOLUTION TIME OF REGULATORY ISSUES AND FINES.[xii]


Copyright © 2021 Tribal Habits | 

# Benefit: Reduce risks of non-compliance

The ideal system combines online compliance learning with detailed employee tracking, so that compliance certification can be linked directly to employee performance. You should be able to measure easily…

- Which areas have an employee become compliant in?
- How long has it been since their last compliance update?
- What version of each compliance topic did they complete?
- Which topics are they overdue or non-compliant in?

An online compliance training platform can also match course enrolments with user demographics. This helps reduce the risk of non-compliance by monitoring training levels and maintaining accurate records as evidence of compliance. With an online training platform, you can send alerts for both initial completion as well as when credentials require renewal.

As a result, an online compliance platform can help each employee understand exactly which course they need to take to complete to meet their compliance requirements.

## How does this work in Tribal Habits?

In Tribal Habits, you can establish up to 20 **custom fields** of user demographics such as location, role, title, responsibilities, fields of work, start dates or any other data relevant to determining compliance requirements.

Custom Fields are added in the Administration area by navigating to the Account tab. You can then edit your Custom Fields.

- Add up to 20 custom fields
- Select up to 5 custom fields for online filtering (all 20 are available in offline reports)
- Choose which fields will be visible on user profiles

You can then map your compliance library by matching topics with user demographics through **enrolment rules**. For example, a 'Working safely at heights' topic can be assigned when a custom field of 'Location' is set to 'Onsite construction'.

- Navigate to the People tab in the Administration area.
- Create a search based on the demographics you have in mind. You can make your search as simple (Type = Staff) or as complex (combining multiple demographic fields) as you like. Run the search to review the filtered people to confirm your search criteria is appropriate.
- Select 'Save Rule' below the search panel. This will bring up a list of topics and pathways in your portal. Select one or more to apply this rule to. Those topics and pathways are now available for self-enrollment by people who match that rule (both now and in the future).
- You can automatically enrol matching people at any time too. Navigate to the Knowledge tab and then select the topic or pathway with that rule. Select the Settings tab in that topic or pathway. In the Enrolment panel, you will see the rules applied to that topic or pathway. Select 'Run Rule' beside any rule to immediately enrol all matching people.

# Benefit: Build a positive compliance culture

## Promote an inclusive and safe workplace

The statistics above show real the risk of an unsafe workplace is for all organisations. As a result, it is critical to ensure all your employees are familiar with your organisation's expectations around creating an inclusive, friendly, and safe workplace. Remember that abuse isn't restricted to physical violence and intimidation. Abuse can also verbal abuse, inappropriate jokes, and unequal treatment.

Managers also have a key role to play in creating an inclusive and safe workplace. Leaders and managers should receive training on how to manage situations that may involve abuse, as well as how to build a team culture of equal opportunity.

Finally, every person in the organisation should feel empowered to report anything that threatens a safe and inclusive workplace environment. Employees must know how to safely and correctly raise concerns or report issues within your organisation.

## Help define organisational policies

To nurture a positive culture, it's essential that leaders establish organisational values. They must effectively and clearly communicate those values so that employees feel aligned with those values.

It's not enough to display values across organisation media. It's also crucial to translate compliance policies into every-day behaviours and standards that employees can relate to.

This is where good online compliance training steps it. It can bring policies to life with training scenarios and quizzes to show what happens when policy becomes action.

## Balance priorities and ethics

A positive compliance culture promotes accountability among employees. When employees feel they are acting ethically, they feel invested in their organisation.

Leaders can help staff members by rewarding them for displaying values that align with ethical ways of doing business. Furthermore, management can foster an environment where employees feel comfortable speaking up when they are concerned or think that something is wrong.

The attitude and management style of organisational managers directly impact organisational outcomes. By training your managers and employees to nurture a culture of compliance, you are laying the building blocks for success.

## Boost reputation and the bottom line

You might think a non-compliance fine is a once-off impact on the bottom line. That isn't so. The resulting damage to an organisation's reputation could wind up costing a lot more. Potential clients, investors and media will all have their focus on your organisation.

On the flip side, proactively investing in compliance training will not only help to avoid public scandal and embarrassment, it can also help you draw in like-minded clients. Your commitment to compliance, safety and ethics can be a competitive advantage. Social media updates, blog articles, organisation values, news alerts and more can all be used to show your commitment to compliance and compliance training.


Copyright © 2021 Tribal Habits | 

# Benefit: Create a powerful audit trail

It's not enough to 'provide compliance training' – you must be able to prove that it occurred. First, from a legal perspective, your organisation needs an accurate audit trail which can clearly show which employees are compliant in which topics.

Besides, you cannot merely rely upon 'someone attended training'. Your organisation must be able to show that employees were engaged in the training, understood the content and demonstrated some degree of proficiency with the required behaviours or knowledge.

Online compliance training will provide built-in assessments, which boost accountability with employees. It can help confirm that employees understood and were able to apply the required compliance knowledge – a demonstration which may become critical at a later date if an employee fails to follow correct procedures or behaviours.

> AN ONLINE COMPLIANCE TRAINING PLATFORM SHOULD COMBINE COMPLIANCE TRAINING, INCLUDING ASSESSMENTS, WITH ORGANISATIONAL POLICY, INCLUDING ACCEPTANCE.

If your organisation has an accrediting body, they will also want to see proof that your employees maintained credentials in order to be able to perform their job. Equally, you may need to prepare regular internal reports on compliance for new employee induction or existing employee credentials.

In both cases, an online compliance platform provides this data instantly, instead of through some mess of outdated spreadsheets and documents.

## How does this work in Tribal Habits?

In Tribal Habits, you can combine our approved compliance training topics with an article of your own containing the related internal policy document.

For example…

- Utilise our 'Anti-bullying and harassment training for employees' topic to provide employees with explanations, scenarios and assessments on correct workplace behaviours.
- Combine with your own 'Anti-bullying and harassment Policy' article, where you can upload your policy and ask employees to certify they have reviewed, understood and accepted it. Optionally, include a short online assessment about your policy.

### Step 1 – Select a Compliance library topic

To do this, start by importing the relevant topic from the Compliance library. Navigate to the Knowledge tab in the Administration area and select the Libraries in the menu bar, followed by Compliance. You can then browse or search the library to find your topic. Click 'Import' and your topic will be imported instantly into your portal.

## Step 2 – Create a Policy Acceptance article

Now you need to create your matching article. Navigate to the Templates library (selected right beside the Compliance library in the menu bar). Browse or search the library for the 'Policy Acceptance (Article)' template and copy it into your portal. Then navigate to the Knowledge tab and select that template. Click 'Edit Article' to switch to creator mode. You can then follow the template to upload your policy, set-up the policy acceptance poll and create 4-6 quiz questions.

## Step 3 – Combine the topic and article into a single pathway

All you need to do now is combine the compliance topic and your policy article into a single experience. We'll use Pathways for this. Navigate to the Knowledge tab in the Administration area and select Pathways in the menu bar. Create a new pathway and give it a name matching your policy. From the list of topics and articles, drag the compliance topic and your policy article into the list of Mandatory Topics for this pathway, with the compliance topic first. Then select the option to 'Require explorers to complete topics in order'. Save the pathway and it's ready to go.

People can now be enrolled in that pathway and must complete both the training and your policy acceptance – and its all presented in your branding with consistent navigation.

## Step 4 – Track outcomes and provide internal reporting

Later, you can track compliance training completions and compliance policy acceptances through a range of online and offline reports.

1. Online reports show both tables and graphs of compliance enrolments and completions. Data can be filtered by custom demographics and topics and then exported into spreadsheets for additional reporting.
2. Administrators can review individual employees at both an aggregated level, showing all training completion data, or at an individual topic level, showing granular data including exact completion times of each module as well as answers to every poll, question and quiz.
3. Topics data can be shown both aggregated, including filtering by custom demographics, as well as overall topic analytics including policy acceptance, quiz results and written responses.


Copyright © 2021 Tribal Habits | 

# Benefit: Training helps attract talent

Keeping your organisation ahead of the game when it comes to being compliant boosts brand reputation not only with clients and investors but also with your employees – current and future.

> A BAD REPUTATION CAN COST YOUR ORGANISATION AT LEAST 10 PER CENT MORE PER HIRE[xiii]. AND THAT'S ONLY IF YOU CAN EVEN GET GOOD TALENT IN THE DOOR.

With millennials making up an increasing majority of the working population, both prospective and current employees evaluate an organisation with regard to how its values match up with their own.

When millennials feel an organisation has a good fit for their values, they work harder.

- If they believe their organisation has an inclusive culture, the vast majority - 83 per cent - report being actively engaged.
- If they believe the opposite, that their organisation doesn't care about creating an inclusive environment, only 13 per cent say they're engaged.[xiv]

# Summary: Key reasons to move compliance training online

COMPLIANCE TRAINING DOESN'T NEED TO BE BORING, DIFFICULT TO TRACK, OUT-OF-DATE AND A PAIN-IN-THE-NECK TO ADMINISTER. BY MOVING YOUR COMPLIANCE TRAINING ONLINE, YOU AND YOUR ORGANISATION CAN REAP A RANGE OF EASY REWARDS – MOST LIKELY AT A MUCH LOWER COST TOO!

Let's take a look at the top five reasons to make the change from traditional compliance training to online compliance training.

## Improve engagement by appealing to the modern employee

If your compliance training remains workshop and paper-based, you are appealing to a decreasing audience. Technology has enabled the modern employee to direct their learning by providing instant access to training and knowledge. Employees increasingly use search engines to find ways to improve their skill sets and learn what they need for their roles. They enjoy looking online and learning online.

Acknowledging the modern learner is critical when it comes to compliance training due to the risks associated with employees not keeping up-to-date with rules and regulations. Organisations need to make every effort to engage with employees in a way which they – the employee – finds engaging!

Modern employees want to be able to learn when they want – during breaks in work, in transit, at the end of the week, while at home or wherever they are ready to engage. Moving your compliance training online gives the modern employee the access when and how they want it. Compliance training can already be (incorrectly!) seen as an annoyance by many employees, so why make it any harder for them to access it the way they want it?

## Allow for a flexible learning pace

Online compliance training excels in the convenience it offers to your employees. Online training allows a learner to move at their own pace.

First, this allows them to engage with their training and schedule it as they see fit. It also eliminates the downtime of moving to a workshop, waiting for the workshop to start and then transferring back to their work environment.

Second, online learning is asynchronous – learners engage 1:1 with the learning, not 1:many with a group. As a result, they can undertake the training at their pace. In a workshop, the learning will move at a pace which will be too fast for some, and too slow for others. Online learning eliminates this problem, which boosts engagement from each individual learner.

With online learning, employees can revisit materials, retake assessments and choose to complete training in one go, or in multiple sessions. All this flexibility improves the chances of employees engaging meaningfully with the training – and at no extra costs to the organisation.


Copyright © 2021 Tribal Habits | 

## Less time spent on compliance training

Every minute your employees spend in the training room is a minute that they could be helping a stakeholder or customer. Online compliance training reduces the amount of time they spend in the training room so that they can have more time in the workplace. Also, there are no travel fees, room rental expenses or printed workbook costs.

Instructor-led compliance training requires significant payroll hours, but online compliance training can cut costs by more than half. Online modules remove the excess – there's no ice breaker activities, no delays waiting for that last participant, no need to push the workshop to fill the entire hour and so on.

## Easy to update with on-going changes

Let's face it – organisational policies and government regulations change regularly. If you are still relying on paper-based training you must update all of your printed materials and retrain your instructors whenever a change occurs. This is not only time-consuming but has quality control risks. It's too easy for multiple versions of workbooks to be floating around an organisation and employees to be learning out of date information.

With online compliance training – particularly in an easy-to-use platform like Tribal Habits – changes can be made to any training in minutes. All new employees can then immediately receive the latest information. An online compliance training platform will also track version completion, allowing existing employees to be notified when material changes have occurred and requiring them to re-take learning.

## Accurate tracking in real-time

Moving your compliance training online also makes it easier – significantly easier – to track completion data among your employees. You can monitor compliance among individuals, teams, locations or roles with simple reminders and easy reporting for managers and supervisors. Not only can the organisation gain better intel on compliance, there is also a huge efficiency gain for the HR or L&D department too!

Online compliance training allows you to easily link compliance to remuneration too – set hurdles or requirements for employees to maintain their compliance before they can access a promotion or monetary recognition.

# Part 2: How do you implement online compliance training?

Let's now consider the process of implementing online compliance training. What topics do you need to cover, how can you organise that training in an efficient way and what's involved in the actual implementation of a compliance program with an online learning portal.

# Planning a compliance training program without the hassle

So, your organisation wants to create a 'proper' compliance training program, with features like:

- Online content available 24/7 in any location
- Automated enrolments with due dates and reminders
- Automated notifications to managers on completion rates and overdue topics
- Australian content which is up-to-date with regulations and legislation
- Recorded assessments to demonstrate employee understanding
- Separate training for managers to ensure correct oversight of employees
- Unique completion certificates, with completion dates and training hours
- Employee feedback and data about compliance concerns or uncertainties
- Central repository for your compliance policies, including version tracking
- Policy acceptance during employee induction with data tracking and reporting
- Coverage of all key compliance issues – behaviours, employment, IT, health and safety
- Presented in your branding to reinforce the organisation's commitment to compliance

As the person responsible for making this happen, how are you feeling now? A little overwhelmed? That wouldn't be surprising and, often, organisations have paralysis about compliance training programs. It all seems like too much hard work.

- *'Our employees will be confused.'*
- *'It's another process or platform for everyone to use.'*
- *'It's just too hard to know where to start.'*
- *'We'll get to it later.' (A date which never seems to arrive until a compliance incident occurs and suddenly it can't happen fast enough!)*

> IN MANY WAYS, THIS IS A CHANGE MANAGEMENT PROCESS. LIKE MOST CHANGE MANAGEMENT PROCESSES, THE FEARS AND WORRIES OF THAT CHANGE ARE TYPICALLY EXAGGERATED. WITHIN JUST A FEW WEEKS, EMPLOYEES AND THE ORGANISATION HAVE MOVED ON AND IT IS ALL 'BUSINESS AS USUAL'.

At least, it can be. With the right platform and the right planning, the roll-out of a new compliance training program can be easy, rapid and effective. Let's break down the roll-out into a four-step process to make things easier.

## Step One – Start with compliance fundamentals

Quick wins. That's what we want at the start. It helps prove the concept to all stakeholders before undertaking the next steps. Let's start with ready-made compliance training. Ideally, that training should be…

- Presented in your branding to reinforce the organisation's commitment to compliance
- Based on Australian content which is up-to-date with regulations and legislation
- Able to cover all key compliance issues – behaviours, employment, IT, health and safety

You could start by just having employees complete a module or two, but given the very low workload in this step already, we would recommend going a little further. Ideally, create 4-5 'Pathways' of related topics. These Pathways can become the cornerstone of your on-going work too, as you build into and around each Pathway.

Your organisation's values or compliance methodology may already have compliance streams or pillars which can form these Pathways. If not, common Pathways are…

- **Conduct**
  - Anti-bullying and anti-harassment for employees
  - Sexual discrimination awareness
  - Alcohol and drugs in the workplace
- **Safety**
  - Workplace health and safety fundamentals
  - Office and workspace ergonomics
    - Manual handling safety
  - Duty of care for employees
- **Information**
  - Information security for employees
  - Phishing awareness for employees
  - Social media awareness
  - Privacy in the workplace
- **Management**
  - Anti-bullying and anti-harassment for managers
  - Equal employment opportunity for managers
  - Duty of care for managers
  - Managing staff underperformance

For example, in Tribal Habits, you can import these topics from our Compliance library and bundle them together into Pathways in just a few minutes. Pathways provide enrolment notifications, due dates with reminder notifications, module completion certificates and a variety of automated enrolment options. With Tribal Habits, everything appears in your branding too.

With this approach, your organisation's workload is dramatically reduced in the first step. You will only need to set-up your compliance platform (which is done for you with Tribal Habits) and set-up your employees (which you can do via a spreadsheet upload in Tribal Habits).

Suddenly, you have four Pathways of branded compliance training ready to go. You could immediately enrol new employees as part of induction and then start a rolling process through existing employees. Quick wins are easy to create at this point.

## Step Two – Add your compliance policies

At this point, with your compliance fundamentals humming along, you can turn your attention towards your organisation's compliance policies.

Assuming you have developed your policies, your next step is to fold them into the training process. Each policy needs to be presented to employees in a way which improves their understanding and demonstrates your organisation took appropriate steps to inform and educate employees.


Copyright © 2021 Tribal Habits | 

Ideally, your compliance training platform can handle this too. In Tribal Habits, for example, you would use our Compliance Policy template to rapidly build training modules around your policies. This template gives you a 'fill in the blanks' process to present your policies as interactive online training, which captures policy acceptance, employee questions and online assessment. It takes less than 30 minutes to create a policy training module too.

You can then build this into each of your Pathways. For example, let's return to the Information Pathway. Let's say your organisation has an 'Acceptable Internet Use Policy'. You would use the template to create that module, and then add it to the Information Pathway.

- Information
    - Information security for employees
    - Phishing awareness for employees
    - Social media awareness
    - Privacy in the workplace
    - Our Acceptable Internet Usage policy

> IN A PLATFORM LIKE TRIBAL HABITS, THE COMBINATION OF READY-MADE COMPLIANCE TRAINING AND YOUR OWN CUSTOM POLICY TRAINING IS SEAMLESS. ALL TRAINING APPEARS IN YOUR BRANDING, WITH CONSISTENT NAVIGATION AND INTERACTIONS.

With just a few 30 minutes sessions, you can add your policies into each Pathway. Suddenly you have a perfect combination of compliance training and policy acceptance.

## Step Three – Expand for specific roles

Your final step in the process is to take the 'training + policy' approach and expand it to cover all roles and key issues in your organisation. For example…

- Warden training
- Risk management, incident reporting and injury management
- Driver training
- Mental health awareness and management

You may find that many of these issues continue to be covered by ready-made training modules and can be combined with your internal policies. With a platform like Tribal Habits, you can then discreetly target enrolments in these modules based on teams, locations, roles, titles or any other demographics.

## Step Four – Build your custom compliance training

As your experience and results with compliance training grow, you may even take the final step – creating custom compliance training. For many organisations, this is not necessary. Most organisations find that the combination of ready-made training and customised policy training is enough.

However, your organisation may have specific industry or regulatory compliance requirements which are not available in external libraries. Alternatively, you may have certain compliance requirements which cannot be adequately managed by online training – working at heights or working in confined spaces are examples of issues which generally need instructor-led training to adequately prepare employees.

At this point in the program roll-out, you have many positives achieved already – with very minimal effort. Making the investment to create these final modules is often much easier now with that experience.

> THE KEY IS SMALL STEPS, EACH BUILDING ON THE PREVIOUS STEP, TO AVOID OVERWHELMING YOURSELF, YOUR EMPLOYEES AND YOUR ORGANISATION. THEN, IN JUST 3-6 MONTHS, YOU SUDDENLY FIND YOU HAVE TICKED EVERY OBJECTIVE LISTED AT THE START OF THIS ARTICLE AND YOU WILL BE WONDERING WHY IT DIDN'T HAPPEN SOONER!


Copyright © 2021 Tribal Habits | 

# Using a compliance training framework

With your custom fields, enrolment rules, compliance library and policy articles ready to go, you are now ready to build your online compliance training.

> ONE OF THE KEY CHALLENGES IN COMPLIANCE TRAINING IS ORGANISING YOUR TRAINING AND INTERVENTIONS INTO A CONSISTENT FRAMEWORK WHICH MAKES SENSE TO YOU, YOUR ORGANISATION AND YOUR STAFF.

A consistent compliance training framework should allow you to start establishing compliance as a culture, rather than a 'tick the box' activity. It promotes compliance as an on-going exercise which requires a sustained focus. Managers come to appreciate that compliance covers a suite of critical topics and helps managers position the time spent on compliance with staff.

There are several compliance frameworks available on the internet, but many are complex and designed for organisations with significant resources to devote to the management and implementation of compliance.

For most organisations, 'less is more'! This means a simple and easy to understand compliance training framework, which doesn't require tremendous explanation or management, can be far more powerful. On that note, here's a three-pillar compliance training framework which would suit almost any organisation.

## Pillar 1: Values

This pillar is about what your organisation does. What does it stand for, its principles, its mission and its goals. All of these values need to be clearly defined and known to all staff. Given that this knowledge exists at an organisational level, guiding principles in the form of the organisation's core values and its code of conduct can be the basis for compliance in practice.

## Pillar 2: Policies

Whether it's government-imposed regulations or legal/regulatory requirements, every organisation would benefit from having their own internal compliance measures in place in the form of internal policies and procedures. This can also incorporate unique internal policies around, say, data storage, service level agreements or similar Standard Operating Procedures (SOPs).

## Pillar 3: Behaviours

Compliance programs, if designed and implemented from the standpoint of a "change in culture" or "change in behaviour" are directly beneficial to the employees of the organisation, as well as the leadership and management teams that help design and implement it. How employees behave and deal with their colleagues and customers directly impact themselves as well as the organisation. Behaviour-centric policies are, therefore, an inevitable component of compliance programs.

# Pillar 1: Values Checklist

For the Values component, you need to communicate the organisation's core values, code of conduct and culture. This training should occur immediately upon a new employee joining your organisation. However, it should also occur regularly for existing employees as your messaging, goals or values change.

In this case, your primary compliance tool is a Code of Conduct, including:

- ☐ Core values
- ☐ Mission and vision
- ☐ Substance abuse
- ☐ Conflicts of interest
- ☐ Confidential information
- ☐ Health and safety
- ☐ First-aid and emergency information

## How does this work in Tribal Habits?

We recommend creating a Code of Conduct pathway.

### Step 1 – Import relevant compliance topics

Start by navigating to the Knowledge tab in the Administration area, select Libraries and then Compliance from the menu bar. You can then import 3-5 compliance library topics relevant to your Code of Conduct.

### Step 2 – Create a Code of Conduct article

Next, create an article for your Code of Conduct, once again using the 'Policy Acceptance (Article)' template – then just follow the template instructions.

Finally – and optionally - you could also create a topic to introduce your organisation. You could start with the template 'Organisation introduction (Topic)'. That template provides you with step-by-step guidance to create a training module which introduces your organisation and its values.

### Step 3 – Combine topics and articles into a pathway

You are now ready to create a new pathway, which you can call 'Code of Conduct'. Start with your organisation introduction, then the compliance topics and then acceptance of your Code of Conduct policy. Select the option to require people to complete the topics in order. As an example:

1. (Created Topic) Our organisation and values
2. (Library Topic) Alcohol and drugs in the workplace
3. (Library topic) Privacy in the workplace
4. (Library topic) Workplace health and safety fundamentals
5. (Library topic) Sexual harassment awareness
6. (Library topic) Information security: Social media
7. (Created Article) Our Code of Conduct


Copyright © 2021 Tribal Habits | 

# Pillar 2: Policies checklist

In this aspect of the framework, you want to outline the policies applicable to job roles, including government-imposed requirements, legal/regulatory requirements, as well as internally-implemented best practices and Standard Operating Procedures (SOPs).

Once again, this information should be presented as part of a new employee induction process, but equally when people change job roles or when policies are updated.

- ☐ Applicable regulations (Industry-specific)
- ☐ Applicable legal requirements (Industry-specific)
- ☐ IT and Cybersecurity
- ☐ Social Media policy
- ☐ Phishing protection
- ☐ Hazards reporting
- ☐ Incident reporting
- ☐ Manual handling
- ☐ Record keeping
- ☐ Risk management
- ☐ Workplace safety
- ☐ Office ergonomics

# Pillar 3: Behaviours Checklist

Finally, you should place people at the heart of the compliance program, emphasising their role as drivers of the cultural and behavioural change in the context of workplace scenarios. This information will form part of new employee induction, but may also be required when people are promoted or as part of workplace performance management.

- ☐ Anti-bribery
- ☐ Anti-bullying
- ☐ Anti-discrimination
- ☐ Anti-harassment
- ☐ Personal conduct
- ☐ Sexual harassment
- ☐ Workplace violence
- ☐ Mental health awareness
- ☐ Stress management
- ☐ Managing poor performance
- ☐ Whistleblowing
- ☐ Plus, Manager versions of most of these topics

## How does this work in Tribal Habits?

Once again, we can utilise the Pathway functionality in Tribal Habits.

### Step 1 – Create pathways for employees and managers

First, let's create a pathway which is for all employees. This pathway will contain topics which are relevant to everyone, regardless of role or location, covering key policies and behaviours. We might call this pathway 'Employee Core Compliance Training'. The choice of topics will vary with your organisation and industry, but typically would include topics such as:

- Anti-bullying and anti-harassment for employees and workers
- Information security: Employee awareness
- Mental health awareness for employees
- Duty of care for employees

Next, create a matching pathway for managers called 'Managers Core Compliance Training', which includes topics such as:

- Anti-bullying and anti-harassment for managers
- Information security: Employee awareness
- Managing mental health in the workplace
- Duty of care for managers

You can optionally add policy acceptance articles which relate to these topics. Using custom fields, you can then enrol managers and employees into their respective pathways.


Copyright © 2021 Tribal Habits | 

## Step 2 - Create pathways for common roles

Now create specific pathways for common roles. For example, for employees working in the finance area and in an office, you may have a pathway called 'Finance Office Compliance Training' with topics such as:

- Information security: Phishing awareness
- Office and workspace ergonomics
- Anti-money laundering
- Fraud and corruption awareness and prevention

Alternatively, for managers in a physical environment such as a warehouse, there may be a pathway called 'Warehouse Managers Compliance Training' with topics such as:

- Risk management for managers
- Injury management for managers
- Equal employment opportunity for managers
- Workplace incident investigation

## Step 3 – Allocate individual topics for less common roles

Once you have mapped these core and extension pathways, you are likely to have covered 90% of your compliance training. At that point, you may just need 'spot' topics for particular situations such as warden training, driver safety or working with children.

Remember that all of these topics are included in the Compliance Library, reviewed and approved by Australian lawyers, appear in your branding and are complete with online assessments.

# Making compliance a continuous process

Compliance as a culture requires a continuous process that must be monitored and maintained once it has been implemented. It's beneficial for organisations in the long run to develop a culture of compliance rather than add to numbers of employees every year who simply 'know' the rules and policies.

Knowing the policies and principles is essential for employees so that they may apply the knowledge in their daily work, in turn embodying the cultural change.

An effective compliance framework, therefore, needs to tackle compliance in three ways.

1. Compliance training and interventions that create awareness and share knowledge of compliant behaviour. This is a first step. It is, however, the step most organisations are still struggling to implement!
2. Compliance training and interventions that let employees demonstrate the acquired knowledge and behaviours. This is the second step and a step which can be difficult for organisations without a digital learning platform to monitor activities.
3. Compliance training and interventions that serve as reminders or 'nudges' to help sustain complaint behaviour. This is the third step. It's the movement of compliance out of HR or the Compliance team and into the broader organisation.

## How does this work in Tribal Habits?

In the earlier parts of this guidebook we focused on the framework of your compliance training programs. Now it is time to automate this process to make the delivery of your compliance training as regular as possible. Let's review some best practices in Tribal Habits to reduce your administrative workload.

### Step 1 – Add due dates to all compliance topics and pathways

All compliance topics and pathways should have due dates.

- Tribal Habits supports both relative and absolute due dates. Relative due dates are set as a number of days from enrolment, while an absolute due date is set as specific date regardless of the enrolment time. Generally we recommend setting relative due dates which can then be 'set and forget' for all future enrolments. You may choose to use absolute due dates for specific topics which require timely completion or perhaps on an initial compliance roll-out where you want everyone to be completed by a specific date.
- Each compliance topic and policy article should have an individual due date. For compliance topics, we typically recommend 7-14 days. For policy articles, we typically recommend 2-5 days.
- Each compliance pathway should also have a due date. This is the date for all the topics in the pathway to be completed. It should be the sum of all the due date periods for each topic plus an extra 1-2 weeks. So if you had five compliance training topics, each with 7 day due dates, we would recommend the pathway due date be set at, say, 42 days (5 topics x 7 days + 7 extra days).


Copyright © 2021 Tribal Habits | 

## Step 2 – Enable enrolment notification emails

All compliance topics and pathways should have 'manual enrolment' notifications enabled. Generally we recommend only selecting the employee for enrolment notifications.

## Step 3 – Enable reminder notification emails

All compliance topics and pathways should have reminder notifications enabled. Remember that employees only receive reminder notifications if they have not completed a pathway or topic.

- For topics, we recommend using the '3 days before' and 'one week overdue' notifications. We recommend adding managers to the 'one week overdue' notifications.
- For pathways, we recommend additional notifications for before the due date. Depending on the length of the pathway, we recommend 2 or 3 notifications. For example, 4 weeks before, 2 weeks before and 3 days before. Then also the 'one week overdue', again with the manager added to this notification.

## Step 4 – Enable completion notification emails

All compliance topics and pathways should have completion emails enabled.

- For topics within a pathway, we recommend only subscribing the employee to the completion email. For topics which are not within a pathway (less used topics for less common roles), you may choose to add the employee's manager to the topic completion notification as well.
- For pathways, we recommend subscribing both the employee and their manager for the pathway completion email.

## Step 5 – Start enrolling employees (and managers)

There are a variety of ways to enrol employees into pathways and topics.

1. Self-enrolment rules - Pathways. As discussed earlier in this guidebook, it can be worthwhile assigning appropriate self-enrollment rules to each compliance pathway. Employees can then self-select into compliance pathways when they match rules, rather than having to wait for an enrolment.
2. Self-enrolment rules – Topics. Generally we do not recommend assigning self-enrollment rules on compliance topics UNLESS the topics are very specialised and not included in any pathway. Warden training is a good example of this. You could create a custom field called 'Warden' and create a self-enrollment rule for 'Warden = Yes'. Then apply that rule to the Warden training modules. Any employee who is a Warden will then see that topic for self-enrollment (or you can auto-enrol in bulk). Otherwise, use pathways for self-enrolment.
3. Uploads – Topics and Pathways. Both topics and pathways have unique codes in Tribal Habits which can enrol employees via a spreadsheet upload. This is often the fastest way to enrol groups of employees at once and could form part of your onboarding checklist.
4. Auto-enrol links – Topics and Pathways. Both topics and pathways have unique URL links which can allow employees to enrol simply by clicking on that link – for example, using these links on your intranet, embedded in a PDF document or internal communications. E
5. Learning Management System (LMS) links – Topics. Topics can also be embedded into an LMS if your organisation is using one. In this case, you can create a SCORM 1.2 link to embed into a module in your LMS. Employees can then enrol into the topic via your LMS, with topic completion data (and assessment scores) sent back to your LMS.

# How can we easily implement a new online compliance training platform?

Implementing online compliance training can seem a little overwhelming. The key is to implement in stages, not all at once. There will be many lessons learnt when implementing online training – lessons which allow for updates and improvements as each stage in the implementation process is completed.

So let's wrap up this guidebook with an easy seven-step process to make it easy when implementing online training.

> IN ADDITION, USING THE LINKS BELOW YOU CAN WATCH A SERIES OF 2-4 MINUTE VIDEOS WHICH DEMONSTRATE EACH OF THESE STEPS IN ACTION IN THE TRIBAL HABITS PLATFORM FOR AN EXAMPLE ORGANISATION CALLED ONE TREE CO.

One Tree Co moves through these steps over a 45 minute period and in that time implements three online compliance training pathways for 175 employees and managers in multiple locations.

## Step One – 2 mins - Set up your new online training platform

Your first step in the process is to set up your new online training platform. For modern online training platforms, this should be a relatively simple matter. The platform is hosted in the cloud, so no deployment or installation is required. No downloads should be required either.

Ideally, there are no set-up or implementation fees either, since setting up a new organisation in a cloud-based online training platform typically takes just a few minutes. Your major decisions will be on some brand logos and colours and your primary administrator details.

If your organisation utilises single-sign-on, you could also choose to integrate with your SSO provider at this step or do that later. For maximum compatibility, you could also elect to provide your IT department with any URLs or email addresses from your platform which they may need to whitelist (if your internal IT security is particularly fussy).

Watch step one in real-time video here.

## Step Two – 5 mins - Import ready-made compliance training

In this example, we are going to focus on some early wins. We want to get the platform initially in use without creating too many difficulties. It's also important we see the platform well used and have useful data to report quickly, to reinforce the value of the online training platform and build support for additional stages of implementation in the future.

We would typically recommend you, therefore, start with online compliance training. This training can be imported from the compliance library in your online training platform (ensuring it is approved by Australian lawyers). It most online training platform, this process should take just a few minutes.

The imported online compliance training should appear in your organisation's branding too which will boost engagement and reinforce the importance of the compliance training (check with your online training platform to confirm this rebranding process occurs).


Copyright © 2021 Tribal Habits | 

Watch step two in real-time video here.

## Step Three – 10 mins - Prepare a simple custom online training module

For the initial roll-out of your online training platform, it can be useful to include one relatively simple customised online training module. This is a chance for you to test out the online training creation tools in your platform.

The simplest choice here would be a short topic on a compliance policy in your organisation. The topic can present your policy, capture the acceptance by your employee and then (optionally) ask 5-10 quiz questions to confirm their understanding.

This should be an easy process in a modern online training platform. In Tribal Habits, for example, you would simply copy the 'Compliance policy acceptance' module from the Template Library and then fill in the blanks. You could then request your free review by a Tribal Habits training expert.

Watch step three in real-time video here.

## Step Four – 3 mins - Create some online training pathways

The next step is to organise your imported and custom online training into some training pathways. Pathways group together modules into a single experience. Pathways make enrolments much easier since you only need to manage enrolments into a single pathway rather than many modules.

Pathways are also easier for employees since it is clear that they must complete a series of modules to finish this training exercise. It becomes a 'to-do checklist' which is intuitive and engaging.

You might create separate pathways for employees and managers, as well as pathways for compliance and induction. In this case, two pathways of compliance modules and policies for both employees and managers might make sense.

Watch step four in real-time video here.

## Step Five – 5 mins - Set up automated administration functions

Now you are ready to make your administration easier. Your online learning platform should contain a number of features which can automate the ongoing management of your employees in their online training.

- Automated due dates – You should be able to set due dates for both your modules and your pathways based on either specific dates (e.g. the due date for all compliance training pathways is set as 30 June regardless of the date an employee joins the organisation) or dynamic dates (e.g. the due date for each module is set as seven days from the date the employee starts each module).
- Automated notifications – You should be able to have the online training platform automatically send email notifications to employees as they are enrolled in pathways. Ideally, their manager should also be notified so they can help manage the employee through the process.
- Automated reminders – Finally, you should be able to activate automated reminder emails for employees, both in advance of their due date and after their due date. Ideally, their manager should also be notified when they are well overdue.

Watch step five in real-time video here.

## Step Six – 10 mins - Set up custom user profiles and prepare data

We are almost ready to upload and enrol your employees. Before we do that, go into your online training platform and set up the data you want to record for each employee. You should be able to add things like location, role, team or any other useful demographic information.

These fields can be later used to help segregate employees for improved reporting, data analysis and enrolment options. Once you have your data fields set, download a CSV template from your online training portal to populate with employee information.

Watch step six in real-time video here.

## Step Seven – 2 mins - Upload and enrol your employees

You can now upload your employee spreadsheet AND enrol employees into their compliance training pathways at the same time. That should trigger your automated notifications and due dates. At this stage, your initial implementation is complete.

You can allow some time for employees to undertake their training. As a next step, you can start to review training data, quiz answers, success rates and employee feedback while contemplating the next step in your implementation process!

Watch step seven in real-time video here.

Copyright © 2021 Tribal Habits | 

# Case Study: Madison Technology and delivering effective online compliance training fast

| Challenge | Approach | Outcome |
|---|---|---|
| Madison Technologies needed a cost-effective way to train its workforce. The solution had to be rolled out rapidly and needed to address business challenges that were unique to the organisation. | Madison Technologies implemented the Tribal Habits platform and quickly deployed ready-made Development and Compliance training modules. Once these were bedded down, the team started to create customised online training. | Within a matter of weeks, Madison Technologies went from having no online training to a fully-fledged online learning suite that included compliance training, professional development and best practice sharing. |

Madison is Australian owned and is comprised of businesses specialising in the design, development and distribution of leading connectivity products and technologies. Their businesses provide connectivity solutions across a broad range of communications, audio visual, wireless and networking disciplines.

Being part of the fast-moving tech space means this business has many moving parts. Innovating to create customised product solution, meeting tight supply deadlines and engaging in consultative selling with clients are all part of the day-to-day activities of the business.

Since its founding in 1991, Madison has maintained a strong commitment to its people and aims to abide by its mantras of being 'Well Connected' and 'Making it Happen.'

## Staff desire to improve was the catalyst for online learning

The results of one of the organisation's frequent employee engagement surveys suggested that role-specific training and professional development was something that the organisation's staff had a strong desire to pursue.

Upon receiving this feedback, Madison's leadership team committed to meet its staff requests for more training and development opportunities.

Madison does not have a formal learning and development or training function. As such, the Human Resources team picked up the initiative to create and roll out the new training initiative across the organisation.

## Nothing fitted the bill

Madison knew that delivering comprehensive training across the organisation would require an online learning solution. Due to a heavy workload and resource limitations, the business could not dedicate hours and hours to face-to-face training.

When the team started looking for a technology solution, they began to hit roadblocks. Most solutions they investigated came with a high price point, required specialist instructional design skills and were pitched more towards enterprise organisations with large budgets and dedicated learning and development staff.

Madison came across Tribal Habits at the AHRI conference and were immediately impressed. The ability for anyone in the organisation to create customised training content was something that stood from the initial discussions.

> "From the first time we spoke, I could see that Tribal Habits were offering something different, something that would fit a business of our size." Kate Arnold, Manager People and Change

## Start small and grow

While the end goal for Madison was to be creating role-specific customised content, the organisation needed to get runs on the board quickly. To make an immediate impact, it rolled out the Tribal Habits Compliance and Development Libraries. These ready-made content libraries provided the team with compliance training that was approved by Australian lawyers and professional development topics such as 'confident business networking' and 'coaching and developing staff'. This training was rolled out to staff in a matter of days.

As well as providing the team with great learning opportunities, this rapid roll-out gave staff their first exposure to the Tribal Habits platform and the concept of delivering training online.

> "The training, and the platform itself, received great feedback from our staff. Starting with the ready-made libraries was a fantastic jumping-off point on our journey into online learning." Kate Arnold, Manager People and Change

Perhaps the biggest win was the fact that the training content was available at any time, on any device. This meant that staff could access training where and when it was needed. With staff working different rosters and distributed across multiple locations, warehouses and offices, this 24/7 availability solved a lot of challenges when it came to delivering training.

## Creating custom online training content

With the libraries place, the team shifted its focus to creating learning experiences that were customised to its operations.

The ability to easily create training was one of the things that stood out about the platform. The team followed Tribal Habits' AI guide (Sage) who provides constant updates throughout the training creation process.

> "Sage is amazing. Not having a background in instructional design I was uncertain if the training I created would hit the mark, but Sage guided us through each step of the process. She let us know if the training was too long, too short, where we could leverage videos or images and lots of other tips. It's an amazing feature." Hailey Myatt, Employee Experience Officer

Combining the directions from Sage with the easy to use drag-and-drop training creator has made the task of creating training possible for Madison employees who do not have previous experience in designing training.


Copyright © 2021 Tribal Habits | 

## Our teams are now building customised online training

The HR team created the first custom training modules. Then, over a short period, the HR team were able to introduce different subject matter experts across the business to the platform and show them how easy it is to create training in Tribal Habits. These experts, and their teams, are now creating their own customised online training. Some business units are doing this work entirely on their own, while others are working together with the HR team to create training collaboratively.

> "It's very powerful to have different functions in our business creating training that is relevant to what they do. They know their own space best, so they are the perfect people to be creating the training. We sometimes jump in and help, but ultimately it's the subject matter experts sharing what they know." Hailey Myatt, Employee Experience Officer

## What the future holds

Madison is committed to rolling Tribal Habits out across more parts of the business. The organisation will increase the amount of compliance training its offering and will be complementing its face-to-face leadership training with online training elements in Tribal Habits. Tribal Habits is also being written into formal performance improvement and personal development plans.

> "In the short time we've been working together we've delivered some big results. Our experience with Tribal Habits has been great. The task for us now is to get the training to more people more regularly." Kate Arnold, Manager People and Change

# What is Tribal Habits?

Tribal Habits is the all-in-one learning platform for modern organisations. We provide online training that's easy to create, engaging to learn and simple to manage.

- **Easy to create**. Allow your staff to share what they know. If you can create a PowerPoint presentation, you can create interactive online training in Tribal Habits.
- **Engaging to learn**. Training your team will love. Tribal Habits leverages video, social learning and interactive elements to inspire employees to make real change.
- **Simple to manage**. Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

## What types of organisations use Tribal Habits?

- **5-500 employees**, which may not have any dedicated training resources or existing online learning platform. In these organisations, it is often the business managers or human resources team who looks after training. For these organisations, we offer 'enterprise-level' outcomes but at a far more affordable cost and with a simpler process.
- **500-50,000+ employees**, which may or may not have a learning and development team, but are struggling to keep up with training requests. In these organisations, there is often a huge demand for training but traditional eLearning authoring tools are too slow. For these organisations, we leverage existing resources and supercharge learning output.

*Tribal Habits gives us more control over our content in terms of developing and editing it. It's much more responsive than other learning platforms we have used before, where you request changes and it takes a long time to be done. We can just make changes instantly now.*

★★★★★

Queensland Human Rights Commission

*Tribal Habits is unique in the market as it allowed us to rapidly capture and transfer organisational knowledge via text, imagery, video and interactive elements. It also shares tips from participants, meaning the knowledge captured increases as users complete topics!*

★★★★★

SMEC
Member of the Surbana Jurong Group

*Content creation is easy and fun on Tribal Habits; the system's built-in structure ensures that content is organised in a manner that enables the final output to be exactly what's needed. This gives me great confidence that my training will hit the mark.*

★★★★★

MOQdigital.
Leading Business Transformation

*It would have taken us up to a year to create the topics using a traditional e-learning authoring tool. With Tribal Habits we were delivering amazing training in three months, and we've estimated the cost has been about 25% of what it would have been had we gone with a traditional solution.*

★★★★★

Cardno

*Tribal Habits' online compliance library has been a game-changer for us. We now have total peace of mind that our people are safe and our brand and organisational reputation is protected. Delivering compliance training online has also saved us a significant amount of time, money and hassle.*

★★★★★

CARROLL & O'DEA LAWYERS

*Tribal Habits' video feedback on the topics we created is amazing - really useful suggestions and so easy to follow. People are already loving the training! The system is so easy to use, and the interactive elements have allowed us to make training a lot more engaging. We couldn't ask for anything more.*

★★★★★

DVCONNECT
Be heard. Be safe.


Copyright © 2021 Tribal Habits | 

# What are the top features of Tribal Habits?

## Rapidly create online training on any topic

Learners crave relevant training. Tribal Habits allows anyone to build relevant, engaging online training. The content you create will speak to your learners and appear in your branding.

- ✔ Intuitive, fast and powerful building block elearning authoring process
- ✔ Built-in image library (2 million+ images), image editor and video hosting
- ✔ Real-time feedback of your modules from Sage, our digital learning designer
- ✔ Free video analysis of your modules from our expert learning designers
- ✔ Version control, wide range of interactions, uploads/downloads, embeds and more

Modules are responsive to any device, can support WCAG 2.1 accessibility to a Level AA standard, are streamed on-demand in a lightweight environment and allow for social learning opportunities between users.

## Tap into ready-made modules – branded and editable!

Access 100's of fully editable online courses from Australian compliance topics to personal development courses.

Our training library is more than just a random assortment of videos and articles. Every module is professionally designed, appears in your organisation's branding and is 100% editable by you at no extra cost. Import and immediately use, or create a copy and fine-tune as needed.

## Automate training management for online and offline learning

Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. A range of automations and rules make it easy for anyone to manage users and enrolments.

- ✔ Automate due dates, notifications, certified dates and certification
- ✔ Enrol via 10 different methods – spreadsheets, groups, managers, links and more
- ✔ Dedicated manager's view, including enrolments, reminders and emailed reports
- ✔ Dynamic training catalogue, which adjusts available modules to suit the learner's role
- ✔ Integrate with 3,000+ other platforms to reduce effort and ensure data consistency

Add online or offline events to any module, with calendar bookings, roll-calls, locations or more. Record external knowledge, such as licences, accreditations and qualifications for a complete view of all completed learning.

## Go deep with learning data and detailed reporting

Tribal Habits tracks far more than just training completion. You can report on all learning contributions, outcomes and activities.

- ✔ Training completion data for every part of every module
- ✔ Compliance completion and expiry (past and future)
- ✔ Job role tracking for required competencies and skills
- ✔ External training – licences, accreditations, qualifications
- ✔ Continuing education reports by time or points, with custom categories
- ✔ Filter by any user data field and download all data into spreadsheets

# What problems can Tribal Habits help solve?

Tribal Habits offers complete online training solutions for your organisation on any stage of the journey. We typically help organisations with five key solutions through the learning journey.

## Manage training online

Organisations waste a great deal of time delivering the same training over and over. Offline management of training is time-consuming and frustrating, and issues with version control mean your staff could be accessing information that is no longer accurate.

Tribal Habits remedies these challenges by providing a 'single source of training truth'. Reporting is simple and powerful, while automation and reminders drastically reduce the administrative burden associated with managing training.

## Meet compliance needs

Compliance training is a vital part of your organisation's strategy, protecting your staff and boosting the bottom line. From building a culture of safety to helping managers develop strong and inclusive teams, compliance training is a critical part of your reputation.

Tribal Habits' library of engaging, interactive compliance training is fully approved by Australian lawyers. Our library can be supplemented by self-created compliance topics using a simple drag and drop editor, providing you with a comprehensive online compliance training solution.

## Convert existing training

If you're already running face-to-face training and workshops with PowerPoint presentations and facilitator-led engagements, you've done the hard work. Moving your training content online is a breeze with Tribal Habits.

Open up a world of new learning opportunities by moving away presentations and documents, and away from the logistical challenges of face-to-face training. Unlike a traditional learning management system, Tribal Habits has a completely integrated online training creation toolset.

## Optimise employee induction

How new employees are brought into an organisation matters. Optimising employee induction reduces employee churn, engages staff, reduces rework and makes new starters productive in far less time.

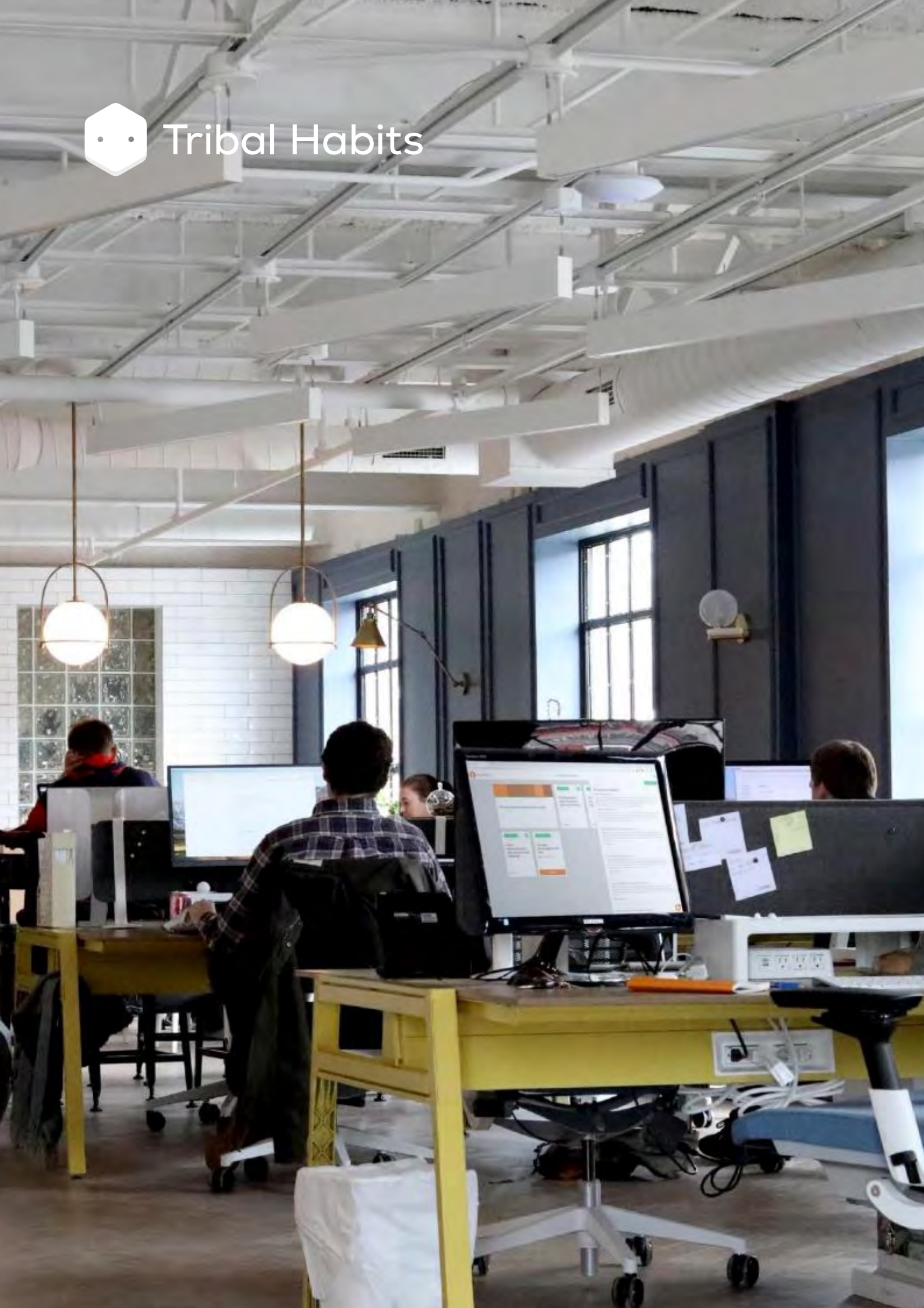
Tribal Habits optimises employee induction by delivering induction learning pathways that align new starters to organisational culture and processes, while bringing them up to speed as quickly as possible with consistent, repeatable training.

## Share best practices

Over time, your top-performing employees have developed unique skills and approaches. Successful organisations capture and transfer this knowledge increasing the capability of their workforce and protecting again the loss of critical knowledge as staff move on.

Tribal Habits' simple drag and drop editor allows anyone in your organisation to create learning experiences based on their unique knowledge. These experiences can be shared across your team, broadening the organisation's knowledge base and turning best practice into everyday practice.


Copyright © 2021 Tribal Habits | 


Tribal Habits

# How does Tribal Habits boost online training?

## How does Tribal Habits make training easy to create?

If you can create a PowerPoint presentation, you can create online training in Tribal Habits.

1. **Start by importing from a library**. Tribal Habits has two libraries of world-class training content ready to be imported into your portal. From Australian online compliance training to personal development training, we have you covered. Our library topics appear in your branding and seamlessly plug-and-play with any training modules of your own. Access instant training content or complement internal knowledge.
2. **Start from a training template**. Creating your own training in Tribal Habits is simple. Start from one of our commonly used online training templates, or simply begin from scratch. Our building block editor makes capturing knowledge as easy as creating a PowerPoint presentation. Except now you have interactive online learning, complete with tracking and reporting! You can also upload existing elearning from legacy formats including SCORM, xAPI, AICC and cmi5.
3. **Start by following a guided process**. Tribal Habits provides a fully guided process to create online training that ensures you capture the information that is most pertinent to your organisation. Our online training building block editor allows Tribal Habits to automatically format all your training content. You can also tap into free advice from our experts to ensure your training is on point.
4. **Allow us to lend a hand**. Call on the experience and expertise of the Tribal Habits team to get the job done for you. Whether it be updating and transferring old material or starting from scratch, we're here to help. We can provide advice on training curriculums, transfer existing training content or run briefing sessions with your internal experts to motivate and inspire their efforts.

## How does Tribal Habits make training engaging to learn?

Tribal Habits' modern interface leverages video, social learning and interactive elements to inspire employees to make real change.

- **A modern learning experience**. Today's organisation is mobile, agile and responsive. That's why Tribal Habits is available 24/7 and performs on any device. It's like using a modern website, not an old-fashioned slide show. Tribal Habits user interface is sleek, intuitive and requires no training. We automatic adapt content to your brand standards, including modules from our ready-made libraries.
- **Social sharing and peer learning**. Reflection questions encourage learners to periodically share thoughts with other learners to improve knowledge retention and foster a feeling of social learning. Tribal Habits can share insights that other users have gleaned through their learning journey. These connections enhance the learning experience by providing context and social proof.
- **Move from theory to practice**. To facilitate the flow of information from theory to practice, Tribal Habits actively prompts users to implement what they learn into their day-to-day jobs (and feedback about outcomes achieved). The best performing teams are those that continuously practice and reinforce what they learn in training. Tribal Habits understands this and includes built-in features to support implementation.


Copyright © 2021 Tribal Habits | 

## How does Tribal Habits make training simple to manage?

Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

- **Automate the mundane**. Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. Simply enrol staff in pathways, and our set-and-forget admin panel automatically sends training prompts to users and tracks training progress and knowledge transfer throughout your organisation.
- **A single view of training**. Tribal Habits is your repeatable, foolproof approach to training. Do away with spreadsheets, folders, emails, PDFs and slides, all containing different information and no completion data. Online training provides the same experience to every employee, every time, in any location. Tribal Habits' version control ensures staff access only the latest information at all times.
- **Detailed reporting and analytics**. Tribal Habits reporting goes way beyond simple topic completion tracking. Two-way communication and feedback loops allow staff to comment on what they've learnt and the effectiveness of training. Reporting shows how new skills have been implemented in day-to-day work and highlights the requirement for further training—filter training data online with interactive graphs or offline via CSV.

# What ready-made training can we access?

**Here's a sample of the 100s of modules in our library – all in your branding and fully editable.**

## Communication and Personal Development

- An introduction to emotional intelligence
- An introduction to negotiation skills
- Best practice listening skills
- Building your influencing skills
- Coming back from a big mistake
- Communicating effectively in the workplace
- Communicating with management and stakeholders
- Designing presentations that engage
- Introduction to effective decision-making skills
- Managing and resolving conflict
- Overcoming imposter syndrome
- Overcoming the fear of failure
- Problem solving and creativity
- Professional business writing skills
- Staying productive: Managing internal meetings
- Staying productive: Managing your emails
- Staying productive: Managing your priorities
- Verbal communication: Advanced skills
- Verbal communication: Essential skills

## Equal Employment Opportunity (EEO)

- Anti-bullying and anti-harassment for employees
- Anti-bullying and anti-harassment for managers
- Equal employment opportunity for employees
- Equal employment opportunity for managers
- Overcoming unconscious bias
- Sexual harassment awareness

## Finance and Regulation

- Anti-money laundering
- Competition/Consumer law: Conduct and Statements
- Competition/Consumer law: Introduction
- Competition/Consumer law: Safety and Warranties
- Fraud and corruption awareness and prevention
- Modern slavery awareness
- Privacy in the workplace
- Whistleblowing awareness for employees

## Health and Safety

- Alcohol and drugs in the workplace
- Colds, flu and COVID-19 prevention
- Driver safety
- Duty of care for employees / managers
- Information Security: Employee awareness
- Information Security: Phishing awareness
- Information Security: Social Media
- Injury management for employees / managers
- Managing mental health in the workplace
- Managing slip and trip hazards
- Manual handling safety
- Mental health awareness for employees
- Office and workspace ergonomics
- Risk management for managers
- Risk management for workers
- Safety for children and vulnerable people
- Warden Training
- Workplace health and safety fundamentals
- Workplace incident investigation

## Leadership and Management

- Delegating as a manager or leader
- Five successful leadership styles
- Holding productive 1-on-1 meetings with your team
- Managing teams for better performance
- Motivating your staff and teams
- Setting expectations with staff and teams
- The five core skills for leadership
- Transition from employee to manager

## Project Management

- Project Management: Overview
- Project Management: Practical ideas
- Project Management: Selecting a framework
- Project Management: Scheduling and deliverables
- Project Management: Tasks, time and resources
- Project Management: Managing communication
- Project Management: Project meetings
- Project Management: Reporting and KPIs
- Project Management: Costs, risks and quality
- Project Management: Scope management
- Project Management: Change management

## Remote working

- Interviewing skills: Remote hires
- IT security while working from home
- Managing remote and virtual teams
- Running successful virtual team meetings
- Staying productive: Working at home

## Sales and Service

- Best practices in client service
- Building trust in the sales process
- Conducting effective client review meetings
- Confident and effective business networking
- Creating sales momentum and closing more deals
- Defining your ideal client
- Developing a compelling value proposition
- Generating upselling and cross-selling opportunities
- Marketing tactics to help client referrals
- Obtaining client referrals and references
- Sales proposals and engaging writing skills
- Sales proposals and managing the process
- Sales proposals and pitching for success
- Strategies to boost repeat business
- Successfully helping upset clients
- Successfully responding to client objections
- Understanding and managing client expectations
- Understanding the client buying cycle

## Talent Management

- Coaching and developing staff
- Creating a personal training plan
- Discussing performance with staff
- Interviewing skills: Advance techniques
- Interviewing skills: Essential skills
- Managing staff training for success
- Managing staff underperformance
- Mentoring: An introduction to being a mentee
- Mentoring: An introduction to being a mentor
- Recognising and rewarding staff performance
- Writing effective position descriptions


Copyright © 2021 Tribal Habits | 

# How affordable is Tribal Habits?

## 1 - No upfront fees

It's so easy to get started with Tribal Habits - there are no upfront costs!

- ✔ No set-up fees. All plans have no set-up or implementation fees.
- ✔ No storage fees. All plans have unlimited stored users and training content.
- ✔ No support fees. All plans, including admin training and passionate support.
- ✔ No branding fees. All plans include a private, branded online training portal.

## 2 – Select your packages

Choose from one of two packages.

### Creator

In this package, you gain access to our complete creator toolset. You can create unlimited online training (topics, articles and pathways) on any knowledge important to your organisation.

### Creator + Library (Most popular and best value)

In this package, you can not only create your own training, but you gain access to our entire library of ready-made training. Our ready-made training modules are complete online learning experiences, with interactions, media, assessments, templates and more. Library modules appear in your branding and are interchangeable with training you create. With the Creator + Library package you can also edit our library content to rapidly develop custom training for your organisation. It's the best of both worlds – create your own, use our modules or seamlessly customise and combine.

## 3 - Only pay for actual use

Unlike most learning platforms, we do not charge based on stored users. Our plans are based on 'active users'. An active user is a user in your portal who logs in during a calendar month. Active users are counted on their first log in each calendar month and can then login as much as they like, to create or complete as much training as they like.

For example, if your organisation has 500 employees, but only 200 tend to login in each month, you only need a 200 monthly active user plan. Don't worry if you overrun your plan either – you are simply charged for the incremental extra users for that one month at the same monthly rate. **Active user plans can cut your training costs by 30-50% (compared to stored user plans).**

## 4 – Select a monthly or annual subscription

Then just select a payment plan to suit your needs.

- Monthly plans suit organisations with less than 75 active users per month. You pay for actual use each month, which keeps costs flexible and aligned with your value. Monthly plans start from $7.50 per active user per month.
- Annual plans offer discounted, and predictable, annual costs. You pay for 12 months of active users in advance. Annual plans start from 100 active users per month ($5.50 per active user per month) and increase in multiples of 50 users.

# How secure is Tribal Habits?

We take security seriously at Tribal Habits. We want you to feel Tribal Habits is a safe and trustworthy portal for your staff, clients and prospects to build a community of knowledge.

- Constant vulnerability testing, including during code development and from third party security firms (including annual penetration and vulnerability testing by external firms).
- We are hosted by Amazon Web Servers and take full advantage of their security and infrastructure capabilities (including DDOS protection, IAM monitoring and full backups).
- All data is encrypted in transit and at rest using industry standard encryption. Geographic filtering is available to restrict user access from specified countries.
- Our Security Policy, Security Practices, Incident Response and Acceptable IT Use documentation are available for review – just contact us for a copy.
- Tribal Habits is fully SAML 2.0 compliant and integrates with compatible Single-Sign-On platforms (Azure AD, Okta, OneLogin and more) for additional user security.

A good starting point for a security review is our online Security FAQs.

# How easy is it to implement Tribal Habits?

Very easy.

1. First, your trial portal will become your live portal. This means most of the initial set-up for your portal is already complete during the trial. In fact, the workload to implement Tribal Habits is far less than other online platforms and can be measured in minutes.
2. Second, you can import (and update) users and existing training records via spreadsheet or enable single-sign-on to auto-create new users. In either case, establishing your initial users takes minutes. Most of the work will be in preparing a spreadsheet of your users to upload.
3. Third, importing topics from our libraries and establishing initial pathways or enrolments takes minutes. Topics are imported in seconds, and it takes less than a minute to activate some due dates, notifications and reminders of each topic. Similarly, you can upload existing training content in SCORM (or similar format) in minutes.
4. Fourth, when it comes to creating your own online training, Tribal Habits will be faster than any other alternatives. We have template topics, guided processes, pre-formatted content, built-in feedback and free human reviews. We'll shortcut you from paper-training to interactive online modules in hours or days - not weeks or months.
5. Fifth, you receive private Zoom training sessions on both creating training content and managing your training processes. We have an extensive knowledge base of support articles, built-in modules on using the platform, live admin chat (during Australian business hours) and regular Town Hall webinars with the Tribal Habits community.

You can continue reading about on-going support after your initial implementation online.

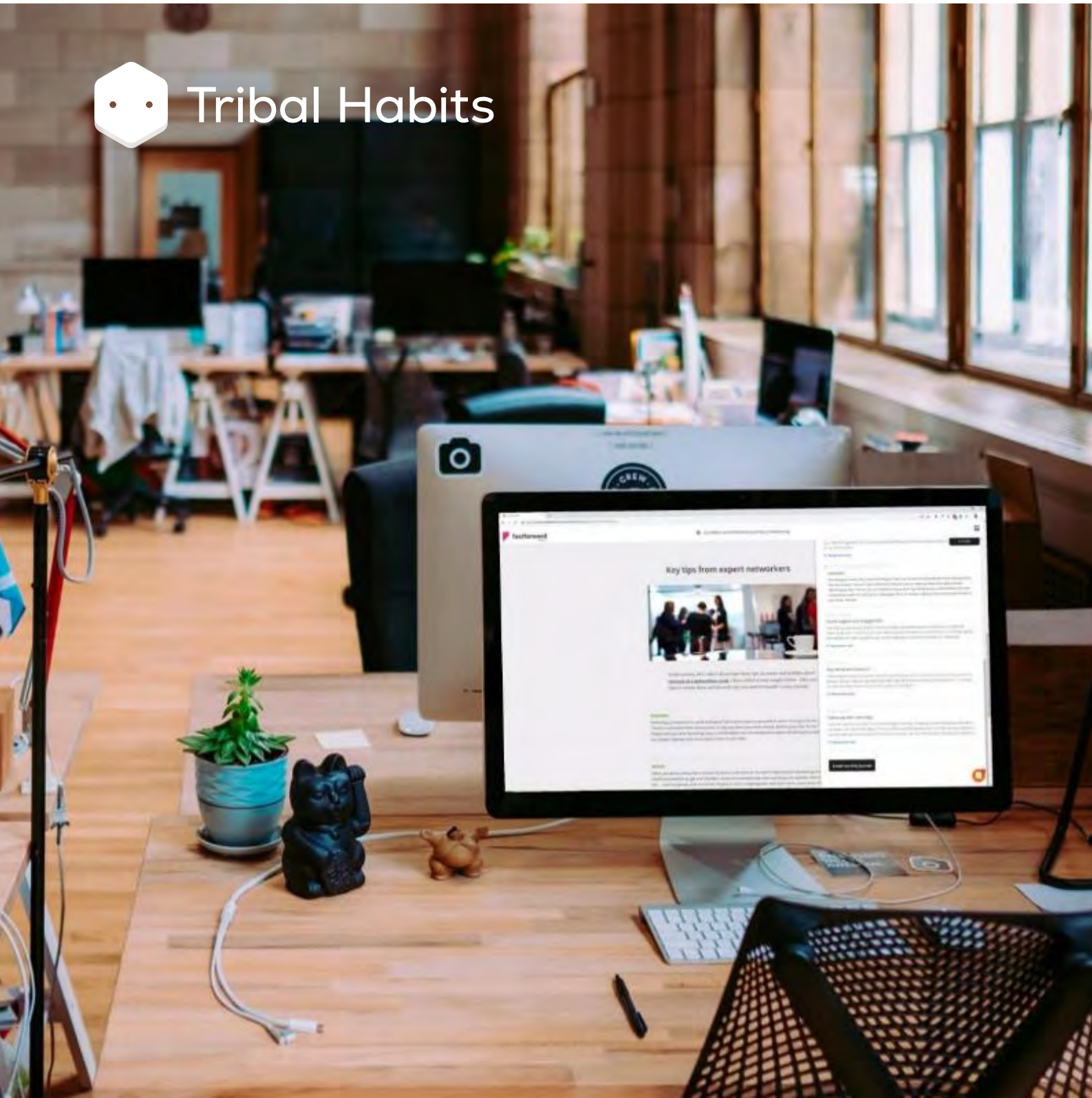

Copyright © 2020 Tribal Habits | 

# How can I get started with Tribal Habits?

A quick demo will give you everything you need to know about Tribal Habits and how to make it a success within your organisation. After the demo, you'll have access to a free, full-featured trial portal to you get started.

There's no catch. You're not signing up for pushy sales calls and endless emails. There's no obligation or credit card required. Your trial is hosted on Amazon servers. We really just want to show you how Tribal Habits works. We think you're going to love it.

Go to [https://tribalhabits.com/get-started/](https://tribalhabits.com/get-started/) to organise your demo.



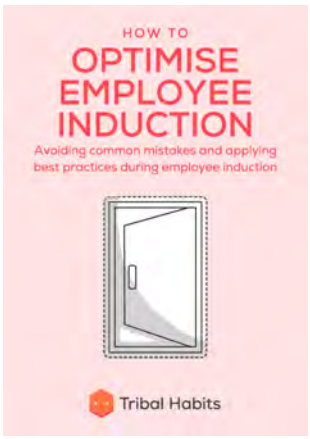
# Other Tribal Habits Guidebooks

## Manage Training Online

Examine a step-by-step guide to saving time, money and hassle with an online learning platform in this 60-page guidebook.

Spread over three parts, you'll learn:

1. Why you should manage training online
2. Which online learning platform suits your organisation
3. How to implement a learning platform

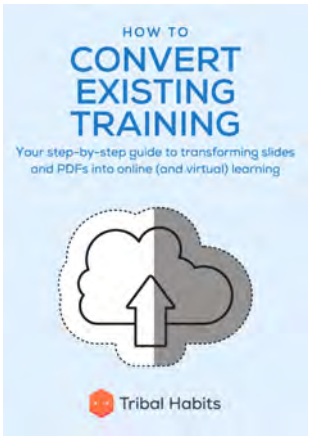



## Optimise Employee Induction

In this guidebook, we review how to avoid common mistakes and apply best practices during employee induction.

Split into two parts, you can learn:

1. Why your organisation needs induction training and how to build the business case
2. How to optimise employee induction training with both online and offline strategies




## Convert Existing Training

This guidebook outlines a step-by-step guide to transforming slides and PDFs into online training.

With three detailed chapters, you'll learn:

1. Why offline content should be converted to online training
2. How to map out a plan to convert content to online
3. How to manage virtual training for blended learning

## Share Best Practices

This guidebook examines a step-by-step guide to turning best practice into common practice with online training.

Across six key articles, you'll learn how to identify and work with your subject matter experts and help build a culture of collaboration and knowledge sharing in your organisation.


Copyright © 2020 Tribal Habits |

## Reduce Training Costs

In this guidebook, you can review tips and tricks to set a training budget and maximise your training expenditure.

Over seven detailed articles, we examine how to set a training budget, the most common costs of training (and how to reduce or eliminate them) and examine more cost-effective ways to deliver training than expensive traditional methods.

## Tribal Habits Success Stories

In this guidebook, get inspired by real-life success stories from leading organisations across Australia as they use Tribal Habits to improve their learning.

There are detailed examples of real implementation in compliance, induction, best practices and converting existing training materials.

## Tribal Habits Training Libraries

In this guidebook, you can review the entire range of ready-made training modules in the Tribal Habits Foundation, Development, Compliance and Template libraries.

See how quickly you can be activating our ready-made training modules in your organisation's branding.

# References


[i] ADP Research Institute, Top Concerns and Challenges of Midsized Business Leaders in 2013

[ii] ADP Research Institute, Top Concerns and Challenges of Midsized Business Leaders in 2013

[iii] Stryker, Nicole. "The Compliance Journey: Boosting the Value of Compliance in a Changing Regulatory Climate." KPMG. Ed. Karen Staines. KPMG LLP, 2017. Web. 13 July 2017

[iv] Penman, C. & Stephens, R. (2016). 2016 Ethics and Compliance Policy Management Benchmark Report.

[v] Barclay Simpson. (2016). Corporate Governance Recruitment Market Report 2016 - Compliance.

[vi] Freedeen, I. (2016). 2016 Ethics and Compliance Training Benchmark Report.

[vii] Ethics and compliance initiative. (2016). Global Business Ethics Survey.

[viii]Association of Certified Fraud Examiners. (2016). 2016 Report to the Nations.

[ix] Barker, I. (2016). 60 percent of enterprises have fallen victim to social engineering in 2016.

[x] https://www.safeworkaustralia.gov.au/doc/infographic-workplace-bullying-and-violence

[xi] https://www.safeworkaustralia.gov.au/doc/infographic-workplace-bullying-and-violence

[xii] Penman, C. & Stephens, R. (2016). 2016 Ethics and Compliance Policy Management Benchmark Report. Retrieved 18 January, 2017

[xiii] https://hbr.org/2016/03/a-bad-reputation-costs-company-at-least-10-more-per-hire

[xiv] https://www2.deloitte.com/us/en/pages/about-deloitte/articles/press-releases/millennial-majority-driving-transformation.html




Copyright © 2020 Tribal Habits | 