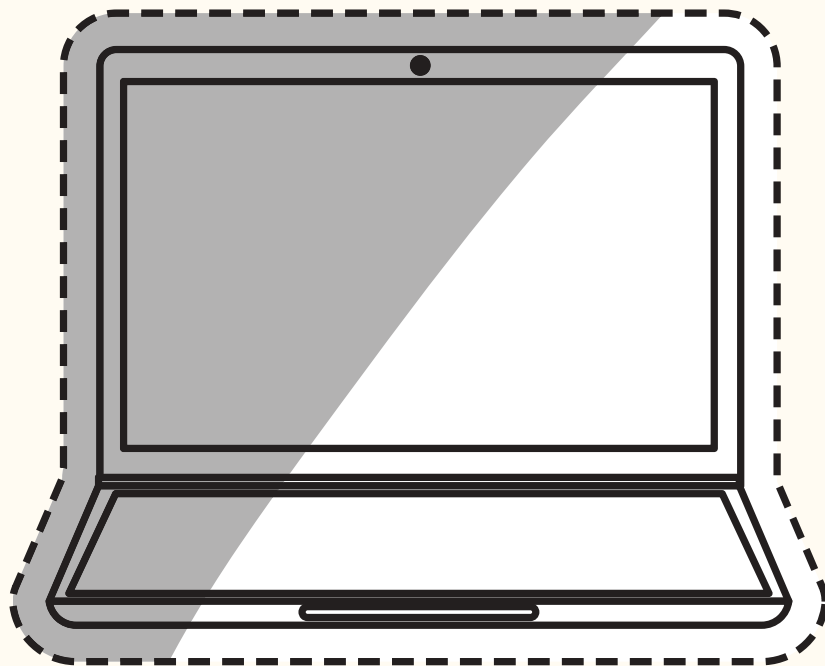


# HOW TO MANAGE TRAINING ONLINE

Your step-by-step guide to saving time, money  
and hassle with an online learning platform



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 organisational goals.

- Capture internal processes to ensure internal consistency and efficiency in all teams.
- Share internal 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**. This phase includes the process of moving your organisation's learning online. We'll help you to understand your training needs, build a business case for a digital learning platform and then select a platform which suits your organisation. This is a tricky process for many organisations, as most online learning platforms are designed solely for enterprise-level organisations (in complexity and cost).

Of course, I believe the solution these challenges is Tribal Habits – a unique online learning platform which combines three (historically separate) platforms into one:

1. A fully-featured elearning creation process with easy to use tools and built-in guidance.
2. A complete learning management system (LMS) to brand and share your training online.
3. A holistic training management platform – internal, external and blended learning combined with skills/competency tracking, continuing education, compliance reporting and more.

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

David King

Founder | Tribal Habits

[david@tribalhabs.com](mailto:david@tribalhabs.com)

# Contents

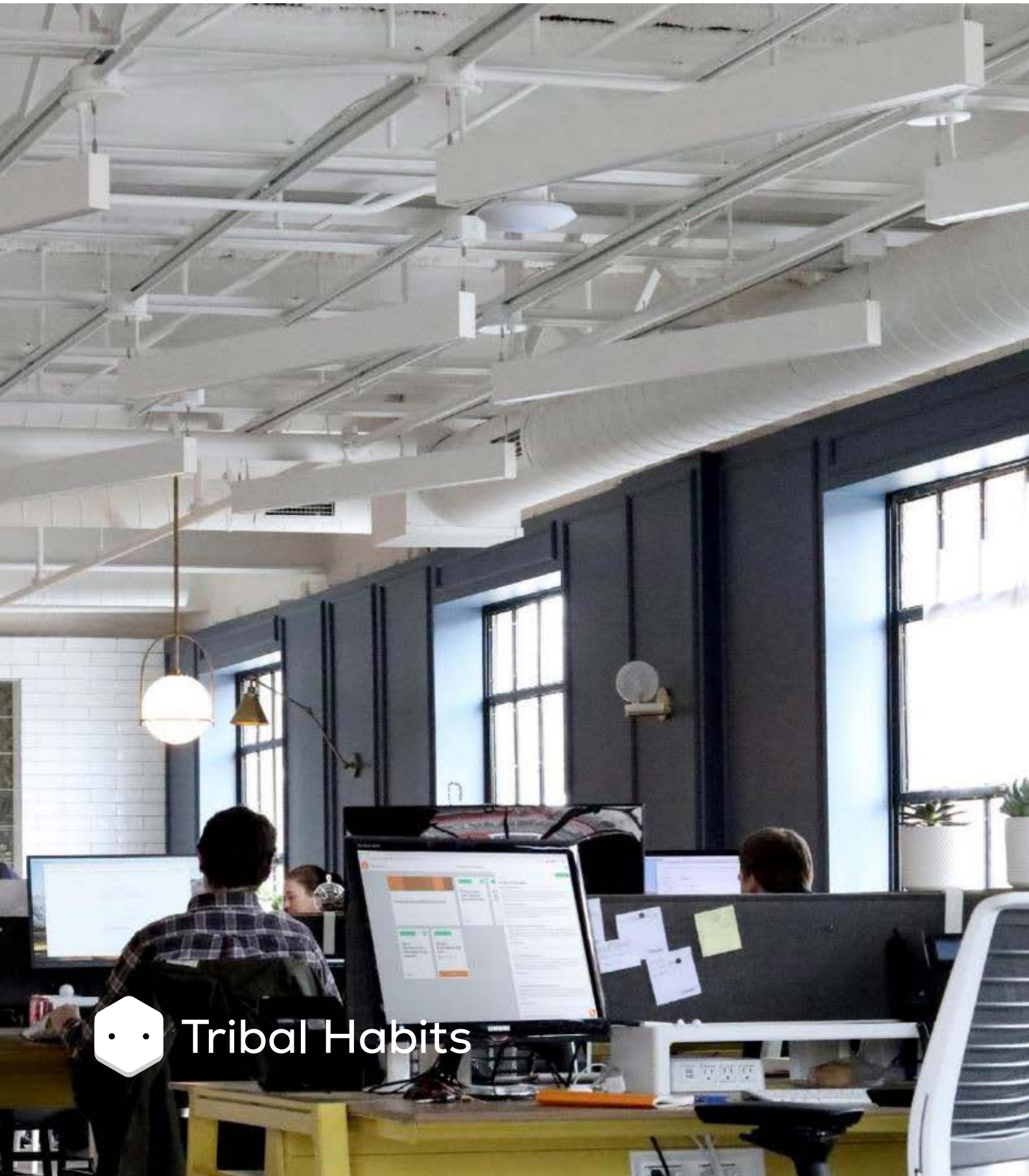
---

Part 1 – Why manage training online? .....	4
What are the different ways to deliver training? .....	5
How do I build a business case for an online learning platform? .....	13
Six reasons to rapidly switch to online training right now! .....	16
How can I demonstrate what training we will be able to provide? .....	19
How do I determine an appropriate training budget? .....	23
Part 2 – Which online learning platform? .....	28
Should we use an ‘all in one’ platform or several ‘best of breed’ platforms? .....	29
Which should we implement first – a HRIS or a learning platform? .....	32
What are the different types of learning platforms? .....	36
How do I compare different learning platforms? .....	38
How can I determine if I need an LMS or a more complete learning platform? .....	41
What are the total costs of online learning? .....	44
Part 3 – How is a learning platform implemented? .....	48
How can we easily implement a new online learning platform? .....	49
How do we run an effective pilot program for a learning platform? .....	52
Case Study: MOQdigital and reimaging training in a high growth environment .....	55
What is Tribal Habits? .....	57
What are the top features of Tribal Habits? .....	58
What problems can Tribal Habits help solve? .....	59
How does Tribal Habits boost online training? .....	61
What ready-made training can we access? .....	63
How affordable is Tribal Habits? .....	64
How secure is Tribal Habits? .....	65
How easy is it to implement Tribal Habits? .....	65
How can I get started with Tribal Habits? .....	66
Other Tribal Habits Guidebooks .....	67

# Part 1 – Why manage training online?

---

Let's begin with the business case – why does your organisation need to consider implementing an online learning portal and moving your training online? In this part, we examine the pros and cons of different types of learning, the benefits of online learning and how to present both the return (scope of training) and potential costs of your investment in an online learning portal.



Tribal Habits

# What are the different ways to deliver training?

---

When thinking about training delivery methods, you will no doubt encounter the various debates about which method is best. This debate has raged among training professionals for many years as technology continually opens up new methods beyond face-to-face training.

---

THE SIMPLE ANSWER IS: THERE IS NO 'BEST' TRAINING DELIVERY METHOD. EVERY TRAINING DELIVERY METHOD HAS ITS USES, AND A MODERN TRAINING MANAGER WILL EMBRACE EVERY POSSIBLE OPTION.

---

The debate only continues because of vested interests from training providers, or professions which holding onto traditional views. We see the result of this in the ongoing bias held for certain training delivery methods.

---

THIS BIAS, HOWEVER, CAN BE A BIG PROBLEM WHEN YOU ARE TRYING TO MODERNISE YOUR ORGANISATION AND INCLUDE AN ONLINE LEARNING PORTAL INTO THE TRAINING SOLUTION.

---

## Bias in training delivery methods

First, and hopefully in decline, is the 'old guard' of the training industry and their view that face-to-face training is best. This view is more established in older generations or among subject matter experts who now sell their expertise in the form of workshops. "Nothing beats face-to-face training" remains the catch cry of not only traditional training facilitators but also Baby Boomer managers who view alternative training delivery methods with suspicion.

This leads to the second bias – comfort. Face-to-face training is attractive to managers as it appears that participants are 'forced' to learn. Managers can ensure staff attend training and facilitators can ensure they are engaged. The problem is that this belief relies on many assumptions, not the least of which is that 'attendance is the same as engagement'. I am sure we have all been present at a workshop and yet wholly disengaged, dreaming of being elsewhere and leave with only snippets of information retained.

And herein lies the problem. The attendance and completion of training (whether it's face-to-face, online or any other method), is not a good measure of training engagement. The measurement of training effectiveness should come from outcomes – not simply attendance!

So, let's take a look at the entire range of training delivery methods available to your organisation.

## Training delivery method: Face-to-face

Let's start with face-to-face training. It has been the bedrock of corporate training for decades and will no doubt remain an important training delivery method going forward. It has many strengths when it comes to learning, but also many weaknesses which become more apparent as other training delivery methods arise.

- **Face-to-face training: Strengths**

- Takes participants away from their jobs, potentially reducing distractions and improving focus.
- Allows body language to play a part in the training, which can be critical for certain topics.
- Provides opportunities for group discussion in a way that everyone can understand and contribute to.
- Can be easy to organise as it only requires a suitable location and little or no technology.
- The physical interaction can boost teamwork and make internal connections.
- Can provide some excitement or 'event' status which may boost morale or help engage participants.
- Can, in theory, handle large volumes of information and long programmes (half day or full day). However, this must be balanced against the overall success of the experience; more is not always better.

- **Face-to-face training: Weaknesses**

- While group discussion can be easy, it can also be difficult. It is common for participants to feel anxious about public discussion and strong personalities can dominate discussions.
- Requires a physical location. It can be restrictive or difficult to organise for distributed teams and expensive to bring participants together.
- Is typically the most inefficient training delivery method, particularly if participants have to travel to the event and external venue hire is required. A large portion of cost is spent on expenses which do not impact the training result.
- If external facilitators are used, it can require long sessions to justify the cost. Long workshops are even harder to coordinate, and participants become anxious about being away from work for too long.
- Is at risk of being viewed as an 'event' – an activity which is fun but not effective. Requires careful preparation and, particularly, good follow-up to ensure learning is embedded.

## Training delivery method: Large group webinars

The next of our training delivery methods takes the face-to-face concept into the internet. Group webinars are live webinars, typically with 25-1,000 attendees with a facilitator to host and present the event. Participants join via their computer or a shared screen in a meeting room.

- **Large group webinars: Strengths**

- An extremely efficient training delivery method. Costs are low so the majority of funds can be spent directly on learning.
- Can potentially involve 1,000s of participants at once.
- Well-suited for large-scale transfer of information where the focus is on informing participants, with little or no behavioural change required.
- Can efficiently run short sessions (15-60 minutes) as the cost to organise and effort to join each session is low.
- Suits participants located in widespread locations, within or outside the corporate offices.
- Easily recorded for playback in the future or those unable to attend the live event.
- Allow for live Q&A, and some live interaction (polls, group chat).
- Easy to track and report attendance and, with the right software, the degree of engagement.
- Easy to refine and re-use so that sessions can improve over time.

- **Large group webinars: Weaknesses**

- Can be a passive experience unless the webinar facilitators are skilled at using the delivery platform.
- Can turn into 'death by PowerPoint via the internet' in unskilled hands.
- The level of engagement decreases as the number of participants increases. If the group becomes large, it is harder for the webinar facilitators to respond to every chat or question.
- Can be difficult to genuinely understand participant engagement. Participants may be subject to distractions or disengage during the webinar.
- Potential technology issues, but most modern webinar platforms are stable and optimised (even for low bandwidth environments like mobile).
- Can be hard to run webinars for more than 60-90 minutes. Large topics may require multiple sessions, in comparison to what can be achieved in a single four-hour face-to-face workshop.

## Training delivery method: Small group webinars

Small group webinars are limited to 10-25 participants. These are more like face-to-face workshops than large group webinars, which tend to resemble keynote presentations. Small group webinars offer a high degree of interaction, and the facilitator would typically know each of the participants. Among many modern organisations, small group webinars are a popular method.

- **Small group webinars: Strengths**

- Extremely efficient training delivery method. Costs to run webinars are low so the majority of funds are spent directly on learning.
- Can be extremely engaging and may offer as much as (or even more than) face-to-face training in the hands of a skilled facilitator.
- Can involve 1:1 live chat, breakouts for small groups, document edits, screen shares and more.
- Can support 'soft' skills topics, including role-plays and use webcams for displaying body language.
- Group discussion can rival face-to-face workshops, or even exceed them. Some participants may feel more comfortable contributing via keyboard discussions than speaking in public at face-to-face workshops.
- Excellent at gathering group input. Everyone can contribute, and it is harder for an individual to dominate the discussion.
- Can efficiently run short sessions or a series of sessions over weeks or months, as the cost to organise and effort to join each session is so low.
- Suits participants located in widespread geographic locations, within or outside the corporate office.
- Easily recorded for playback in the future or those unable to attend the live event.
- Easy to track and report on attendance and, with the right software, some degree of engagement.
- Easy to refine and re-use, so sessions can improve over time.

- **Small group webinars: Weaknesses**

- Can be a passive experience unless the webinar facilitators are skilled at using the delivery platform.
- Can turn into 'death by PowerPoint via the internet' in unskilled hands.
- Participant numbers need to be limited in the same way as face-to-face training. Beyond 10-20 participants the webinar becomes a 'large group' and engagement falls.
- While it is easier to monitor each participant for engagement in a small group webinar the facilitator still needs to be active in this monitoring.
- Potential technology issues, but most modern webinar platforms are stable and optimised (even for low bandwidth environments like mobile).
- Can be hard to run for more than 60-90 minutes per session. Large topics may require multiple sessions, in comparison to what can be achieved in a single four-hour face-to-face workshop).

## Training delivery method: Customised eLearning

The next choice for training delivery method is eLearning; online learning delivered via prepared modules. Participants work through modules at their own pace by reading content, watching videos and completing online activities. In this style of training delivery, content is customised and developed internally or externally by a professional eLearning designer to suit exact requirements.

- **Customised eLearning: Strengths**

- Content can be highly relevant and customised to suit the business.
- Content can be branded to reinforce company values and improve engagement.
- Content is presented consistently to every participant.
- Participants explore content at their own pace, and have the option to repeat parts of the training if desired.
- The experience can be highly engaging when developed by professionals using modern eLearning authoring tools.
- Content is available for participants at any location and any time assuming there is access to a learning management system to host the content.
- Content can be self-directed, with self-enrolment or auto-enrolment (again, assuming there is access to a learning management system to host the content).
- Participants have flexibility to complete the content at a time that is convenient.
- Easy to track and report on completion.

- **Customised eLearning: Weaknesses**

- Can be extremely expensive to create. Creation is time-consuming and requires internal staff with specialist skills or the ability to outsource to an external consultancy.
- Updating the content can be difficult and expensive. While the saved file for eLearning (typically a SCORM package) can be hosted by any learning management system, the actual eLearning file can only be edited by the original software which created it. It must then be resaved and transferred back to the hosting platform.
- While the experience can be engaging, it can also be disengaging if poorly created. Potentially, the eLearning experience may be passive for the participant, feeling like nothing more than watching a series of slides.
- Data capture is limited and commonly can only offer completion rates and possibly assessment results. More valuable Kirkpatrick Level 2, Level 3 and Level 4 data is typically not available.
- Most eLearning does not support any social or peer learning, so group discussion is difficult or impossible.
- Most eLearning requires a separate learning management system to host and deliver the content.

## Training delivery method: Subject Matter Expert developed eLearning

This version of eLearning involves the development of content via your own internal subject matter experts (SME). This method is customised to suit your organisation and differs from customised eLearning as development is done directly by internal experts, rather than a third-party eLearning designer. This is one of the newest methods of training delivery. It includes Tribal Habits, but also similar platforms like Coursera or Udemy.

- **SME developed eLearning: Strengths**

- Content is highly relevant and customised to suit the business.
- Content can be branded to reinforce company values and improve engagement.
- Content can be presented consistently to every participant.
- Participants explore at their own pace, and have the option to repeat the training if desired.
- The experience can be highly engaging, depending on the tool or platform used.
- Content is typically created in the platform that distributes the learning, removing the need for a separate learning management system.
- Content is easy to update and maintain.
- Content is available in any location at any time.
- Content can be self-directed, with self-enrolment or auto-enrolment.
- Participants have flexibility to complete the content at a time that is convenient.
- Easy to track and report on completion.
- Costs can be very low. Typically, the most significant cost will be the time spent by internal staff to create the content.
- Data capture should be better than SCORM based eLearning, but this will depend on the platform.
- Social and peer learning should be possible, but will depend on the platform.

- **SME developed eLearning: Weaknesses**

- While the experience can be engaging, it can also be disengaging if poorly created.
- Many of these platforms do not integrate with existing learning management system currently in use.
- Your internal experts will need to set aside time to create the content. A culture which is supportive of capturing and sharing knowledge is required.

**Sitting firmly in this space is Tribal Habits which offers all of the above features and addresses the weaknesses commonly found in SME developed eLearning:**

- Tribal Habits' learner UI is highly engaging and intuitive
- Tribal Habits integrates with other learning management systems
- The creation process for your internal experts is guided and rapid

---

TRIBAL HABITS OFFERS READY-MADE TOPICS AS WELL AS THE ABILITY FOR INTERNAL EXPERT DESIGNERS TO CREATE THEIR OWN CONTENT, MAKING TRIBAL HABITS A SOLUTION THAT MEETS THE NEEDS OF ORGANISATIONS LOOKING FOR BOTH CUSTOMISED eLEARNING AND GENERIC PURCHASED eLEARNING.

## Training delivery method: Generic purchased eLearning

This version of eLearning is the method of ready-made eLearning modules purchased from a third party, your learning management system, or other platforms. Typically, you cannot edit the content supplied or brand it to your business. The content is professional but is usually generic as it must be useful across a range of industries.

- **Generic purchased eLearning: Strengths**
  - Content is presented consistently to every participant.
  - Participants explore content at their own pace and have the option to repeat parts of the training if desired.
  - The experience can be engaging, depending on the tool or platform used to create the learning.
  - Content is available in any location at any time.
  - Content can be self-directed, with self-enrolment or auto-enrolment.
  - Content can be completed at convenient times for the participants.
  - Easy to track and report on completion.
- **Generic purchased eLearning: Weaknesses**
  - Content may not be relevant or practical, unless specifically designed for your situation.
  - Content typically cannot be branded to your organisation.
  - Content cannot be updated.
  - A learning management system is usually required to host the content (unless you are using an integrated platform like LinkedIn Learning).
  - The experience can be engaging, but can also be disengaging if poorly created.
  - Many of these platforms will not integrate with existing learning management systems.
  - Can be low cost, but this is dependent on the contract.

## Training delivery method: Micro or Just-in-time eLearning

Micro-learning tends to take the form of very short, focused pieces of content, available instantly on a mobile device. As such, it is also just-in-time eLearning – learning which is accessed as it is needed. The delivery is small but frequent, often accessed by participants on the go and can fit in around other tasks.

- **Micro-learning: Strengths**

- Quick and easy to complete, with low barriers to entry.
- Available anywhere and at any time.
- Often achieves high engagement as participants access information when they need it, so they have an immediate context to use the content.
- Can be relatively easy and low cost to create but requires careful design in order to be effective. Cost can add up given the number of micro-learning modules required.
- Usually has some aspect of social or peer-based learning.
- Can be self-directed, with content accessed by engaged participants.

- **Micro-learning: Weaknesses**

- Doesn't suit all topics, particularly those that require a deep dive or need to be learnt in advance.
- Potentially a superficial method as there is limited time to drive behavioural change. A few tips are picked up, but success relies upon self-motivated participants.
- Participants can achieve completion even if they are disengaged during the process. Can be many distractions for the participant or they can 'just get it done while sitting on the train'

Is better used as a reinforcement or reference tool alongside other delivery methods.

## Result: You need variety in delivery, but consistency in management

---

As you can see, there are pros and cons in all methods of training delivery. It's for this very reason that a reliance on just one type – typically face-to-face workshops – is a major risk (not to mention extremely inefficient).

Training, just like any other project, is about using the right tool for the right job. An organisation's ability to access multiple training solutions is therefore critical – as is its ability to coordinate the different training delivery methods through a centralised system.

That's where your online learning portal steps in. It can manage offline and online training, deliver online training and – if you pick the right portal – create online training as well.

# How do I build a business case for an online learning platform?

---

Is training an investment or an expense?

This classic question continues to challenge all modern organisations as they seek ways to grow and innovate. Training can appear to be an expense because it registers as money out the door. Yet the signs that training might actually be an investment - by providing a return - are harder to see. Staff go to training, but the benefits are not immediately apparent.

Many traditional forms of training don't help the situation because there is often little to show at the end of the training event. Training usually feels like a one-off 'event' with no or little follow-up, no chance to refine and improve it, no ability to re-use the content (without considerably more expenses) and no tracking of change to measure the return.

As we have discussed, face-to-face or instructor-led training also often involves several very real expenses - room hire, travel costs, food and beverages, printing workbooks. These are sunk costs with absolutely no return, and are often taken out of a training budget, while not directly contributing to staff learning.

## An online training platform as an investment

In summary, with traditional training we have a single 'event', with no permanence or re-use value, attached to several expenses which do not directly result in any training benefit. No wonder most training looks like an expense. However, that's where employee training software can turn an expense into an investment.

---

AN ONLINE TRAINING PLATFORM ADDRESSES SEVERAL OF THESE EXPENSE ISSUES. IT PRESENTS A MUCH STRONGER CASE FOR TREATING TRAINING AS AN INVESTMENT AND AS A WAY TO MAXIMISE YOUR TRAINING BUDGET.

---

Let's consider how employee training software can benefit your organisation.

## An online training platform creates a journey of learning, not an event

An online training platform changes learning from a 'big bang event' to an ongoing journey of learning that offers:

- **Smaller and more frequent training.** Staff who spend even a half-day at a training workshop make an investment of 4-5 hours of their time. Chances are, they forget a lot of the early content by the end of the session. Time is wasted with breaks, ice-breaking activities and setting up physical elements. Online training focuses purely on training - there is almost no time wasted on travel, set-up, breaks or anything else. An online training platform can take that same 4 hours of workshop content and distribute it via smaller 20-40 minute modules over a series of weeks.
- **Automated training reinforcement and social learning** via email summaries, online journals, peer sharing and on-the-job activities. At literally no cost at all, this automation can reinforce key content to staff and encourage long-term change in their behaviours.

Together, these features allow an online training platform to dramatically boost learning retention and behavioural change, which results in a better training return.

### An online training platform makes self-paced learning available 24/7

When they explore an online training course, staff can more easily manage training needs with their immediate work-in-progress. This allows them to reduce the expense of training and accelerate the returns.

- **Improves learning outcomes.** From a learning perspective, an online training platform provides far greater control to each staff member. If staff don't fully understand the material, they can repeat content to clarify issues. If everything is making perfect sense, they can move at a more rapid pace through the course. This simple ability immediately makes better use of your staff's investment of time.
- **Reduces delays or restrictions in learning.** An online learning platform makes cloud-based learning available 24/7. New staff can start induction programs on day one, without having to wait 6 months for the next set of workshops. Existing staff can address development areas immediately after a performance review. New processes, product knowledge, compliance issues or service standards can be shared with your business in days, not months. An online training platform reduces the 'time to productivity' for any staff member.

### An online training platform eliminates wasted learning expenses

Finally, having improved the speed and size of the return on a training investment, an online training platform can also reduce the size of the training investment. Instructor-led training or physical workshops have a huge inefficiency in training expenses. An online training platform allows you to:

- **Eliminate expenses without a direct impact on training returns.** With an online training platform, you remove any travel expenses, food and beverages, printing expenses and training room hire.
- **Reduce or eliminate expenses for the creation of training content.** While there is a cost in developing or buying training content for your online training platform, that same cost exists with any form of training. However, those costs are also directly correlated with training returns. With a great knowledge sharing platform, you can even eliminate many of those costs too as you tap into internal expertise within your business.
- **Share training expenses over a wider group of staff.** An online training platform also provides better scale in training. The training content you develop can be utilised with 5, 50, 500 or 5,000 staff with little extra cost for each additional staff member. As a result, the average cost to train each employee falls as the investment is shared over more staff.
- **Share training expenses over a longer time period.** There is also a far higher degree of permanence with an online training platform. Training content can be reused over years as it is not dependent on any single facilitator or person to deliver it. Employee training software can also quickly update training content, to help maintain its usefulness for years. This allows the training investment to be spread out over years, instead of a single day.

## Better and faster training returns, with a reduced training investment

Once we start to think about making training an investment, we can see that an online training platform becomes a viable solution. An online training platform can...

- **Improve training return** by increasing knowledge retention via smaller, more frequent training, as well as driving behavioural change through automated follow-up.
- **Accelerate training return** by allowing staff to align training requirements with their work-in-progress, and complete training immediately, at a pace which suits them.
- **Reduce training costs** by eliminating expenses without a direct correlation to training, as well as reducing content creation costs (especially via a knowledge sharing platform) and sharing expenses with more staff over a longer time period.

## Result: Better, faster and cheaper training via an online learning portal

---

The result is a higher return, delivered faster and with less cost. That's the power of an online training platform. When that platform is also a training creation platform, like Tribal Habits, then the return increases and the expenses reduce even further.

With Tribal Habits, you can develop engaging training content by tapping into the proven expertise in your own organisation. Transform your organisation by capturing all your top ideas and best practices, and use that knowledge to power online learning. Your staff can engage with content that is proven to already work in their business. This involves ideas, case studies and examples which are 100% relevant to their roles.

---

WHAT'S MORE, WITH TRIBAL HABITS YOUR TRAINING NEEDS CAN BE  
CREATED AND MANAGED BY ANYONE - YOU DON'T EVEN NEED A  
TRAINING MANAGER!

YOUR TRAINING BECOMES AVAILABLE 24/7, IN A SECURE CLOUD PORTAL,  
BRANDED TO YOUR ORGANISATION, FOR JUST A FEW DOLLARS PER  
PERSON PER MONTH.

THAT'S NO EXPENSE. IT'S A SMALL INVESTMENT WITH A MASSIVE RETURN,  
WAITING TO HELP YOUR ORGANISATION ACHIEVE ITS STRATEGIC GOALS.

# Six reasons to rapidly switch to online training right now!

---

Over the last decade, many organisations have thought about the switch to online training. As we discussed in the previous article, perhaps it is to reduce training expenses, deliver training in a way which resonates with a modern workforce or improve learning outcomes through more consistent, slower-paced learning.

Sometimes, however, you might need to accelerate decisions and make a rapid switch to online training. Reasons for this could be to quickly deliver critical content, respond to changes in your business environment or immediately overcome hurdles in face-to-face training.

In this article, let's consider six reasons why you might need to rapidly switch to online training – and how you can support your business case and inform your decision-makers during this process.

## 1 - Organisational change needs timely online training

A common reason to rapidly switch to online training is in response to change. When something important changes in your organisation, you can't expect your employees to 'keep doing what they were doing'. Typically a change in your organisation, or operating environment, requires a change in your organisation's process in order to achieve the same outcome.

Training is a critical component of change management. Unfortunately, it is often an after-thought. Training occurs days, weeks or months after the change event. Employees are left struggling through the changes on their own.

This delay is worse if your organisation relies on face-to-face workshops. Successful organisations have a sense of urgency in ensuring that appropriate training accompanies change events in a timely manner. This is when organisations 'bite the bullet' and rapidly switch to online training.

With the right platform, online training can be quick to develop, consistent in its delivery, easy to distribute and track, and available 24/7 in any location.

## 2 - Online training creates critical feedback loops

Continuing with this theme of change management, quickly establishing online training around a change event creates a valuable feedback loop for the organisation.

---

THE FASTER TRAINING IS PROVIDED, THE SOONER THE ORGANISATION LEARNS ABOUT CHANGE MANAGEMENT ISSUES. PROBLEMS IN PROCESSES ARE IDENTIFIED, EMPLOYEE MORALE IS QUICKLY MEASURED, AND SUCCESSES CAN BE CAPTURED AND SHARED TO HELP BUILD MOMENTUM IN THE CHANGE PROCESS.

Once again, organisations need to rapidly switch to online training to build this feedback loop faster. The need to quickly switch to online training is intensified by more significant changes, more expensive changes or changes which have short implementation periods (the change needs to occur NOW!).

### 3 - Online training helps maintain morale

Face-to-face training takes a long time to set up, book, organise and conduct. Think about a new employee waiting months for the next induction session, or an existing employee now working in a remote location (or working at home). For employees in those situations, face-to-face training may seem far away.

Access to training and personal development is a huge part of employee engagement. The further employees feel removed from training opportunities, the greater the negative impact on their engagement and morale.

Online training, meanwhile, is available all the time, in any location. It's a perfect way to allow employees to feel supported. Even if an employee is temporarily busy and unable to stop for training, the knowledge that training will be available as soon as they are ready is critical for morale.

Unlike face-to-face workshops which have an 'event' feeling to them – a large, sudden sugar hit of engagement – online training can be accessed in smaller, bite-sized pieces and in a way which more easily fits into the schedule of a modern worker.

Online training offers constant positive engagement for employees in any location.

### 4 - Online training supports continuous improvement

Another key advantage of online training is its ability to manage smaller pieces of knowledge.

Consider a small change to your sales process. Perhaps 30-45 minutes of required training to update your sales teams on new product knowledge and sales methods you have introduced.

Face-to-face training for such small updates like these is difficult. The effort involved in preparing the session, organising a location and getting everyone to attend the training generates a poor RoI for training when the content only requires 30-45 minutes. At the very least, virtual training via a webinar would be more appropriate.

Rapidly created online training, through a learning creation platform like Tribal Habits, allows that knowledge to be captured in less time and distributed without delay to any employee in any location (as well as future employees or those who otherwise miss a face-to-face workshop).

With less effort to create and share online training, it becomes easier to provide more training and more often. Smaller, more frequent learning promotes continuous improvement. It allows the organisation to iterate change and avoid 'big bang' announcements.

It also encourages teams to review critical processes regularly. Managers can focus employees on specific issues each week, rather than trying to fix everything at once in a single day workshop.

### 5 - Organisations need experience with online training (to maximise outcomes)

If your organisation doesn't have much experience with online training, then it needs to rapidly switch to online training right now for one very simple reason: it takes time to obtain organisational skill.

As you introduce online training into your organisation, not only is there a small adjustment for employees (although often much more modest than management thinks), there is also an adjustment for the organisation.

Managers, HR and training staff need to learn how to use their online training platform, how to best manage and distribute online learning, how to drive accountability for online training outcomes and how to create customised online training on critical topics.

The sooner this process of organisational learning begins, the faster the organisation will uncover more valuable ways of using online training (within that particular organisational culture). Like many digitisation processes, the snowball effect rewards organisations who move sooner.

## Result: There's no reason not to rapidly switch to online training

---

A SIXTH AND FINAL THOUGHT IS 'WHY NOT?'. AT THIS POINT, ONLINE TRAINING PLATFORMS ARE LOW COST AND EASY TO USE. THE BENEFITS ARE TANGIBLE AND SIGNIFICANT – WITH NO DOWNSIDES.

If your organisation continues to run face-to-face workshops, an online learning platform can only enhance them. It can make the workshops shorter, more focused, or provide pre or post workshop content. It is quite possible that your net training costs even decrease with an online training platform as you can reduce the most inefficient of training costs (room hire, catering costs, travel expenses).

*'Times are a-changing'.* The number of organisations not yet using online training continues to fall every day. Successful organisations are using rapid, online delivery to accelerate knowledge through teams – quickly eliminate mistakes, promote best practices, boost employee engagement, ensure operational compliance. In any location, for every employee, at all times.

# How can I demonstrate what training we will be able to provide?

---

Whether you manage a growing range of training topics or are looking for inspiration on how to map out learning pathways, it's beneficial to use the concept of a '*training stream*' within your organisation.

You can also use these training streams to demonstrate the scope of training your organisation could ultimately provide via an online learning portal. Perhaps you won't provide the entire set of training streams on day one, but scoping out training streams can help demonstrate the size of the potential return on your investment in an online learning platform.

So, let's review the most common training streams found in organisations to help you define your most suitable streams.

## Training Stream: Business Development

This training stream focuses on 'new business' and 'new clients'. This is often a stream employees find challenging. Business Development differs from Sales. Business Development finds new clients and brings them into the sales process. Sales focuses on the conversion of new clients into billable revenue (among other things).

This stream is significant for growth many organisations as it impacts overall revenue, growth in new clients, business for new advisers or consultants, expansion into new services and development into new products. It should include both personal skills in business development, but also organisation-level knowledge about marketing, branding and planning. Elements of this stream should apply to all client-facing employees, while other topics in this stream may only be suitable for business development teams or managers.

Topics in the Business Development stream include...

- Client referrals
- Internal referrals and cross-referrals
- External referrals and referral partners
- Referral marketing
- Personal branding
- Thought leadership
- Business networking
- LinkedIn profiles and strategies
- Cold calling and telephone skills
- Business Development planning
- Presentation skills
- Writing articles and blogs
- Managing social media
- Understanding the client journey and buying cycle
- Ideal clients and client personas
- Business branding

## Training Stream: Sales

The sales training stream focuses on capturing opportunities and creating revenue. This stream includes converting new leads into new clients, as well as repeat business, up-selling and cross-selling with existing clients.

This stream is often a struggle for employees who have a negative view of the concept of 'sales'. They may view 'selling' as unprofessional. As a result, this stream must often begin with establishing a suitable sales framework or methodology which is appealing to those employees and your organisation's culture. Until your staff recognise that selling can be a positive experience for all parties, it is unlikely any other topics within this stream will be effective.

Topics in the Sales stream include...

- Introduction to selling or sales methodologies
- Building trust in the sales process
- Listening skills
- Questioning skills
- Developing a value proposition
- Closing techniques
- Managing proposals
- Writing proposals
- Presenting proposals
- Presentation development
- Business writing skills
- Managing client objections
- Negotiation skills

## Training Stream: Relationship Management

This training stream focuses on servicing and relationships with clients. For employees with transactional clients, Relationship Management is about excellence in execution of a transaction. For employees with relationship clients, this stream also includes on-going relationship management techniques. For many employees, this stream is about 'work in progress' or project execution. So, it must cover issues of both quantity and efficiency, as well as quality and excellence.

Topics in the Relationship Management stream include...

- Managing client expectations
- Conducting client review meetings
- Repeat purchases
- Cross-selling
- Up-selling
- Service excellence
- Handling client complaints
- Managing client portfolios
- Referrals, references and testimonials
- Seeking client feedback
- Project management

## Training Stream: Management and Leadership

This training stream focuses on two issues which could easily be split into two streams: the management of people and the leadership of an organisation. In smaller firms, these roles are shared. However, in larger firms, there may be managers whose purpose is people-focused, and senior leaders whose focus is on business strategy.

The biggest challenge for many organisations is that staff are often promoted to management positions based on their technical or commercial success – not their team and people skills. Great managers don't always come from your strongest performers.

In fact, strong performers can sometimes have a selfish streak, motivated by results and competitiveness in sales and business development. This characteristic can be problematic when the role suddenly involves people management.

Topics in the Management and Leadership stream include...

- Coaching and developing staff
- Staff delegation
- Mentoring others
- Discussing staff performance
- Managing staff training
- Motivating staff and teams
- Recognising and rewarding staff performance
- Leadership skills
- Setting expectations with staff
- Interviewing and recruitment tips
- Managing conflict
- Business ethics
- Building teams
- Change management
- Business strategy
- Business planning

## Training Stream: Personal Development

This training stream is often viewed as containing the remaining 'other' topics relevant for an employee. However, a better way to think of this stream is that it contains the skills required for any employee to be effective in any role. While the Business Development, Sales, Relationship Management, and Management and Leadership streams are role specific, this stream is role agnostic. From support staff to senior leaders, this stream covers the essentials to operate efficiently and effectively.

The Personal Development stream is also important for employees who's technical and role expertise is strong, but they struggle to operate at a high level in your business. These staff lack organisational or productivity skills or may be struggling to communicate effectively with others.

Topics in the Personal Development stream include...

- Managing time and productivity
- Managing priorities
- Goal setting
- Managing emails

- Managing meetings
- Communicating effectively
- Decision-making skills
- Influencing skills
- Managing stress
- Emotional intelligence

## Training Stream: Compliance and Technical

Your business needs will drive this final training stream: Compliance Requirements and Technical Capabilities. As with Management and Leadership, it is possible to break this into two separate streams.

Compliance Requirements vary widely between industries, driven by specific regulatory requirements. However, Compliance streams should also address universal issues of appropriate workplace behaviours including harassment, discrimination and workplace health and safety.

Technical requirements also vary with each industry. There will likely be some accredited technical training available from registered training providers. However, technical training can also originate from within the firm, as internal experts share best practices in the technical aspects of each role and industry. This is often the ‘street smarts’ to match the ‘book smarts’. As a result, it is often this stream of ‘technical best practice’ which is of greatest interest to employees as they feel familiar with the topic and keen to improve upon it.

Topics in the Compliance and Technical stream will depend on your industry, but can include...

- Workplace health and safety
- First aid training
- Injury management
- OHS awareness
- Privacy awareness
- IT security
- Appropriate IT usage
- Risk management
- Discrimination awareness
- Harassment prevention
- Workplace bullying
- Cultural awareness

# How do I determine an appropriate training budget?

What is an appropriate training budget for a modern organisation? It's a bit like asking how long a piece of string is? At every annual budget planning session there is no doubt the annual argument over the training budget.

Many times, that argument is settled from a bottom-up approach. There is a discussion about the possible training requirements over the next 12 months, estimates of training costs and then the sum total of those costs to form a budget. However, if the possible training requirements are not well defined, this training budget often ends up being very small. Thus a bad cycle begins - the previous year's small training budget does not create an atmosphere which inspires training and so the next year's possible training requirements are not given much thought...which leads to yet another small training budget.

So, let's break the cycle. A bottom-up training budget is excellent when you have a well-defined training plan, supported by position descriptions, training needs analysis and personal training plans. However, what if you don't have that level of detail? Alternatively, even if you do, how do you know if the total of all those training requests is appropriate?

## Standard training budget calculations

Your first stop is often a search of comparative data. We are going to save you considerable time by summarising the findings of a number of research sources and articles below...and even package it all up in a training budget calculator.

- 2017 training budget per employee (US based) - \$1,075, ranging from \$399 for large firms, \$941 for medium firms and \$1,886 for small firms
- 2012 training budget as a per cent of revenue (Australia based) - 68% companies spend <5% of revenue, 19.5% spend 5-10% of revenue.
- 2017 training budget per employee (US based) - \$1,273.
- 2017 training as a per cent of salary (Australia based) - 5.7% for <200 employees and 4.4% for 200-499 employees.

From these stats, you will find training budgets tend to be calculated against three metrics...

- Training budget as a per cent of revenue.
- Training budget as a per cent of salary.
- Training budget per employee.

## Method 1: Training budget per employee

Let's deal with the last metric first - training budget per employee. This is a wildly variable number and hard to use as a benchmark. Some industries are not people dependent, while other industries are entirely built on human capital. Some industries are stable, while other industries are undergoing rapid change and reskilling. Training needs can vary by experience and role. In all cases, a like-for-like comparison based on dollars spent per employee is difficult.

However, it is a data point. If you review the various studies and links above, the training budget per employee tends to fall out at around \$900-1,400 per employee.

## Method 2: Training budget as a per cent of revenue

Next, we have a training budget determined by overall revenue. This metric is also subject to some wild swings! Industries or firms with a higher reliance on human capital might have a higher requirement for training than industries with heavy reliance on capital and machinery. Yet the revenue of those firms may be the same, yielding the same training budget.

Still, this does represent a data point and it is indeed good 'top-down' analysis. Drilling into industry averages can also improve accuracy by adjusting for the reliance on human capital.

Indeed, most benchmark analysis suggests that most organisations average around 0.5% to 2.0% of revenue on their training budget (although there are no doubt many organisations which have 0% too, as well as some which spend >5%).

The correlation between revenue and training is also a good one as it links training to a critical business outcome. So perhaps as revenue grows, there is a good argument that the training budget - which may be at least partially driving that revenue growth - should be increasing.

## Method 3: Training budget as a per cent of salary

This next metric - training budget driven by overall salaries - is a beneficial one for a training budget. It more accurately links training needs with human capital. For example, growth in salaries through new hires should, therefore, result in a higher training budget to support induction processes. This metric can also be examined on a per industry basis for extra accuracy.

Most benchmarks suggest that organisations average between 2% and 6% of total salaries on their training budget. For organisations with total salaries averaging around 35% of total revenue, this will yield a similar result to a training budget as a per cent of revenue. The 2-6% range will be a bit wider and will skew higher or lower as the dependency on human capital changes. Now we have a third data point.

## Method 4: Training budget versus training outcome

These first three metrics are useful starting points. They shouldn't be ignored as they reveal the collective experiences and wisdom from 1,000s of businesses and their attempts to define an appropriate training budget. However, these data points are removed from their outcomes - they define possible training budgets without any reference to what that training is trying to achieve.

So let's consider a fourth data point - training budget as a per cent of training outcome.

Imagine that your organisation has specific strategic outcomes to achieve over the next 12 months - an increase in revenue, more new clients, reduced expenses and so on.

You could consider that in your organisation, some part of those outcomes may be achieved through business-led initiatives like improvements in process, development of new services or increases in marketing spend.

However, some part of those outcomes may also be driven by improvements in human capital - through training. It might be better sales skills, improved technical know-how or better personal productivity. Outcomes are therefore determined by some combination of improvements in business and human capabilities.

The more these strategic outcomes are dependent on improvements in human capabilities, then there is an argument for a higher training budget. Training is the investment in improved human capital. It is the same as an investment in better software, more marketing or improved machinery.

## Example: Training budget to support a larger average sale

Let's consider an example.

Say your strategic goal for the next 12 months was a 10% increase in the size of an average sale, project or transaction. Let's say that represents \$100,000 of additional revenue with all other things being equal (same number of sales, projects or transactions).

---

THE DISCUSSION AT YOUR STRATEGIC PLANNING EVENT OR ANNUAL BUDGET MEETING SHOULD BE BASED AROUND HOW THAT OUTCOME WILL BE MET - WHAT PER CENT WILL BE DRIVEN BY BUSINESS INITIATIVES AND WHAT PER CENT NEEDS TO COME FROM IMPROVEMENTS IN HUMAN CAPITAL?

In this example, let's contend that 50% will come from business initiatives. You might increase your prices and launch a new value-added service. The remaining 50% will have to come from improved human capital - better upselling skills and improved client relationship management skills for example.

On this basis, training is responsible for delivering \$50,000 of the desired outcome. So what's an appropriate training budget to drive that training outcome? To put it another way, what's a good 'return on investment for training?'. That is a great question to debate! So let's move onto RoI.

## Training budget versus training 'return on investment'

Most training return on investment (RoI) measurements occur after the event. They focus on determining what the RoI was, not what the RoI should have been. Setting a target RoI for training isn't easy either, and it's not always measurable via a metric. What is the RoI for staying compliant with technical knowledge or improving your delegation as a team leader?

For this analysis, we are going to have to set an average RoI metric to work across a range of training. Let's suggest 500%. For every dollar you spend on training, you would like a five times return. Remember, we are seeking an average. Some training initiatives might justify a higher return - such as in sales or marketing - while other training initiatives are focused on non-monetary returns like morale, teamwork or innovation.

If we continue with our example above and apply a 500% RoI, then a training budget of \$10,000 would seem appropriate to drive the \$50,000 desired outcome.

Taking this further, if we could identify the significant measurable outcomes your business is seeking over the next 12 months, determine what per cent is driven by improvements in human capital and apply an average training RoI, then you could calculate an appropriate spend for training for each of those initiatives. The sum of the training spend for each outcome would yield a partial training budget.

Interestingly, this data point would be directly linked to your strategic outcomes. To complete the budget, you could add additional spend for training which is not linked to measurable strategic outcomes, like compliance or technical training. In combination, you have a training budget linked to strategic outcomes.

## A training budget calculator

With this analysis, you now have four data points for a training budget. Within those data points, a suitable training budget should become apparent for your business. Higher human capital and higher demands on improvements in that human capital should result in higher training budgets.

To make all this easy for you, [you can download our training budget calculator](#). It's a simple Excel spreadsheet (no macros) which calculates all four of these data points for you.

- You need only enter six strategic metrics for your business (revenue, number of clients/transactions, per cent of repeat clients/transactions, general expenses, total salaries and number of employees).
- You can then indicate the extent to which training will need to drive up to five common strategic outcomes: higher average transactions, more repeat clients, increased new clients, lower expenses and increased productivity.
- Finally, you can select your desired training RoI.

The training budget calculator will then provide four data points, including high/low ranges, and average them to indicate a recommended top-down training budget for your business.

Whether you calculate these metrics yourself or derive the outcome with our training budget calculator, you will now have a much clearer idea of a top-down training budget. From there, you can start to consider your training needs, and how to drive the outcomes you are seeking!

## Example Training budget calculator in action

As a final example, let's see how the training budget calculator works for an accounting firm with the following key metrics.

- Revenue: \$1,750,000, with a next year goal of \$1,850,000
- Annual transactions: 990 transactions (clients and their entities), with a next year goal of 1,020. So that's an average transaction size of \$1,768 this year, growing to \$1,814 next year
- Repeat transactions: 95% as this is a very sticky client base.
- General expenses (ex Rent, Utilities, Staff): \$280,000, with a next year goal of \$300,000
- Salary expenses: \$525,000, climbing to just \$530,000 next year
- Number of staff: 10, with no change next year

The training budget calculator then asks for the attribution towards four (out of five) key business outcomes. The fifth outcome, of reduced general expenses, is eliminated by the calculator as expenses are forecast to increase. It is decided that training is responsible as follows for each of the four remaining business outcomes.

- 2.6% Increase in average transaction size. Training is responsible for ALL this increase.
- 3.0% Increase in repeat business. Training is responsible for MOST of this increase.
- 3.0% Increase in new transactions. Training is responsible for a LITTLE of this increase.
- 5.7% Increase in staff productivity. Training is EQUALLY responsible for this increase.

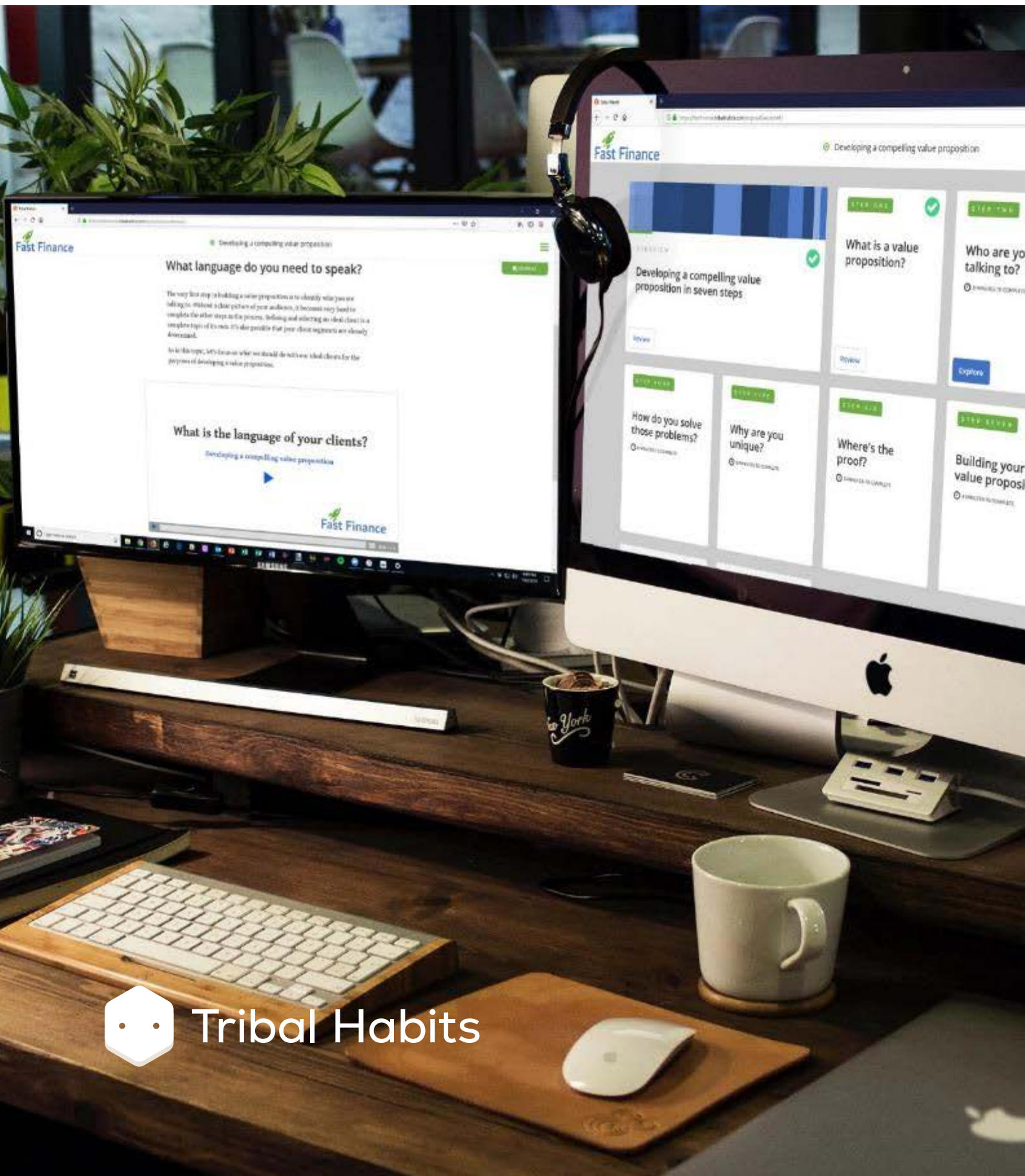
A 500% average training RoI is selected.

The result for this firm is a recommended training budget of \$19,200. As you can see, this falls mid-way in the revenue and salary benchmarking, and above average per employee budget. It is driven up by the outcomes benchmark, as training has a significant responsibility for driving

business outcomes. The training budget calculator shows the high/low ranges of the four data points and the recommended budget against those ranges.

## Part 2 – Which online learning platform?

As you build your business case for a new online learning platform, let's now consider the choices before you. Understanding the different types of digital learning platforms, their comparative advantages and their costs will be a key part of your approval process.



Tribal Habits

# Should we use an 'all in one' platform or several 'best of breed' platforms?

---

Choosing new online platforms for your organisation can feel a little overwhelming. A common problem is a choice between an 'all in one' system and multiple 'best of breed' systems.

## The temptation of 'all in one' platforms

Your organisation is often dealing with issues on multiple fronts. There are strategic goals to achieve, along with general efficiency improvements to implement. Every day is a series of battles with multiple problems. Not surprisingly, it would feel fantastic if you could solve all these problems and start to get ahead.

This is the common starting point for many organisations: let's find something to solve all our problems.

But therein lies the catch. You have to find a solution that actually solves all these problems. For human resources and training teams, these problems can include:

- Employee recruitment
- Employee payroll
- Employee onboarding
- Employee induction
- Compliance training
- Compliance policies
- Employee engagement
- Employee review processes
- Knowledge management
- Process and systems training
- Leadership and personal development training
- Remuneration processes
- Certification management
- And more!

Then you see a platform which 'does it all'. But can it? It's easy to list features on a website or brochure, but can one platform really do everything – and do everything well?

All too often, 'do it all' platforms are hiding a secret. They are actually very good at some things, but everything else is tacked on. You end up with a multi-use tool that's great at one thing and useless at everything else.

Now you have an even bigger problem. You have probably justified the purchase of this platform as the 'one solution. Now you are stuck with it. There is unlikely to be extra budget allocated at this point as your business case probably explicitly stated that you wouldn't need any extra budget. Ultimately, you are stuck with a huge new 'all in one' platform system that doesn't actually solve all your problems.

## Where did 'all in one' platforms come from?

Let's start with stakeholders and consider how the 'all in one' platform came into being.

Through the 2000s as cloud platforms started to emerge, there was a focus on process. Simplifying internal processes was the goal. Not surprisingly, two trends emerged.

1. A focus on platform administration to make for easier processes...at the expense of a positive online experience for employees. These platforms placed administration as the priority. This is putting the needs of the few admin stakeholders ahead of the needs of the majority of employee users.
2. A focus on platforms buying competitors or tacking on more processes. As a result, many 'all in one' platforms are actually made up of different systems acquired over time and hobbled together...at the expense of those systems having completely different architecture and data structures. This is putting quantity ('solve more problems') over quality ('actually solve those problems').

It can be extremely tempting to look at 'one platform which does it all'. It seems like it should simplify things and, in some ways, it might. The problem is one of meeting expectations. An 'integrated' platform often doesn't work as you might expect. Their 'integrations' are internal (between the various parts of the platform) and often not well implemented.

Essentially, 'all in one' platforms are a relic of the 2000s before application integrations become easy and common. Today, specialist platforms have 'application program interfaces' – APIs – which allow to easy and powerful cross-platform integrations. As so arises an 'ecosystem of apps'. A best of breed approach.

## How do 'best of breed' platforms differ?

'Best of breed' platforms are specialists. That doesn't necessarily mean they do just one thing.

'Best of breed' platforms may actually address several problems at once, but they don't try to address every problem at once. They are focused on selected problems, driving deep into those issues without worrying about solving every possible related problem.

This combination of focus, combined with the *need* for 'best of breed' platforms to excel at integration, has given rise to a new 'ecosystem of apps' approach which is replacing the more traditional 'all in one' approach.

Consider analysis from independent technology experts such as [Josh Bresin – HR Tech's dirty little secret](#) or [Lynne Capozzi – Best of Breed vs All in one: Why is this still a debate?](#).

Stop for a moment and really consider how 'all in one' versus 'best of breed' platforms stack up in 2020 (not in 2010).

## Integrations

This isn't even close. 'Best of breed' platforms have a dominant win with integrations – they are made from the ground up to be open and ready for integrations. 'All in one' platforms are conversely propriety and closed with external integrations a competitive threat to their business model.

## Support

This is another clear win for 'Best of breed' which are specialists in their fields. Support from 'best of breed' platforms tends to be specialist consultants with deep expertise in their field. Support staff at 'all in one' platforms are like general consultants - they know a little about everything.

## Implementation

‘All in one’ platforms require a ‘big bang’ implementation. You are committing to a massive implementation project with a single vendor. ‘Best of breed’ platforms are more focused, with smaller objectives and easy implementation from specialist support staff. You can more easily manage the incremental implementation of platforms over time.

## Flexibility

There is no comparison here. ‘Best of breed’ platforms can be swapped out if they aren’t working as planned. The ‘all in one’ solution locks you into that platform for everything. Leaving, even for just one specialist area, is expensive (no discounts from the vendor if you don’t use a feature) and difficult (due to the lack of integrations). It’s not double or nothing – it’s all or nothing.

## Innovation

Once again, ‘best of breed’ takes the win – every platform in your ecosystem of apps can be innovating and developing. With an ‘all in one’ platform, innovation is shared around the platform – often with no improvements for months or years in some areas of the platform while all attention is given to other areas which need improvement. If you read reviews of ‘all in one’ platforms, you often discover they are broad in approach but lack depth in features.

## Result: Specialists always outperform generalists

---

When organisations start the journey to find a new platform, they often have a list of desired use cases and associated features. The platforms you choose to fit in with your needs. That’s what a ‘best of breed’ approach can do – bring in the best of each to fit your needs.

With an ‘all in one’ platform, it is often the other way around – you will need to fit in with that one platform’s approach to everything. It is impossible to avoid compromise. And for what gain? Simply to have ‘one platform’? Yet if that platform doesn’t actually solve required problems, compromises on features and delivers less suitable options than a ‘best of breed’ approach, what is the point exactly?

Ultimately, choosing platforms which are ‘best of breed’ is the sensible choice for modern organisations looking to choose platforms based on current technologies.

---

**TRIBAL HABITS IS YOUR ‘BEST OF BREED’ PLATFORM FOR LEARNING. IT IS FOCUSED ON THE CAPTURE AND TRANSFER OF KNOWLEDGE WITH SIMPLE BUT POWERFUL TOOLS BUILT FOR THAT PURPOSE.**

We don’t try to also be your onboarding platform, recruitment platform, employee engagement platform or help desk software. Our APIs and spreadsheet uploads and downloads allow you to plug us into other platforms as needed. And if you need help choosing those other platforms, we can happily share our knowledge of platforms which can build an ecosystem suitable for your organisation.

# Which should we implement first – a HRIS or a learning platform?

---

For many small to medium organisations on a digital transformation pathway, there is a moment of choice: shall we first implement a new human resources information system (HRIS) or shall we start with a new online learning platform?

For some organisations, they have the capacity to implement both platforms at the same time. However, many organisations may be concerned about their ability to implement two platforms and wonder which to start with first.

Let's consider both aspects at play here:

- What's the effort in setting up each platform?
- How can each platform assist with strategic goals?

## What's the effort in setting up each platform?

First, what is the effort involved in these platforms? Let's consider effort from several points of view: stakeholders, data and implementation.

### Stakeholders

For an HRIS, the stakeholders are small and defined. It is largely the human resources team with potential input from the finance team if payroll is integrated into the HRIS. The IT team may also be heavily involved given the HRIS stores both personal and sensitive data about employees and may need to integrate with other systems.

For an online learning platform, everyone is a stakeholder. The human resources and/or training teams may lead the way, but all managers and employees are likely to use a learning platform on a regular basis. While an HRIS may also have employee portals, that is not always the case, and HRIS employee portals are accessed less regularly by general employees than a training portal is.

At first glance, it may seem like an HRIS, with a tighter group of stakeholders, is a better place to start. It can appear more manageable. Certainly, from a project management point of view, fewer stakeholders are better.

### Data

Next up is data management. In an HRIS, data management is significantly more complex than in an online learning platform. To get a meaningful benefit from an HRIS, it must become the central system for all employee reporting. This can amount to a mountain of data to prepare, clean and coordinate.

In comparison, data management in online learning systems is comparatively straight-forward. Training can begin with the most simple of user data (name and email are often enough) and gain complexity as required over time.

Preparing the data for an HRIS is often a 3-6 month process, whereas preparing the data for an online learning platform is often a 3-6 day process (or even less).

## Implementation

The final issue in effort is one of implementation.

For an HRIS, there is a smaller group of stakeholders...but with significant implementation workloads. Every single aspect of an HRIS needs to be customised during implementation – there is very, very little opportunity to ‘plug and play’ or achieve quick wins. For employees, the interface for an HRIS is often relatively more complex too. HRIS are typically designed for administrators, with employee portals a secondary issue (especially as employees may only access their HRIS periodically). Change management issues and employee training after often higher for an HRIS roll-out.

For an online learning platform, implementation is comparatively simple. While custom training content can require work to create, initial implementation is often able to generate quick wins with ready-made training content. Training platforms, by their very nature, are designed for ease of use by employees. Most employees have used an online training platform before and are familiar with concepts of enrolment and completion. Most employees can implement a training platform in their role in minutes with minimal instructions or effort.

Online training platforms are also far easy to roll-out in stages. It’s simple to run pilot programs with teams and slowly roll-out training across the organisation. The implementation of an HRIS tends to be more of a ‘big bang’ since its functions require everyone to be moved to the new platform at once.

## How can each platform assist with strategic goals?

While effort is one consideration, the potential return should be the other consideration. We can consider return as a combination of the scope of issues addressed along with the time required for benefits to accrue.

## Scope

Implementing an HRIS has immediate benefits for the human resources team. It may also have benefits for other teams, such as payroll or training. However, those teams are likely to already have business processes in place. An HRIS may only provide incremental improvements for payroll or training teams.

Nevertheless, the human resources team is likely to see immediate benefits in efficiency and accuracy. So, if the efficiency of human resources activities or the accuracy of employee data are key organisational goals, then an HRIS may need to be prioritised.

Employee onboarding can also usually be made more efficient by an HRIS, as can annual employee review processes. Once again, business processes are likely to exist for both of those functions, so an HRIS is about improving efficiency or accuracy. If the organisation is undergoing extremely high new employee growth or having significant problems with its annual employee review processes, then an HRIS may need to be prioritised.

Alternatively, improvements in business processes around those areas may also be a solution. Certainly, however, the larger your organisation, then the more critical an HRIS becomes for solving issues of personal data, payroll accuracy, employee onboarding or performance reviews. As your organisation reaches 500-1,000 employees in multiple locations, then an HRIS can become a very useful platform.

An online training platform can also be a solution to these problems. Better training for managers on performance review discussions or automated employee induction training (which moves beyond simple onboarding and into actual induction) can be provided by an online training platform.

An online training platform is more likely to address a wider range of strategic goals too. Improvements in sales, reductions in errors, better team management or stronger compliance processes are all addressed by an online training platform. Business process cannot address poor management skills, non-compliant behaviours or lack of knowhow with internal systems. This is where training needs to kick in and provide missing knowledge.

### Time

A final consideration is that of time – time for the scope of change to have an impact.

An HRIS delivers almost immediate change. Improvements in accuracy and efficiency in human resource and payroll data should be almost immediate.

An online learning platform delivers change both immediately and over time. Some training can deliver immediate impact – eliminating mistakes in common processes or knowledge, or ensuring compliance with required behaviours or regulations are two common examples.

Training also delivers change over time. In fact, some training *requires* time in order to generate its benefits. Training in soft skills, including business development, sales or service, often requires time for change to occur. New skills must be tested and refined, new tools or processes may need to be developed, or the opportunity to implement new ideas must occur.

This issue of timing is very important. If a strategic goal is to reduce mistakes or improve sales, then delays in appropriate training create compounded delays in achieving those strategic goals. If you wait six months to deliver training on a strategic goal, and that training takes 3-6 months to embed and have an impact on strategic outcomes, then the initial delay is critical.

## Result: Faster implementation and faster results from a learning platform

---

Chicken or egg. Which came first?

It is true that an HRIS can assist every employee in an organisation. However, the range of strategic goals which an HRIS can address is significantly less than the reach of an online learning platform. The typical benefits of an HRIS are also more keenly felt at large scale, where business process struggles to provide a solution without improved IT.

For large organisations, or for organisations which have identified strategic goals in employee onboarding (not employee induction), payroll accuracy or employee data management, then an HRIS should be a priority.

---

HOWEVER, FOR THE VAST MAJORITY OF ORGANISATIONS – AND PARTICULARLY SMALL TO MEDIUM ORGANISATIONS – AN ONLINE LEARNING PLATFORM IS MORE LIKELY TO BE THE PRIORITY.

- An online learning platform has easier data management and significantly faster implementation, reducing bottlenecks in providing assistance for strategic goals.
- An online learning platform can assist with a wider scope of strategic goals.
- Delaying an online learning platform can compound delays in providing required assistance for strategic goals.

Put simply, prioritising at HRIS can add 3-9 months of delay for the implementation of an online training platform, which may then have another 3-6 months of delay for the impact of some training activities on strategic goals.

---

ALTERNATIVELY, AN ONLINE TRAINING PLATFORM CAN BE UP AND RUNNING IN WEEKS. ATTENTION CAN THEN TURN TO AN HRIS WHILE THE BENEFITS OF THE TRAINING PROCESSES BEGIN TO ACCRUE TOWARDS STRATEGIC GOALS.

# What are the different types of learning platforms?

---

At this point, you should have some ideas about the...

- Need for, and initial focus of, required training in your organisation
- Potential training streams to start organising training
- Pros and cons of different training delivery methods
- Scope of a potential training budget for your organisation
- Business case for an online learning platform to maximise your training budget

Now we need a little education about the online learning platform industry. Let's start at the very beginning. The learning and training industry has evolved to offer many different online learning platforms, each offering different feature sets for different types of organisations and their learning goals. LMS? LXP? LCP? DLP? LRS? Let's review your options now.

## What is a digital learning platform (DLP)?

Let's start at the top - a digital learning platform (DLP). A DLP is an overarching term for all online learning platforms. It's essentially a generic label. Chances are that your organisation has, or should have, at least one DLP. Larger organisations may end up with 2-3 DLPs fulfilling different functions.

## What is a learning record store (LRS)?

Next, a learning record store (LRS). An LRS is a new type of platform. While unknown to many organisations, it aims to become the centre of any DLP strategy in the future. An LRS stores learning data. It is a platform designed to store centralised learning data across platforms and experiences. Ideally, all other DLPs (as well as external learning and instructor-led training (ILT)) would connect into your LRS allowing you to utilise a 'best of breed' approach to sourcing training content while maintaining a single source of training data.

## What is a learning management system (LMS)?

Now for the most common DLP - a learning management system (LMS). Learning management systems were the first DLP, coming into popularity 15-20 years ago. These platforms focus on the management of learning. They store user data and manage learning enrolments and reporting. These platforms were originally designed to manage workshops and other instructor-led training, as well as provide a hosting platform for eLearning modules.

As you can probably already tell, many of the functions of an LMS are now provided in a LRS. LRS tend to integrate with a wide variety of training sources since they did not host any content themselves. LMSes, which are trying to provide an all-in-one solution, tend not to integrate with any other platform as they attempt to provide everything in the one platform.

LMSes also struggle with training content. They are a 'hosting' platform not a 'creation' platform. They are empty vessels which can only create users, not content. 10-15 years ago this made sense

as eLearning modules were created in complicated desktop software. Today, learning creation platforms have made the creation of online learning much easier and well beyond the limitations of older eLearning formats. As a result, LMSes have attempted to also allow for online training creation by adding in some simple creation tools. Unfortunately for most LMSes, they are simply not designed for content creation.

Nevertheless, LMSes excel at managing training and can simplify the administration of training enrolments and reporting. LMSes tend to be used by large and enterprise level companies managing a wide variety of training content and locations.

### What is a learning experience platform?

A learning experience platform (LXP) is almost the opposite of an LMS. An LXP contains ready-made training content, often created with very high production standards (videos, animations, games). It is a plug-and-play solution providing a large volume of prepared training content.

An LXP is typically not unique to your organisation. It is a shared platform used by many organisations. While user data can be segregated by organisation, the training content is shared. It's like a 'Netflix of learning' with hundreds or thousands of prepared training modules. An LXP therefore focuses on training on content which can fit many industries - leadership and management, sales skills, popular software, teamwork and so on.

LXPs solve part of the content problem by providing high-quality ready-made learning on a wide range of topics. Depending on the LXP, this content may or may not be branded to your organisation and may or may not report back to an LRS or LMS. Some LXPs can be quite niche too, which can help provide valuable training content for some roles.

### What is a learning creation platform?

Our final DLP is a learning creation platform (LCP). Learning creation platforms are the new breed of LMS. Unlike an LMS, LCPs start with the creation of online training content - without training content, there is no training! An LCP is designed to make the creation of custom training content easy. Organisations should be able to use intuitive tools, guided processes, template modules and building-block editors to create interactive, branded online training modules.

With an LCP, an organisation can solve issues which cannot be solved by an LXP such as employee induction. An employee induction program requires custom content about your organisation and its teams, tools, values, processes and standards. This content is unique to your organisation. An LMS cannot help with this problem as it cannot create quality online training. An LXP cannot help with this problem as its content is not unique to your organisation.

An LCP typically also provides a hosting function for its online modules in a similar way as an LMS. For many organisations, an LCP can replace an aging LMS by providing a complete solution to training content and training distribution. Some LCPs also include ready-made content libraries - so they are also a small LXP.

# How do I compare different learning platforms?

For many organisations, the key decision is comparison between an LMS vs LXP vs LCP. So let's break down these digital learning platforms (DLPs) by examining their features across the four most common learning requirements for most organisations.

## Comparison 1: Training management

In this first comparison, let's consider the support each DLP has for managing the most common types of training content. In this comparison, organisations should consider what the majority of their training content will be (e.g. if your organisation has instructional designers, a significant existing eLearning module library or large training budget, then an LMS may be suitable).

	Learning Management System	Learning Experience Platform	Learning Creation Platform
<b>Self authoring training</b>	Very limited with basic tools and no guided process or templates	None	Comprehensive with many tools, full guided process and templates
<b>Ready-made training</b>	No Support	Massive library not in organisation branding and not editable	Substantial library in organisation branding and editable
<b>External eLearning training</b>	Yes can host all forms of external eLearning packages	No Support	No support
<b>Instructor-led training</b>	Varies but usually supports calendar and scheduling	No support	No support

## Comparison 2: Training users

In this second comparison, we consider who the typical users of each DLP. Organisations should consider how they will implement training and what roles will be required to both create, complete and managing learning.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Who can create training?	L&D professionals with external eLearning authoring tool	No support	Anyone using built-in tools
What content is covered?	Anything (with appropriate software, resources and budget)	Popular and generic topics with cross-industry appeal	Anything
Who can use the platform?	Staff, contractors, clients, e-store customers	Staff	Staff, contractors, clients, e-store customers
Typical organisation size?	Mid-sized to enterprise	Any size	Small to large

## Comparison 3: Platform costs

In this comparison, let's consider the key costs in managing each DLP.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
Set-up cost	0 to \$\$\$\$	0 to \$\$\$	0 to \$
Subscription cost	\$ to \$\$\$\$	\$\$\$ to \$\$\$\$	\$ to \$\$\$
Operating cost	\$\$\$ to \$\$\$\$	0	\$ to \$
Operating effort	Highly customisable so high complexity. Needs separate content solution. Built for L&D professionals.	Usually not customisable. Pay for access to their content. Easy to manage with limited options.	All-in-on solution with extensive automation. Anyone can administer. Easy DIY training content creation.

## Comparison 4: Training data

For this comparison, we are ignoring LRS. All three platforms store learning data. In this comparison, we want to consider the quality of that data. What data is easily available for both users and the organisation. LMSs and LXPs tend to use older learning data standards (typically SCORM) which limits their data recording options. We also consider the different levels of Kirkpatrick training effectiveness and if each platform can assist in those measurements.

	Learning Management System	Learning Experience Platform	Learning Creation Platform
<b>Level of data captured</b>	Completion, Score	Completion, Score	Completion, Score, Polls/Surveys, Open Text, Learning Objectives, On-the-job Outcomes, Relevance, Content Feedback, Next Steps, Social Learning Results
<b>Satisfaction data</b> <i>Kirkpatrick Level 1</i>	Yes, if custom created (time and cost)	Yes, built-in	Yes, built-in
<b>Understanding data</b> <i>Kirkpatrick Level 2</i>	Yes, if custom created (time and cost)	Topic dependent	Yes, easy to create
<b>Behavioural data</b> <i>Kirkpatrick Level 3</i>	Rarely, if custom created (time and cost)	No	Yes, easy to create
<b>Outcomes data</b> <i>Kirkpatrick Level 4</i>	Very rarely, if custom created (time and cost)	No	Yes, easy to create

# How can I determine if I need an LMS or a more complete learning platform?

---

At this point you might be thinking about a learning management system (LMS). You may have seen one at another organisation or heard about LMS at a HR or learning conference. You may have even been told ‘get a learning management system’ by a peer or colleague.

However, don’t rush to decisions just yet.

**BEFORE YOU PICK AN LMS, TAKE A STEP BACK AND CONSIDER WHY YOUR ORGANISATION EVEN NEEDS AN LMS. WHILE IT’S TRUE THAT MANY LARGE ORGANISATIONS HAVE AN LMS, THAT DOESN’T MEAN IT’S A SOLUTION FOR EVERY ORGANISATION.**

Let’s consider seven key questions which will help you consider if your organisation really needs an LMS at all. This isn’t to say that LMSs don’t have benefits or aren’t useful platforms. It’s simply a case of the ‘right tool for the right job’. LMSs developed in the very early days of the internet long before cloud computing, streaming video, social learning and many other valuable modern technologies were developed.

An LMS still has a role to play for the right organisation. So let’s ask seven simple questions to help you determine if an LMS is right for your organisation.

## Do you need to host externally created eLearning modules?

If not, then you don’t need an LMS.

Remember that LMSs do not create training content. They are administrative platforms. An LMS can typically only record training completed elsewhere or host training created elsewhere. Some LMS platforms claim to have training creation tools, but they are simple and limited - it will typically be just pages of text with a few quizzes.

The early days of online learning required that all eLearning modules were created offline in traditional desktop software. This software then exported eLearning in a common format, called SCORM, which an LMS could host online. This was 15–20 years ago, well before modern cloud-based learning platforms. The legacy for some organisations is a library of externally created SCORM eLearning modules.

If your organisation does not have this legacy, then you don’t need an LMS. If your organisation does have a library of SCORM eLearning modules, then you might need an LMS to host them. The alternative would be to transfer that content out of SCORM and into a modern learning platform (which may be a good chance to update that content, create more social interactivity and improve learning reporting). In all these cases, a learning creation platform would be a better choice than an LMS.

### Do you need to manage 1,000s of training enrolments?

If not, then you don't need an LMS.

LMSs are built for 'learning management'. The clue is in their name! If your organisation has a 'learning management' problem, then an LMS may be the solution. This typically means that your organisation has to manage so many training enrolments, on such a regular basis, that a central learning management platform is required. Typically, this would be 1000s of enrolments for 1000s of users in a wide combination of training events (onsite, offsite, webinars, online, external, self-paced) in several locations.

Therefore, most LMS platforms are designed for enterprise level organisations where training management is often decentralised and an LMS is required to centralise all the information from all locations. If that's not your organisation, then you will likely find an LMS to be complicated and time consuming as it attempts to solve a problem your organisation doesn't have.

### Do you have staff or budget to create customised eLearning?

If not, then you don't want an LMS.

This question is clearly related to the first question. While the first question deals with legacy training content, this question considers future training content. An LMS requires that you have a separate training content solution. It's a learning 'management' system after all.

If your organisation has instructional designers and eLearning authoring software, then an LMS might be a good solution for you. Your teams can build custom eLearning to populate your LMS. Alternatively, you could outsource the creation of your eLearning to external designers if you have a suitable budget (typically \$5,000-\$10,000 per hour of customised eLearning).

If you don't have these resources, then an LMS doesn't solve training problems for you - it creates an empty vessel with a new problem: a lack of training content.

### Do you need to organise 100s of instructor led training workshops or webinars?

If not, then you don't need an LMS.

Like the previous question, an LMS excels at training administration. For organisations focused on instructor-led training, be it workshops or webinars, this can be a very valuable function. LMSs can help manage training rooms, recording attendance, distributing workbooks and provide a calendar function for instructors.

Once again, this is usually only valuable for organisations with scheduling needs which have surpassed Outlook or Google calendars. If your training team has 3-10 instructors running dozens of workshops or webinars each week, this might be useful. If not, then this LMS functionality is largely irrelevant to your organisation.

### Do you have a large L&D team which needs to coordinate multiple locations?

If not, then you don't need an LMS.

Most LMS platforms will have multiple levels of administrative roles - from full administrator, to area administrators, assessor, facilitators and more. If you have a large L&D or training team which needs to coordinate its activities, typically across locations and roles, then this role-management functionality can be valuable.

However, if your training team is just a few people and your administrative requirements are modest (and can largely be automated with an online platform anyway), then this complexity will not benefit your organisation.

### Do you need to track training from a wide variety of sources?

If not, then you don't need an LMS.

Perhaps your organisation doesn't have 1000s of staff or locations, but it does engage in a very wide range of training initiatives. In this case, an LMS may be useful to bring all these separate training records together. A training records platform may be an even better solution for this type of organisation. Training records platforms centralise training details automatically from a wide range of sources, automating many features which would require manual input in an LMS.

### Do you need to track competencies and compliance requirements?

If not, then you don't need an LMS.

What you probably need is a HRIS. Competency mapping and compliance tracking can be managed through quite a variety of means - starting with an Excel spreadsheet. Some learning platforms include various degrees of competency and compliance mapping and you may get this through an LMS. However, an LMS is not the only solution for this and, certainly, purchasing an LMS specifically for this feature is usually the wrong decision.

First up, manage learning creation platforms can provide some features around competency and compliance tracking. Second, a HRIS typically provides very robust features in this area. If you have an HRIS, then it should manage these functions and then your learning creation platform provides the training content. So, the HRIS identifies the problem (missing competency, lack of compliance certification) and the learning creation platform provides the solution (induction training, skills development, compliance training).

## Result: Most non-Enterprise organisations do not need an LMS

---

When online learning platforms first originated, the idea of a learning management system was important. It was a management portal designed to store user data, host training created elsewhere (workshops or online learning created in an eLearning Authoring tool) and store basic training records. At the end of the day, an LMS is an administrative platform. So its perfect for larger, enterprise-level organisations which have a major training administration problem.

Those large organisations also have the training budget and training teams to justify an LMS and still have resources left to provide actual training content and delivery.

For every other organisation – which is 95% of organisations – an LMS would be inappropriate. For those organisations, finding, creating or affording training content will be the #1 issue. Most organisations do not have large training teams or unlimited training budgets. They need an online learning portal which is easy to use with minimum administration requirements and which can solve their #1 issue – training content! That's not an LMS.

# What are the total costs of online learning?

---

As a final step in understanding online learning platforms, let's return to the issue of cost. What does online learning cost?

If your organisation hasn't already made a move to online learning, you might be uncertain about the costs associated with such a move. In this article, we'll examine all the potential online learning costs as well as ways to eliminate or minimise them.

As we review the various costs in online learning, we'll need to consider two parts of the process.

- Online learning platform costs. These are the costs in providing a platform to host and distribute online learning. It should be noted that many online learning platforms also provide other benefits, from the administration of instructor-led training to acting as a video-hosting environment.
- Online learning content costs. An online learning platform cannot function on its own – it also needs online learning content. These costs may include access to ready-made online learning libraries as well as the cost of developing new, customised, online learning content.

## Set-up costs

Set-up costs are a one-off online learning cost to establish your cloud-based learning platform.

Setting up a domain for a new organisation in a modern online learning platform should require just minutes of effort. There are no provisioning costs in establishing a new organisation in a modern cloud-based infrastructure.

---

AS A RESULT, AT TRIBAL HABITS, WE BELIEVE SET-UP COSTS FOR ONLINE LEARNING PLATFORMS SHOULD BE FREE.

---

That being said, some older learning platforms can require considerable effort to provision a new organisation portal while some online learning vendors use set-up costs as a way to improve margins (particularly as a way to coerce organisations into longer contracts to 'spread set-up costs over many years'). Set-up costs for these learning platforms can range from \$500-\$25,000 or more.

## Implementation costs

Implementation costs are a one-off online learning cost involved in establishing the initial settings and processes in your learning platform.

These costs are typically human-capital costs. They involve one-off initial implementation activities, such as defining custom fields in user profiles, setting up initial categories, activating single-sign-on protocols and establishing branding on the platform.

For most modern online learning platforms, these activities should be simple and straight-forward. Organisations should be able to quickly establish these settings themselves during a standard implementation process, while platform providers may help with decisions around some of these settings during an initial training process for new platform admins.

---

AS A RESULT, AT TRIBAL HABITS, WE BELIEVE IMPLEMENTATION COSTS FOR ONLINE LEARNING PLATFORMS SHOULD BE FREE. THE EFFORT IS MINIMAL AND SHOULD BE ABSORBED BY BOTH OUR CUSTOMER SUCCESS STAFF DURING THE FREE INITIAL ADMIN TRAINING WE PROVIDE.

However, many complicated online learning platforms may require an implementation fee. This may include costs for upfront training of staff, help from the platform provider in setting up parts of the platform or 'consulting' services which are required to otherwise use the platform. Implementation costs for these learning platforms can range from \$500-50,000 or more.

### Package costs

Package costs are on-going online learning costs associated with the features of your learning platform. Package costs are the first component in determining your on-going usage subscription.

Some online learning platforms have one package – you receive all features, all the time. Indeed, this may make sense for some platforms which have a defined (limited) feature set.

Alternatively, some online learning platforms allow you to select only the features you need. For platforms with more extensive feature sets, that can help make your online learning costs more efficient.

---

AT TRIBAL HABITS, YOU CAN SELECT FROM SEVERAL DIFFERENT PACKAGES DEPENDING ON THE PARTICULAR FEATURES YOUR ORGANISATION REQUIRES. MANY OTHER MODERN ONLINE LEARNING PLATFORMS OFFER SIMILAR PACKAGE STRUCTURES. IT IS CERTAINLY WORTH INVESTIGATING WHICH PACKAGES YOUR ORGANISATION DEFINITELY REQUIRES.

### Plan costs

Plan costs are on-going online learning costs associated with the volume of activity in your learning platform. Essentially, plan costs are the second component in your on-going subscription – they are the 'multiplier' of your package costs. The most common plan cost is 'per user per month' charge.

In a simplified case, let's say your package costs are \$10 per user for the features you have selected. Your plan costs will then adjust the \$10 per user amount up or down. For example, larger organisations may receive a discounted per-user rate for high volumes – it may reduce the per-user cost to, say \$7.50 per user, for the same set of features.

Similarly, paying monthly or annually may adjust the plan cost – annual plans (paying for 12 months of use in advance) typically result in a lower per-user fee. The trade-off here is that you commit to a particular volume of usage, which may not suit seasonal or irregular usage or small to medium organisations who do not need regular monthly usage.

A more important distinction in the plan cost is how a user is counted.

- **Stored users.** Many online learning platforms use 'stored' users (or total users). They count every user in your portal regardless of whether that user is active in the portal (logging in to

use the portal). This method is simple but can be very inefficient if your users are not using your portal every month.

- Active users. Some online learning platforms use 'active' users (or actual users). In this case, only users who log into the portal are counted. This method most closely aligns the value you receive from the online portal with the costs you are paying. If users are not using the portal, your costs should fall.

---

AT TRIBAL HABITS, WE USE AN ACTIVE USER PRICING MODEL. YOU ONLY PAY FOR USERS WHO ARE ACTIVELY GAINING VALUE FROM YOUR LEARNING PORTAL. THIS IS A VERY EFFICIENT COST MODEL. ORGANISATIONS WITH, SAY, 300 EMPLOYEES MAY ONLY NEED A 150 ACTIVE USER PLAN – THIS WOULD ALLOW 150 DIFFERENT USERS TO LOG IN EACH MONTH. IF YOU HAVE MORE USERS IN A MONTH THAN YOUR PLAN, YOU ARE SIMPLY CHARGED FOR THE EXCESS USERS FOR THAT SINGLE MONTH (AT THE SAME PER-USER RATE).

AT TRIBAL HABITS, YOU CAN ALSO ELECT TO PAY MONTHLY ('PAY AS YOU GO' WITH NO CONTRACT) OR ANNUALLY (STARTING FROM 100 ACTIVE USERS PER MONTH WITH INCREASING PER USER DISCOUNTS FOR LARGER PLANS).

### Storage costs

Storage costs are on-going online learning costs associated with the amount of content stored in your online learning portal.

This is often a hidden and unexpected cost, typically associated with older online learning platforms. Organisations may find that a certain amount of storage is initially free on these platforms. However, as usage grows and more content is added to the platform, a storage fee can suddenly be charged.

---

FOR MODERN CLOUD-BASED LEARNING PLATFORMS, THE COST OF STORAGE IS EXTREMELY LOW. AS A RESULT, AT TRIBAL HABITS, WE HAVE NO STORAGE FEES AT ALL. 'COSTS OF STORAGE' ARE BUILT INTO THE PLAN COSTS.

### Support costs

Support costs are on-going online learning costs associated with receiving support for your online learning platform.

For most online learning platforms, there are no additional support costs – support is included in your package and/or plan costs.

However, some online learning platforms charge extra for certain levels of service. For example, they may provide email support (which can take 2-3 days to respond) for all packages, but more responsive live chat support may be an additional on-going cost (typically a per cent of your overall subscription cost).

---

AT TRIBAL HABITS, WE OFFER THE SAME LEVEL OF SUPPORT FOR ALL PACKAGES WITH NO ADDITIONAL FEES.

### Content Creation costs

Now for the single biggest hidden cost in online learning platforms – content.

Almost all online learning platforms are designed only to host online learning content. That means you need to find your online learning modules somewhere else...at an additional cost. Some of these online learning platforms will claim to have the ability for you to create online learning modules, but the tools are simple. They are often nothing more than some basic text, a few images and simple quizzes.

The sources for online learning modules really come down to two options.

- Ready-made online training modules. These modules provide training on common topics. Some online learning platforms now include access to libraries of online training modules – perhaps has an additional package subscription. If not, then you may need to track down ready-made external training and integrate that into your online learning platform (at a cost, and with some effort).
- Online training creation software. Alternatively, you can use dedicated online training creation software (eLearning Authoring tools) like Storyline or Captivate. These tools are expensive (\$500-2,000 per creator per year) and have steep learning curves. If you would like 4-5 of your staff to be able to create training, you need to factor this cost into your planning.

---

AT TRIBAL HABITS, WE HAVE SEVERAL LIBRARIES OF READY-MADE TRAINING WHICH CAN BE INCLUDED AS A PACKAGE IN YOUR SUBSCRIPTION. UNLIKE OTHER LEARNING PLATFORMS, THIS TRAINING APPEARS IN YOUR ORGANISATION'S BRANDING AND CAN EVEN BE EDITED BY YOUR ORGANISATION.

IN ADDITION, TRIBAL HABITS HAS INTEGRATED ONLINE TRAINING CREATION FEATURES. IN FACT, TRIBAL HABITS WAS DESIGNED AS AN ONLINE TRAINING CREATION PLATFORM FROM THE GROUND UP. THE ABILITY TO CREATE FULLY INTERACTIVE ONLINE TRAINING IS INCLUDED IN YOUR PACKAGES.

## Part 3 – How is a learning platform implemented?

---

As a final part of your business case for an online learning platform, you may need to consider the effort required in implementation. This is often a concern for senior management who worry that implementation will be expensive and time consuming.

While we have discussed the implementation of a learning platform versus a HRIS earlier in this guidebook, let's now dive into the detail of your first few days and weeks with a new online learning platform to show just how easy the implementation can be (with the right platform!).



# How can we easily implement a new online learning platform?

---

Implementing online 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.

In this article, let's look at 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). In most online training platforms, 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).

[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.](#)

## Result: Implementation within hours and days

---

Implementing a modern online learning platform is far easier than most people think. With a platform like Tribal Habits, your implementation process can be measured in hours and days, not weeks and months.

While it is true that you can continue to roll-out new aspects of training – converting existing training materials, optimising employee induction or sharing best practices – the core implementation process of an online learning platform is easy to manage.

# How do we run an effective pilot program for a learning platform?

---

When you think about implementing a new learning platform for your organisation, it is necessary to ensure it will be advantageous before making the purchase decision. Running a pilot program for a learning platform allows you to test diverse aspects of the new platform but on a small scale.

First things first, however - you initially need to consider if a pilot program for a learning platform would be an effective step in the purchasing process. Not every purchasing decision needs a pilot program. A pilot program for a learning platform is an investment itself. They take time and effort (and sometimes even a monetary investment) and may not even yield useful information unless they are run correctly.

Before committing to a pilot program, take a moment to consider if it is worth the investment.

- How unfamiliar are you with learning platforms?
- How large is the change management exercise in your organisation?
- How many stakeholders are impacted by the new learning platform?
- How costly is the new learning platform?
- Can a pilot program actually return effective results?

---

THAT LAST QUESTION IS CRITICAL. NOT EVERYTHING CAN BE TESTED VIA A PILOT PROGRAM. SOMETIMES THE EFFORT TO OBTAIN USEFUL FEEDBACK FROM A PILOT PROGRAM IS EQUAL TO SIMPLY IMPLEMENTING THE NEW PLATFORM ITSELF.

When the new learning platform has flexible pricing and/or no set-up or implementation costs, then it may be simply more effective to skip the pilot program and proceed straight to implementation. If the learning platform has a large set-up cost, complicated implementation process or would commit you to a multi-year, expensive subscription, then running that pilot program might indeed be a wise idea!

If you do decide to run a pilot program for a learning platform, then these six steps will start you on the path towards effective testing and useful data for your decision-making processes.

## Step One - Identify your goals

Ideally, your review of learning platforms should have already identified the desired solutions and outcomes for your organisation. In this first step, you need to step back from those overall outcomes and instead define what you want to know from the pilot program itself. Gather your stakeholders or decision makers and start brainstorming specific questions you are currently struggling with or uncertain about.

In the context of a new learning platform, this might include:

- Can employees use the learning platform without significant assistance?
- Do learners use or gain value from certain features?
- Does the style of learning feel natural to employees?
- Did employees have problems accessing the learning platform?

- Was the process of setting up employees and learning manageable (for a pilot)?

Ideally, group similar questions together and summarise them into a set of questions you need to find answers for with your pilot program. These questions will guide you in deciding what features or pieces of the platform need to be evaluated.

### Step Two – Determine what to measure

That last sentence in the previous step is very important – a pilot doesn't need to test every single aspect of the platform. It just needs to focus on those areas or features required to answer your questions and help you make a purchasing decision.

So, for example, if your concern is about how easily employees can navigate the platform, then you'll need to provide modules for employees to navigate within and between. If you need to evaluate the ease in creating online training, then testing social learning may not be as critical as having a few subject matter experts try out the training creation tools. By setting goals, you will understand the key features of the platform you need to focus on. Test those and those alone.

### Step Three – Recruit your program participants

A pilot program group doesn't have to be large, but if your final audience is diverse, you might need to replicate that diversity. You also need to ensure you involve enough departments and roles to give you enough data. Often your stakeholders will be able to help you identify the right people, particularly if you need to test this among multiple segments.

Testing training is a tricky task too. If an employee is testing the interface, they often don't concentrate on the training content as much as they would if it was a real training exercise. Conversely, if you want employees to focus on training content, then you need to empower them to spend as much time testing and implementing the training content as they would with real training (with the same support they would get from their manager in a real training exercise). That's often a big task and requires a substantial investment.

You can manage this by picking training topics with less 'load' on the employee – compliance training is often used for this. However, if your goal is to drive training which impacts strategic goals – such as sales or leadership – then compliance training isn't a great proxy. You need to tread carefully here.

---

ASKING TOO MUCH OF YOUR EMPLOYEES IN A PILOT PROGRAM OF A TRAINING PLATFORM MAY BE UNREALISTIC AND ONLY FRUSTRATE THEM (NEGATIVELY BIASING THEIR RESPONSES).

A half-way measure may be for employees to largely complete the training and to then answer a series of review questions about their impressions and intent. Could they foresee the remaining (intensive) training activities being achievable? What have they managed to achieve with the training they did complete?

When testing other aspects of a training platform, similar issues of balance can arise. If you want to test out the ability to create training, asking someone to create an entire training module as a pilot may be too much – you might need to settle with creating part of a module – enough to 'get the gist'. Administration tasks can be similarly tested. If you are worried about the burden or effort of training administration, then ask an administrator to focus on automation tasks around a single module (not dozens of modules).

Ask too little, and you won't get high-quality responses as the testing may be superficial. Ask too much, and you may negatively bias the results from a level of frustration.

#### Step Four – Collect your pilot program data

Your pilot program data will vary depending on your goals. Look at your goals to understand the best mix of qualitative and quantitative data you need.

You can then decide how you will collect that data. It could be physically watching employees use the platform, or it might be an online survey. Good learning platforms should have built-in learner feedback features (such as the built-in feedback and quality polls in all Tribal Habits modules).

Remember: If you plan on gathering quantitative data, make sure you also collect qualitative data. It's important to a system of checks-and-balances; otherwise, you run the risk of numbers dominating feedback and numbers can be open to interpretation.

#### Step Five – Revisit your decision-making process

There is no point in running a pilot program for a learning platform if you don't actually use the results! It's great if you discovered that employees are using the platform as intended and found the experience beneficial. Chances are, however, that not every aspect of the new platform went perfectly – it is just a pilot program, not a full implementation after all.

Take what you discovered and see how serious the issues are. For example, if employees struggled with navigation, consider if that could be solved in a proper implementation with more useful onboarding or instructions. If employees didn't use certain features, consider if those features are perhaps less important than you thought or if they need a better explanation.

#### Step Six – Turn testers into champions

---

ONCE YOU HAVE WORKED WITH YOUR PILOT PROGRAM GROUP, YOU'LL HAVE A GOOD IDEA WHO FOUND IT VALUABLE AND WHO APPRECIATED YOUR DESIRE TO IMPROVE LEARNING IN YOUR ORGANISATION. TAKE THOSE PEOPLE WHO ARE INTERESTED AND ASK THEM TO SHARE THEIR EXPERIENCES.

These platform champions might send emails to their department, present on the platform at a team meeting or let you use quotes in rollout communications. They may also be great candidates to create your first custom online training modules in a platform like Tribal Habits.

### Result: Smart use of a pilot program for a learning platform

---

Using these six steps will help you optimise a pilot program for a learning platform. If you take the time to plan, work through a process, clearly evaluate data and identify possible changes, you dramatically increase your chance of success when the full platform makes its debut. And you can make a more confident purchasing decision in the first place.

# Case Study: MOQdigital and reimaging training in a high growth environment

Challenge	Approach	Outcome
After a period of rapid growth, Australian based professional services firm MOQdigital needed a scalable approach to optimise its induction process and ensure all staff members were utilising best practices at work.	Tribal Habits was implemented to replace PowerPoint and time consuming face-to-face training. The platform guided experts at MOQdigital to create their own shareable learning experiences.	Training engagement and completion has shot up. Relevant company-specific best practices are shared across the organisation making induction a seamless process. The time spent delivering training significantly dropped.

## Business is booming



As a result of acquisitions and an impressive track record of organic growth, MOQdigital has grown rapidly in recent years.

With staff numbers swelling from 150 to 250 in less than a year, the business faced several challenges from a learning and development point of view.

- How could it continually induct and optimise the performance of its newest staff members while maintaining the culture and level of productivity its current workforce possessed?
- How could the business improve, scale and track its current paper-based and face-to-face training sessions to meet its rapid growth?
- How could the business be sure all staff were leveraging proven best practices to deliver exceptional results for MOQ digital customers?

With the support of the COO, the business elected to implement Tribal Habits to digitise its current training practices, optimise its induction process and ensure best practices were shared across its operations.

## A clear choice

Tribal Habits was selected because of its ability to empower MOQdigital training staff to quickly translate its current training content into engaging, trackable online learning experiences.

Experts at MOQdigital were able to engage with Sage, the Tribal Habits AI, to create training modules that captured their unique expertise and distributed this information to other staff members.

“SAGE IS AWESOME. SHE LETS ME KNOW IF I’M ON TRACK OR NOT AND, OF COURSE, THERE ARE THE FREE REVIEWS OF MODULES WE CREATE. THESE FEATURES MADE ME FEEL VERY CONFIDENT CREATING TRAINING IN TRIBAL HABITS.” LINDSAY BASTIAN SZ – MANAGER PERFORMANCE ENABLEMENT

The combination of digitising an existing training library and rapidly creating new interactive training content provided MOQdigital with a full suite of tailored training with a minimum of fuss and capital outlay.

## Delivering rapid results

After implementing Tribal Habits, MOQdigital had a fully functional, tailored, trackable learning knowledge transfer platform in place in a matter of weeks.

The team can now rapidly create learning experiences that are specific to their unique business environment. These topics are bolstered by leveraging Tribal Habits Development library of ready-made topics which address broad professional development areas — providing MOQdigital staff with full development pathways.

Feedback from the team around the creation of content, traditionally a challenge in the learning development space, has been overwhelmingly positive.

---

“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.” LINDSAY BASTIANZ – MANAGER PERFORMANCE ENABLEMENT

MOQdigital’s shift to a digital platform has yielded vast time savings. Expert staff are creating online learning experiences once that are then shared multiple times. This has led to a massive reduction in the amount of time these expert staff need to spend running face-to-face sessions, allowing them to focus on their core responsibilities.

---

“ESSENTIALLY WE’RE GETTING BETTER OUTCOMES WITH LESS TIME SPENT“. LINDSAY BASTIANZ – MANAGER PERFORMANCE ENABLEMENT

The training has been deemed to be far more effective than the fragmented nature of the previous initiatives. The way the Tribal Habits guides creators to build practical learning experiences and the consistency the platform provides has vastly improved the quality of training and reduced the time taken to embed knowledge in new staff members. Videos, quizzes and reflection questions have significantly increased engagement and completion rates. A new company-wide training exercise delivered through Tribal Habits had a 95% completion rate within a week – far higher than previous efforts.

The team now has a centralised platform that can support the structured nature of their learning and development program. All training is now aligned with staff development pathways and can be reported on in real-time. This has immensely improved the induction experience for new staff members and is saving the business time and money in the process.

There is confidence within the organisation that Tribal Habits is helping instil ‘MOQdigital way’ of working across the team. Best practices and proven approaches are now easily shared and replicated, and the business is reaping the rewards.

## The evolution of MOQdigital training

MOQdigital is now looking to further develop its engagement on the platform by diving into Tribal Habits analytics to identify learning gaps and create functional, company and personal development opportunity for staff members from these insights.

# 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.*



*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!*



*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.*



*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.*



*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.*



*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.*



# 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.

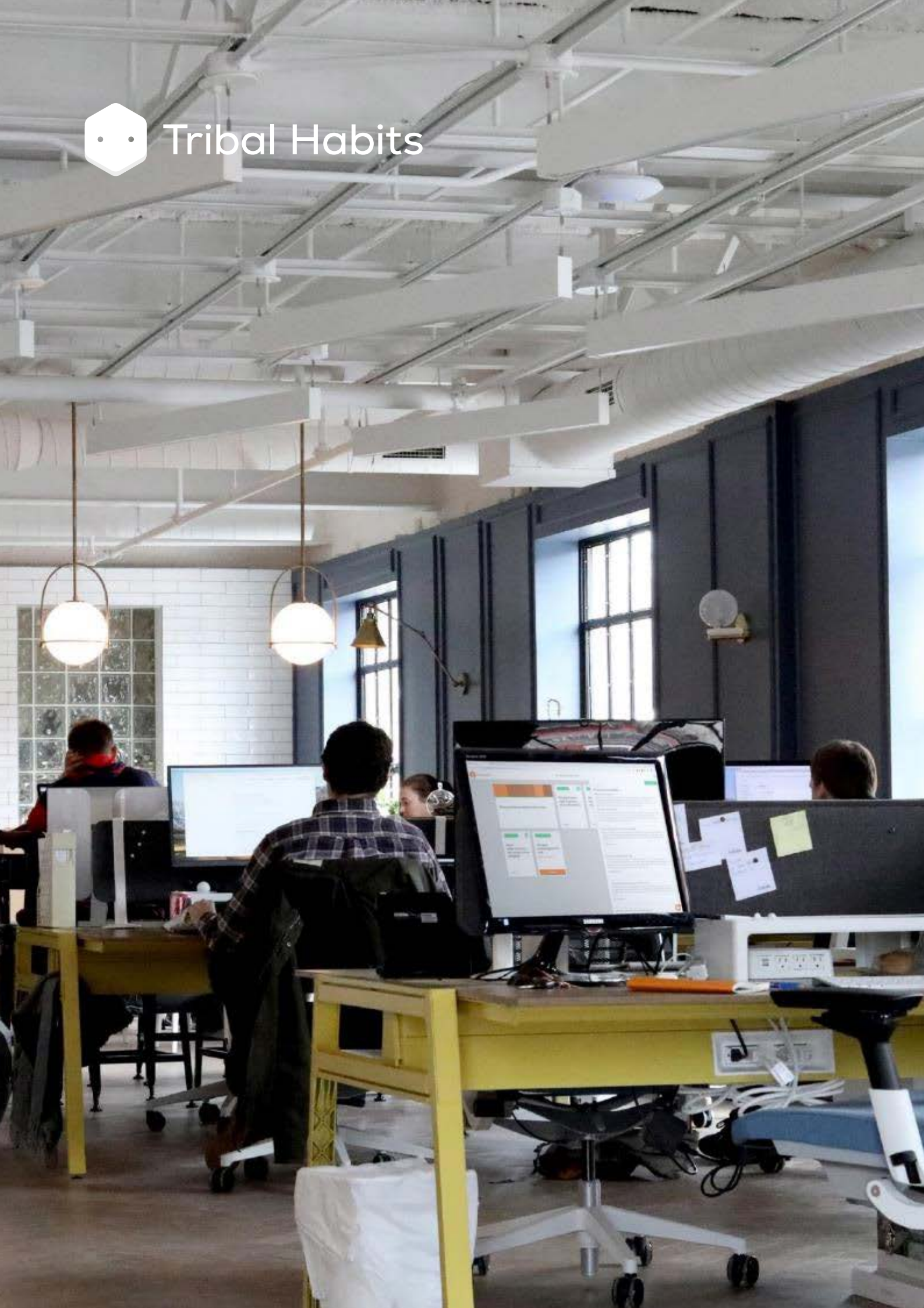
## Share best practices

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 against 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.



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.

## 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.



Tribal Habits

# 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

# 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](#).

# How can I get started with Tribal Habits?

---

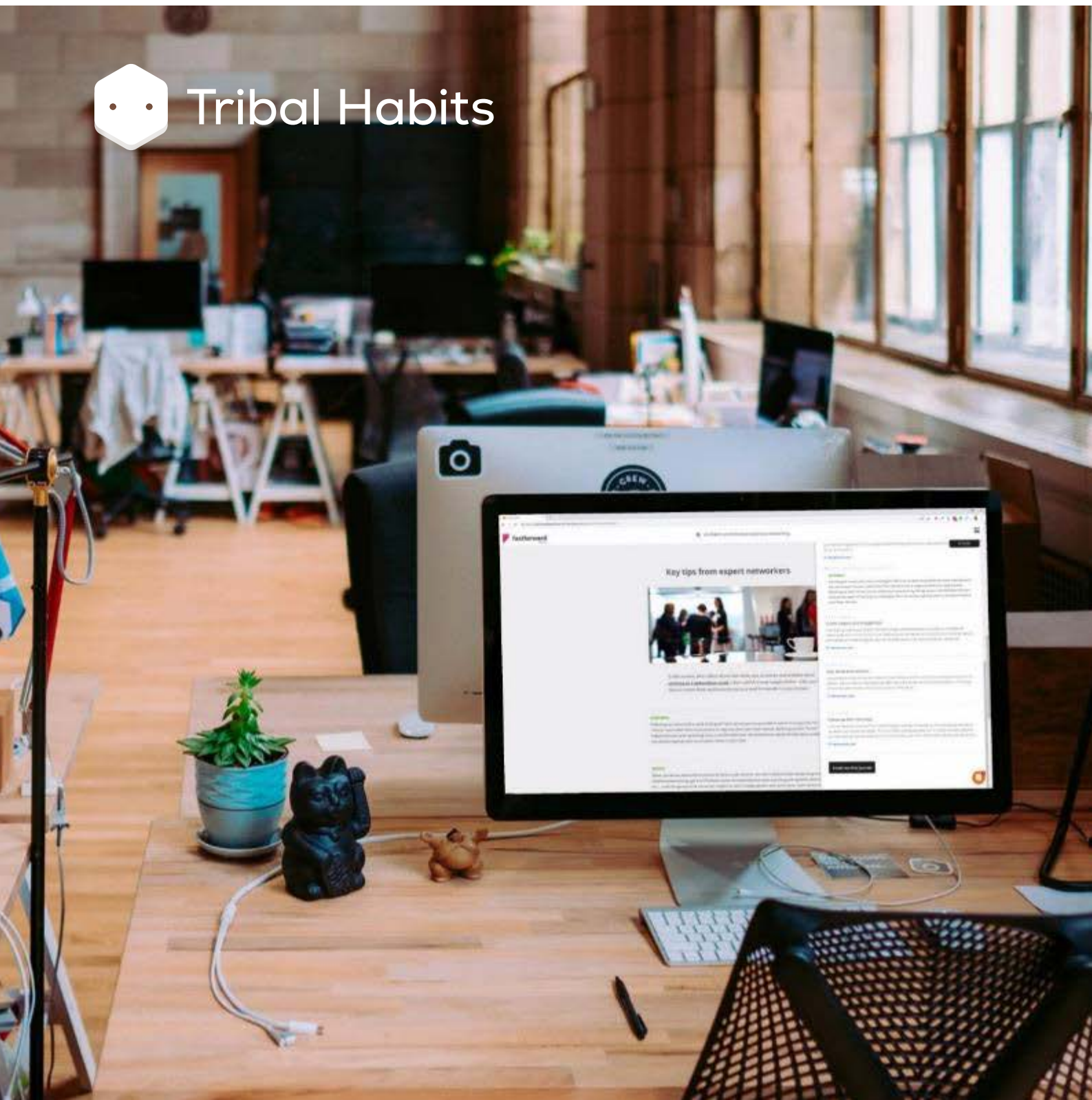
A quick demo will give you everything you need to know about Tribal Habits and how to make it a success within your organisation. After the demo, you'll have access to a free, full-featured trial portal to you get started.

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.

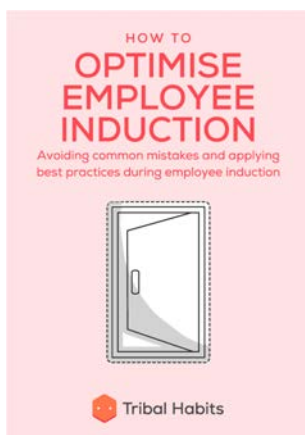
Go to <https://tribalhabits.com/get-started/> to organise your demo.



## Tribal Habits



# Other Tribal Habits Guidebooks



## 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

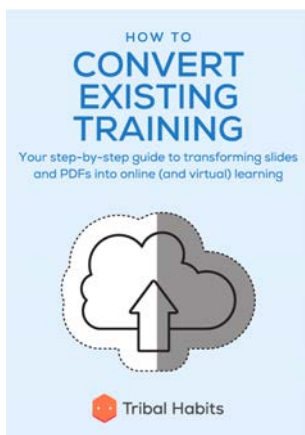


## Deliver Compliance Training

[This guidebook outlines the steps to build an easy, affordable and effective online compliance training strategy.](#)

Over two details sections, you'll learn:

1. Why you need compliance training, including key reasons to support your business case
2. How to implement an online compliance training strategy, including detailed topic checklists



## 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.



## 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.

