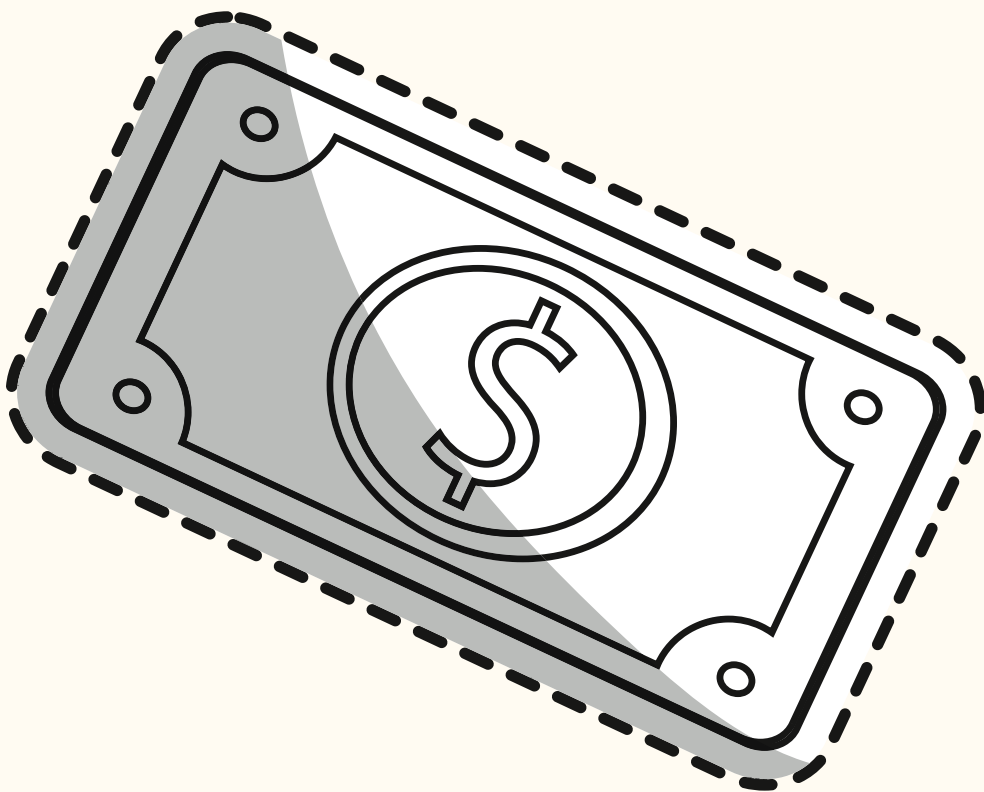


HOW TO REDUCE TRAINING COSTS

Tips and tricks to set a training budget
and maximise your training expenditure



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, we are going to **cut across all three phases** – since it is possible your organisation has training budgets allocated to compliance/induction, internal processes and customer support! This guidebook is designed to help you take control of your training budget.

You'll review a sequence of questions to help you find inspiration to either set a more appropriate (and defensible) training budget, take steps to reduce training costs and find ways to demonstrate training outcomes. If you have already undertaken some steps in this process, you can skip ahead – if not, you can follow the entire process from start to finish.

Of course, I believe the solution these challenges is Tribal Habits – a unique online learning platform which allows anyone to rapidly create online training (eliminating many costly or repetitive face-to-face training requirements), automate training administration (reducing burden, time and effort) and make training available 24/7 in any location (accelerating the sharing of knowledge).

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

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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 several 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 organisations, \$941 for medium organisations and \$1,886 for small organisations
- 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 that 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 organisations 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 organisations 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 that 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 an 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 organisation 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 organisation 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.

What are the total costs of online learning?

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.

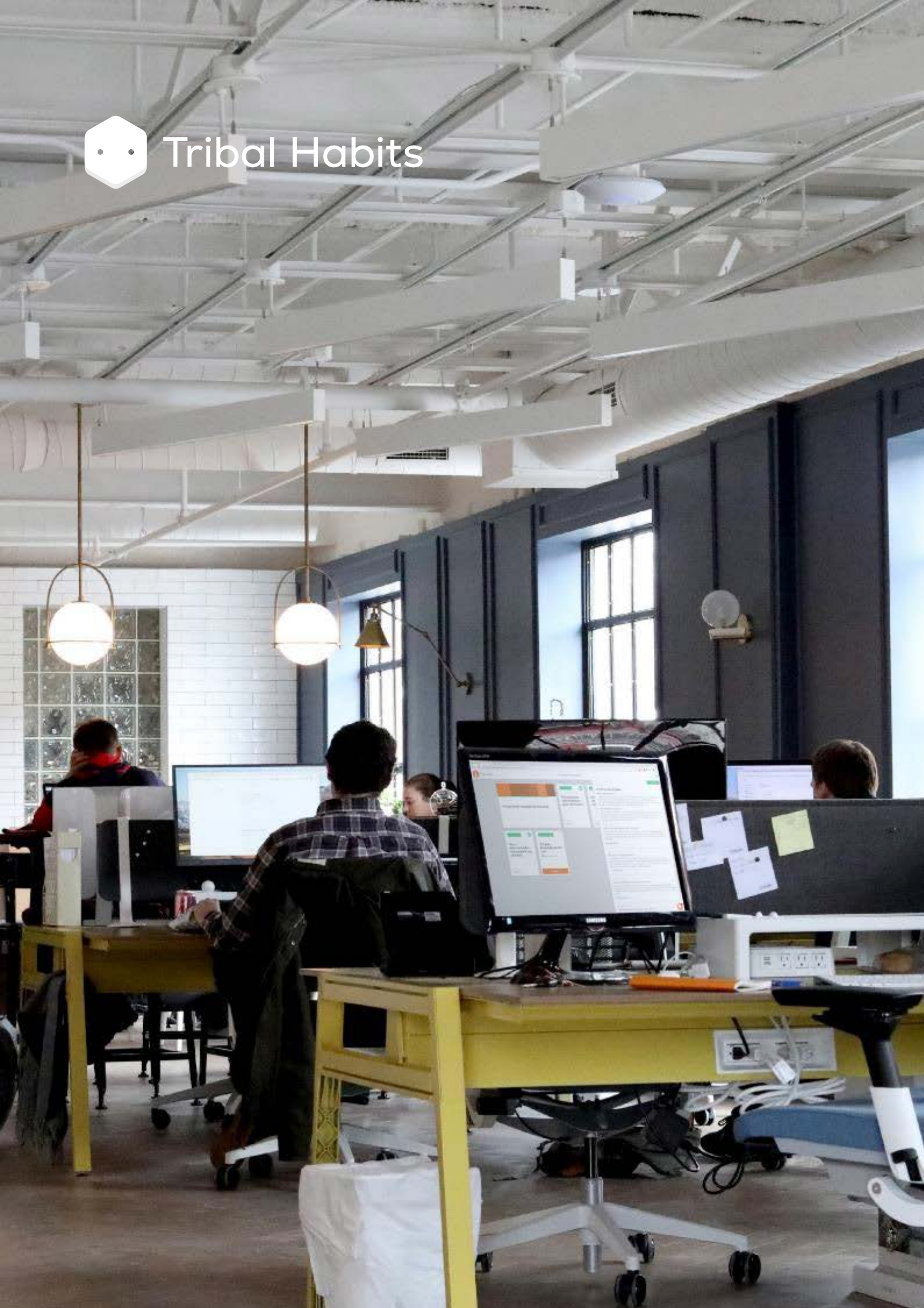
- Ready-made online training modules. These modules provide training on common topics. Some online learning platforms now include access to libraries of online training modules – perhaps has an additional package subscription. If not, then you may need to track down ready-made external training and integrate 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.



Tribal Habits



How can I reduce training costs?

Oh no. You need to reduce training costs.

Perhaps this isn't the first time your CFO has viewed training as an expense and has decided that training needs less budget. It certainly won't be the last time either. As organisations ride the economic cycle, the training budget tends to move with it.

If you already run a lean and mean training budget, then well done! You may find, though, that your previous good management will not always stop that CFO from asking you to reduce training costs further.

In any case, whether you have already maximised your training budget or you realise that you have a long way to go, here are ten practical steps that you can take to reduce training costs.

1 - Eliminate training which is not adding value

This first tip will tie into our last tip (demonstrate return). If we want to reduce training costs and improve training RoI, then your training spend needs to be laser-focused.

So first things first – any training which isn't aligned to strategic goals and can demonstrate clear value should be the first to be removed. We are not saying that such training is not worthwhile, but when the training budget is under pressure, then choices must be made.

You may need to protect compliance training and other training directly linked to strategic goals – perhaps sales to drive revenue, or service to retain customers, or processes to improve efficiency and reduce mistakes. As such, training on assertiveness skills or business ethics may just have to wait for a while.

2 - Fewer workshops, more online training

When it comes to managing the balance between training quality and training cost, online learning can be the most significant factor. Online training is a scalable method of making training activities, content and assessments available to many employees in any location.

They can access knowledge and training most relevant to them, in an engaging format, whenever they need it most and in multiple sessions which suit their availability.

Online training modules can be updated quickly and easily. Online training can be automated for delivery with minimal effort from a training administrator. This means less time and lower costs for each 'unit of training content delivered'.

Transforming your workshops into online training is also significantly easier than ever before – the time and effort are modest, and the return on your investment is significant. Essentially moving all your workshop training which only teaches theory, facts, processes or knowledge into online learning can dramatically reduce training costs.

3 - Fewer workshops, more virtual training

Next, move workshops online with webinars. Webinars significantly lower the average training cost per employee by removing the need for a venue, travel, and catering.

Webinars can replicate small group interactions from workshops too. Modern webinar platforms even offer breakout facilities, allowing you to split groups of 20-30 employees into small teams of 3-5 employees to replicate small team tasks from a workshop.

Meanwhile, your webinar facilitator can address multiple employees at once (keeping one of the big efficiency advantages of workshops). Better yet, if an employee can't make a webinar, it's no big deal as learners can watch the recording when they get the time.

Finally, it is easy to take a four-hour workshop and transform it into three 60 minute webinars. From an effectiveness point of view, shorter and more frequent training is always better than longer, one-off events. So not only do you reduce training costs, but you also improve training outcomes.

4 - Replace in-house workshops with public workshops

If you must use workshops from external suppliers, consider switching to public workshops rather than private in-house workshops. This is particularly useful when you have just a small number of employees who need to be trained.

Also, consider that the employees who attend the public workshops can return and share that knowledge internally. Ask them to contextualise the training for the organisation and capture that information to share internally (see the next two points about this).

5 - Less external consultants, more internal expertise

Learning and development consultants are expensive. While they can do a great job, it comes at a cost, particularly as they are removed from your organisation. That distance adds time and complexity to their actions. They also tend to want to produce high-quality training resources, sometimes with complex animations, custom images and other time-consuming additions.

It's alarming how many organisations turn to external consultants, which come with expensive costs while ignoring all the free consultants who know your organisation best – your employees. You can probably already identify employees with expertise, proven skills and valuable knowledge. All you need to do is empower them to share their expertise and give them the tools to do so.

Empowerment needs time and focus. It may be as simple as a KPI which requires team leaders to create two hours of online training every six months. The tools can come from a learning creation platform, which allows anyone to create online training as quickly as building PowerPoint slides. Alternatively, ratchet up your lunch-and-learns (while recording them for online distribution).

While you may still need learning experts to assist, tapping into your internal experts can substitute a lot of costs and further reduce training costs per employee.

6 - Less purchased training, more created training

Similarly, while it can be tempting to buy external training content, it is expensive. Sending employees to an external workshop is often very inefficient. In essence, you are paying for the marketing costs of that workshop, room hire, printed (and often forgotten) workbooks, travel time, food and more.

Externally created online training can be cheaper but still carries a hefty cost – especially if the content is generic and already exists in your organisation. Now, some external online training content may need to be purchased if you lack the internal skills to create it. Compliance training is a great example of this, where you need to be sure the content is approved and meets standards. Equally, highly specialised training – safety training is a good example – might also be best done by a professional.

However, any external training on universal modules like sales, management or service can usually be created internally by your experts. With the bonus that the content will be 100% relevant to your organisation.

7 - Switch to actual or active use online training plans

If your online learning platform supports active (actual) user plans, switching to those plans can also dramatically reduce training costs.

Many online learning platforms have total user plans. This means your monthly or annual subscriptions are based on the total number of users in the platform. This is fine if the majority of your users are accessing your platform every month. For many organisations, however, this just isn't the case.

Often training is seasonal. Compliance training may occur in just a few months each year, while soft skills training is often focussed outside of busy periods. If you combine this with holiday periods, the usage in your learning portal is often well less than 100% of your employees.

It may be worth running a monthly usage report for your learning platform and determining what per cent of your users log in each month on average. For many organisations, this number is 40-60%. This means your learning platform efficiency may be just 50% (you are paying for 50% of usage which you don't need).

Some online learning platforms utilise an active (or actual) user plan. These plans are based on the number of active users per month. An active user is typically defined as a user who logs into your learning platform during a calendar month. If a user does not log in, they are not counted. If your organisation has, say, 200 employees but you realise that only 100 of them log in each month, then you can use a 100 active user per month plan to reduce costs.

Most active user plans also allow monthly overruns for spikes in usage, and you are just charged for the incremental excess users for that month. Moving to an active user plan might reduce training costs for your online learning portal by 30-60%. That's no small number.

8 - Eliminate expenses not directly related to training

Let's think about all the costs we incur in training activities which are not directly related to training outcomes. Then let's see how many we can eliminate.

- Venue. Use internal rooms or move to virtual rooms (webinars).
- Food. Simply do not supply. Ask participants to organise their own food (they do so every day on-the-job, so why do they need you to organise food for training?).
- Workbooks. Don't print them. Provide a PDF version instead and ask learners to print and bring to the workshop or use electronically. Adjust your training activities to use things other than workbooks. Most training workbooks end up buried in the bottom of drawers anyway.
- Travel. Switch to online or virtual training to eliminate travel expenses (for both participants but also facilitators).

9 - Re-use internal knowledge assets for training

Recycling saves money, and it can work to reduce training costs too.

If you have an internal expert running a lunch-and-learn or any sort of internal workshop, you should record it. Then upload that video into your learning platform for re-use in the future. With just a small amount of work, it is easy to take a 60-minute video and transform it into a 60-minute online training module with 6-7 video extracts, summaries of key information and online assessments.

If you have teams which are creating process guidelines for standard operating procedures, ask them to do so in a way which can be repurposed into online training. This usually just means providing enough detail that the SOP guidelines can be understood on a stand-alone basis. It's easy to take your SOPs and create an online learning library.

10 - Work hard to demonstrate return

While we are looking at reducing training costs, another strategy to fight training budget cuts is to better illustrate the returns. Higher returns help maintain higher investments.

Ensure that as many of your training activities as possible are tracking on-the-job outcomes and can demonstrate the value of new behaviours or skills. Let's be honest – tracking training outcomes, particularly to a Kirkpatrick Level 4 standard, is tricky. But it's not impossible.

Qualitative data (Kirkpatrick Level 3 standard) is often easier to obtain and just as powerful. Employees who can discuss a reduction in mistakes or improvement in efficiency, sales teams who can share stories or new clients or improved margins, or managers who can identify retained staff or reductions in absenteeism are all valuable in proving training RoI.

The problem is that most training measurement stops as participants leave the training. Instead, you need to build in on-the-job activities, reporting and tracking (something with modules in Tribal Habits can do for you with the Activities feature).

The bottom line

Efforts to reduce training costs are always a process fraught with danger for the organisation. It is all too easy to cut training and then later wonder why mistakes increase, sales reduce and morale decreases.

That doesn't mean the training budget should be immune from scrutiny. Like all functions, it needs to work hard to maximise its outcomes. The ideas in this article should inspire you to find the gains while minimising the pain.

If you need further help, Tribal Habits can assist. We offer active user plans (including monthly no-contract PAYG plans) and have low per-user costs. Tribal Habits can also help you to tap into internal experts, create more internal training, eliminate expensive external content and re-use internal knowledge assets. Reach out to us today for a no obligations demo and see how we can help you achieve more positive training outcomes, while we reduce training costs.

When should I move workshops to online training?

Despite the internet existing for over 25 years, many organisations are still highly reliant on face-to-face workshops. Indeed, there are times when face-to-face workshops are valuable. However, it can be a mistake to apply the same solution to every problem, particularly when there are many reasons to consider new solutions.

In this article, let's consider when you may want to transform face-to-face workshops into online training, and then look at a series of steps to guide you through the process to transform face-to-face workshops into online training both efficiently and effectively.

Why transform face-to-face workshops into online training

No doubt, there is a place for face-to-face workshops. Workshops have been the foundation of training for decades and will no doubt remain an important training delivery method in the future.

They have many strengths when it comes to learning, but also many weaknesses which become more apparent as other training delivery methods arise.

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 modules.
- Provides opportunities for group discussion in a way that everyone can understand and contribute to.
- Can be easy to organise (see weaknesses as well) 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.

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.
- Can be very difficult to organise. It 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 the 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. Else it is a once-off hit and leads to no real change.

When its time to start considering alternatives to workshops

For many organisations which have relied on workshops, it may be time to reconsider that reliance.

- Workshops are expensive. The cost of a two-day workshop can easily exceed the cost of an entire annual subscription to a learning platform. That's two days of learning vs 365 days of learning for the same monetary investment.
- Workshops are inefficient. Much time is lost in organisation and travel, not to mention time in attendance. A high proportion of overall costs are spent on items which do not impact the training outcome (room hire, travel, food, printed workbooks).
- Workshops are often ineffective. Delivering theory via a workshop is not only the single most inefficient way to deliver theory, it is also ineffective. It can be inconsistently delivered, boring for participants and offer no ability to skip or repeat content.

Unless your workshops are 100% focused on group interaction, then it's time to consider replacing them with online learning. You will only get outperformance from a workshop when it is focused on teamwork, full group discussion or application of ideas. Even then, small group virtual workshops can replicate many of those outcomes at a much lower investment too.

Another time to reconsider your workshops is then they are causing delays in training. If your workshops need 5-10 or more employees to justify running, then you are creating bottlenecks in training. New employees might need to wait 2-6 months for a workshop, by which time they have been forced to learn on-the-job, often picking up bad habits. Online training removes that bottleneck immediately, allowing learning to be accessed 24/7.

If your organisation needs to reduce costs or travel, online learning is a powerful solution too. This is particularly true when online training is blended with small group workshops. This can give you the best of both worlds at a significantly reduced cost – and often with much better training outcomes!

How can I transform workshops into online training?

One of the reasons many organisations continue to stick with face-to-face workshops is that they feel the process of converting their workshop material into online training is too hard.

Until recently, this was probably correct. If you had to use complex eLearning Authoring tools, like Captivate or Storyline, to create online training, that was a long process with a steep learning curve (or an expensive process completed by external consultants or training designers you would have to add to your employee list!).

With modern cloud-based learning creation tools, this process can be a LOT easier. With a platform like Tribal Habits, it is so easy that anyone in your team could do it. At a high level, here's the process to follow to transform face-to-face workshops into online training.

Step 1 - Decide what to include

Start by defining the scope of content and what delivery method would best suit that content.

1. If your workshop is largely theory, then you may transform the entire workshop into online training.
2. If your workshop has some implementation activities, often at the end of the workshop, then you may still use online training and combine it with automated offline tasks.
3. If your workshop has detailed implementation or requires a substantial discussion about the application, then you may transfer initial (more theoretical) content into online training and then run a virtual or face-to-face workshop afterwards. The workshop can be significantly shorter in time and focus on issues of application. This also makes the workshop itself more effective since participants attend having already completed the online training and prepared some materials.

As an example, modules in Tribal Habits can include triggered on-the-job activities, with their own due dates and notifications, including reminders. These activities can be used to step learners through implementation, set-up and submit workshop preparation materials, download templates or case studies for offline assessments (and then upload results) and more.

Step 2 - Break your existing content into chunks

Having defined what will go into the online training, start with your existing workshop content and break it into chunks. Each chunk should end up representing around 5-15 minutes of content. If you have a workshop presentation or workbook, this can be as simple as defining which slides/pages should be grouped together into chunks.

Think of chunks as a table of contents. You are seeking well-defined pauses in your workshop content – moments when it is good for a learner to pause, reflect on what they have covered and then move onto the next chunk.

Step 3 – Add detail to your workshop materials

The chances are that most of your workshop materials will lack sufficient detail. For example, you may have a set of workshop slides, but the delivery notes for those slides are missing – they are simply 'in the mind' of the facilitator.

As a result, many workshop materials do not make sense on their own. They need someone explaining them. In this step, you need to add sufficient detail to make those materials stand-alone. This is the largest step, but since you have broken your materials into chunks, it can be addressed in stages.

With a modern online learning creation platform, there are also many ways to prepare – and then capture – this detail.

- Add notes to the slides in your presentation. Essentially, write the speakers notes as used by your facilitators.
- Record your facilitator explaining slides and content. A modern mobile phone camera, in a well lit, quiet and distraction-free room can be enough to capture an interview with your facilitator.
- Update slides with additional detail. If a slide shows five steps in a process, but only the names of the steps, then add in the missing detail.

In all cases, the simple test is to ask: could someone understand this content if I was not here to explain it to them.

Step 4 – Identify opportunities for online activities

Now look at your workshop and highlight all the activities which the facilitator runs. Chances are, many of them can be replicated online.

- Review quizzes are the easiest to transform into online quizzes. Indeed, they often work much better online! You might just need to add explanations for the correct/incorrect answers.
- Scenarios or case studies are also easy to replicate. You can present the scenario and then ask the learner how they should respond, either via a quiz or an open answer poll.
- Polls can be used to ask learners how they already deal with the content, what experience they already have, what common problems they face or what issues they want to solve. This can replicate any activity which begins with 'Raise your hand if...'. Unlike a workshop, online training also remembers the answers to polls (whereas no-one remembers who raised their hand...).
- Open answer questions can be used to capture thoughts from learners. If you ask a learner what steps they want to take after the workshop, you can ask the very same thing in online learning.

Ideally, you want to replicate as many of your workshop activities as possible. However, as you gain more confidence with online learning, they are also activities you can add which are not possible in workshops. Matching, sorting, or ranking exercises are a good example.

Step 5 – Transfer your prepared content

At this point, you now have your workshop content with sufficient detail and a series of activities to encourage interaction. Now it is just a matter of converting that content into an online learning module.

Once again, if you are using a modern online training creation platform, this is now a simple matter. Let's use Tribal Habits as an example.

In Tribal Habits, you use a building block editor to add content.

- If you have text to add, just click the text icon to add a text element and then copy/paste your text. Alternatively, click hotspot to add an image which you can annotate with interactive text, or click Narration to build a simple narrated slideshow with your text.
- If you need to add media, then click the icons for videos, images, audio or files and then upload as needed.
- To add your interactive elements, just click on the icon and then fill in the blanks. If you add a quiz, you just need to copy/paste your question and answers, select the right answer(s) and copy/paste your feedback.

The process becomes one of simply selecting the appropriate building block and then copying/pasting the content you have prepared. Tribal Habits will automatically format and brand your content to your organisation standards. It will manage all navigation, estimate time for learners to complete each section, handle online assessment marking and more.

Step 6 – Get some feedback on your first draft

Once your first draft is finished, its time to get some feedback.

This can be as easy as asking a few colleagues to complete your module. In particular, ask them if the content was able to be understood on its own. This is often the main issue when you transform face-to-face workshops into online training – you just don't provide enough detail. If not, go back and add additional content.

Then ask them if there was enough interaction. If not, then look at perhaps changing some of your text content into more interactive elements, or add in some additional online activities.

In Tribal Habits, you can obtain two additional forms of help.

- Sage. Built-in to Tribal Habits is a digital training designer called Sage. Sage provides real-time feedback on your training module. She can give you a checklist of ideas, provide tips on creating better content and even give you a quality score for your module!
- Review. Every module you create in Tribal Habits also qualifies for a free review by one of our expert training designers. When your module is in good shape, just hit the review button and you receive a personalised 10-minute video review of your module. Our experts will help you solve issues of 'too much text', 'needs more interaction', or 'its too long' with ease.

Step 7 – Remember that training is never really finished

At this point, its time to pilot your module with your first learners. Be sure to get feedback from them (you can automatically enable feedback questions in Tribal Habits modules too). No training module is ever really finished!

That's the beauty of online training. You can easily take learner feedback and tweak the module – every new learner will immediately benefit from this. Fixing things in a workshop often requires far more work and won't have any impact until the next time the workshop is run.

Now you are up and running. You can now deliver the same content as your workshop...

- At any time
- In any location
- In the same way
- With full tracking completion
- With full tracking of dates and versions
- With simple updates to content
- With a detailed recording of learning data

Plus, you can now do this with no additional time effort and minor costs to deliver per learner. If you are then continuing with your workshops, you can now reduce their length and improve their effectiveness by having learners who are prepared and ready to engage!



Tribal Habits



How can I better measure changes in behaviours from training?

As we discussed earlier in this guidebook, a key step in defending your training budget is to better demonstrate training outcomes. So in our final two articles in this guidebook, let's focus on how to better measure training outcomes, starting with qualitative measures around behaviours.

This level of measurement is most commonly associated with the Kirkpatrick model of training effectiveness which is the easiest training evaluation method to understand. It's a well-known and well-proven model which serves as inspiration for the built-in reporting in the Tribal Habits platform.

The Kirkpatrick model suggests four levels of training measurement.

1. **Reaction:** The degree to which participants find the training favourable, engaging and relevant to their jobs.
2. **Learning:** The degree to which participants acquire the intended knowledge, skills, attitude, confidence and commitment based on their participation in the training.
3. **Behaviour:** The degree to which participants apply what they learned during training when they are back on the job.
4. **Results:** The degree to which targeted outcomes occur as a result of the training and the support and accountability package.

Levels 3 and 4 are the key ones for the purposes of demonstrating training value...and the measurements where most training experiences fail to go! This is because most training experiences stop at the transfer of knowledge (Levels 1 and 2) and leave it to someone else to track any further outcomes.

Perhaps many training experiences don't want to know the results, as it may reflect poorly on the training! Although to be fair, Level 3 Behaviour measurement is not appropriate for every module. Training involving regulations, technical knowledge or product knowledge may only require a Level 2 Learning measurement.

As a result, **Level 3 Behaviour reporting is optional within Tribal Habits** and should be considered carefully for any training program. Measuring behavioural change in training can be a complex and consuming task. It requires a mechanism to capture both quantitative and qualitative feedback from participants *after* they have left the training program. Often, this is weeks or months later.

IT REQUIRES COMMITMENT FROM ALL STAKEHOLDERS INCLUDING THE TRAINING PROVIDER, TRAINING ADMIN, PARTICIPANTS AND PARTICIPANT'S MANAGERS TO ENSURE ENOUGH HIGH-QUALITY DATA IS COLLECTED.

However, once you have behavioural change data, you have powerful data to support your training budget! The trick with Level 3 Behaviour reporting is to make it as easy as possible to capture. So let's investigate a few tips and tricks to do that. We'll focus on the Tribal Habits

platform, but you can replicate these ideas in other modern learning platforms (although perhaps not as easily).

Measuring behavioural change through reflection and intent

First and foremost, asking participants to self-reflect and identify their own areas for change is a critical measurement of likely behavioural change. **It is a massive leading indicator.**

When a training participant is asked to compare their thoughts to others, identify areas of strength and improvement and reflect on training ideas, their responses are very telling. Participants who struggle to reflect are unlikely to bring about much behavioural change.

If participants provide poor quality reflections or no reflections at all, they are clearly not engaging in the training. If they cannot even identify interesting points or potential new ideas to implement, then no behavioural change will occur.

This is why training programs must ask participants to identify areas for change. When you simply give each participant the same *checklist* of things to do, participants have not taken ownership of how they may change. A better idea is to ask participants to build their own checklist of things to do, or ask them to select key items from a larger list. Participants must take this first step towards behavioural change themselves.

Tribal Habits enables this process in three critical ways.

1. **Reflection questions.** Creators can simply enable reflection questions in their module and participants will automatically engage through a series of reflection opportunities throughout the module. Not only does this boost learning retention and commitment, but participants can compare their reflections with their colleagues, providing a deeper level of self-reflection and awareness.
2. **Polls and Q&A answers.** Creators can use polls (fixed response) and Q&A (free response) elements anywhere in their module to ask explorers to respond to a question. Creators can also elect to have any of those responses copied to the participant's journal. This allows creators to use polls and questions to ask participants to identify ideas for improvement, select from next steps, highlight uncertainties or commit to action. That information is then recorded and available offline and for managers.
3. **Key discoveries and next steps.** Creators can enable an optional final reflection question for participants which asks them to write down their next steps with the module. Once again, their answer is captured in their journal for later use.

In all cases, it's easy to include reflection opportunities throughout a module with just a few checkboxes. It challenges participants to think beyond the status quo and look for ways to change. It also creates a wealth of useful data on participant intentions for the organisation.

Measuring behavioural change through on-the-job activities

The next step in measuring behavioural change is to **move from intent to action**. In this case, it is on-the-job activity which demonstrates new behaviours.

FOR MANY TRAINING PROGRAMS, THIS LEVEL OF MEASUREMENT FALLS OUTSIDE THE SCOPE OF THE TRAINING. AND THAT'S A SHAME.

Demonstrating proficiency with a new skill or tool in a training experience – a controlled environment when the new knowledge is fresh – is very different from demonstrating proficiency in unpredictable real-world conditions at a later time.

For modules where behavioural change is important, setting up on-the-job activities for participants to demonstrate their new behaviours is the ultimate test. Measuring changes in behaviour is also often an excellent leading indicator of future improvements in business impact.

In Tribal Habits, creators can simply enable one or more on-the-job activities in any module. These activities are unique to each module. They can be designed to specifically test and measure new workplace behaviours related to that module. Explorers have a deadline to complete the activity and must then report on their success and learnings, providing both quantitative and qualitative measures.

Activities can be very versatile. An activity might require the explorer to conduct a demonstration of technique with their manager or another assessor. Or it might require them to build or implement a new tool or document in their role. Or perhaps, download a case study and complete a technical assessment.

Good Kirkpatrick Level 3 Behaviour reporting promotes long-term change

Kirkpatrick Level 3 Behaviour measurement is one of the most valuable measurements training budgets. Any training program which is aimed at improving an organisation's results usually requires new behaviours in staff to produce new business results.

So, consideration should be given to how behavioural change can be encouraged and measured. In Tribal Habits, this is an easy process with a number of simple yet powerful features to automate the process. For you, this means a significant argument to promote more – not less – focus on training.



Tribal Habits



How can I better measure actual outcomes from training?

The ultimate test of effective training is the measurement of its impact on business results. It is true that some training, for example, technical knowledge training, may only require simple analysis to be considered a success.

However, it is highly likely that most organisations are investing in training for the purpose of improving results. With better skills, staff help the organisation achieve its strategic goals.

This leads to the final form of training measurement – Level 4 on the Kirkpatrick scale – measuring the impact on results. The level of training measurement is also going to deliver the strongest possible defence of your training budget.

The ultimate measurement requires the ultimate commitment

To be fair, tracking Kirkpatrick Level 4 Results can be extremely difficult.

Isolating the impact of training on the overall performance of an organisation can be almost impossible. Many events impact an organisation's results; changes in competitors, the economy, or services, for example, and it is highly likely that these events occur at the same time as your training. Also, every module has a different impact on an organisation, in terms of both the areas it improves and the level of impact or improvement.

Measuring the business impact of training also requires planning. Appropriate business metrics must be selected and measured prior to training. Without this benchmark, Level 4 analysis cannot be completed. Put simply; you can't decide later to measure business impact from training. You must decide this *before* the training begins.

The selected business metrics must then be measured over an acceptable period. Sometimes the business impact may not occur for 6-12 months. Training on business development modules are a good example; it can take months for business results to show the impact of the training. And the longer the time period, the harder it becomes to isolate the effect of training on those metrics.

Strict measurement versus anecdotal measurement

Nevertheless, we can make efforts to measure the impact on business results, even if it is to get a 'sense' of the impact or to create proxies for measuring results. Depending on the selected metric, a trend of change may be enough to demonstrate impact.

Anecdotal measurement, or observational feedback, can also act as a business impact measurement. For example, if managers feel that their employees agree to client contracts with fewer rounds of legal reviews, then that might suggest the negotiation training has had a positive business impact. Further attempts to quantify the positive impact may be futile.

With all that in mind, let's examine how Tribal Habits measures impacts on business results from training – a level of measurement which is often far beyond the capability of traditional learning management systems or learning experience platforms.

Measuring results by goal achievement

The first way Tribal Habits tackles the impact on business results is through the use of learning goals.

Each module in Tribal Habits can enable the capture of participant learning goals. Once enabled, explorers are asked to define what they would like to discover as part of exploring the module. On its own, that's great data for module creators and the organisation to determine if this module is addressing staff needs and to consider additional modules.

However, we can go further. In each module, creators can also enable a poll which asks participants if they found the discoveries they were seeking.

To be fair, these stated goals are not always the same as an outcome goal. But this process, when used in the right modules, often sets a participant's mind to what they want to do differently. Indeed, explorers often think in terms of outcomes when setting their discovery goals. So, tracking the achievement of this goal provides not only a measure of the effectiveness of the module but one proxy for overall business results.

If participants know their KPIs and what the business wants them to achieve, they can usually define what they need a particular training event to provide. If that information, skill, process or tool is provided, then it's likely to have a positive impact on the underlying business goal.

Measuring results through common criteria

Another useful way to measure business impact from training is to ask participants to define what aspects of their role they feel the training can assist them with.

This allows the business to see if its selection of training modules is aligning with its business goals. You can also examine your overall portfolio of training modules to see if there is balance in the training being provided.

ONCE AGAIN, IF YOU CAN MEASURE IMPROVEMENTS IN YOUR KEY BUSINESS METRICS, AND THERE IS FEEDBACK FROM PARTICIPANTS THAT THEIR TRAINING IS RELATED TO THOSE METRICS, THEN YOU HAVE A GOOD LINK ESTABLISHED BETWEEN TRAINING AND BUSINESS OUTCOMES.

Within Tribal Habits, module creators can simply enable a poll to measure the impact of any module on six pre-defined business goals for an organisation. This provides consistent tracking across modules as well as making the process of tracking this data as simple as possible.

Measuring results through participant observation

In every Tribal Habits module, participants create a journal. Many parts of their journal are automatically created as the platform captures key activities, contributions and milestones. Explorers can also add their own notes to their journal. The journal is emailed to explorers, and can also be sent to managers and other specified email addresses (HR or IT, for example). Notification to those stakeholders can be automated at various points in the module.

This notification function creates accountability for the participant as they know their manager will have access to the journal and its outcomes. When tied to on-the-job activities (see measurement ideas for behavioural change in the previous chapter), it can trigger offline intervention from a manager in the form of on-the-job observation, 1:1 debriefs, personal coaching or team success sharing.

It also encourages managers, or other stakeholders, to conduct personal observation with participants to confirm certain business outcomes are being achieved. This anecdotal observation can actually be quite accurate. Managers are typically very aware of the various factors influencing business outcomes and can often determine the extent to which training played a role.

By providing managers with insight into the decisions and actions of their staff during the training, they can better align the business results they are seeing with the training they now understand to have occurred.

Measuring the impact on results ultimately measures RoI

Kirkpatrick Level 4 results measurement provides an organisation with demonstrated proof that its investment in training is justified. It brings full circle the purpose of training by connecting:

- Online and offline training
- Knowledge with application
- Behaviours with outcomes

It provides the truest measure of any training module.

Even though it may be a proxy or estimated impact, if you can capture the ‘sense’ of the impact of training on key business goals, then you will have more data than 99% of most other training. Within Tribal Habits, this level of reporting is available for every module with simple checkboxes. It simply doesn’t get any easier to demonstrate the value of the training you are providing for your staff.



Tribal Habits

Case Study: SMEC and saving \$400,000 while delivering award winning training

Challenge	Approach	Outcome
To ensure optimal performance, SMEC needs to attract, develop and retain Australia's best graduate talent. Delivering on this was expending significant time and financial resources across the business.	To overcome geographic constraints and to optimise its training budget, SMEC implemented Tribal Habits to supplement and enhance its face-to-face training sessions.	Tribal Habits allowed SMEC to achieve its three goals of attracting, developing and retaining Australia's best graduates. SMEC's achievements in this space saw the business awarded two 2019 LearnX awards.

SMEC is a specialist engineering, management and development consultancy, headquartered in Australia while operating out of more than 40 countries. The organisation is a member of the Surbana Jurong Group, an Asia-based urban and infrastructure consulting powerhouse. From building hydroelectric plants to sports stadiums, SMEC leads the way in delivering advanced engineering and management advisory across the world.

A Graduate Focus

To continue to deliver ground-breaking infrastructure projects and to thrive as a business, SMEC ANZ understands it must attract and develop Australia's top talent. One of the most critical talent groups for the organisation is graduates. In Australia alone, SMEC's workforce includes 160 to 200 graduates at any one time.

Polishing diamonds

SMEC had a long track record of attracting graduate talent to its business but had identified (as most businesses do) that there was a significant learning curve required to translate the technical knowledge obtained through university and other tertiary institutions into tangible skills that can be used on the job.

Feedback from previous graduates about the training and induction process had been positive, but a number of employees noted that while training was interesting and educational, it didn't always translate directly into skills they could leverage to improve their performance on the job.

The tyranny of distance

Another challenge the SMEC learning and development team faced when it came to inducting and developing graduate talent, was the dispersed nature of its workforce. SMEC's Australian operations are spread across 20 different sites, all of which house graduates. This vast geographic spread presented two key challenges when it came to training and upskilling staff.

The first was that staff in more remote locations didn't always receive the same quantity of training as those in major offices did. Secondly, the business noted that to deliver the consistent training required it must either commit to costly face-to-face sessions with people flying in from different locations across the country or manage the duplication of effort that arose from delivering the same training across multiple locations.

This reliance on face-to-face training also meant that graduate development pathways were very time-sensitive. If someone missed a session or joined the group outside of major graduate intakes,

it could be many months before they were able to attend the next round of training, which would impact their performance on the job.

From Good to Great

Despite what was considered to be a good graduate program, SMEC saw opportunities to improve the way it was training and developing its next generation of talent. Seizing on these opportunities, the CEO identified building a more robust and scalable graduate development program as the number one priority for the SMEC learning and development team.

A program of work was devised to achieve three primary objectives

1. Attract and retain the best graduate talent
2. Expose graduates to multiple disciplines of engineering so they can deliver to a high standard for SMEC clients and to the community
3. Develop graduates' soft skills beyond academic learning

The approach

The learning and development team went through a rigorous process to determine how to best meet these objectives. Interviews were carried out with current and past graduates, managers and training providers to develop an approach that would best suit the business.

At the end of this process, it was determined that a blended approach (leveraging both online and face-to-face training) would be the most effective way to deliver on the business's objectives. This approach meant the organisation could maintain a cultural connection between graduates through face-to-face sessions, but supplement and enhance these sessions in a cost-effective and timely manner by enabling graduates to do online training in their own time.

It became apparent immediately that a technology platform would be needed to support this new, blended approach to graduate induction. Until this point, all company training had been delivered face-to-face so no training platform existed in the business.

The organisation knew that to achieve its goals, the platform would need to support customised training content. This capability was seen as critical for the team as it was understood that generic 'off the shelf' training would not deliver the specific skills that graduates require to succeed within SMEC's unique environment.

The team at SMEC were faced with a decision. Commit to a full Learning Management System (LMS) roll out and accept that they would need to pay an external third party for the custom creation of their learning content or implement Tribal Habits and allow its own employees to easily create interactive engaging training themselves. After analysing the associated costs and scalability of each option, the decision became very clear.

TRIBAL HABITS CAME IN MORE THAN \$400,000 CHEAPER THAN THE NEXT BEST ALTERNATIVE AND THE FACT THAT TRIBAL HABITS ALLOWED SMEC STAFF TO EASILY CREATE THEIR OWN TRAINING MODULES MEANT THE SOLUTION WAS INFINITELY MORE SCALABLE THAN PAYING FOR EXTERNAL TRAINING CONTENT CREATION EACH TIME A NEW NEED AROSE.

The Head of Learning and Development at SMEC said the following about the decision to go with the Tribal Habits platform

“TRIBAL HABITS WAS UNIQUE IN THE MARKET AS IT ALLOWED US TO RAPIDLY CAPTURE AND TRANSFER ORGANISATIONAL KNOWLEDGE VIA TEXT, IMAGERY, VIDEO AND INTERACTIVE ELEMENTS. IT CAPTURED AND SHARED INSIGHTS AND TIPS FROM PARTICIPANTS, MEANING THE KNOWLEDGE CAPTURED IN EACH MODULE ACTUALLY INCREASES AS USERS COMPLETE TOPICS.

IT SET AND TRACKED ON-THE-JOB ACTIVITIES, AS WELL AS NOTIFYING MANAGERS OF THE LEARNING THEIR GRADUATES WERE COMPLETING. THE PLATFORM PROVIDED READY-MADE EXPERT CONTENT ON RELEVANT BUSINESS AND SELF-DEVELOPMENT TOPICS, IN SMEC BRANDING, WHILE ALLOWING FOR THE RAPID CREATION OF COMPLETELY CUSTOM AND INTERACTION TRAINING.”

Up and running in no time.

The team at SMEC were able to carry out the technical implementation of Tribal Habits in two weeks and had a fully functional graduate learning platform with custom content in place within six weeks. This is roughly half the amount of time it would have taken to implement a traditional LMS system.

As discussed earlier, the graduate development project was established to achieve three distinct goals. Here is a summary of how the team tracked against each of them.

Objective 1: Attract and retain the best graduate talent.

Feedback from the manager of the graduate program has been overwhelmingly positive. Speaking how the program has helped attract graduate talent, she said;

“THE GRAD PROGRAM HAS BEEN AN INVALUABLE ATTRACTION TOOL FOR OUR INTAKE. TODAY’S GRADUATES WANT TO KNOW THAT THEIR PERSONAL AND PROFESSIONAL DEVELOPMENT IS IMPORTANT TO THE COMPANY THEY JOIN AND WITH THE STRUCTURED TRAINING THE PROGRAM OFFERS, IT IS CLEAR THAT SMEC IS COMMITTED TO DEVELOPING OUR NEXT GENERATION OF ENGINEERS.”

SMEC has been able to exhibit a significant reduction in graduate turnover since the program started, as the figures below exemplify.

- Year: Graduate turnover rate
- 2017: 17%
- 2018: 12.5%
- 2019: 10.3%

Over the life of the program, graduate turnover has dropped from being 2% above the organisational average in 2017 to 0.6% below the organisational average in 2019. These figures are remarkable given that younger workforce members tend to be more transient than their older, more senior colleagues.

In the 2019 engagement survey mentioned above, 79% of ANZ employees aged 18-24 agreed or strongly agreed they would not hesitate to recommend SMEC to a friend seeking employment.

Objective 2: Expose graduates to multiple disciplines of engineering so they can deliver to a high standard for SMEC clients and to the community.

Through its self-created learning experiences, SMEC was able to expose its graduate cohort to the full array of engineering disciplines the business engaged in. This provided graduates not only with a broader knowledge base of the company's operations but also provided granular detail into how their role fits into the wider business.

These learning experiences were created by subject matter experts within the business and were positioned to specifically address the challenges and opportunities that SMEC faced as an organisation. Feedback from graduates suggests that this highly focussed approach has provided valuable insights into how the business operates and has enabled graduates to get up to speed as quickly as possible.

Objective 3: Develop graduates' soft skills beyond academic learning

As well as role-specific technical training, SMEC identified that it needed to develop the professional skills of its graduate team. To achieve this, SMEC developed several professional development pathways. These learning workflows provided graduates with a structured approach to skills that would help them succeed in a professional environment like managing emails, how to be run productive meetings and effective communications.

The combination of technical skill development, understanding how the broader business functions and soft skill development means that SMEC is approaching graduate development from a holistic point of view, ensuring all graduates have every opportunity to succeed.

Evaluations for both the face-to-face and online components of the graduate training program show that around 95% of participants find them relevant and valuable. In addition to the survey data indicating improved effectiveness on the job, anecdotal feedback from managers shows tangible improvements in performance.

An organisation-wide engagement survey was conducted in April 2019. Results from the survey revealed that 85% of ANZ employees aged 18-24 (likely to be in the graduate development program) agreed or strongly agreed that they were satisfied with the support the organisation provides for learning and education.

Onwards and upwards

Management feedback on the new graduate training program has been extremely positive, with the project being deemed a categorical success. In 2019 the SMEC management team committed to the continuation of the program stating that:

- The content and delivery were of high-quality.
- The program was delivered as scoped and to budget.
- They had received positive feedback from participants.

Speaking on the impact of the program, SMEC's state manager for QLD and NT stated;

“I'M VERY PLEASED TO SEE THE IMPACT THE GRADUATE DEVELOPMENT PROGRAM IS HAVING ON OUR BUSINESS OUTCOMES. NOT ONLY HAS THE PROGRAM CREATED AN EDGE FOR SMEC AS AN EMPLOYER OF CHOICE, BUT IT IS ALSO PROVIDING THE GRADUATES WITH GENUINE OPPORTUNITIES TO BECOME ROUNDED PROFESSIONALS.”

Based on the positive outcomes delivered, the CEO of SMEC & CEO International Surbana Jurong Group advocated for the program to be expanded beyond ANZ and a modified version is currently being deployed in the Africa Division. A sister company is also in the process of joining the program from July 2019, largely based on the feedback from participants and management.

THE PROJECT HAS NOT ONLY GARNERED INTERNAL PRAISE. SMEC AUSTRALIA'S GRADUATE DEVELOPMENT PROGRAM HAS BEEN RECOGNISED AS A LEADER IN THE INDUSTRY, WINNING GOLD FOR BEST LEARNING & DEVELOPMENT PROJECT (INDUCTION/ONBOARDING) AND SILVER FOR BEST LEARNING MODEL (BLENDED) AT THE LEARNX LIVE AWARDS 2019.

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.

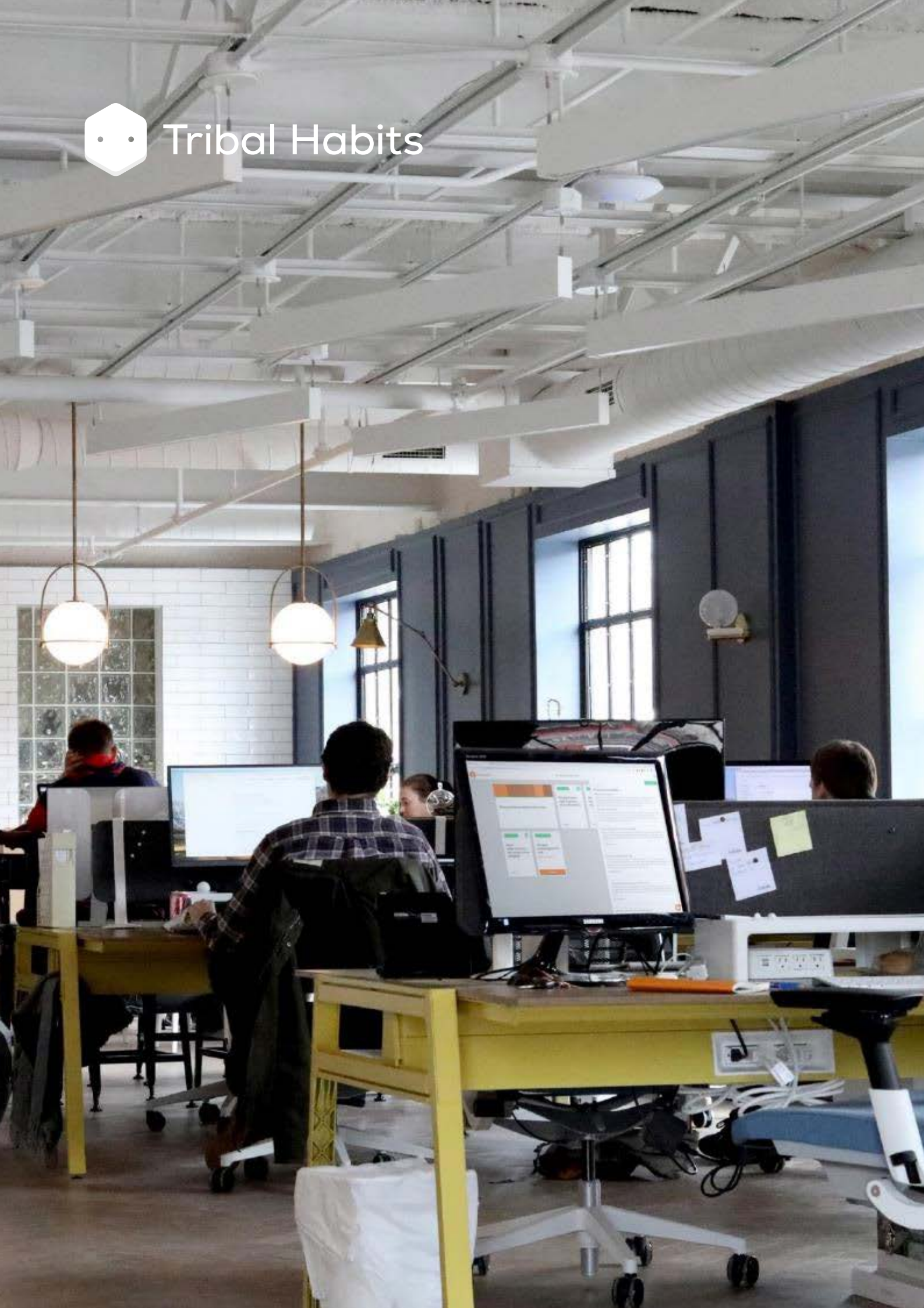
Share best practices

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?

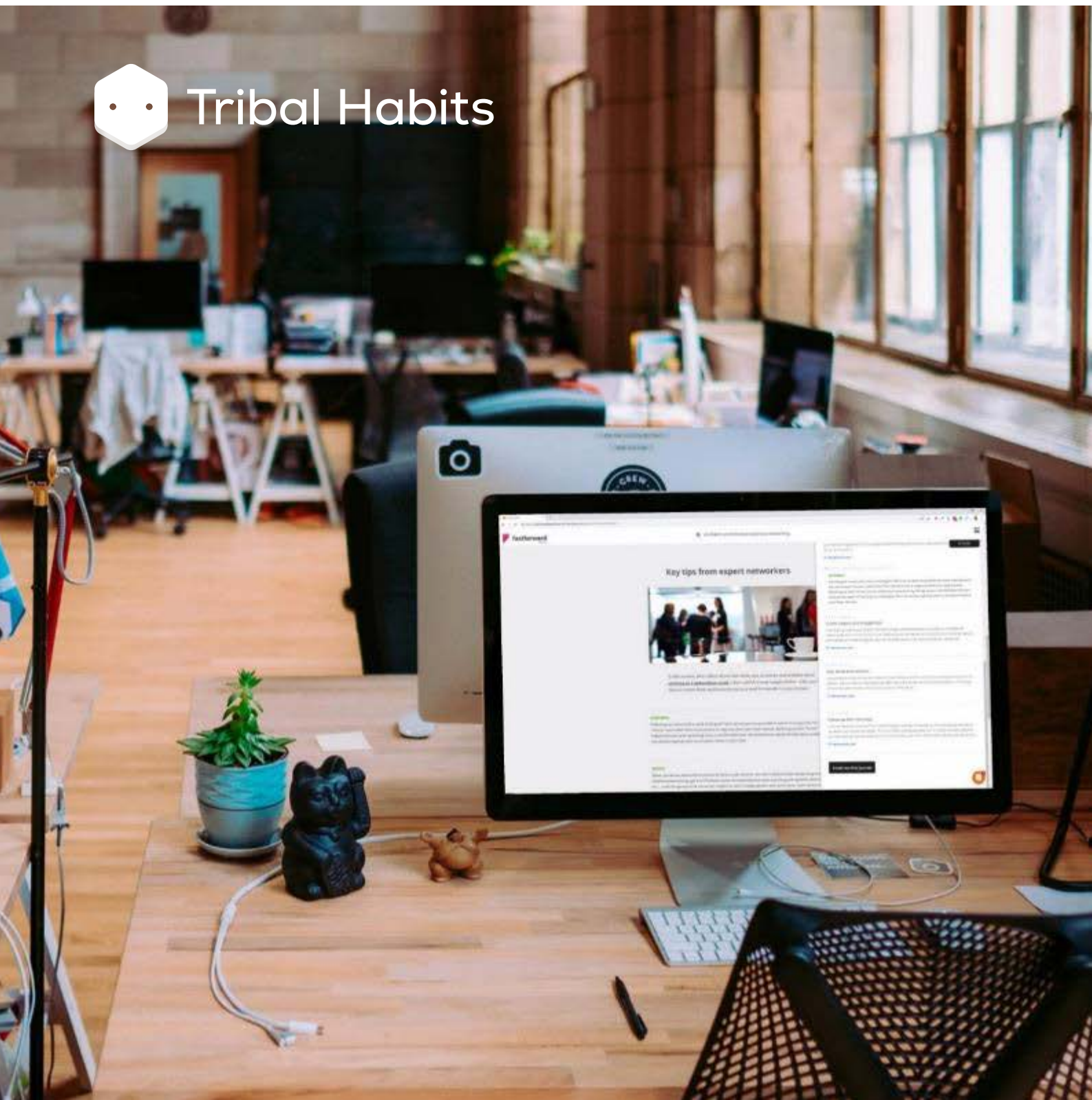
A quick demo will give you everything you need to know about Tribal Habits and how to make it a success within your organisation. After the demo, you'll have access to a free, full-featured trial portal to you get started.

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

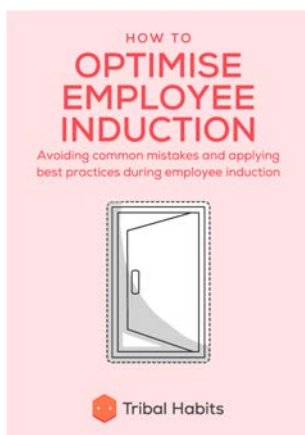


Manage Training Online

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

Spread over three parts, you'll learn:

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



Optimise Employee Induction

[In this guidebook, we review how to avoid common mistakes and apply best practices during employee induction.](#)

Split into two parts, you can learn:

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



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.



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.