

End-User Productivity and Technical Training For Long View Systems Client

Overview

Long View Systems approached McGhee Productivity Solutions (MPS) about their client, a major long-term care company, who was migrating from IBM Lotus Notes to Microsoft Outlook.com and Microsoft Teams. The client had an extremely short timeframe and needed professional end-user productivity and technical training to support the migration.

Situation

The client has 4,000 end users who support their operations nationwide, through 170 care facilities. Due to significant changes to the IBM Lotus Notes Cloud servers, they needed to move all users over to Microsoft 365 and Teams within a matter of weeks and did not have the bandwidth to train end-users in the depth and short time frame needed. Long View Systems contacted MPS to support the end-user training needs.

Solution

Before the training began, a senior consultant from MPS met with the key IT stakeholders in the client organization to understand the needs. Within 24 hours, MPS created a proposal to create and deliver three waves of custom, virtual end-user training, spanning 6 weeks. The client accepted the proposal several days later and the first training started less than two weeks later.

All courses were delivered by a senior consultant at MPS.

Wave I was designed for all users, before they were migrated from Lotus Notes, to prepare the environment. Participants got a tour of the key

features and functions in Outlook.com and Teams, to set expectations and get them familiar with what would be changing. This course was one hour and delivered over Zoom.

Wave II was designed for all users, after they were migrated from Lotus Notes, to take a deep dive into the features and functionality of Outlook.com and Teams, with hands-on practice and engagement. Wave II also taught productivity essentials of getting email to zero and setting up tasks to support project and action management. This course was two hours and delivered over Teams.

Wave III was designed for a power users and admins, to teach advanced features in both applications, including delegate access in email and calendars, integrating mobile, and using Teams to manage projects and recurring meetings. This course was 90 minutes and delivered over Teams.

Results

MPS trained a large number of users at the client organization across a multiple divisions and roles in the organization.

After each Wave, users reported an increase in competence, engagement, and confidence in using the new applications.

The client IT team was able to migrate the entire organization to a new platform, while MPS handled all end-user training. Long View served the customer quickly and easily with a trusted partner in MPS.

MPS created three custom courses within a matter of weeks, after several brief virtual meetings aligning with the client on needs and opportunities.

Client shared the training MPS provided resulted in their Help Desk not getting overwhelmed during the transition. End users were well-equipped as a result of the training, needing support less than they anticipated, and allowed IT to focus on the migration.

Insights

Location:

United States

Time Frame:

6 Weeks

Deliverable:

Custom end-user productivity and technical training for 4,000 client employees, at all levels and divisions in the organization.

Focus:

Migrating from Lotus Notes to Outlook.com and Teams

Challenges:

IT dept "drinking from a fire hose." Did not have bandwidth to create and deliver training during migration. Long View needed a partner to fill gap with client need.

Successes:

Users engaged and excited about new technology. Training needs offloaded from IT. Client ecstatic with outcomes and shared they would do more work with Long View as a result.