

Corporate Case Study

NASD used CustomGuide's print-on-demand courseware to create instructor-led classes for several years. Those who took the training had positive feedback, but it was difficult to provide the same training in NASD's 15 other offices around the country.

To make training more widely available, NASD decided to research options for online training. Buckberg acquired CustomGuide's online learning solution on a short-term basis, and the results were so encouraging that they decided to discontinue instructor-led classes entirely and use CustomGuide's online learning instead.

NASD looked at other online training products, but found they were not as effective as CustomGuide. "In the end, I didn't feel that the other WBTs were as robust or as user-friendly. I'm sure they're all competent, but CustomGuide, in my opinion, seems to present the material in the best way to make it easy to learn," he said.

Online learning is accessible and lets users learn at their own pace

To deploy the CustomGuide online training, the company converted a training room into a study room where users could learn the material at their own pace, away from their desks and other obligations. Buckberg thinks that having the resources available for self-directed learning will have an impact in the office. "I think that it will be a significant culture change, and one that will enable more and better learning here," he said.

Training is also useful as a reference tool

Buckberg believes that the materials will be used as a reference tool after training is complete. Because of the brief "cookbook" format, it is easy to look up individual tasks and learn them as needed. "I think this is a great benefit of the CustomGuide format," he said.

Organization:

NASD, a leading private-sector provider of financial regulatory services

Problem:

Needed training for Microsoft Office 2003

Solution:

CustomGuide Online Learning

Reference:

Phil Buckberg
Organization and Talent
Development

"CustomGuide, in my opinion, seems to present the material in the best way to make it easy to learn."

—Phil Buckberg, NASD

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BOK Financial was looking for an online learning solution that would serve as a training tool and reference resource for employees.

HR Manager Erma Roquemore said that out of four vendors, CustomGuide stood out. The product's consistent look and feel and the topic-based lessons were the best fit for their needs. "The short learning modules allow our learners to take a quick look at topics of interest and begin using the newly acquired skills right away," she said.

Interactivity makes it easy to learn skills

Employees at all levels—administrative assistants and executives—used the online lessons to acquire Microsoft Office skills. BOK found that the employees could learn the programs at their own pace and the skills and techniques they learned were easily absorbed because of the brief and interactive lessons.

"I [administered] the Outlook online learning lessons to a CIO who came to us after using LotusNotes at a previous job, and he quickly picked up tips and techniques for using Outlook," Roquemore said.

Short, topical lessons are easy to reference

The topic-based lessons make it easy to quickly look up how to use an advanced feature in an application, and then apply it to the task at hand. Even well-versed Microsoft users go through the lessons to brush up on skills that were previously learned, but aren't frequently used.

Roquemore herself references the lessons on advanced Excel features to perform some tasks. "I even find for myself that I'll take a look at the advanced features of Excel quite often, to help me through some of the sophisticated spreadsheets, graphs, and decision support reports I run monthly," she said.

Users offer positive feedback

One sign that the online learning is being used and is effective is the unsolicited feedback Roquemore has received on the product. "Lots of people tell me that the online learning is very useful in their jobs."

Organization:

BOK Financial Corporation, a \$16 billion financial services company

Problem:

Needed Microsoft Office training and reference materials for 250 employees

Solution:

150 concurrent seats of CustomGuide Online Learning

Reference:

Erma Roquemore
HR Manager

"We love the 12-15 minute learning modules. They allow our learners to begin using the newly acquired skills right away."

—Erma Roquemore, BOK
Financial