HOW TO PLAN FOR EDUCATION WHEN PURCHASING SOFTWARE

Philosopher, Henry David Thoreau wrote, “It is not enough to be busy. The question is: what are we busy about?” Many leaders in IT can identify with this question as it relates to expectations placed on today’s enterprise IT organizations. The business expects that all critical systems run with almost no downtime and at the same time, there must be a focus on innovation and development of new capabilities. In fact, a Deloitte 2017 CIO Survey shows that 57% of technology budgets are allocated for standard business operations versus only 16% for business innovation.[1] So, the challenge is, how can IT organizations be “busy” in a way that drives incremental value to the business instead of just “keeping the lights on?” One critical piece to the solution is a skilled, educated, and enabled team that can efficiently manage day to day processes.

To best serve the lines of business, technical teams should not only have the proper knowledge and skills to maintain the software they use on a regular basis, but also and even more importantly, be as efficient as possible in utilizing them. Often, someone tasked with the role of administrator learned that role from the previous administrator, who might have learned it from the one before that. The cycle continues in that manner to keep costs low and leverage existing knowledge. However, over time the skills and knowledge get diluted or even worse, outdated. As a result, efficiency goes down and the likelihood of downtime and errors increases. Even further, untapped software capabilities that could increase value realization are often left unused for lack of knowledge, and the full power of the software is not brought to bear.

No one argues whether education is important for technology teams or in general. The challenge with many organizations is that education does not get prioritized or even brought up when the purchase of software is occurring. But why?

The first two reasons that often come up are money and time. Let’s acknowledge that yes, formal

software education does not come cheap (e.g., 5-day in-person training can be $5k/person or a 5-day private course $35k). However, the time and money required for focused education pales in comparison to the cost of lost efficiency, loss of ability to innovate with the technology, and overall not realizing the full value of the software investment. The purpose of this blog is to help IT leaders gain a better understanding of how to address the concerns that arise when making decisions to invest in education at the time of license purchase. By pro-actively approaching these five concerns when working with any technology vendor at the time of a software purchase, you can more effectively prioritize what enterprise IT will be "busy about."

Concern #1: The team cannot get away from day to day operations to attend a class.

The day-to-day operations are absolutely critical for IT teams and even more so for companies who have fewer resources on-staff. To overcome this challenge, most software vendors (e.g., like BMC Software) have taken advantage of the latest instructional methods and learning technologies to change the way their education is delivered and consumed. Most everyone is familiar with self-paced, web-based training (WBT) which has been the mainstream for over 10 years. A standard WBT is perfect for teaching the basic concepts and architecture of a specific tool. Most WBTs are only a few hours and can be taken on almost any device including smartphones and tablets. That means staff can fit in their training around their core operational demands reducing the amount of time away from the office to gain basic proficiency.

While WBTs are a good start, adult learning theory[2] clearly shows that people learn by doing. Traditionally, the only way students could apply what they were learning was by attending an instructor-led class and working in a safe, sand-box or lab environment where they could do structured exercises that reinforced the key concepts taught in class. Today, virtual classes are available that have the exact cadence and structure as traditional in-person training to eliminate the need to travel. Also, new blended delivery methods combine the time flexibility of self-paced learning with on-demand practice labs. They also offer live support from qualified instructors so that students' questions can be addressed in a timely manner. This means that the tether of rigid schedules can be cut, and complex technical training can be effectively delivered to meet the students' and business' scheduling needs.

Concern #2: Trained and certified staff will leave for better opportunities.

It's been said countless times by IT management, "The time and money spent to train my employees will enable them to take their skills somewhere else." While this might happen on occasion, let's look at the facts. According to Deloitte University Press research[3], "More than two-thirds believe it is management's job to provide them with accelerated development opportunities." Employees that are not improving their skills are more apt to leave their current position than those who are given the opportunity to grow.

Another way to think about it, does it make sense to keep an employee less effective just on the remote chance they might leave for another position? Despite the slight risk, maximizing the skills and ability of IT staff is the rational thing to do for them and the enterprise. If we look honestly why employees leave, investing in their growth is going to be at the bottom of the list.

Concern #3: How do I combat the perception that "Knowledge Transfer" is the same as education?

Let's clearly illustrate knowledge transfer in this context. After the software is implemented by the service provider, they will typically run a session to show the project team the final implementation and provide some insight on specific use-cases. While this is a critical component of any new roll-out, it is exponentially more valuable when key technical staff and operators are formally educated prior to the knowledge transfer session because they have a base-line of core knowledge, can ask more advanced questions, and get more out of the session.

To use an analogy, think of going to college as the formal education. College is where you learn core topics like statistics, economics, and computer science. Upon graduation and entering the workforce, there is job-specific training which assumes a certain level of understanding of core concepts. The "on the job training" is knowledge transfer. That said, without the formal education (i.e., college), it's much less likely that the knowledge transfer (i.e., on-the-job training) will provide sufficient details to expand solution use cases or drive the desired business outcomes that change annually.

Even further, companies tend to attempt to use "all-stars" to teach the others as a cost-savings approach. Just because someone is good at what they do, doesn't mean they can teach others how to do it, let alone help them to excel at it. In fact, according to Sian Beilock Ph.D., a professor of psychology at the University of Chicago, the best players rarely make the best coaches: "As you get better and better at what you do, your ability to communicate your understanding or to help others learn that skill often gets worse and worse."[4] Think about the best coaches in sports. Very few of those coaches were star players. Most of the top coaches were mediocre players or didn't even play professionally. It's because they had to work hard, learn the game intimately, and not rely on natural talent.

Working with professional trainers who not only know the tools well but also know how to teach and communicate to everyone across the spectrum of skills and experience is the most effective way to ensure across the board skill development and effectiveness.

Concern #4: How do I determine the scope of education need for my team?

With limited personnel, time, and budget, it can be a challenge to decide who should get formal education. In an ideal world, everyone would, but reality isn't always that simple. If the goal is to maximize time and budget while achieving an acceptable level of team competency, the best approach is to understand the capabilities of each team member.

Like any team, players often have diverse areas of strength. To prevent personal bias from skewing your ability to determine who would benefit most from a specific learning path, it's best to validate the skills of each individual. A technical skills assessment is one way some software vendors can assess how well an individual knows how to use a specific software based on roles (i.e., Administrator, Developer, etc.). These assessments can be qualitative by conducting one on one interviews, or they can be quantitative by asking a set of standard technical questions in a standard testing format.

Regardless of the format, the goal is to identify where there are individual skill gaps and create a learning plan that addresses those gaps. Some people may be very competent requiring little to no

extra training while others may have significant needs to learn new skills and would benefit greatly from formal training. By utilizing skills assessments, you will have the data points to build an accurate education plan for maximizing value realization from your new technology investment through ensuring your team knows it thoroughly.

Concern #5: How do I demonstrate a return on investment for education?

Trying to isolate the financial return of education on any process or technology is nearly impossible without rigorous measurement and resources. With already tight budgets and resource constraints, specific measurement is not realistic for most IT departments.

Rather than measure the financial impact, it's more useful to measure something that has direct correlation to the project or process—also known as a "return on expectations." This can be done by looking at Key Performance Indicators (KPIs) like reduction in downtime or errors. Analyzing those KPIs and others before and after education is a more reliable way to measure the likelihood of education making a material impact on the organization. If there are core outcomes or objectives expected from the software implementation, other KPIs could be identified for a "return on objectives" as well.

An investment in properly educating the people that manage the organization's core systems is a "win-win-win" for the enterprise. First, the IT professional learning new skills and techniques extends their capabilities and allows them to earn a tangible accomplishment of which they can be proud. Second, the IT organization becomes more efficient so that more time can be spent on innovation and new services. Third, the enterprise as a whole benefits when critical systems are running smoothly and valuable new services can be made available faster. While it's not always simple to ensure a properly educated IT staff, the benefits to everyone involved make it worth the effort. So, to reference another quote from Thoreau, "If you have built castles in the air, your work need not be lost; that is where they should be. Now put the foundations under them."

If you would like help planning for training of your IT team, please fill out our form to speak to one of our BMC Education advisors to get started.

[1] Kark, Khalid, et al. "Technology Budgets: From Value Preservation to Value Creation." Deloitte United States, 2017, www2.deloitte.com/insights/us/en/focus/cio-insider-business-insights/technology-investments-value-creation.html#endnote-sup-3.

[2] Pappas,Christopher. "The Adult Learning Theory - Andragogy - of Malcolm Knowles", 9 May, 2013. https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles.

[3] Bersin, Josh. "Becoming Irresistible: A New Model for Employee Engagement." Deloitte United States, 2015, www2.deloitte.com/insights/us/en/deloitte-review/issue-16/employee-engagement-strategies.html#end-notes

[4] 3 Scotti, Dan. "This Is The Real Reason The Best Athletes Usually Make The Worst Coaches." Elite Daily, 2016, https://www.elitedaily.com/sports/amazing-athletes-flop-coaches/1339816.