



Ingersoll Rand Creates Blended Learning For Distributors, Dealers

Ingersoll Rand
Best Advance in Creating an Extended
Enterprise Learning Program
February 2018



Company Background



Company At-a-Glance	
Headquarters	Swords, Dublin, Republic of Ireland
Year Founded	190
Revenue	13.3 Billion USD
Employees	43,500
Global Scale	Global, with regions: EMEA, APAC, Americas
Customers/Output, etc.	Ingersoll Rand creates comfortable, sustainable, and efficient environments in homes and buildings, transports and protects food and perishables, and increases industrial productivity and efficiency. Its diverse products include air compressor systems, tools, and material handling systems. Its family of brands include Club Car®, Ingersoll Rand®, Thermo King® and Trane®.
Industry	Diversified Machinery
Stock Symbol	IR
Website	www.irco.com

Budget and Timeframe

Budget and Timeframe	
Overall budget	\$168,000 USD (See Appendix A for detail)
Number of (HR, Learning, Talent) employees involved with the implementation?	10
Number of Operations or Subject Matter Expert employees involved with the implementation?	30
Number of contractors involved with implementation	3
Timeframe to implement	12 Months
Start date of the program	April 2016

Business Conditions & Business Needs

The following business conditions led Ingersoll Rand to develop and deploy a sales and technical training program called LEAP for Leadership Education Advancement Program.

- Lack of instructors, a limited number of instructor-led courses, and the need to reduce the cost of instructor resources.
- Need to limit the amount of time away from work and the cost of traveling to attend on-site classes for sales personnel, technicians, and dealer contractors.
- Partners pay their employees for a full day when they attend training, making it tough for small businesses to afford on-site classes.
- Partners need quick and easy to access to learning content and resources on mobile devices and tablets.
- Need for rapid content development such as how-to videos instead of using traditional eLearning software.

- Need to support the business by reducing product (e.g. Residential HVAC) installation errors and heading them off by providing timely updates.

In addition to creating content for the new blended-learning program, Ingersoll Rand's training team looked for ways to fully utilize the company's LMS, iLearningPlus by SeerTech Learning, to deliver the content and report on its impact.

Overview

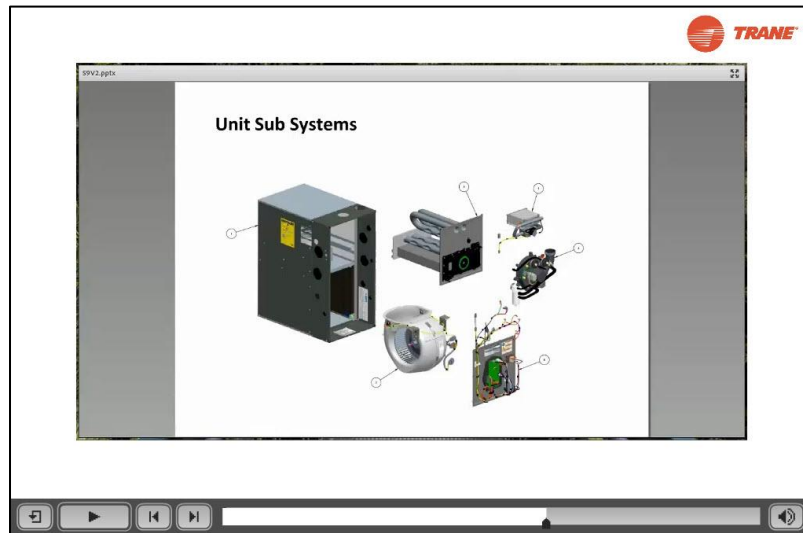
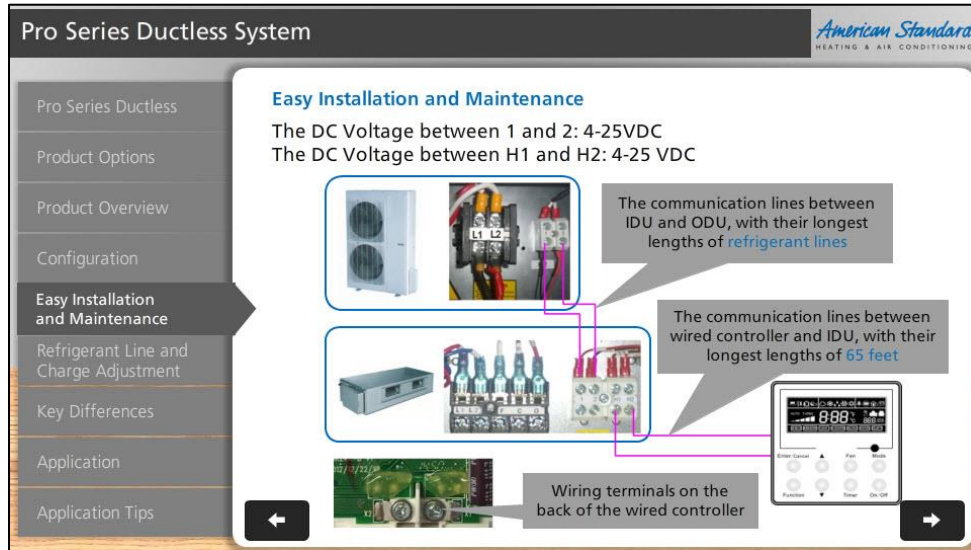
The target audience were new Territory Managers (TM) of Independently Owned Distributors (IWDs) and their dealer partners. Most of the 30 participants were new to both HVAC and sales. For context, Trane/American Standard manufactures the HVAC products and sells to the IWDs. The IWDs then sell to dealers, who sell the products to the homeowner. The TM role is diverse and has a demanding skill set, including sales knowledge and system/technical knowledge. TMs are responsible for meeting sales targets, and they make a direct impact on the business.

The program's objective was to reach distributor and dealer partners with sales and technical learning opportunities focused on overarching business goals:

- Increased sales.
- Reduced technical installation errors.
- Increased product awareness in underserved market segments.
- Increase the knowledge of Trane and American Standard products offered to distributors, dealers, and homeowners.

LEAP was designed as a blended learning program, replacing the original program that was up to 12 weeks, all classroom.

Figure 1: ELearning Created for Blended Solution



Source: Ingersoll Rand 2018

Figure 2: LEAP Timeline



Source: Ingersoll Rand 2018

It is important to note that the majority of the content was optional/voluntary training and not required for the dealers or distributors.

Intended Impact

- Increased knowledge of distributor and dealer personnel to properly sell, install Ingersoll Rand products.
- Improve participant confidence by providing the knowledge needed to select the right product for an application, answer customer questions, perform better installations, improve troubleshooting skills, and enhance marketing efforts.
- Learn how and where to go to get additional support.

Outcome

The goals of the program were not only achieved but surpassed.

The goal of course completions was an increase of 10% YOY from 2015. In 2016, the program achieved a 34% increase. In 2017, the training team was on pace to exceed the goal with a course-completion increase of 13% over 2016.

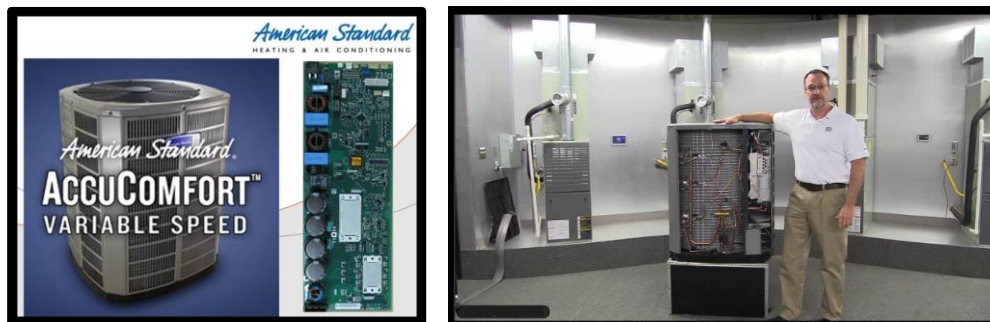
The team also saw a 25% improvement in participant knowledge (Pre=65%, Post=90%). Overall, the feedback goal was 4.5 on a 5.0 scale. The 2016 the score was 4.5%, and 2017 YTD was 4.6%.

Design of the Program

Technical-focused customers such as technicians, FSRs, and installers were offered eLearning courses: Installation, New Product Technical Information, and Troubleshooting.

In addition, the training team launched the company's first virtual instructor-led course, Installing the Variable Speed Product.

Figure 3: Virtual ILT for Installing the Variable Speed Product



Source: Ingersoll Rand 2018

Two class locations were set up to dial into the course remotely while the facilitator presented from the manufacturing facility in Tyler, Texas, and demonstrated with live equipment. Simulations provided an overview of the new product, the 1050 thermostat, while distributors, dealers, and homeowners browsed through screens on how to set up the control. The User Wizard took the learner through a series of steps to simulate setting up the thermostat.

The blended-learning program was designed to grow and develop new Territory Managers, who manage sales/business relationships between distributors and dealers in their territories. The LEAP mission statement is to provide TM training, coaching, and development through understanding IR business, sales process, brands, products, and programs.

LEAP ran for 12 weeks with in-person ILT, virtual ILT, eLearning courses, videos, learning paths with courses and a target completion date, learning tracks that assigned learning experiences to a cohort of participants, knowledge checks, surveys, and reporting. The first session launched in January 2017, and registration filled up within four days. The next class in fall 2017 filled quickly, too.

Figure 4: Program Agenda

LEAP Major Topics 	
<ul style="list-style-type: none">• ASDealerNet and ComfortSite™• Brand Differentiation• Commercial Leasing• Consumer Financing• Dealer Development<ul style="list-style-type: none">– Right New Dealer Acquisition– Dealer Business Acumen– Dealer Business Profile• Fundamental System Cycle• Market Segmentation• Marketing Programs<ul style="list-style-type: none">– Customer Care™ and Trane Comfort Specialist™ Programs– Marketing Advertising Express (MAX)	<ul style="list-style-type: none">• Product Feature Function Benefit<ul style="list-style-type: none">– Residential and Light Commercial• Sales Management Excellence (IRSMX)• Sales Processes<ul style="list-style-type: none">– Business to Business Selling– Intentional Sales Call (ISC)– Overcoming Price Objections– Owning The Sales Process (OSP)– Pipeline and Opportunities– Sandler Sales Training• Territory Analysis• Warranty

Source: Ingersoll Rand 2018

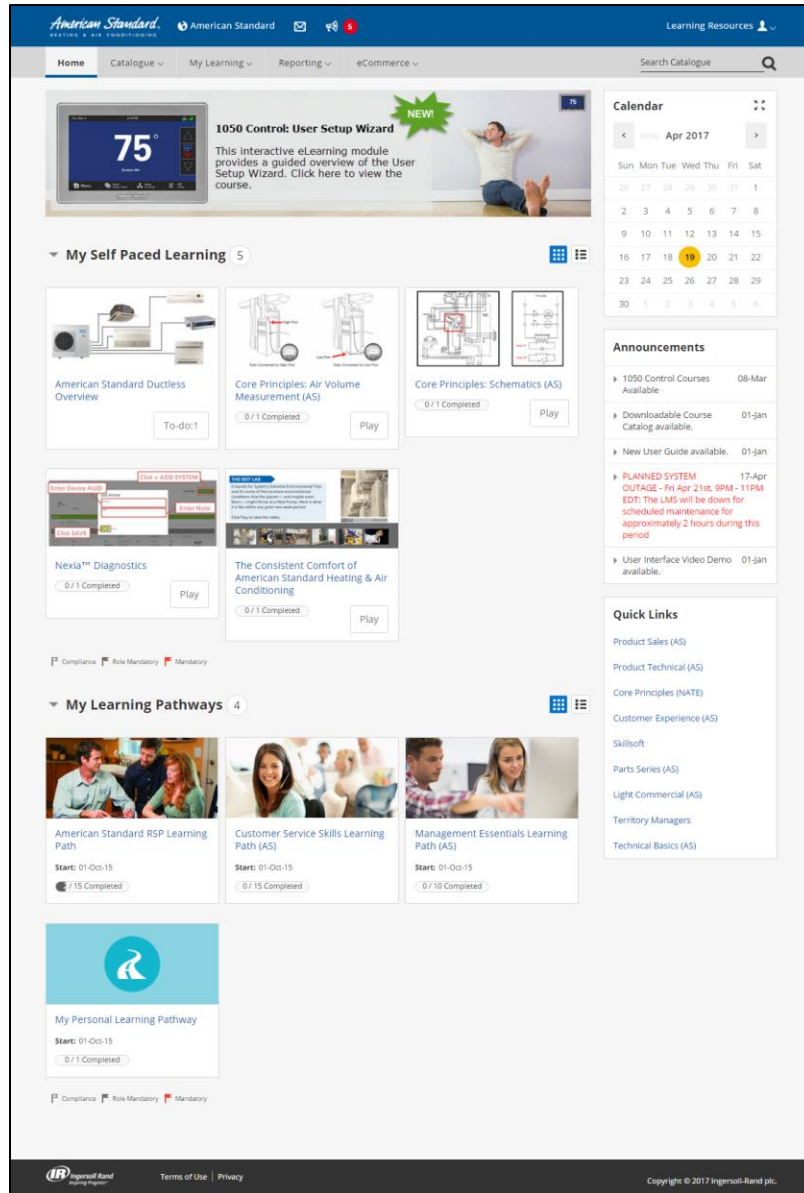
Delivery of the Program

LEAP was delivered over 12 weeks. Previously, TM training was conducted in the classroom over 9-12 weeks. Now, TMs have more self-paced options, including recordings of virtual ILT and in-person sessions they might have missed. This flexibility has proven to be better for participants and their work-life balance.

Training content was created based on survey results from the Sales Leaders and Regional Managers. They wanted the learning program to include key business initiatives and vendor training and be available in multiple locations instead of one.

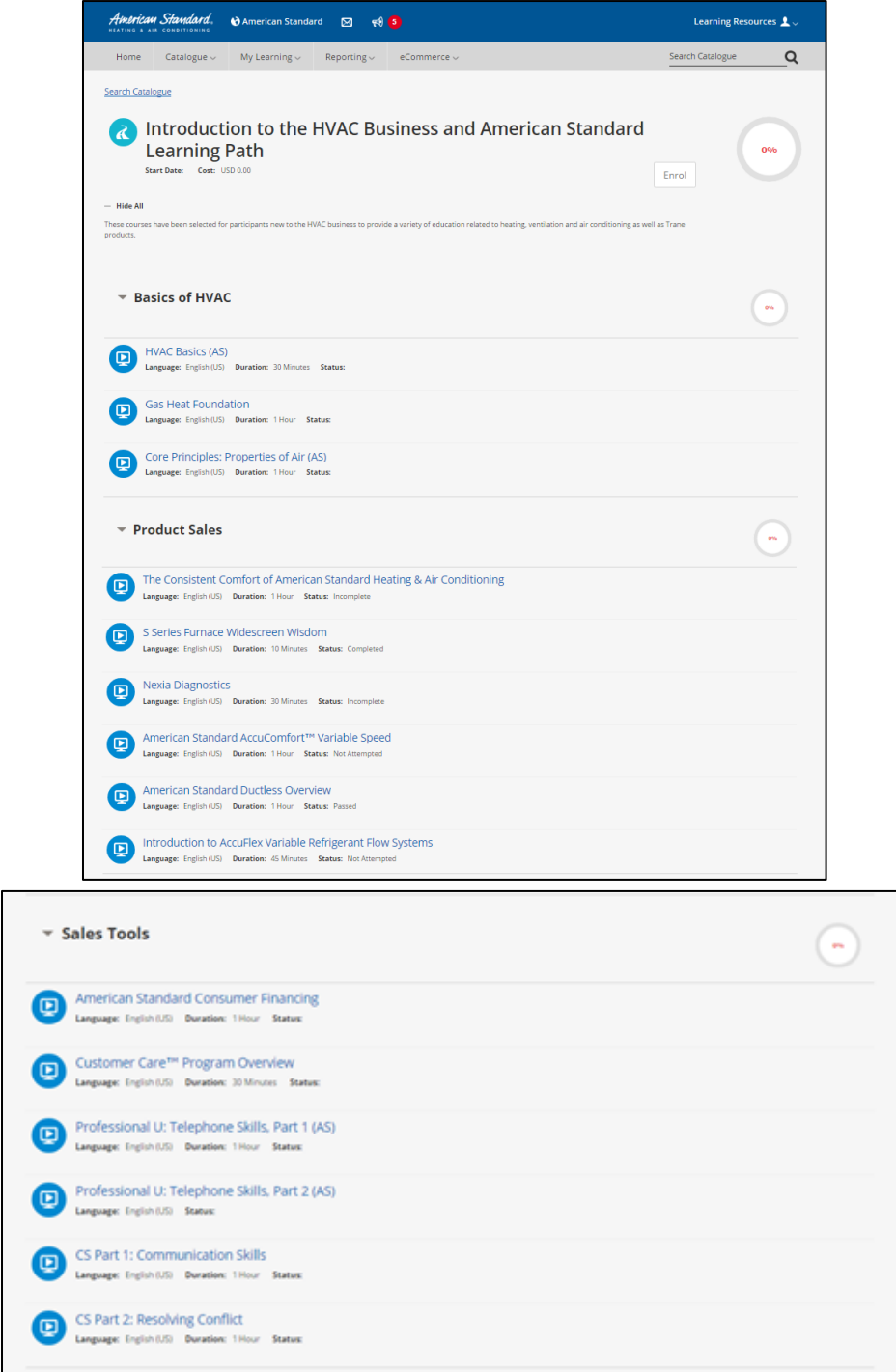
The LMS home page was redesigned to be mobile ready and more user-friendly with better navigation and visuals.

Figure 5: iLP Learner LMS Home Page



Source: Ingersoll Rand 2018

Figure 6: iLP Learning Path UI Example 1



The screenshot displays the 'Introduction to the HVAC Business and American Standard Learning Path' interface. The main header includes the American Standard logo and navigation links for Home, Catalogue, My Learning, Reporting, and eCommerce. A search bar is located in the top right corner. The main content area is titled 'Search Catalogue' and features a large 'Enrol' button and a progress indicator showing 0% completion. Below this, there are two main sections: 'Basics of HVAC' and 'Sales Tools', each with a dropdown arrow and a progress indicator. The 'Basics of HVAC' section lists several courses with their respective details:

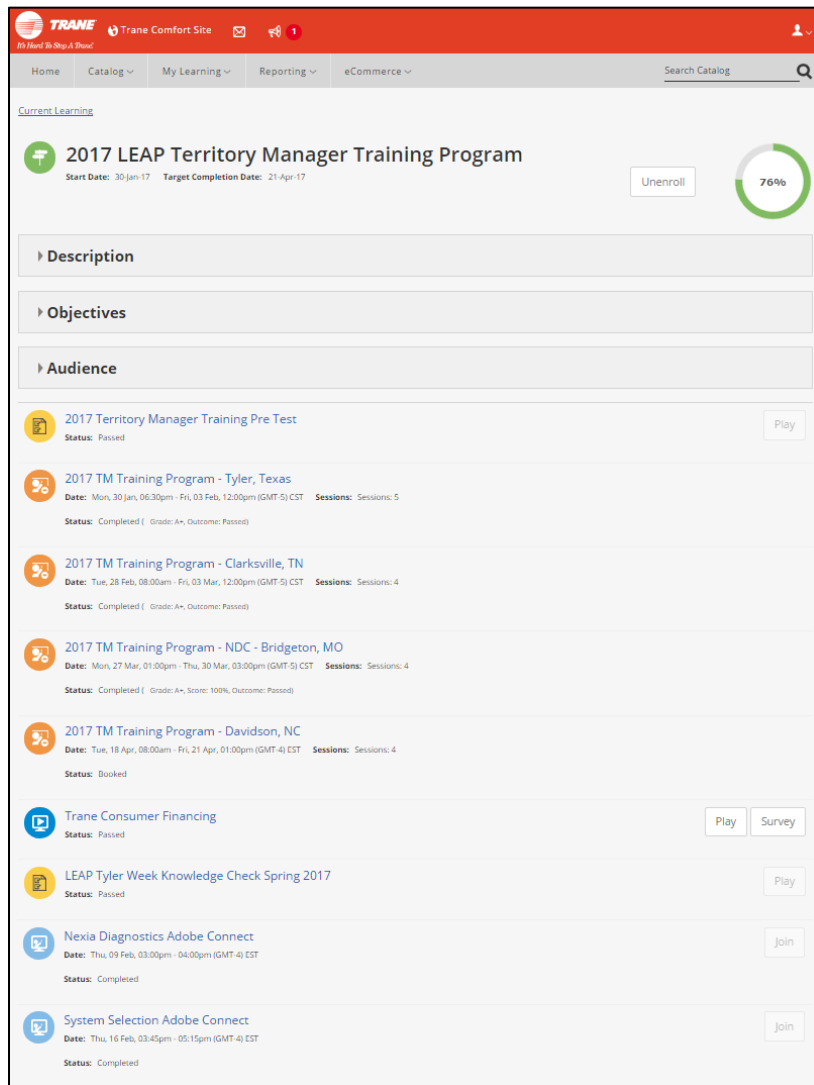
- HVAC Basics (AS)**: Language: English (US), Duration: 30 Minutes, Status: (empty)
- Gas Heat Foundation**: Language: English (US), Duration: 1 Hour, Status: (empty)
- Core Principles: Properties of Air (AS)**: Language: English (US), Duration: 1 Hour, Status: (empty)

The 'Sales Tools' section lists the following courses:

- The Consistent Comfort of American Standard Heating & Air Conditioning**: Language: English (US), Duration: 1 Hour, Status: Incomplete
- S Series Furnace Widescreen Wisdom**: Language: English (US), Duration: 10 Minutes, Status: Completed
- Nexia Diagnostics**: Language: English (US), Duration: 30 Minutes, Status: Incomplete
- American Standard AccuComfort™ Variable Speed**: Language: English (US), Duration: 1 Hour, Status: Not Attempted
- American Standard Ductless Overview**: Language: English (US), Duration: 1 Hour, Status: Passed
- Introduction to AccuFlex Variable Refrigerant Flow Systems**: Language: English (US), Duration: 45 Minutes, Status: Not Attempted

Source: Ingersoll Rand 2018

Figure 7: Learning Track UI Example 2



The screenshot displays the Trane Learning Track interface. At the top, there is a navigation bar with the Trane logo, the text "Trane Comfort Site", and a search bar. Below the navigation bar, the "Current Learning" section is highlighted. The main content area features a list of training programs, each with a status indicator, a description, and a "Play" or "Join" button. The first program, "2017 LEAP Territory Manager Training Program", is currently 76% complete and has an "Unenroll" button. Other programs include "2017 Territory Manager Training Pre Test" (Passed), "2017 TM Training Program - Tyler, Texas" (Completed), "2017 TM Training Program - Clarksville, TN" (Completed), "2017 TM Training Program - NDC - Bridgeton, MO" (Completed), "2017 TM Training Program - Davidson, NC" (Booked), "Trane Consumer Financing" (Passed), "LEAP Tyler Week Knowledge Check Spring 2017" (Passed), "Nexia Diagnostics Adobe Connect" (Completed), and "System Selection Adobe Connect" (Completed).

Program Name	Status	Completion/Action
2017 LEAP Territory Manager Training Program	In Progress	76% Complete, Unenroll
2017 Territory Manager Training Pre Test	Passed	Play
2017 TM Training Program - Tyler, Texas	Completed	Play
2017 TM Training Program - Clarksville, TN	Completed	Play
2017 TM Training Program - NDC - Bridgeton, MO	Completed	Play
2017 TM Training Program - Davidson, NC	Booked	Play
Trane Consumer Financing	Passed	Play, Survey
LEAP Tyler Week Knowledge Check Spring 2017	Passed	Play
Nexia Diagnostics Adobe Connect	Completed	Join
System Selection Adobe Connect	Completed	Join

Source: Ingersoll Rand 2018

Figure 8: Learning Management System



IR Ingersoll Rand Learning Management System **American Standard**
HEATING & AIR CONDITIONING

Dear [Redacted],

Have you had a chance to check out our free American Standard Heating and Air Conditioning eLearning courses? If not, now is a great time to do so! Your login credentials are below:

Username: [Redacted]
Password: [Redacted]

Please click [here](#) to login to www.amstdlearningresources.com.

If you have any difficulties or require further information please email us at learningresources@irco.com.

[Click here to download a course catalog](#). Watch for new course announcements via email from American Standard Learning Resources.

<p>Popular Courses</p> <ul style="list-style-type: none"> • 5 Series Furnace • Variable Speed • Nexia™ Diagnostics • Ductless Overview • HVAC Basics • Intro to AccuFlex VRF • Customer Care™ Overview • Consumer Financing <p>New FREE courses added monthly.</p>	<p>Accessing the LMS</p> <p>ASDealerNet™ > Training Center > AS LMS – Single Sign On www.amstdlearningresources.com Username = ASD Username Password = welcome</p>	<p>eLearning Focus</p> <ul style="list-style-type: none"> • HVAC Fundamentals • Customer Service • Product Technical • Product Sales • Sales Tools 	<p>Manager Capabilities</p> <p>Assign courses Create Learning Paths Run Learning History Reports</p> <p>To be set up as manager, email learningresources@irco.com.</p>
<p>Benefitting the Most</p> <p>To get full benefit from the LMS:</p> <ul style="list-style-type: none"> • Educate Employees • Coach and Follow Up • Define Learning Paths • Recognize and Reward Learning • Support Learning Openly 	<p>NATE</p> <p>We have courses approved towards NATE recertification hours. Simply print your certificates and submit them to NATE for credit.</p> <p>NATE Re-certification Hours</p>		<p>Learning Paths</p> <p>NATE American Standard RSP Customer Service Skills Management Essentials Introduction to HVAC and American Standard</p> <p>Learning Paths suggest courses for career development and are free!</p>
<p>Skillssoft</p> <p>Choose from thousands of business and desktop skills courses for an annual subscription of \$75 per person.</p> <p>Business & Desktop Skills</p>			

If you have any difficulties or require further information please use the "Contact Us" link below.

Regards,
Learning Management System Administration Team

Source: Ingersoll Rand 2018

Change Management Efforts

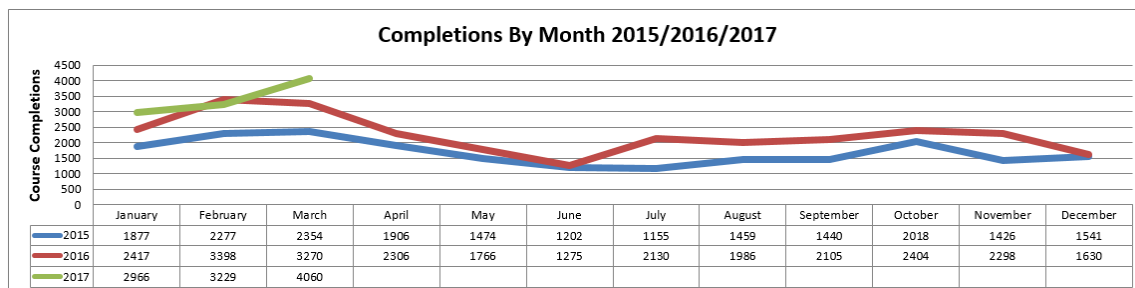
In rolling out LEAP, the training team faced several obstacles, including login problems, lack of awareness, and the length of the training program.

1. Obstacles/Challenges: How to login, login problems, and lack of awareness. Some TMs didn't know that the program or other learning resources were available.



- Solution: An email notification with login instructions, the website, and course catalog was sent to everyone who had never before logged into the LMS. This notification is now sent each time a new account is created.
 - Result: 34% increase in utilization of online courses in 2016 versus 2015 completions; utilization by unique users increased 24%, from 5,308 in 2015 to 6,622 in 2016.
- 2. Obstacle/Challenge:** Lack of awareness. Helped by the creation of the login notification that goes to all new users (16,054 sent from April 2016 through mid-2017), but more promotion was needed.
- Solution: Increased internal awareness has helped external awareness. Accomplished through collaboration with other internal teams such as sales, technical, and marketing. The program has been a topic of discussion each time a presentation is made to distributors and dealers.
 - Result: Result: 34% increase in utilization of online courses in 2016 versus 2015 completions; utilization by unique users increased 24%, from 5,308 in 2015 to 6,622 in 2016.

Figure 9: Completions by Month 2015-2017



Source: Ingersoll Rand 2017

- 3. Obstacle/Challenge:** Length of TM training program. Previously, TM training was a 9-12 week, in-person program. The time away from home was stressful for learners, their employers, and their families.
- Solution: Revamped training program into four separate weeks of in-person training, eight weeks with one-hour, virtual-training sessions (usually 2–3 per week), and knowledge checks and online training at the participant’s own pace.

- Result: Classroom registration filled up within four days the program was announced and the next LEAP class filled without being announced based purely on the impact of the first session. Prior TM learning program took two months to obtain the minimum number of participants required to hold a training.

Measurable Benefits

New Product (S9V2 Furnace) eLearning courses resulted in doubled usage over the summer months YOY, with July 2016 almost double (84%) usage in July 2015.

- July 2015 = 1,155 completions
- July 2016 = 2,130 completions.

This interest is a big testament, in part because the summer months in the United States are the busiest for air-conditioning sales and installs, leaving little time for learning opportunities. This result showed strong demand for the learning programs, even during a time when learning is typically low on the list of priorities in the HVAC industry.

The training team experienced a similar situation with 1050 Simulation Launch and March 2017 completions. Launch hit an all-time high for completions of 4,060. The User Wizard takes the learner through a series of steps to simulate setting up the thermostat, including scheduling.

With the notifications, new program introductions, and increased awareness, there was a 24% Increase of unique learners from 2015 to 2016.

Figure 10: Total Users

Year	American Standard Users	Trane Users	Total Users
2015	1,649	3,659	5,308
2016	2,101	4,521	6,622

Source: Ingersoll Rand 2018

Sales and technicians have a direct impact on the bottom line. Although training cannot always be tied directly to increased sales/decreased technical problems, it is implied and stated in survey results and success stories:



- LEAP participant: “I used [the facilitator’s] approach on calling directly on a new dealer prospect and getting straight to the decision maker. It worked so well that the contact gave me a few minutes and has since developed into a quote on a project and credit application.”
- LEAP participant: “I have already implemented the agenda into my intentional sales call and am having great success with it. I feel like it is getting me taken more seriously.”
- NOO videos/presentation: “Called on first multi-family contractor Thursday and it went very well.”
- Light commercial training: “I already have a meeting with a dealer to sit down and go over everything I learned during the B2B session.”
- 1050 eLearning simulation: “This is a very useful tool in teaching us how to setup the 1050.”
- Technical eLearning course: “I like how easy it is to use this course, easy to follow along and understand. It reminded me of some steps of calculations that I haven't used in while. These courses help with giving me that edge on my competition and keeping my mind fresh to take on bigger jobs which means more money. Thank you TRANE or whoever took the time and effort to provide this service. I will take full advantage of these courses and recommend to my friends, family and anyone that looking for the same opportunity. THANK YOU!!!!!!!!”

The new LEAP Territory Manager program has shown beneficial results. Not only did the classroom registration fill up within four days of announcing it, but the next class filled without the need to announce it. This interest is based on word-of-mouth about the first session.

The average pre-knowledge check score for participants was 65% and the post-knowledge check was 90%, yielding a knowledge increase score of 25% (Kirkpatrick, Level 2, Learning Effectiveness).

Territory Managers already are experiencing results as they implement what they have learned on the job (Kirkpatrick, Level 3, Learning Transfer effectiveness).

All training programs offered to TMs are optional/voluntary, yet usage continues to grow year over year.

Overall

Key findings and lessons learned include:

- **LEAP.** Lessons learned from participants on what should be delivered in person/virtual/online, what to spend more time on, and what to include in an additional training class, for example LEAP 201.
- **1050 Control.** Better define what was needed from the start of the project. Initially, too much time was spent developing the content. Instead, the training team needed a more specific scope. Also, use more simulation versus demonstration.
- **S9V2 & other technical eLearning.** Based on feedback, more technically-focused courses are needed. Although this launch was excellent, it also was evident that more courses like it should be a priority in the future.

The training team will continuously evaluate and update content on current programs. The team also has been working with Seertech to combine the LMS login page with the video-source page for technical troubleshooting into one location. This change will create a better set-up for proprietary content and make on-demand content available without having log in, providing added convenience for users.

Figure 11: Current State

iLP LMS Login Page



www.fieldtechhelp.com

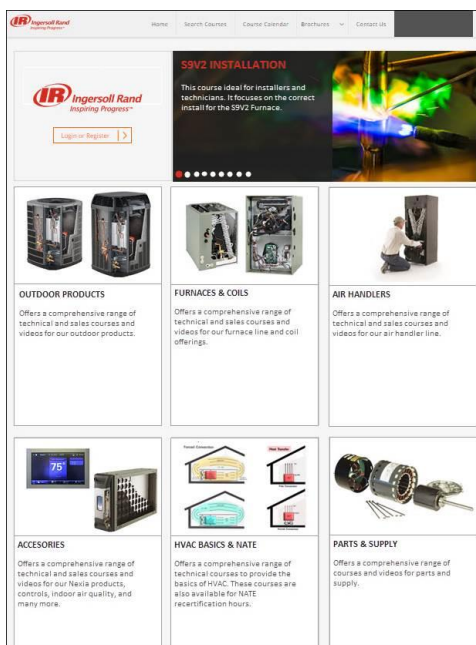


Source: Ingersoll Rand 2018

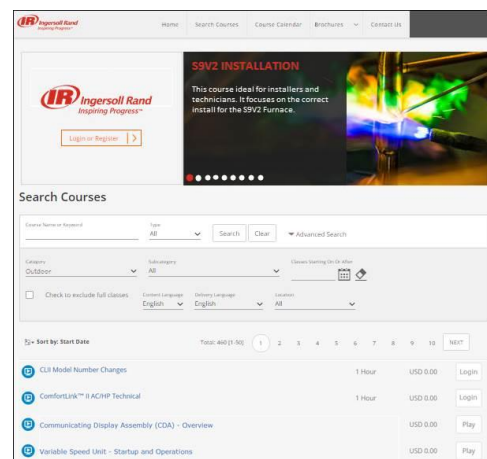
With the combined page, learners will click on a category tile and go to the search- catalog area. For courses that were level 1 (formerly on fieldtechhelp.com), the learner will see a “play” button next to the course listing. For courses created for tracking purposes or with proprietary content, users will see the button labeled “login” instead of play.

Figure 12: Future State

iLPS LMS Login Page



Not Logged State Catalog



Source: Ingersoll Rand 2018



About Brandon Hall Group

Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 20 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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- Assessment
- Survey
- Process Integration

For more information, contact us at success@brandonhall.com.