



ServiceTitan Creates eLearning Culture for Its Customers

ServiceTitan
Best Customer Training Program
October 2018



Company Background



Company-at-a-Glance	ServiceTitan is a mobile, cloud-based software platform that helps home-service companies streamline operations, improve customer service and grow their business. Their end-to-end solution for the multi-billion-dollar residential home-service industry brings a fully operational modern SaaS infrastructure to an industry traditionally underserved by software.
Headquarters	Glendale, California
Year Founded	2012
Revenue	Current valuation \$800 million
Employees	400
Global Scale (Regions that you operate in or provide services to)	North America
Customers/Output, etc. (Key customers and services offered)	ServiceTitan is the end-to-end solution for hundreds of the world's most-successful plumbing, HVAC and electrical companies to book jobs, manage customer records, dispatch technicians, sell to customers, track marketing campaign performance and report on key metrics across their business.
Industry	B2B technology
Stock Symbol	N/A
Website	www.servicetitan.com

Budget and Timeframe

Budget and Timeframe	3-plus years Annual budget (headcount, platform, operating costs): <ul style="list-style-type: none"> ● 2015: \$80,000. ● 2016: 0.2 million. ● 2017: 0.9 million. ● 2018: 1.6 million.
Overall budget	Sept 2015 launch to EOY 2018: \$2.8 million.
Number of (HR, Learning, Talent) employees involved with the implementation?	20 directly involved, total HR/learning/talent staff. 50-plus.
Number of Operations or Subject Matter Expert employees involved with the implementation?	40
Number of contractors involved with implementation	0
Timeframe to implement	2 ½ years
Start date of the program	September 2015

Business Conditions and Business Needs

ServiceTitan provides desktop and mobile applications that home-services companies — HVAC, electric, plumbing, etc. — use to manage their entire business. It supports every user in the business and their customers from accountants managing payroll and inventory to field technicians selling equipment and providing services to homeowners viewing estimates and paying for invoices online.

Since a user’s ability to successfully leverage ServiceTitan has a direct impact on ServiceTitan’s customer’s business, providing training that ensures users are knowledgeable and confident in ServiceTitan is imperative. Since ServiceTitan supports complex workflows for mission-critical processes across several user personas, training also is incredibly challenging given the stress of those being trained.

Additionally, ServiceTitan is a rapidly growing tech startup with monthly new releases and is on track to triple revenue two years in a row and then double for three years in a row. For that growth to be sustainable, the company needed to be able to provide training more efficiently than live webinars and one-on-one sessions. ServiceTitan also must ensure its team members are as knowledgeable as its customers to help them achieve their own revenue growth goals.

Overview

In late 2015, ServiceTitan saw an opportunity to provide a higher training service level than a simple 30-minute demo as its customers went live. The company started its training organization in September 2015 with a mission to create a multi-tiered training and transition program to create confident, effective ServiceTitan users without having to add endless headcount to support its growing customer base. At the time, ServiceTitan operated as a 60-person “scrappy” start-up which celebrated every single customer sale and success story, so headcount was carefully scrutinized.

To accomplish that, the company set a vision to build an online hub of self-service training content in a variety of formats where users would be presented with the content relevant to their needs, organized to progress them from the basics to more-advanced functionality with opportunities for them (and ServiceTitan) to confirm their grasp of the material. This hub would be supported by a staff of professional trainers to provide live training for customers in onboarding, users ready for advanced training and customers needing hands-on guidance to implement unique workflows.

Tactically, ServiceTitan would have to create and maintain training content that covered more than 100 different workflows across nearly 20 distinct product components. This effort would span two years and enlist dozens of subject matter experts across ServiceTitan.

But building the content wouldn't be enough. Users would need to be aware of the availability of training resources, motivated to leverage the training and successful in deriving value from the training. Driving awareness, motivation and success would lead ServiceTitan to further develop a “learning technology culture” into partnerships with engineering to create seamless training discovery from with its application into virtual reality to explore new platforms for educating users and even into curricula at trade schools to empower the next generation of high-tech tradespeople.



From a single-person department leading live webinars for a few customers weekly, ServiceTitan's training program has grown to 20 dedicated training staff supporting 55,000 users with more than 140 training courses and growing, plus multiple live trainings both online and on-site every week. Half of ServiceTitan's 400 team members solely are focused on helping customers achieve success with its software. With continued company success and incorporating increased efficiency, the training group will grow to a 30-strong team by the end of 2018.

Design of the Program

From the start, ServiceTitan knew that the company's training program needed to focus on more than just a series of demos. Building and delivering strong training content was as, if not more, important than exceptional live training and change management coaching. Its users are incredibly busy and not always comfortable with technology. In fact, many don't even have an email address. The training program needed to ensure that users had seamless access to relevant live training and on-demand training content that would effectively build their confidence in ServiceTitan.

The company's first challenge was to launch a live training program incorporating:

1. Multiple forms of live training relevant to different user personas and specific workflows they would perform in ServiceTitan. Some of this would need to be made available on-demand, accessible just-in-time via the ServiceTitan application itself.
2. Change management and "learning checkpoints" to help businesses manage the transition to ServiceTitan.
3. "White glove" custom on-site training programs for enterprise customers and strategic partners.

The next challenge was to build a robust "eLearning ecosystem" accessible on-demand to every ServiceTitan user, including:

1. Build on-demand content to lower the burden on live training (particularly since service industries start early, causing some ServiceTitan team members to start working at 3:30 a.m.).
2. Provide users (especially for those technicians who have never worked with an iPad or software before) with hands-on tools to get comfortable with technology and practice company-specific workflows in ServiceTitan before using the application with homeowners

3. Build content to cover 100% of ServiceTitan’s product — every user persona, every feature, every workflow.
4. Launching a seamless, contextual, automated learning solution (the “Academy”) for employees, customers and partners — completely white-labeled, stylized and integrated into the ServiceTitan experience.

The final challenge was to collaborate with the ServiceTitan engineering team to create a continual learning tool to engrain training and eLearning as a constant process for its customers. The solution included:

1. Developing a separate training domain continually available to customers and upgraded weekly to allow customers to up-train and re-train constantly.
2. Giving customers the ability to “create fake jobs” — giving technicians a rapid-fire ability to practice real-life scenarios in a specific “training mode.”

Delivery of the Program

The ServiceTitan training program was delivered in phases based on the program’s design.

Phase 1: Live Training Delivery — First, a webinar program was launched to address key workflows common across home-services businesses. As new customers started to use ServiceTitan, the company then delivered live one-on-one web-based training programs specific to each business. As ServiceTitan started working with larger customers, the complexity and average burden of training increased — and its “white glove” on-site training program was born.

ServiceTitan now delivers this “white glove” on-site training to two to four separate customers, each with hundreds of employees, every week. The company even provide a “Managing Your Team’s Transition to ServiceTitan” change management program to help business owners get their teams comfortable with moving to an online software platform and mobile app.

ServiceTitan has seen huge results, with its net promoter score increasing to a best-in-class 60 score since the launch of this program.

Phase 2: eLearning Ecosystem Delivery — In early 2017, ServiceTitan invested in a dedicated eLearning team with a mission to develop marketing-grade training content (which gives ServiceTitan differentiation over its competitors) and an “in-app training hub.” Its first eLearning content featured robust workflow simulators and training tutorials on the most-complicated topics that customers learn through the implementation process.



Each piece of content fits into a “hierarchy” of learning paths applicable to specific user personas within home services businesses — from the “essentials” to get up and running, all the way to “management” showcasing reports and best practices.

Early efforts later were streamlined through partnership with customer-facing subject matter experts, resulting in a 80% reduction in the time to launch for eLearning content. This also gave industry and customer experts a voice to spread resident knowledge, rather than limiting content scope to what eLearning producers knew about ServiceTitan’s software and limiting that resident knowledge. As a result, ServiceTitan now launches three new courses every week. The company also has diversified its content formats to better match the needs of its customers with simulators, video tutorials, audio podcasts, assessments, webinars, live in-app walkthroughs and even change management assets like comic strip posters and handouts — all completely integrated within the ServiceTitan help experience.

Phase 3: Launch of Academy and In-App Help — Common ServiceTitan user feedback featured frequent mentions of wanting “more training content,” “just-in-time” or in “small chunks.” ServiceTitan’s product management and customer experience teams partnered with Litmos to design and launch an in-app help experience that consolidated educational assets from multiple integrated systems:

- KnowledgeBase — Web-based ServiceTitan help articles.
- Community — An online discussion board for users and ServiceTitan employees.
- Contact — Real-time assistance from ServiceTitan’s support team via phone, email or live chat.
- Academy — A white-labeled implementation of Litmos’ cloud-based learning management system, the Academy would serve as the hub for the learning “hierarchy.”

Ongoing learning is critical for new team members — both for customers and ServiceTitan. The company’s application continually evolves with monthly updates of new and enhanced features. By authenticating Academy users via single sign-on API with its application, the company enabled all ServiceTitan users to access the Academy without a separate log-in. Better yet, ServiceTitan recognizes their user persona (or “role” in ServiceTitan) so it can ensure that it’s showing each user the content relevant to their workflows. White-labeling Litmos enabled ServiceTitan to stylize Academy to match the look and feel of the ServiceTitan platform for an even-more seamless user experience. The Academy also is accessible right from the ServiceTitan mobile application so users could easily navigate to different forms of live and eLearning content right when they need it while using the app. Additionally, all content is developed to be mobile-compatible



— especially important for technicians accessing content from mobile devices in the field. Those technicians make up over 50% of ServiceTitan users.

For new customers, training in the ServiceTitan Academy is highly recommended of every user before their business can begin using the application, and the same content is used by employees and partners alike.

Academy users are assigned to the essentials learning path: basic-level courses required to certify users have working knowledge of the ServiceTitan features relevant to their role. Managers and specialists take additional learning paths to certify beyond the basics on topics such as reporting, setup and best practices. Reports can be scheduled and sent to employees and customers on a regular basis.

The Academy's scope quickly grew.

- As of March 2018, 55,000 active ServiceTitan users were synchronized via API into the Academy with the goal that most users will log in via single sign-on to utilize Academy content on a regular basis.
- Nearly 140 courses exist in 73 learning paths and are made available both via a library to every user based on a team library hierarchy with auto-assignment based on specific user personas.
- The Academy is connected via API and reporting to salesforce CRM and Tableau business intelligence tools.
- The Academy is used by ServiceTitan's people operations team for new-hire onboarding and even to manage benefits enrollment — in fact, it is accessible to new ServiceTitan employees even before meeting their manager or logging in to its internal messaging system.

Phase 4: Launch of "Next" Training Domain — To help bridge the gap between "simulation" and the real thing, the eLearning team works with engineering to incorporate a live training sandbox into a separate web domain called "Next."

- Trainers run live training using the customer's own data and settings (but in a safe "production mirror image"), creating a net for customers to safely practice and make mistakes.
- Continuous access gives customers the ability to reinforce ServiceTitan's training and provide remedial practice to those who need it, plus the ability to train new hires months or years after go-live training.
- Data is refreshed automatically on a weekly basis to maintain "currency" of the "Next" training system.



- Customers also can preview upcoming features in the “Next” domain, allowing for advanced training before new features are launched.

The “Next” domain was met with such success that it is supported and maintained as a second production system.

Major Milestones

Team Expansion — In April 2017, the training team expands to 15 full-time employees to continue providing exceptional live training and eLearning content.

National Training Coverage — In June 2017, ServiceTitan expands to an East Coast office, providing live training coverage to the entire United States (without having to wake up at 4 a.m.).

100% eLearning Coverage — In March 2018, the eLearning team achieved 100% coverage of the entire ServiceTitan product. Every workflow and user persona now is covered by eLearning content. This drives efficiency improvement in the customer onboarding process: for example, a “How to Set Up ServiceTitan” learning path gives admins some responsibility to learn themselves, reducing the manual effort required to onboard a customer.

Internal/Industry Training Team — In April 2018, an “Internal/Industry Training” subteam is launched to spearhead new internal training and enablement initiatives for ServiceTitan’s employee population (now approaching 400). This includes a “Post-Orientation Boot Camp” and other product training workshops for new and current employees.

Training Team as a Profit Center — In April 2018, the training team officially becomes a profit center by launching a 3-day “Power User Training” program twice a month to allow current customers to solidify expertise and share best practices between industry peers. A four-day “Admin Boot Camp” program also is designed to supplement the onboarding process.

Measurable Benefits

The launch and expansion of ServiceTitan’s training program helped to increase the overall customer experience, resulting in a 30% increase in its net promoter score. These advances were one reason onboarding team members could support more concurrent customers and make them confident and successful using ServiceTitan much faster. This results in fiery evangelism for the overall customer experience as well as the software — an absolutely critical combination in creating loyal ServiceTitan advocates.



In the two years since launching a learning platform, monthly total course usage has increased by more than 30 times. This usage increase represents savings of tens of thousands of man hours in what would otherwise have been live training sessions to a few users. Forty percent of those courses are completed as part of onboarding, significantly improving the efficiency of ServiceTitan’s onboarding team.

One training format that is both impactful and confidence-building is the software workflow simulators. In the first month after launch, ServiceTitan saw 175 users complete a simulator course. Today, 1,500 users complete the simulators every month. The effectiveness and popularity of these simulators have reduced live one-to-one technician training sessions by 33%.

With the Academy, ServiceTitan has awarded users over 10,000 certifications, signifying completion of a learning path and mastery of workflows key to successful performance of their jobs.

Overall

Lesson 1: It is necessary to continuously innovate and carefully measure the impact.

- ServiceTitan is exploring new frontiers in virtual and augmented reality with a potential partnership with HTC. This will ensure a more-immersive training experience for learners who largely are visual or tactile learners.
- ServiceTitan runs quarterly “hackathon” events to innovate new content types and Agile development techniques.
- To be responsive to its users, ServiceTitan is launching a voting feature to collect quantifiable feedback from users to optimize its content development roadmap.

Lesson 2: Scalability has limits. Every customer is different so ServiceTitan cannot always operate under a “one-size-fits-all” philosophy. To address the unique needs of some of its customers, ServiceTitan is piloting:

- “Train-the-Trainer” and other professional training services aimed to allow customers to run internal training.
- Custom eLearning content development and consulting services for enterprise and strategic customers.
- Custom content hosting via the Academy.

Lesson 3: ServiceTitan is now the de-facto business operations software for home-services businesses. To recognize this reality and enable its customers' success, the company is:

- Further gamifying the certification experience for ServiceTitan customers and partners.
- Developing multi-language resources to enable training of Spanish-language speakers (alongside the Spanish-language live training ServiceTitan already delivers).
- Giving "ServiceTitan Certified" a name by connecting its certifications to LinkedIn.
- Groom trade school graduates who are already "ServiceTitan Certified." The company is exploring partnerships with multiple trade schools to embed its curriculum in trade education. This has huge implications for ServiceTitan's customers, as this now becomes a recruiting tool to connect "certified" technicians with ServiceTitan customers who are expanding their teams. In other words, ServiceTitan gives its customers "another tool in their (recruiting) toolbelt."



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