

Onshape Scales Customer Training from Dozens to Thousands Through Blended Learning

Onshape and Thought Industries

Best Customer Training Program

October 2019



Company Background

Onshape

Company-at-a-Glance	Onshape is a next-generation cloud design platform that speeds up product development. It's an all-in-one system that combines CAD, release management, workflow, collaboration, analytics, admin tools, and an API with more than 50 engineering applications. Onshape helps extended design teams work together faster and helps executives make better business decisions with real-time analytics and unprecedented visibility into their company's design and manufacturing processes.
Headquarters	Cambridge, MA
Year Founded	2012
Employees	101-102
Global Scale	Onshape serves customers in 170 countries around the world.
Industry	Product Design Software
Website	www.Onshape.com

Company Background

T H O U G H T I N D U S T R I E S [®]

Company-at-a-Glance	Thought Industries powers the business of learning with the Learning Business Platform and Customer Learning Platform — two comprehensive suites of enterprise-level learning delivery and monetization tools enable businesses and organizations to deliver engaging and fully-branded learning experiences to their business and consumer audiences.
Headquarters	Boston, MA
Year Founded	2013
Revenue	\$10 million
Employees	60
Global Scale	Primarily North America and Europe
Customers/Output, etc. (Key customers and services offered)	Motorola, Canon, Onshape, Life is Good, Mass Mutual, Vital Smarts, and Market Traders, Inc.
Industry	Learning Management Software
Website	www.ThoughtIndustries.com

Budget and Timeframe

Overall budget	Confidential
Number of (HR, Learning, Talent) employees involved with the implementation?	10-12
Number of Operations or Subject Matter Expert employees involved with the implementation?	Four to six
Number of contractors involved with implementation	None
Timeframe to implement	Four months/continuous
Start date of the program	Jan. 1, 2017

Business Conditions and Business Needs

There were several drivers that led Onshape to create a customer training program:

- To educate and onboard new customers in a way that would reinforce Onshape's unique value and help them become successful with Onshape.
- Serve as a value-add to customers and position Onshape as a legitimate offering and a competitor in the CAD and PDM market.
- To consolidate learning material and offer several different styles of learning content from a central location.
- Provide a sales incentive for freemium users to purchase a subscription of Onshape.

Onshape is a collaborative-design platform that provides CAD, data-management and release-management tools. To streamline the successful use and adoption of the product, Onshape's leadership team identified the need to develop a repeatable onboarding program to educate new customers on the unique capabilities of the platform to retain customers and help them use the tools successfully.

As a first step, the Onshape team wanted to clearly define, communicate and educate prospects and customers on the platform's key differentiators. To accelerate time-to-value, the training team introduced Onshape Bootcamp, a four-part virtual instructor-led training (vILT) program that's designed to help customers understand how to use the platform to quickly and effectively.

As **Katie Huffman**, Training Manager at Onshape, explains: "Thought Industries has given us a lot of insight into how our customers become educated and understand Onshape's

key differentiators. In turn, they become spokespeople for us just in learning about how awesome Onshape is.”

To be seen as a legitimate offering in the CAD and PDM market, the Onshape team knew the new Learning Center needed to exceed the expectations of new customers and prospects to be successful. To stay one step ahead of the competition, and meet growing demands of customers and prospects, the team wanted to ensure that it tailored its customer-training program to meet the needs of different learning styles.

To accommodate this goal, Onshape wanted to offer a blended-learning style from the beginning, and wanted it to be easy for customers to find all of the learning content in a centralized location. Additionally, the Onshape team wanted to offer both vILT and self-paced courses to kick off the customer training program. By meeting these requirements, the training team was able to offer customers a customized learning experience that would improve onboarding and strengthen product adoption.

Onshape's last goal for creating a customer training program, although not a main priority, was to incentivize freemium users to purchase an Onshape subscription. At the kickoff of the customer training program, only Onshape customers received free access to training offerings. Onshape hoped that offering “free training” to customers might convince new prospects who were “on the fence” to purchase an Onshape subscription.

Overview

The customer training program Onshape created as part of the Onshape Learning Center is a one-stop destination for customers to find training content in various forms so they can quickly learn best practices, modeling methods and how to use Onshape more successfully.

While designing and developing the customer-training program, the Onshape team wanted to:

- Quickly and effectively scale its customer-onboarding program.
- Provide a learning platform that would foster the customer experience while increasing product adoption.
- Consolidate training assets in a single platform, offering blended-learning content including vILT, articles, self-paced courses (including hands-on exercises and videos) and organized learning pathways.
- Capture and report customer training behaviors so that the company can develop a stronger, more effective training platform.
- Provide Onshape's Customer Success team with materials to share with customers during their account check-in meetings.

- Increase customer engagement with the product and the Learning Center.
- Deliver a seamless brand experience between the Onshape product and the customers' learning environment.

To accomplish these goals, Onshape partnered with Thought Industries to build a new online Learning Center using its Customer Learning Platform (CLP). As part of the build-out, Onshape incorporated Single Sign-On (SSO) from the product to the Learning Center so that customers could easily access the correct training materials based on their user-type. The Onshape training team also used Thought Industries' white-labeled capabilities to create a seamless brand experience that aligned with Onshape's brand style guidelines.

In addition to improving the customer learning experience, the Onshape training team used integrated authoring, certification capabilities and third-party integration with GoToTraining to help consolidate and manage a variety of training materials from a centralized location. These tools allow Onshape to author self-paced courses, set up and manage vILT, and offer customers certificates for attending and completing specific courses.

To support the team's reporting requirements, Thought Industries provided the necessary APIs that allow the Learning Center to gather the data needed and funnel it through to backend reporting tools. As a result, Onshape now has visibility into how many users have started and completed a class, for example.

Onshape also increased engagement with the Learning Center by placing a button within Onshape (the product) to quickly access the Learning Center, rather than just within the Help menu. It is also the highlight of an introductory video that plays upon creating an Onshape account. After adding these elements, Onshape has noticed an increase in engagement with the Learning Center.

While working collaboratively with Thought Industries, the customer training team was able to design and implement the framework for the new customer-training platform within four months. During the design and build process, the team was able to use different features and functionality of the Thought Industries platform to address and accomplish each of the project goals. The Onshape training team now is in the process of creating more content on advanced topics to continue its customers' education.

Design of the Program

Onshape's design of the Learning Center had to include:

- Single Sign-On (SSO) with Onshape (product) with accessibility only to content based on user-type
- The ability to register for vILT training and integrate seamlessly with GoToTraining and eCommerce capability
- Authoring and publishing of self-paced courses that included:
 - Videos hosted from Wisita
 - Guided hands-on exercises
 - Self-check questions
- Learning pathways to organize courses
- Certificates for course completions
- Articles to explain best practices and guide users
- A fully branded experience
- An easy-to-navigate homepage

When designing the Learning Center, the Onshape training team wanted its customers to be able to use the same sign-in credentials they would use to access the Onshape platform. They also wanted to be able to restrict access to training materials for different levels of customers. To satisfy both requirements, Onshape was able to use Thought Industries' Single Sign-On (SSO) and subscription capabilities. These advances helped improve the user experience and made it easier for the training team to segment training content based on customer type.

Next, the Onshape team wanted to offer customers a variety of training content, including fee-based virtual instructor-led training (vILT) that was capable of accepting coupon codes to attract new customers. Thought Industries was able to fulfill this requirement by creating a seamless integration with GoToTraining that is capable of managing, discounting and tracking online registrations.

Another critical component of Onshape's customer training program is the team's ability to use authoring and publishing tools to create training content for self-paced courses. As part of the new Learning Center, the team wanted to publish and organize material in a way that made it easy for customers to either complete a class from beginning to end or have the flexibility to skip around and consume what the customers felt they needed.

Using Thought Industries' native authoring tools, Onshape now creates structured self-paced courses with bite-size 2- to 4-minute videos mixed in with hands-on guided exercises and self-check questions. Onshape believes learning by doing is the best way for most customers, and these self-paced courses provided a path for this learning method.

The ability for users to check their work helped validate their exercises. Each exercise also provides a link to a completed example.

To strengthen the overall learning experience, Onshape wanted a way to organize the courses in a recommended flow. Learning pathways allowed Onshape to string courses together and provide a checklist for users who wanted to complete one class after another. Onshape also offers certificates for completing any learning pathway or attending any vILT training.

Articles or technical briefings are another medium that Onshape started using after the launch of the Learning Center. Authored by members of the technical services team, these documents serve as informal white papers and offer customers suggested best practices on a range of advanced topics.

Centralizing all this information in the Learning Center makes it accessible to both Onshape users and Onshape employees (to recommend to customers). The reporting behavior also helps the training team understand which content users access so the team can make adjustments in future course design and marketing. Allowing users to rate the training content also has been a valuable way to gather feedback.

Delivery of the Program

To maximize the success of their new Learning Center, the Onshape team used a phased approach to introduce the new customer-training platform to its subscription customers. The team's initial goal was to offer 12 self-paced courses to their customers within the first four months of going live. After an internal QA process, Onshape set up an Early Visibility Program (EVP) to select customers, allowing only a hand-full of customers to access the training and gathered feedback from them. The feedback was positive, so Onshape rolled out the 12 subscription courses and the vILT registration to all customers, and announced it with a blog post and a news release.

While helping subscription customers embrace the new learning platform, the team gradually introduced its online training platform to "freemium" users. Within the first six months, the company was able to extend learning and training opportunities to its entire user community, while introducing more learning content.

Today, Onshape offers 17 self-paced courses (12 to freemium users), three Learning pathways, 27 technical briefings (to all users) and four different instructor-led courses.

Measurable Benefits

Once implemented, the Onshape team was able to use self-paced, blended-learning pathways to significantly improve its customer onboarding capabilities — literally from dozens of users to thousands. While providing relevant training and hands-on instruction at every step of the onboarding process, the company is now in a much better position to track and evaluate learner performance as well. The training program added legitimacy and value to Onshape and a consolidated place for the customer success team to point customers. Onshape learned that education is key to its product adoption, and customers who understand its unique value are more likely to renew their subscriptions.

Overall

Managing the design and deployment of a new customer-training platform is a work in progress that truly never ends. While the launch of Onshape's Learning Center went smoothly, the team is continuously looking for ways to improve its learner experience, increase learner engagement and support the needs of its customers.

As Onshape looks to the future, it plans to work closely with its customer community to encourage them to share their knowledge and experience of Onshape's software so that it can continue to share the future of its customer-training program.

About Brandon Hall Group

Brandon Hall Group is an 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 25 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.

Inspiring a Better Workplace Experience

Our mission: Empower excellence in organizations around the world through our research and tools every day. At the core of our offerings is a Membership Program that combines research, benchmarking and unlimited access to data and analysts. The Membership Program offers insights and best practices to enable executives and practitioners to make the right decisions about people, processes, and systems, coalesced with analyst advisory services which aim to put the research into action in a way that is practical and efficient.

Membership Offers Tailored Support

Our membership delivers much more than research. Membership provides you direct access to our seasoned team of thought leaders dedicated to your success, backed by a rich member community, and proactive support from our client services team.

RESEARCH ACCESS & EVENTS

- Reports
- Case Studies, Frameworks & Tools
- DataNow® & TotalTech®
- Webinars and Research Spotlights
- Annual HCM Conference

ADVISORY SUPPORT

- Ask the Expert
- 1 on 1 Consultations
- Research Briefings
- Benchmarking

CLIENT SUCCESS PLAN

- Your Priorities
- Executive Sponsor
- Client Associate
- Monthly Meetings

Strategic Consulting Offers Expert Solution Development

Our consulting draws on constantly updated research and hundreds of case studies from around the globe. We provide services that simplify and target efforts to produce business results.

BENCHMARKING

- Competitive/Comparative
- Maturity Model
- Custom Research

STRATEGY

- Business Case
- Planning
- Organization & Governance

TECHNOLOGY SELECTION

- Vendor Selection
- Architecture Design
- Systems Evaluation

DEVELOPMENT & INTEGRATION

- Program Design
- Assessment
- Survey
- Process Integration

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