

Learning Uncut Episode 192 - Choosing Learning

Technology in the age of AI - Audrey Chan and Adam Hepper



Michelle Parry-Slater

Welcome to Learning Uncut. We are here today to talk about technology, before we do, in the spirit of reconciliation, we acknowledge the traditional custodians of Country throughout Australia and their connections to land, sea and community, particularly the Kombumerri People, whose land I'm joining you from today. We pay our respects to their elders, past and present, and we extend that respect to all Aboriginal and Torres Strait Islander peoples present or listening today.

Australian listeners and viewers, because we are on YouTube, you may wish to take a moment to consider the traditional custodians of the land where you're listening or watching from today as we begin thinking about technology.

Now, I've been around the learning technology space for a very long time. One of my biggest FOMO moments every year is, now I'm living in Australia, is not going to Learning Technologies, the wonderful conference and exhibition in London. So, to quell some of that, today we're digging into a question that many L&D teams face sooner or later, "How do you actually choose your learning tech?"

I'm not talking about the sales pitch version. I'm talking about the real version, the RFPs, the trade-offs, sorting out the good from the not-so-good. And when I say good, good for you might not be good for somebody else.

The moment you realise your platform just isn't where your business needs to go is the moment you need to listen to this episode. We'll dig into RFPs, choosing technology, partnering, how it feels - quite simply, how to pick the best learning tech for you.

Today I'm joined by two people who've lived this from both sides. I'll introduce our guests briefly and allow them to introduce themselves. They've got an interesting story to share and I'm really grateful to both Adam and Audrey.

Welcome to the podcast. I'm curious to hear a little bit more about you. We have Audrey Chan, Audrey works with L&D leaders every day at Sana, part of Workday, helping them make the kind of decisions we're talking about. And Adam was her customer.

So Adam, tell us a little bit about yourself.

Adam Hepper

Thanks, Michelle. First, I'd like to acknowledge the Dharug people of the Eora Nation where I reside; I'm in the Blue Mountains in Sydney. It's a very strong traditional Aboriginal community, so I want to pay my respects to Elders past, present and emerging.

I'm the Senior Manager of Learning and Organisational Development at a professional services firm called RSM. My role there is very similar to the one I used to have at SiteMinder, where I was the Global Head of Learning. My role was to look after the learning management system and all the end-to-end facets of learning.

Michelle Parry-Slater

Wonderful. Welcome and thank you, Adam. Audrey, it's an absolute pleasure to have you with us today. Do you want to tell us a little bit about your role at Sana?

Audrey Chan

Sure, thank you, Michelle. Very excited to be here. I am a founding go-to-market manager at Sana, focusing on building our presence in the APAC region, working with a lot of people across Australia, New Zealand and Southeast Asia.

My role, day to day, is focused on building our day to day presence, I work closely with teams like Adam's to think through the future of learning for their organisation, what that means in terms of tools and tech, that they need to support them. So day to day, I work with a lot of L&D leaders, people leaders, really trying to understand their business problems and what they are trying to achieve and to see whether or not, Sana is the right fit.

Michelle Parry-Slater

Brilliant. I know you're a super smart cookie, so I'm curious to hear what you've got to advise people about today.

But let's go back to Adam. Adam, take us back a few years. You were in a different company, SiteMinder. You had a platform... didn't have a platform... what was and wasn't working with the learning situation you had in play?

Adam Hepper

SiteMinder was an interesting scenario. We had a platform, and it was very user-friendly and focused on SiteMinder, when it was younger. But as the business grew and as the organisation grew from being based in Australia and growing into a global tech firm, the platform started to, not allow us to expand globally with our learning.

It was very structured, very simple in its approach, very simple in its abilities to enable certain features that you would expect in a modern learning management or learning experience platform for our users. What that meant was, that the user experience wasn't great. What it also meant was, we had multiple systems trying to track and trace how we were running learning, the impact of that learning, and at the end of the day, being able to globalise our learning and democratise it as well.

So one of the things about SiteMinder and being in a tech firm was, you have multiple different business units, doing multiple different things as you'll all expect. And being able to hand some of the power to individuals as best, in specialist spaces, especially

some of the SME's in our product space. Being able to build and deliver content, was high on the agenda. The old system didn't allow that, whilst also creating a lot of admin in the background.

So, in the background it was very admin-heavy; content development was slow because everything was SCORM-based. So at the end of the day, we saw an opportunity to broaden our approach and integrate learning into other systems across the business, to map it into certain other elements that we wanted to from our HTM as well.

Michelle Parry-Slater

I feel like you've just described the business use case for so many organisations, lots of bits of tech not quite talking to each other, people on the ground not quite having access they need, slow progress. But, it was appropriate for the time it was bought, and we do outgrow our technology at the end of the day, it's not an unusual situation.

At what point did you know you needed a new platform and not just a bunch of workarounds?

Adam Hepper

When we started researching. I think the most important thing is that when you start to outgrow something, is you need to dig in and look at what's not there versus what's there. Speak to the business about what they want to take away and what they want from their learning management and their learning as a whole.

So when we started to look at platforms, and do the workarounds, we tried to fill the holes and plug the gaps and do a whole heap of workarounds. One of the things that became evident, it wasn't mapping to capabilities, it wasn't able to assign things automatically for us, and wasn't able to do the simple things we wanted to be able to do. And also, fortunately, the contract was also up for renewal as well.

So, again with a lot of contracts, you go "Shall we keep it?" and the simplest thing would have been to say, yeah, lets keep going the way we're going, put the bolt ons around it.

But if you start to look at the strategy of the business, the direction of the business and where the business wants to head as well. You have to think about those things, as I said, starting as a small business in Australia, SiteMinder was doing an amazing job growing into a global tech firm specialising in the hospitality space, so again, we expected a specific user experience, that our users from a tech, platform position have. We weren't delivering that to our team.

So, again another aspect of why when we were looking at changing and why then, we were on a very clear product delivery roadmap of really expanding the reach of our product, it's advancement, it's development, and our tech in the background wasn't suiting, wasn't fulfilling that.

So, it was at that point if we're on this strategy and that's our direction of the business, how do we match that? Which then helps us to support the capability uplift that we need to keep delivering the product, to keep selling the product, to keep servicing our customers and having it in the hands of our teams to be an effective platform.

And at the same time, knowing where we are looking at that point as well, "Where's technology heading", AI was starting to be very firmly on the radar, so how would that start to impact us and how would that impact our learning experience and the skills we need for the future.

Michelle Parry-Slater

Yeah, this whole AI change plus also the end of contract plus also organisations, the world changing. It's a bit of a perfect storm as you're describing there for having a look at something new. So if, if somebody's listening to this and they're thinking, well, that's us actually, especially around the AI piece, what next? How do you even begin? What, what's the process that you were following? Was it you heading off down to L&D tech fest and picking one out of a bag or was there something a little bit more robust, Adam?

Adam Hepper

It's a little bit more scientific, as much as I wished it wasn't. It is a complex beast. There is a lot of providers, and they range and the first thing we did was start to take a deep dive into the capabilities of the platform, who was out there, who was in the market. We started to do a lot of research with looking at Gartner, Captera, those types of platforms to see what was out there.

And also where they were sitting from their development cycle and where they were headed as a product. You know, coming from a tech firm who was leading edge in hospitality software, you don't want a product that is lagging behind that feel for your team. So we started to look at the top quadrant, who was being progressive, but also starting to look at other pieces of the puzzle.

You know, do they provide trial sites? Are they open for you testing and learning as you go through this?

Could I go in and easily go through their website and actually see what the product was doing? It sounds really simple, But the more complex things looked on paper and on a website as we went through this process, the more complex, it can be

In the back end as well, of course, you're trying to look for things that suit your size of organisation. We had a thousand people globally. So how did you then be able to look globally for a global provider, unfortunately not an Australian local provider?

We also took, you know, a lot of time developing our requirement list.

You know, and that's the first thing. Once we started doing research, we got a handle on what else was out there, what do we actually want it to do? So, we can go, does it need all the bells and whistles? Does it link into the things that we need it to be able to link

into? You know, does it help create an actual whole learning ecosystem which links to your HR data, for example? Can it link to external content that you might want to use so you have to build it all?

So, there was a lot of considerations, but the first step always is to be really clear on our requirements. Does it do X, Y, and Z? And then building on that, we did a very clear listing against you know, must-haves, nice to have's, those types of things within the platforms. And that's how we started to use it. What we also did though was look at what the user experience was going to be. The user experience was key for me.

I wanted I personally and the business was looking for something that could captivate learners, get them in, get them doing things, and make it an experience as opposed to I've put a SCORM file into an LMS and someone can just look at the SCORM file and we tick a few boxes. So, it was also the last piece of that was, as we moved through this was does it have a face to face aspect? So, if I'm still doing virtual training because certain markets in our in SiteMinder really focused still on face-to-face training. What was that experience looking like? Was it just running a Zoom meeting and dumping it back in? Could I record it? There's a lot of different pieces that we put together in that requirement document, which looked at a global platform with the user experience at the end of it, which was starting to build a learning ecosystem.

Michelle Parry-Slater

There's so many things that you've just mentioned there, I just want to unpack a few for listeners that might not be so familiar. So you mentioned Gartner. There's also Fosway. So, these are organisations that assess learning technologies and rate them. So, these are the things that you were looking at. And then against your list of requirements, that is the most important thing. And I think whenever you know, anyone I see them at Learning Technologies Conference and they're not with their list of requirements, you're going to have some really interesting conversations, but you're probably going to get sold to rather than be a little bit more discerning.

You also mentioned about how do you rate that list of requirements? What are the must haves and the should haves, the could haves? Yeah, so there's rating scales, often known as the MoSCoW Rating Scale. So I hope that helps with people picking through this podcast, listening, thinking, how do I go about it?

But you've really demonstrated there, Adam, that this is the process and it is a process known as the RFP process. I'm going to bring Audrey in a second to help us look at this from the other side. But before we do that, so how did Sana come up on your radar, Adam? What was it that was sort of ticking those boxes for you? Because there are, like you said, so many platform providers out there. And I know, like a lot of Australian companies want to look local, and that's wonderful. There are some really great local organisations too. But how do you end up, you know, choosing a Northern European organisation?

Adam Hepper

Their website was awesome, to say one part of it. That's what one of the pieces that attracted me. It looked fresh. It looked modern when we got to that point.

How they came through was we'd actually gone through a lot of research with some of some larger firms, some more niche firms. One of the things that popped up, it came up in my LinkedIn to be honest, and I went, "what is Sana?" and I went and had a bit more of a look at it and what really attracted us to actually doing a bit more research on Sana was the fact that it's been built on learning intelligence and the work that they've done in that space, not just saying it's an AI firm or it's a learning, it's actually built off a lot of research as well.

So that actually really interested me from that it was a different way of looking at how a learning management and a learning experience platform would operate because it's looking at the Josh Bersin way of learning. How it's integrated that into Sana and the platform as well really interested us and you mentioned it before.

The first call was not a sell. And I had my requirement list, which as you said, if you don't have a requirement list you're going get sold to, you've got to be on the front foot when you're looking at any platform for any type of system. If you don't have that requirement list that you could then articulate back to the account manager that this is what we're looking for. Here is what's most important to us. And that's the first thing our then account manager, Nick, really helped us through. That's what attracted us to us from the first call. I was very focused on those first account management calls, those first introductory calls, what they were like as well and that's what really shone with Sana as well, was how they positioned the system or the learning management system to us as a learning experience tool, that will do a lot more and it does meet your requirements at the same time.

So that's how we came across Sana through LinkedIn and then we just built the relationship from there, which took six months to get to the endpoint.

But over that journey was a you know very different experience from all the providers, but it was the customer experience that I had, for not being sold to, to get a product that was fit for our purposes.

Michelle Parry-Slater

I'm loving the fact that you talked about building relationships and I think when you partner with any provider that's actually really key isn't it?

I appreciate that you are a massive fan of Sana, I'm just going to try and keep this in a more generic space but knowing that I want to come to you Audrey, help us to understand from the other side.

You've got somebody like Adam who's looking for fresh, he's looking for new, he's got a totally different set of circumstances from when he originally bought something many

years before perhaps, and now he's coming to you with this shopping list of stuff, asking you the right shop from which to buy? That process is called the RFP process. What actually happens from the vendor side? How did you even know?

You know, Adam says he found you on LinkedIn. What happens next? Can you pick up the story?

Audrey Chan

Yeah, there's a lot of things that happen during the RFP process, a lot of back and forth, meetings, filling out documents. So the process can be quite short depending on the length of requirements or quite like a lengthy piece of work as well. Usually it starts with someone or prospect sending over their requirements list to us. And I think that is a good chance for me to go through the requirements list and understand what the company is actually looking for.

And I think a good RFP really starts with understanding the problem. So, Adam and his team had already done the work to really understand the business problem that SiteMinder was trying to solve. And of course, we have a checklist. The checklist matters. You want to make sure you have all the integrations, the security, content available in the languages that you need to support a global organisation and things like that. So that's also always very important. But I think also in addition, the RFP had an answer to the real question, what are you trying to change as an organisation? Whether that's something like faster onboarding or more engaging learning or making sure that the organisation is keeping up with the progress of the business, having that bigger, broader question that's really tied to business outcomes, I think is really important for a good RFP. So going through that, then as a vendor, I'm able to then understand what those requirements are, the position that the company is coming from. And that's when we can really make the RFP response really specific. So, we can go through line by line, understand the functional requirements, understand the business outcomes that it's trying to, and position Sana or any other learning platform in a way that really makes sense and provides value to the person that will then be reading the RFP and making the assessment on whether or not it's a good fit.

And I think along with filling out the RFP, like there's a lot of functional, cross-functional work. So we speak a lot to integrations people, product people, customer service teams. So I bring in a lot of teams to help work on that. And then we focus a lot as well on the discovery process with the prospect. So that means hopping on calls with Adam and his team to really understand more like about the RFP, how they got there, you know, what they're looking for in a partner.

And I think doing discovery is really so, so important when you're trying to understand whether you're a good fit for the organisation from, you know, a sales perspective, but also from the customer's perspective, to really understand whether or not this company is like a good match for you or this provider is a good match for you. So instead of just doing a generic platform demo or platform introduction, doing discovery really helps us

understand the details how of how everything works. And I think diving really deep into that is always better. You might think it's crazy, but I like to know how long does it take you to create a piece of content? How many people do you have working on integrations? How many clicks do you need to do to complete a certain workflow?

All of that is really important information for us to then feed into the RFP response so that it's really valuable for the person who receives it later on.

Adam Hepper

Can I just expand on that, Audrey?

I think one of the things there that's really important that you mentioned is that transparency and the customer fit. I think that's really important as well.

If you are looking for a new LMS and you're new to this or you've done it many times, and regardless of what happens, is it's that sometimes the customer and vendor isn't actually a fit and I think that's one of the things that catches some people out as well. When they're looking and going through the RFP process because people will force things through as it could, "it going to fit. It's gonna do everything you want it to do." And you end up going, getting a product and you go, that's actually not right. Because the actual vendor versus business fit actually isn't there. And that's something that I've seen that was part of our RFP process as well, was the honesty and transparency from the vendors, around how it actually what that synergy between the vendor and the client actually was.

Michelle Parry-Slater

I think it's a really interesting build, Adam, because it goes back to what you said at the beginning there about building relationships. You are building a relationship. And at some point it may well be that actually one party's got to walk away and say, this isn't a good fit. And that takes a brave vendor. It also takes a brave potential customer. And I know Audrey, that your team, their consultants, they're very problem first. You haven't sat there and described these are all the features and benefits of our platform'. It's that deep dive, that deep dive into discovery.

How much are you helping customers to understand themselves? Because maybe I might be surmising, maybe they're not good at doing that. I'm not suggesting you weren't, Adam.

Audrey Chan

It really ranges. I think different people come to us at different stages. So, we have some people who stumble upon Sana when they're doing that initial research. So, they really are still kind of lost. They don't exactly know what they want yet or the main problem that they're trying to solve, but they know that they want to shop around and kind of understand what else is out there. So, discovery for someone in the earlier stages like that, can be quite different. So we're really trying to understand, you know,

where is the business at? What's your work like? What do you like about your work? What do you not like? What feedback have you gotten from the team? And what is the strategy or what is your goal for you know the next 6, 12, 18 months. And then we also have people who come to us with a much more clear idea or a much more immediate business need, for example, a renewal coming up, or maybe there's a change of leadership and a new initiative with a deadline by which they need to go live. And in that case, it's really understanding first, are we a good fit for you guys? You know, do we meet the requirements?

Do we also understand your business value and can we support that with our platform? And then if so, how can we make sure that the process goes really smoothly so that you get the demos, you understand the commercials, we negotiate the terms that you can go live exactly by the deadline. So, it really depends when in the journey someone comes in.

Michelle Parry-Slater

Are you finding you're having to do more of that in this kind of age of AI being an AI based platform like you are? Because we're all learning this. We're not quite there yet. We don't really know what we don't know. How much guidance are you having to give potential new customers?

Audrey Chan

It also varies. I think it varies depending on how much people know or have experimented with AI. So we have organisations that are very tech-forward, or they work in tech or they even work in the AI space. They have a much better understanding of AI and it's much more embedded into their day-to-day work and how their team works as well. So there, it's more about understanding how AI is applied in Sana through our different agents that live across our learning management platform.

And really just checking that and making sure that it works and it's something that is useful for the client. There are other people who are just starting their AI transformation journey, or they're really wanting to build AI capability across the entire organisation. And in those cases, we do a lot more conversation, a lot more exploration to really understand what AI transformation looks like for this organisation? Why are they going through that AI transformation now? What are they hoping to gain out of that transformation? And from there, how can Sana help you? Whether that's, you know, with content that's focused around AI, whether that's helping you launch an AI academy that you're then going to share with all of your employees, or whether that's, you know, really using our AI agents to help automate a lot of workflows to save you time so that you can actually go and do more with your nine to five job. So it varies again depending on you know, the person, what they're looking for, and what perspective they're coming at it from.

Michelle Parry-Slater

There's an opportunity here for all vendors to kind of take this approach of being helpful because we just don't always know what we're looking for.

We might be able to articulate what doesn't work as opposed to what we want things to do. So Adam, I want to come back to you and talk us through, you've gone through the RFP process, you've chosen Sana, as Audrey just mentioned there, you know, the commercials are right, the onboarding and all the rest of it.

You launch, what does that even look like? Because this is where I see sometimes it falls down when you've got the sales team working with you, you've got the likes of Audrey helping you out to understand, you know, what is your AI agenda? And you're talking there about your business strategy and what you want the platform to do. And then it gets handed over to somebody else in the organisation who's not sales, let's say.

Now, I don't know the setup at Sana to say that, but this is where there's a gap, isn't there? In a lot of processes and a lot of vendors and we sort of fall through the cracks. Talk me through the relationship, the ongoing relationship. How did Sana ensure that that wasn't the problem? And you launched and went live.

Adam Hepper

Yeah, I think and to Audrey's point, I know Sana's grown quite a bit since we launched, which is a fantastic, you know, success for them. But in essence, it was communication and meeting the right people at the right time. So the launch was smooth. It was a very easy transformation for us because one of the things that Sana came to us with was, "How are you going to launch this?" And you know, like any good product, we actually launched it at, you know, eighty percent.

Because we're a very agile focused business, and we positioned that across SiteMinder. And we made sure that we moved all of our information across and we had the right courses ready to go. We had our new onboarding in there. But the thing from Sana was that we had Nick, we had the customer success team, we had a couple of other people helping us throughout, and they were always accessible and that made a huge difference for us. So as we went to get closer to go live.

To Audrey's point, we had a very structured embedding and enablement plan, which also was, you know, six weeks out, what are we doing this week, that week? We had weekly catch ups as we were going through it.

But it was never difficult. Nothing was ever difficult for the team that they'd put in place for us. And we felt like we were their only customer at some point, because we felt we were getting an amazing service.

The other thing around that communication as we were going into live was because Sana had at that point in time, I think they still had something very similar, a very fast development and deployment cycle.

So, the thing that got us was there was a couple of things that were missing at the start that we wanted and then we wanted to see, and as we were going through some testing, it wasn't there and then three weeks later, it was there. Which was fantastic because they're listening to their customer, they were listening to us what we needed to help make it successful.

And then as we went live, know launching an LMS sounds like a really easy thing to do. You switch it on and away you go and Merry Christmas. Everyone's got their new learning platform.

But as, you know, I'm sure many of the listeners would know, it's a learning platform. So it's not always front of mind for a lot of people. So what we did with that was we actually launched specific programs and pieces of the puzzle at the same time. So it actually got people into the system. So they could actually see it, experience it and understand what it was all about. This was after we'd done some initial pilot testing, of course, but the team at Sana made sure that, and this is why when you're selecting a vendor, don't just talk about what happens to sell the product, it's what happens afterwards. It is who's involved with this, how often are they involved with this, how often are we meeting? Again, you need to drive some of this. But again, it's being a little bit more proactive than reactive.

Otherwise you could be 3, 6 months if you need that long, that's fantastic. But we wanted to launch in 6 weeks. Because our contract was ending and we needed to get something up and running. We're up and running in 6 weeks and that was a key for us as well, because we have the right people from Sana talking to the right people in our organisation as well. So make sure you know who your stakeholders are if you are when you launch and when you're gonna build, who you know, the likes of Sana Audrey needs to know who your stakeholders are, who your tech ... there's guys in tech who actually need to do integrations and security and make sure all those pieces of the puzzle because your vendor doesn't become a mind reader overnight around what you need as well. So, I think that's the other piece around this whole process for us with Sana was the questions we were asked. I like to call them expensive questions, they're expensive because it was going to be more expensive for me at the end of the day, but they were great questions to challenge us around some of the ways we were thinking around deployment and launch.

Being very clear on who was involved with team. I think we end up with it five or six people from Sana involved with the go live for us.

Michelle Parry-Slater

That is such good advice, isn't it? That you're not just sort of handing over the RFP and then all the work's done by the vendor. You've still got work to do as the buyer, making sure that you've got all the right people in place, that your tech people and other stakeholders in your organisation. But let's just give some praise from signing to go live for 6 weeks.

Is that what you were saying?

Adam Hepper

Yeah, 6 to 8 weeks we've got it up and running.

Michelle Parry-Slater

Crazy. That's really crazy fast.

Audrey, how do you manage that? I mean, because this is what, contact migration and were you in multiple languages, Adam, because you mentioned about multiple countries?

Adam Hepper

That was one of the reasons we went with Sana. We hadn't done a lot of multilingual at that point in time, but I think that was a month after we went live, we launched our first multilingual piece of work.

Michelle Parry-Slater

So that is really fast. Audrey, how do you manage that? How do you go from, yep, we wanna buy this, we wanna go ahead, you're live.

Audrey Chan

Yeah, it's a really good question. First of all, I think all of the kudos really goes to our customer success team. We call them our impact team because their mission is really to help our customers gain value through Sana over time and make sure that that value increases throughout the entirety of our partnership and after signing, we have pretty much like four work streams that work in tandem.

So, we have project management, so making sure, you know, if you have that 6 to 8 week deadline that we're working back from that so that everything is ready to go by then.

We do content migration as another big one. So, whether you're migrating content from previous LMS or you're wanting to build new content or convert content into learning content on Sana, we focus a lot of time doing that.

We spend a lot of time on integrations as well, so really doing technical integration work, making sure that the tech team from SiteMinder or your company understands how we integrate and getting all of those things set up so that the data is flowing correctly from all of the different platforms that you want to connect Sana with. And then a big part, which Adam mentioned before, is around change management and adoption. We didn't, we don't want Sana to be something that people find very exciting for the first two weeks and then afterwards they forget about it, and you know it's business as usual and no one's really gaining value out of that.

So we work with you guys to really make sure that we're building a playbook for launch, whether that's launching small first or having some internal learning champions that are really going to help spearhead the initiative across the organisation, or doing like a big organisation-wide launch campaign. We figure out what works best for your company.

And what will help us go live with the biggest success. And then I think a lot of it also you know, after we go live, there's a lot of work as well. So that's only part of the story. But the second part of the story is really about increasing value over time on Sana. So that's when we really do things like quarterly business reviews. So our impact team is trying to understand how is Sana performing and how is this tied to your business outcomes that you're trying to achieve. And I think a lot of people typically measure things like completion rates or time spent on the platform. And those are very good indicators, but we also want to focus a lot of our time on really understanding more important questions like can we tie learning behaviour and activity on the platform to sales reps ramping faster?

Or can we tie this to more people retaining a lot of knowledge better and they're performing better on assessment or placement tests?

Or have we noticed that more people are developing more confidence when they're leading meetings with their team and is that tied to certain learning programs that we've launched. So, we do a lot of work with the team to really understand how you know the business is performing and how that's related to the platform and continue to refine and tweak things from there.

Michelle Parry-Slater

It's amazing to hear that you're tracking that type of detail. How are you doing that? How are you linking somebody's behaviour with something that they've done on a platform?

Audrey Chan

Yeah, I think it comes down to integration. So, for example, if you're trying to track ramp time, we'll oftentimes integrate with your CRM, like Salesforce, for example. So we can understand that when you hit a certain stage of the sales process, maybe we can trigger a different type of learning. And they once they complete that course, we'll trigger another type of learning. So, we're able to understand here the time from someone taking an initial call to closing their first deal. We can measure that and we can see that replicated across all of the sales reps and how that changes over time.

And then I think it also comes down to our impact team really performing like performance consultants. So really understanding and working with the customer to understand exactly what behaviour changes they've been noticing or what feedback we're able to get when we launch surveys on Sana or what the assessments are or when we do live sessions, you know, how are people responding and how is that changing over time.

So, it's a lot of qualitative and quantitative and I think observational work that goes into really trying to tie behaviour changes to like platform performance.

Michelle Parry-Slater

How does that show up, Adam, in your day-to-day work? Are you seeing, within the organisation, those leaps and bounds? Did it make a big difference? Have you got any sort solid success stories you could share?

Adam Hepper

Yeah, I think there's a couple of, there's some really good points Audrey makes there, especially around with any LMS or any platform as well, is how you measure the success. And it's that linkage back to your whole learning ecosystem as well, and that competency model of, you know, if we've delivered something, there's a business outcome and there's a competency outcome as well. I think that's really important, the thing that, one of the things around the platform that we looked at was the delivery of face-to-face virtual training. From a global business when you're dealing with people who English is their second language.

One of the things that we identified was coming back to that observational view that Audrey mentioned then was when we were running meetings and running training in Manila, we had a large group a large team in Manila. And we identified that because of how we were delivering the training differently, the level of engagement and the and the rating of those sessions actually lifted.

Now, tip that measure first. That's great. People feel more engaged now and they're actually contributing and interacting with it. The shift over time became that the amount of face-to-face time or face-to-face in-person training that we had to deliver in Manila actually dropped because they were more comfortable with the platform, being more engaged with how they were learning, which was a big shift.

From the everything has to be face to face, but also the lecture style that was very that part of the organisation was very used to. So, it became a lot more interactive. We could see the number of cards being used, the number of people, you know, in the polls that we were running within the sessions as well, actually lifting and increasing. So that is a really good example of how when you're picking an LMS, identifying some of those different measures to see success early as well. And then over time you can see that in your customer SAT, your engagement scores. So again, coming back to what's successful and what's not successful from a business perspective, and you're looking at an LMS, what are the measures that you're looking at to succeed with?

It's not always, as Audrey said, I've had X number of people attend sessions and which is great. Yet that's a tick. But if your platform can help with engagement, if it can help with the sales outcomes and you can see that like speed to competency is huge, especially in when we were SiteMinder with a large sales team, that speed to competency was massive. And we could see that with the team in Manila, quite

particularly as well from the style and how we delivered you know, virtual face-to-face training, which again comes back to why you choose a platform. Can you get a better return on investment from that platform by changing the way trainings delivered as well.

Audrey Chan

Yeah, and I think on that return on investment piece, what's really exciting for me or for you know everyone I work with at Sana to see is if you change your training and you're able to reduce the time of in-person hours, that's a big cost saver for the business. Or for example, if training is helping customer success reps answer questions better to clients and save hours, that's a lot of hours saved. And that's like a huge, again, benefit to the organisation. So taking learning changes over time and behaviour changes and tying those to broader business outcomes is something that I think is a big indicator of success or failure for a learning platform. And if it's not working or if it's not performing up to standards, then we really dive deep to understand why it's not working and how can we actually get that number back up to you know where it should be.

Michelle Parry-Slater

No argument for me on performance outcomes rather than consumption metrics, that's for sure. It is the challenge, isn't it? Because we think it's ticking a box and it's done and it really isn't. And thanks, Adam, for sharing the real stories about what sits behind the value that comes from buying the right platform in the first place.

We need to start wrapping up. And as we start wrapping up, I'm curious, Audrey, earlier we talked about the relationship. We talked about having the right customer and there's nothing like your customer spruiking you.

They're the best adverts. And for our European colleagues, spruiking is my favourite Australian word that I've learned since I lived here, which means shouting about on behalf of somebody else. And Adam certainly does spruik Sana, which is just wonderful.

Are there times when you actually think, Audrey, no, this is not the right relationship and you as a vendor would step back? We could, we can easily say that and see that from a customer perspective, but would a vendor ever say, yeah, it's not about the sale, it's about the relationship?

Audrey Chan

Yeah, I think that's something that is important for us to do. It's not necessarily the easiest thing because obviously I would love to please as many people as possible and make sure that Sana is a fit. But sometimes there is the case where there's a use case mismatch. So a company is coming to us and looking for something that Sana doesn't really do because it's not in our wheelhouse or it's not in, you know, our mission, or maybe sometimes the timing is wrong, like they're looking for something at a certain time. But that's not something that we can support. Or you're looking for value that another provider could do better than Sana, or something again that Sana doesn't

necessarily do. Maybe it's more tied to training needs or in-person training assessments, and you know, we're more about like the online experience, for example.

So, I think that's why discovery again is really important because it really lets us understand the core problems or the core things that a company is trying to solve for. And then be able to map Sana's value to those. And if there's not necessarily a great overlap, then it's sometimes time for us to take a step back and have a conversation with the prospect and say, hey, maybe this isn't the right time or this isn't necessarily the right fit. We think that if we were to enter a partnership, it might not actually give you what you're looking for. So, we would suggest maybe that you know we pause this conversation for now and we can always pick it up in the future if and when things change.

Michelle Parry-Slater

Adam knowing that, does that help build the trust that help build the partnership, the relationship?

Adam Hepper

Yeah, a hundred percent. And it's the cultural fit from that relationship and the cultural fit with the vendor as well. But it's definitely that transparency and honesty. And knowing that from the outset, from the discovery phase, and yes, we went in with a list of what we wanted. But again, it really is that honesty transparency that the vendor provides from the outset. And most vendors will be up front pretty early. If they're not, then you know, keep pushing and keep questioning sometimes, but the vendor that turns around and says, "this isn't a great fit for you or I at the moment", is a vendor that you'd always come back to as well at some later date as well. So I think that honesty and transparency is a huge piece for me personally, because it just shows the cultural alignment to my values as well.

Michelle Parry-Slater

Yeah, I think it's really important and I love hearing it in action, to be honest. OK, well, we're wrapping up and I just want to have this final word really with you, Audrey, AI. AI and taking over learning platforms. We're seeing it pop up all over the place. I had a conversation just recently with somebody who, you know, the learning looks like AI. And, you know, he sent me this, he said, look what I've done. I downloaded your e-book and I've made this for you. And I was like, just really looks like it's just popped out of Chatty G. That's not what Sana is about. Where do you see AI sort of taking learning platforms the next few years? How do you use AI, but it feels like a seamless experience?

Audrey Chan

I think AI is going to push learning platforms and the LD industry more broadly through a much bigger shift than just creating content, either creating more content or creating content faster. I think if we only do the same things faster, and of course we can use AI

to do that, we just become a faster version of the same thing, but we're not necessarily solving for problems or trying to make progress. And I think the real opportunity is much more strategic than that. I think, my bet is that learning platforms will help LD teams move from being more reactive to more proactive. So over the next couple of years, I would love to see L&D teams more capable and have more time and freedom to anticipate business needs and understand how organisations evolve and change and plan for that and really be central to that conversation that they're having with other business leaders.

For example, if a company is launching a new product or entering a new market or changing the way that teams work, L&D teams need to be able to translate that change really quickly into capabilities and then build on that or even anticipate the needs. And having AI automate lots of processes, speed things out, make work much more intuitive and information easier to surface, I think will only enable teams to continue to change how they operate and operate in this more proactive way.

Michelle Parry-Slater

You're definitely at the front foot of all of that. Now, is there anything that you haven't said today that you were really hoping that you had the chance to?

Adam, do go ahead if there's anything that's still burning in your mind to share with our audience.

Adam Hepper

I just want to agree with Audrey on the AI piece and the direction. Regardless of the platform and to your point, Michelle, you can make pretty pictures using ChatGPT and you can put a lot of stuff in and it'll give you a lot of things. But to Audrey's point, I think from the L&D profession point of view, there's an increased value that we provide with what we do. AI for me, yes, is an amazing tool that can turn around reactive content a lot faster. But I think from that proactive standpoint as well, it gives you a bit of roadway and a bit more of a runway into the business as well to demonstrate the value, but it's also an enabler and we have to remember that it's an enabler.

There's always a piece of this puzzle where we've recently done a piece of work at RSM where everyone goes, that's an AI, I don't want to watch it. And you use certain tools because you've still got to know your audience, you've still got to know who you're doing dealing with.

Same with the LMS, same with your LXP - your learning experience. You've got to know your audience, and AI doesn't know your audience. So you then have to contextualize that to your audience, to your business, all those things, regardless of what it does. So I think that's a key for me.

The other thing is, you know, be broad with what you want to look at from an LMS as well. Be bold and go out there. And the other thing for me is make sure it integrates as seamlessly as possible and always check for the add-ons and the bolt-ons that this

needs to be bolted on and this even with a new learning management system, dig a little deeper to make sure it does what you want it to do and that there's no hidden little bonuses at the end of it where you now have to pay for this connector and that connector and we won't do that many connectors.

So there's always little pieces just to dig into. So yeah, I think that's my that's my final takeaway.

Michelle Parry-Slater

Very sage advice. Audrey, any final takeaway?

Audrey Chan

I think just one message maybe to end on is that I think everyone at Sana here believes that L&D is always going to be human. Like we need people to coach and to mentor other teams. And you know, I think learning is a very personal experience as well and what excites us about AI and where we see the industry going is that AI really gives us the opportunity to make L&D leaders more central to the business, not just you know, supporting strategy after things are decided, but really helping organisations build capabilities that are required to grow and succeed and I think that to me is the really exciting part.

Michelle Parry-Slater

Beautiful, beautiful. Well, having listened to Adam and Audrey today, if you've got a platform that perhaps you've outgrown, maybe you need to go to market, I hope that you won't be so afraid of the RFP process.

It is a process and it is there for a reason to help ensure that you get the right learning platform in play. So don't forget to go to Fosway or Gartner. We'll put those links in the show notes as well. Be clear on what you're asking and be clear on how you recognize a vendor who's listening well. And don't just go for the shiny demo, the one that looks cool, but actually we've heard today it is all about the relationships.

That is it for this episode of Learning Uncut. If it's been useful to you or you know somebody who's looking for new learning technologies, please do share it with them. The more shares that we get, the more people that will find the podcast either on YouTube, on our Learning Uncut Podcast channel or on any of the podcast players of your choice. Thanks for listening and we'll see you next time.

Learning Uncut Episode 192 - Choosing Learning Technology in the age of AI - Audrey Chan and Adam Hepper



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