

TOTARA: EXTENDED ENTERPRISE WITH SHIMANO

*This is a transcript of a video
on the Totara Academy*



INTRODUCTION

I'm Jennifer Letch. I'm Responsible for Customer Learning at Shimano. Shimano is a bicycle manufacturer, a bicycle parts manufacturer, sorry, based in Japan. The headquarters and the European headquarters are based in the Netherlands, which is where I work. Next to that, we have in every European country, we have sales offices or a distributor that represent us.

So from the headquarters in the Netherlands, we make the policies and marketing strategies and that goes through to the sales office or distributor who actually does the work directly with our customer.

Why do you offer customer learning?

So why we offer customer learning? Well, we have a slogan. It's 'knowing Shimano is selling Shimano' because we believe that our customers, our customers by the way, are mechanics or, bicycle shop personnel, that they need to know our products in order to sell them properly or service them properly.

So that's our basic slogan that pushes us, drives us and what we strive to do is to create impact with our customer learning. And this is at four different levels or values, so the customer level, so that's actually the individual learner that they'll have a recognition of, that they, that they've learned they can show a certificate that they've earned or for their own being that they have enough information in order to serve their customer, the consumer properly.

The sense of community, hopefully we're trying to make the platform more engaging, that they feel that they're part of something. The service value that's more for our, product sell itself because we find it very important that they work, the mechanics work in the way that we would like them to, and that they service our products according to the requirements that Shimano puts out there.

So we think that that's very important that they can learn that directly from us. The business value for the shop itself because they have knowledgeable staff that know what to do, they know how to service which is also very important towards the consumer because they see a shop that knows everything and that services properly. And that will be obviously a good economical value for the business itself. A shop business.

All right. So the brand value is for Shimano itself that our customers know about our products and are confident in selling them and in servicing them. And in a technical company such as Shimano, that's very important.

How do the external users find the platform and get onto the platform?

So our platform is available, like I said, to customers, which are shop mechanics or personnel. What's important is that our sales office or the distributor in the local countries register the shop first. That's the first step of authorisation to let people get into our platform. Once that's happened and a shop is in our system, a user can create their own account and they go to our website and click on the create new account.



And here they fill in the required information, just the regular name and address, etc, our name, and, yeah, address isn't name and email address is most important. Uh, then they'll go on to the shop, and their shop will have to be in there, because a regular consumer isn't, shouldn't be able to see our products, our courses and then we have some personal interest questions, and then they get an email inviting them to join Shimano Tech.

What do users see when they log into the platform?

Okay, so this is a dashboard of a user, a test user, Mechanic A. This is what they see when they log in and you'll see there's always a photograph that's fairly actual either the seasonal or a new product we put on there. And the picture always is in the background. It's a customisation that we had made for the dashboard.

And you'll see the picture comes back on the bottom. It's kind of a modern look. We copied from someone else who saw on internet. The user has the general tab of menus. This is just a regular user, so they don't have any reporting or anything. We have the Find Learning, which is the library of all the courses they can see and the Record of Learning what they've done and Collaborate that's the workspaces, but we'll get back to that later.

And we also have something called News. And the news you can see here also. So we want that to be something that sticks out and the news can be at local levels. So this mechanic is from the UK and he can see all the local UK news that our colleague in the UK has put on there, but he can also see things that the administrator from Europe has put on there.

So we have general messages that are available for everybody and messages specifically for countries and that you can also access through this menu here, so you can see your local news. What's also interesting on the dashboard, if I scroll down is the featured courses. So when we put out a new module, we give it the tag featured and then they come down here. So people always know what the last, the latest course is. And if they haven't done it, they'll see the white bar here and they know that they can go over and do it.

So that's how the system looks

Do different groups of users see different things when they log into the platform?

In addition, the platform, the whole platform has been translated. We have 11 languages which you may be familiar with on Totara. Not all of the languages that are Totara is offering we've translated, but we have 11 languages that we do which means that also the menus and everything will be translated so people can just change to their local language.

I'll change back to English. Also all our courses are translated with subtitles in each course.



What is the learning experience like for the group of users?

The courses themselves. We have e-learning modules, which are video and quiz, and we use a rise format, which is an authoring tool. There's a lot of clicks to get into it, unfortunately, but once you get in it looks wonderful. And here we have all our animated courses followed by a quiz, and that's the general setup of most of our courses.

When they register, when a person registers under the self registration, they can choose a language and if they choose English, for example in the self registration and later wanna change it, they can always go to the little globe on the side, and then it will automatically open the next time in that language.

In addition, we offer something we call Tech Talks which are extra subjects that don't fit into a course that just kind of pop up and we say, oh, this is something important that people need to know, and we just use a page activity for that to show them something that's relevant at that moment.

So it's kind of kind of like a news Q&A type of section that people find a little bit extra than just a course. So we try and make it more than only learning, try and make a little bit more engaging that way. In addition, we also have blended approaches, and I'll show you how that works.

So we have for a hands-on training in the UK for this, in this example, they've created a course on Shimano Tech, in which they make a whole announcement about the training. They have a pre-work section, which is a program with a number of courses that the user needs to follow.

They add a calendar, and once the user has completed the program, they're able to sign it up for one of the live courses at the office itself.

One other and another example of a blended learning type of series that we're doing is a webinar series on Shimano Tech. So our Bikefitting company, has also registrations through Shimano Tech.

They make a news article, which I showed in the beginning on the dashboard. Telling people to come over here to look at the webinars that they're offering. And then we use as a room for the webinar, we use the BigBlueButton, which is a webinar program. And right in that course we have the links to the BigBlueButton, and those are only accessible to people who register for the course.

And after the course, we put the recorded webinars to keep them coming back.

Do you have any social learning elements switched on for your different groups of users?

Yeah, so we have we always had Shimano of Totara Learning and now we have Totara Engage also, which is the collaborate workspace function. And so far we've been using it for internal use. And so this is our CDM, those are our key users in the countries. And I basically use it to share information with them when I've uploaded in the library work instructions or, some of the best practices from other countries questions that I have for some of the people. So you can see at the library real quick. I have a ton of all our meetings. I put everything in there and the work instructions, for example we also use the HR import. I just saw that



there. This is also an interesting one to help load a lot of customers at once. So that's something we use very often actually.

We have templates made up so that our local offices can fill in the right information and then the actual administration of putting it in the system comes to me. So that's not we don't have any risk of anything going wrong. Yeah, and this is also the work instructions because I know a lot about how to use the system and make courses and add news messages or whatever but the people in the country work with it less often. So I've created work instructions with the screenshots and everything and step by step instruction so that every key user, they also have a little, a little wheel here at the top with their own category, and they can only create things under their own category. So that's pretty handy.

How is the platform managed for the different groups of users?

For the split in the countries we have the sales offices and the distributors each have their own key user and the key users are responsible for the administration of their country. So shops users, but also creating local news or local courses or the registrations they can all do that. They all have the local reporting and they all have their own rights to do that in their own countries and not see the other, so we use the organisational framework to build it up. So we have. It takes a long time. We have a lot of 30 something thousand shops in the system, but we have yeah, country organisation.

You'll see here, France, for example and there on there you have all the shops and different things. So the, a key user would only have a right to do everything at this certain level. So we give them in the, under the permissions, page we give them permission to see everything that belongs under the Netherlands. So all the child's organisations fall under that.

Yeah, we try to try to make it so much as possible that localisations so that the local countries can do what's, what they need to get their engagement in their own country but the general site and the content is centralised because we'd like to have speaking from one voice of Shimano. So that way we try to make a little bit of localisation, but also unification.

How do you encourage your users to learn?

A user engagement is pretty much a challenge, because we're finding that users aren't intrinsically motivated to go onto the system and choose courses and look at them. One of the things that we do have is a retail concept, that's the Shimano Service Center. And the Shimano Service Centers are all required to follow a program.

So we use the program, not certification, but program. And in the program they have courses that which all fall under different categories. So we've created different sets of courses so that you see here, Shimano General, and when you go down you see mountain Bike and it goes on and on. So if somebody, a shop wants to become a Shimano Service Center, they need to have mechanics who have completed all of these courses.



And then each year we have a renewal course, the Shimano yearly Service Center certificate, and that has to be completed also in order to keep their certification as a Shimano Service Center. So we see when the year certificate comes out, that we see a big spike in our users because everybody wants to continue becoming a being a service center. So then you'll see that actually creates more engagement. So one of the things we're thinking to do in the coming year is to create more of these certifications for everybody, make it available for all users, because we wanna concentrate more on the learner themselves and not on a shop. So we can say, learner, you're certified as a Shimano road technician, for example.

And also look at doing things like incentives which unfortunately is something that motivates people more than just wanting to learn. And a lot of our competitors are using incentives such as discounts on products or products themselves to get people to learn. So we're going to look into doing that in the future.

Do you report on what your learners are achieving?

Yeah, we use the standard Totara reporting which is actually very extensive. You can put lots of lots of your own filters in there and if you see here, I put a whole bunch of filters in there that are relevant to me and also determine what you wanna see in your export. We use this one here to find out how many people monthly have signed onto the platform and also to see how many courses have been completed in that month. We track that monthly for the whole of Shimano and see

trends in there and at the moment that you see a dip in your users we start to think, okay, how can we activate or engage people more? The reporting is also available to the countries themselves. So the country themselves can look and say, okay, how is my country doing? And the shop owner and the shop manager have a reporting available so they can see how their learners are doing, how the people, their mechanics are actually learning especially when they have a certificate like I was mentioning before, the Shimano Service Center certificate they have to check and see if their mechanics are finishing it so that they continue as shop being a service center.

Do you have any advice for people?

I guess my most important advice is that the customers, your customers also don't have time. We think it's very important that they learn about our products. They just want the product and sell it and get on with it. So you have to respect that and know who they are. Do a target group analysis and find out what it is that drives them either to learn or to sell your product.

And then try and gear your learning towards that group. Make it as engaging as possible. So as much, as much as you can put on your platform, not just a just an e-learning, but make webinars, make your registrations news, those are just a few suggestions of things that we use, but there's plenty of things you could do on there just to make it kind of the place where people go to find out about your product. So use it more than just learning. It's a very extensive platform.

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