

TOTARA: EXTENDED ENTERPRISE WITH THE BUILDERS MERCHANTS FEDERATION

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



INTRODUCTION

Hello, My name is Kerry Wilson, I'm the learning and development manager here at the Builders Merchants Federation. We are a trade association for builders merchants with over 860 members, um, which is inclusive of merchants both small and large, along with suppliers and service members as well. Within our membership, we offer our BMF campus, which is through the, um, Totara platform using Cortexa.

They have been a massive support in what we need to achieve within our business and been able to offer colleagues, um, across our membership, um, access to updated material and content online. So it's bite size, it's quick, it's easy for them to do when they're, you know, in the midst of their job role and looking at actually how we support the onboarding and upskilling of existing colleagues as well. Um, within the education process for those members, they can take out any core platform areas within their sort of niche, sort of sector if you like and then build a program that supports the development of those colleagues. So that's really key for us.

I'm Jonny Griffiths, Sales and Marketing Manager at Cortexa. Cortexa is a Platinum Totara Partner in the UK and we work with organisations from all sectors to implement and support their learning platforms. We currently support over 15 extended enterprise platforms, a BMF membership organisation, and the platform we support is a value add proposition to all of their membership. Covering their training needs from industry-specific training, right through to health and safety and more traditional skills.

Who are you educating using Totara?

The BMF membership is diverse, particularly around business size, and because of that, there are different options available. That starts from becoming a tenant of the flagship Totara site that we call BMF campus, right up to having your own Totara instance. So typically, small organisations may opt to become a tenant of BMF campus, and larger organisations may decide to have their own instance all together.

Why is it that you're educating this group of people?

Like many industries, the construction supply chain industry is suffering from a skill shortage. And so there's a need to get new recruits joining the industry that may not have relevant experience, up to speed pretty, pretty quickly. Um, notwithstanding that it's also important to keep people safe with health and safety training and also equip them with more generalist skills so they can progress in their career.

How do you employees find and then get onto the platform?

Typically a BMF representative would be discussing the training needs of their member, and that member could either be what we refer to as a merchants, so somebody who stocks and, and sells products, um, or a supplier of those products. And BMF campus is for either of those members. So through a discussion with them, uh, the BMF representative would put together a training plan, and that would consist of both face-to-face training and online training.

And on the online side of things, that's where BMF campus comes into play. So we would then have the discussion, um, as the supplier of BMF campus with





the with the member to understand what their, their real needs are. So what level of functionality do they need from the system, and also what level of content do they need? What type of content do they need in terms of topics? Once we've agreed that, um, we would then upload them on BMF campus as a tenant. So we would send an import file over to, um, the member. They would then input all their user data. Normally we'd rationalise that and maybe have a couple of toing and froing to make sure we've got the right data, and then we would import that and send out welcoming emails at the agreed time.

So we would, it would all be in conjunction with a sort of, um, a greater project to make sure that the, um, they go live at the time they want to go live. So when the, um, mailer goes out or the welcome email goes out, this is the page that they would land on. They'd have their login credentials here. Uh, as a Cortexa admin, I log in via my, uh, Microsoft account via OAuth 2 but the learner gets their username and their password email to them and then they can log in.

What does the first interaction with the system look like to the user?

So when a member of a tenancy logs in, they're greeted with a common dashboard that presents simple navigation to the learning record, my learning over here, their profile, and the catalogue as well. Users can also see their course progress with a graphical report. And they have quick navigation to the courses they most recently interacted with.

The navigation is also mirrored across the top. So when a tenant first logs in, they need little, um, guidance on how to get to certain areas of the system.

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

So I've logged in as, um, a Tenant Manager, so I get a slightly different view. First of all, at the top I get access to additional reports from my team, and I also get a tier one administration guide as well. So within this I get to see a glossary and browse different areas, know how to add a new user, delete to user account, etc

So this really helps us to, um, give ownership to the tenants so they can self-serve most things in the system. Um, the reports are predetermined and pre-written, but they do get the option to schedule the reports themselves, which this user happens to have done. Um, so they get the course completions report to them, sent daily at 1:00 PM so they can keep close eye on the progress of their users.

The, the other element. that can be defined by user and by tenant is what they see in the catalogue. So when I click into the catalogue here and we click on categories, we can see that this tenant happens to have signed up to four course categories. One being, um, "Know your products", another being "BMF Building Blocks", "Sustainability". So these are all different topics and have different types of courses with them, but they're all self enrollable. They also have their own area where they can add their own content too. This is determined at the point of when we sign up a tenant, so they can choose from a bank of different course categories, and by using audiences linked to that tenant, we can then determine which categories they see when the users log in.

So this is the, the entry level option really for BMF members. But they do get the option to have more advanced options too. Um, that normally is within their own Totara instance. So either a restricted Totara



instance that has restricted functionality or their own Totara instance entirely. So if we move over to a similar site, you can see here that the dashboard is, is very similar.

Um, but they've changed it for their own purposes and needs. So this is their own instance. Um, but they've changed their, their dashboard. They've put some of their own iconography and their own graphics in here. Um, and they've also added an element of something that's personal to, to them as an organisation.

So the certifications they've used quite heavily here. Um, and you and most people get enrolled on a certification when they first join the business and they appear on the dashboard. So we can see here that five of the six have been certified and then the due dates are due to come up next year, one of which isn't certified at the moment.

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

So from a learning experience point of view, um, there's some commonalities between the different users and the options that they have. Um, but there's also some differences. So on this view here, where we are a, what we call a tier one user, so an entry level user, they're part of the, the BMF campus infrastructure and site. And when they go into the catalogue, they can access, um, the categories that they've decided to add on to their subscription. Now, the, the options are a twofold, really. One is what level of functionality do you want from the system, and then what courses do you want as part of that too.

So another example is where we've got, um, another system where they've wanted a more self-branded system and also wanted greater functionality that the system could provide. But then the commonality between the two systems is the catalogue itself. So they've chosen a more sophisticated, um, system option, but then we've enrolled them onto the same course categories as the tier one user.

So you can see here in the catalogue that we've got the same courses that we use for the different, um, system functionality options too.

We've found being able to, um, pull reports on various usage, um, really beneficial in terms of being able to understand the individual learner progression, um, and per sort of business. So we can break that down into the individual organisations that are using it for through us and also following that as well, just to be able to look at our member engagement. So actually how involved are our members with that program or not? We do use, um, the certification processes, which allows us to set user groups, um, for certain activities.

Um, so one of the things that we do internally within the organisation is set up any annual training to support their development. So, you know, um, things like GDPR, et cetera, whereby they can come in, start out on that, and then use that. And again, we've um, sort of echoed that across how we can support our members with that onboarding process within that as well.



How is Totara helping The Builders Merchants Federation?

So BMF campus, um, has become an integral tool to BMF with it be an online training tool, which has become increasingly in demand for their members. Um, the nature in, in the way it's set up means it's inclusive to all of their members. So the entry level, multitenant option allows for small organisations that may not even have a HR or L&D function to offer some online training to their staff.

Um, that means they can do that without having to invest with their own resource or even their own learning platform. Um, so I think from the BMF perspective, they now have an online training tool that's relevant from the smaller members all the way up to the larger members that may need something much more sophisticated.

Um, and in terms of the course content as well, that that is common between both small organisations and large larger organisations. So, um, it means that, you know, whether you're working for a small one man band or whether you're working for a big corporate business, you are both consuming the same level of and quality of training.

In terms of helping organisations, um, a lot of our smaller merchants don't have, um, maybe an L&D colleague or a HR colleague within their teams, um, and outsource that. So being able to give them appropriate support through things like our BMF campus in the Totara system has enabled us to really support that organisation within their learning and development talent strategy.

Do you have any final advice?

Advice for creating extended enterprise model? Um, well, the experience that I've got is, um, that people can sometimes overthink it and try to create something that's gonna solve lots of problems. So my advice would be don't be afraid to keep it simple, at least initially.

I think some organisations try and create something and have grand plans that will differentiate themselves from competitors, which is great, and Totara does allow you to do that. But I think it's the more successful projects tend to be the ones that start small and then build towards that end goal. Um, trying to conquer something from the start, particularly if it's a new venture for the business and you're helping experienced people within the business, um, around online learning, it can sometimes end up with something confused that then impacts on the user experience. So yeah, start small and focused, make that brilliant, and then build from there.

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