

TOTARA: EXTENDED ENTERPRISE WITH THE TOTARA COMMUNITY

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



INTRODUCTION

Hi, I'm Rachel Griffith-Boyes, Head of Community Services at Totara.

Hello, my name is Matt Linaker, I'm Partner Onboarding and Enablement Lead here at Totara, so mostly specialise in creating partner training and resources to help partners learn more about Totara products.

Who is the Community for?

So the Totara community is available for anybody with an interest in Totara, but primarily there to support Totara customers and Totara partners. So anybody who sells or supports or uses Totara products and the community is a combination of collaboration spaces, so discussion forums and workspaces, resources that can help people using Totara products.

Um, and also the Totara Academy, which is all self-paced, free courses on using Totara products, and also best practice in the learning performance management space.

How does the Community support an extended enterprise model?

Totara has a network of partners who sell and support our customers using Totara products, making sure that they're getting the most out of them and obviously we have a wide customer ecosystem, which is full of people who are using Totara to do really great work out there in the world. So, we are really an extended enterprise because we are all part of the same supply chain.

So from us producing the product to the partners who are selling and supporting the product to the customers who are using the product out there in the world. And we all want the same thing really, which is for those customers to be getting the most out of the product. And, uh, and yeah, doing good work with it.

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

When somebody first starts using Totara or starts selling Totara, they should be invited to create a Community account, but you can also find their Totara Community via Google. So some people just come across it via search or via our website. And the first place that you come to when you hit totara.community is this, which is our front page.

So we have guest access available on the front page. Because it's kind of a shop window into what the community offers people and an explanation as to why it might be of value to you as somebody interested in using Totara or somebody who is already using Totara products in your business. Um, and so you've got a little bit of an explanation of what we are here for.

You can also do things like you can browse the course catalogue, you can browse our discussion forums. You can have a look at an example course to give you an idea of whether the Community is something that might be valuable for you. Um, if you are convinced that it's valuable to you, then you've got the option to sign up now and then you just give us a little bit of information and request an account.





We use self authentication on the Community. So that means that you can, um, you can just click a verification link in your email once you've provided it to us, and then your user account is free for you to use. So there's no kind of manual intervention from us. Obviously I do have a Community account already, so I will log in.

So this is the Community home dashboard. So this is our landing page. Um, we use these big banner images to promote something that's going on the site. So at the moment we are promoting a product survey, but that might be a new workspace, a new course, a new version of the product, um, something that's going on that we'd like to really draw our users attention to.

Here you can access lots of our discussions spaces. So we are all about getting people to join the conversation. Um, we've got a few different ways that people can work together with other Community members. We've got the Community forums. So these are open discussion forums where people can come along and ask questions about any of our products, suggest a feature to us, view our release notes.

Um, and these are really good places for customers to support each other, for partners to come in and show their expertise and also to ask questions of the to team directly. So we have literally, I think, thousands of discussion threads in here.

We also have what are called workspaces. So workspaces are a feature that's in the product Totara Engage, and we have a range of public workspaces, which again can be joined by anybody. So you can come along to the workspace and choose to join it. And a workspace consists of two main things, discussion threads. So this is people coming and asking questions

and getting answers. And we also have in here a library. So the library will be maybe a poll that we've asked about something on the Community. It might be links to Help documentation. In this case, this, uh, workspace is about reporting. So there's links to a webinar that we've run on Report builder. There are links to white papers and product sheets and also our Academy course on reports.

So this is a great place again, for people to come and collaborate with one another on kind of best practice topics as well. So we've got, for example, a workspace on course creation. We've got 147 community users who've chosen to join that space. This is great. It's really active. We are in here sharing articles, sharing videos that we've created and people come along and ask us questions and share kind of best practice knowledge with other people creating learning content in Totara. And that's a really great thing about our Community, that it's all people who are, who have the same goals and the same kind of tasks, and they're maybe therefore the same kind of challenges as well for that.

So we have, um, quite a lot of representatives in the community of customers who work, for example, in healthcare. We also have another one for government and so these spaces are specifically for users who are working in that space to provide support to one another. There are really active forums in these spaces of people sharing, you know, ideas and challenges and really helping each other out. They're really valuable spaces, I think, for people in those areas.

And here we are really just providing a space that we don't particularly moderate or facilitate these discussions. They're really for people working in these spaces to connect with their peers.



Um, what I really love to see is, you know, somebody might ask a question over here in the UK and the response they get might be from, you know, a hospital in New Zealand or in Australia and people will kind of pop up from all over the world. And it's really great to see that kind of global collaboration facilitated by a community like this.

And then the other side, as I mentioned earlier, is the Totara Academy. So a large part of the academy is our courses and our programs. So we offer lots of feature focus courses. So, um, for example, if I look for a course on audiences, we've got feature focus course on the audience's feature, for different versions of the Totara product. We keep these up to date as there's a each product release. Um, and in these courses there's normally something that explains, you know, what would you use this feature for? The word audiences can mean lots of different things. What does it mean in the context of Totara and Totara products?

Then we'll have maybe an animation on what the feature does, and then a series of videos, which are literally just system demo videos of how we set up in this case, a set audience, our dynamic audience. How we use audiences to provide a multi-tenancy experience. So thinking about the different ways that people might use that Totara feature in their organisation. Um, and also some, normally, some kind of fictional scenarios that explain how an organisation might be putting that feature into use.

One thing that we offer is certification through the Community. So if you are a customer or a partner and you would like to demonstrate your Totara knowledge, we have a Site Administrator program for each product. So just for Totara Learn or just for Totara Perform, but also one for the full Talent Experience Platform, which

is made up of individual feature focused courses that we think somebody who's a certified site administrator should be able to use those features.

Um, and for each course you get a course badge. And then if you complete all of the courses, then you get a certificate as well. What you can see here is a dashboard. So we actually set our programs up slightly differently. Um, and there is a bit of information in the Community about how we do this, if anyone's interested in the way that we approach it.

But in the background, this is a program which enrolls people. So the program knows that in order to be deemed certified that you've completed the program, that these are the courses that you need to complete. Um, and what the user sees is this dashboard, which has featured links tiles using the course tile. So it's still got the progress tracker on it and each of those links through to the relevant feature focus course and then in the background, we are using things like program notifications to remind people of upcoming due dates. If, you know, we send people a reminder saying, you know, you've had the course program for six weeks, How are you getting on? And also to send people congratulations messages at the end when they've successfully completed their program. And for each of these programs and with the courses, we award an open badge and so that means that people can use their badges elsewhere in a backpack online somewhere or link to their backpack from LinkedIn or somewhere like that.

So the nice thing is that people who are kind of building their career in Totara, who might be a Totara administrator in one organisation, but go on to do it somewhere else, can kind of take those skills with them and demonstrate those skills to their new employer too.



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

Okay, so as Rachel was mentioning, the Community is a great place for lots of people to come and learn all about Totara products and obviously one of our parts of our external enterprise is our partner network, which is an enormous network of partners all over the world who are providing, well, providing customers with the opportunity to get exactly what they want from their Totara platforms.

So for partners, we ask them to certify through our training, and Rachel was just sharing there some of the training that's available to partners. And one of the things that we do in the Totara Community heavily is to use audiences to segment what people can see in the Community. So if you are a normal customer, you'll see some of the community, but you won't see all aspects of it.

Some bits are hidden from you as a normal customer because they are for partners only. And in the main menu items at the top here, you can see, by using audiences, you can restrict access to what people can see. So if you're a Totara partner, then you will see more information and there's lots of things we do for partners.

For example, we have workspaces which are focused on Commercial, Marketing, and we also run lots of partner webinars. So if you've come to any of our customer webinars, you'll have seen me run those quite regularly, showing customer stories and showing you how to use the product. But we also do that for partners only, where we run specific webinars just for them.

All of our webinars are actually resources on Totara Engage. So the way we add those, to the catalogue is through a resource and we add the YouTube video here just so it is very simple to do. Just put the YouTube video on and you can also just add text about the webinar. So you can see here, some people can add comments and you can also see related information about other webinars that are available.

Another really important area of Totara that we have for partners is this Perform functionality. So here all partners can come in and see how proficient they are in Totara products. Partners will be able to see exactly how proficient they are across the platform. So they'll be able to see, okay, for example, how much of the Totara Perform do they know?, How much of Engage they understand?, How much of Learn they understand?, And how much of the platform features do they understand?

So if you are also trying to train your customers or your partners on a certain product knowledge, then you can do something like this as well. Use a competency profile that's a feature of Totara Perform so you can use that. The competencies are all linked to courses.

So for example, if you click in here to play some resources, you'll see, so here they have a map of the different versions that are available. Um, so for example, they have version 16 training all the way down to version 9 training, where, um, our latest release at the moment is up to version 16. So we're hoping partners have, um, done all the training up to here.



And that will continue to go as we release more versions. But you can see here that this is linked to a course and they can go to the app and complete it. So another area that we use restricted access for is in the course catalogue. So, um, we have filters at the side here, and partners can filter by Totara partner to find training that's just for them, so they can find programs on support orientation or sales orientation, for example.

And that's again, something that you could do, um, when setting up your own platform is use these different filters. So in this, um, using Totara for onboarding course, you can see for example, some of the activities are all available for everyone who's in the Community. However, we have the option to also restrict access to some activities, and we've chosen to do that with a PowerPoint presentation the partners can use when they're talking to customers, um, to teach them about how to use onboarding with Totara.

And again, that's something you could choose to do. So you could choose to put some of your audience, some of your user groups in a certain audience and show them certain things in a course. But then you could put other users in a different audience and show them a different experience of a course.

Something to really bear in mind, especially with that extended enterprise model. The second that you'd land on the dashboard of the Totara Community is that we have the blocks, uh, and sometimes we do choose to display information for our partners in blocks here. But again, we just use an audience to restrict access so that only partners can see certain information.

So if you're a Totara partner, you'll come in and see something that we want to show you, but the rest of the Community won't see that. And again, that's something you could choose to do. Um, Another thing that we do is quite nice, um, is we try and show team progress. So this is built on a dashboard, um, with lots of reports pulled in, um, showing the teams, um, success over their progress, sorry, over a program.

So there's another thing that you could do there is just show off all the reports. So for example, we can see who is proficient and who needs to do work. And that's something that we ask partners to check themselves as well. And that they can talk amongst their own team. And again, this is something that you could choose to do, um, in your own platform.

Are there any other features that could be helpful to an extended enterprise solution?

So one of the features that's been really exciting for us, and that actually we only turned on last year, it was the use of guest access in the community. So, um, what that means now is that we can offer this front page and this guest access experience so that people who aren't currently using the Community, maybe aren't even using Totara, can come and see this as a kind of shop window into our product and also into the Community and the value that we offer to people who are customers and partners of Totara.

Um, guest access, you can basically decide which parts of the site you want somebody who is accessing as a guest. So somebody who doesn't have a login or hasn't chosen to log in, you can decide what they can see. Here that for us, they can see the front page. They get this lovely, bright video telling them all the great things about the community.



A few bullet points here about why the Community is great, an invitation to log in if they've got an account or create an account, but they can also just view as a view only, um, the cause catalogue. They can have a look at an example course. So they're not logged into the course, they can't complete the course or track what they're doing, but they can go and have a look through the activities and they can also have a look in the forums. So here, I'm not logged in, but I can view the forums just as a read only. So I'm not allowed to comment or interact with the forums in any way, but I can at least see the kinds of discussions to see whether that would be useful to me. And on the right hand side, I've got this big block asking me to create an account if I'd like to see more.

The other great thing about guest access is that it allowed the site to be indexed by Google. So Google can crawl the site as a guest, use a setting that you can allow it to do that. And so that means that anything that's available to guests is also available to Google for indexing. And so for us, that means, for example, all of our forums can be indexed by Google.

So if you search for a question about Totara, something that you're not sure and you don't know about the Community or you haven't thought to search there. But you've put a Google search in, um, you might find that you get a forum post in response to your Google search, and that obviously drives traffic to the Community and it means that we're getting that content and that support out there to people. However, they're trying to find us.

Something else to think about is also just how we offer a personalised experience to users. So obviously we've got thousands of people using the community, but

we don't want people to feel like one of thousands. We want them to feel like a very, the very important community member that they are to us and to have the most kind of personalised experience. Their experience of the Community and we do that in quite a few ways. But one of the things that we've built that's been really popular is something called My Dashboard. And so this uses just dashboards and blocks, which are available, whichever Totara product you are using but as the banner says, this page is all about you. So this just contains really links to things that you are doing or things that you've interacted with. So we are using sort of out of the box blocks here, we've got last course access, which tells me which the last course I've viewed, my latest badges, so the badges that I have made recently acquired. I've got quick links to my forum posts, which allows me to jump into any forum posts that I have made. I've got my current learning here, which tells me what I'm enrolled in and how I'm progressing. I've got a recommended courses block, which is recommending courses to me.

I've got quick links, which I can actually edit myself to areas of the site that I might be interested in. And, and then at the top here I've got my library, which is a link to my resource library and this is actually a really cool feature because what this allows us to do is me as an individual user, I can create a resource just for me, just cuz I want to keep it.

So maybe I've seen something and I wanna pop it in here. I can save resources that I found around the site. Maybe there's a webinar that I think sounds really interesting, but I haven't got time to watch it yet. I can save that and then it comes into my, into my resources, under my saved resources.



I can also create playlists, which are a collection of resources that I think are interesting, and then I can share them. I can either keep that for myself, I can share it with everybody in the Community and make it openly available. Or I can share it with just a subset of users by name. So perhaps just people in my team, um, if I were a partner, perhaps I would share that with my customers, or my prospects.

And so that's just another way of kind of quite personal to me, space that makes the Community feel like mine. Something else that we use on the Community to make the site feel personalised is, um, we actually use the 'Recommended for you' block. So there's quite a few different ways of using that. It's based on machine learning kind of recommendations, engine in the background.

We use it on the homepage here for this trending block. And basically this just looks at content that's trending on the site and then reveals it to the user. So, today it's showing me this SPAR webinar, which is a brand new webinar that we've just run. Um, I can see that a few people have started liking it already.

There's a functionality overview that a few people have liked and because it's had interaction on the site recently, um, it shows me that these are the trending things that might be then of interest to me as a user. So this is a good way of making your space feel quite dynamic as well, and making sure that, um, information that's being interacted and used by other people in your extended enterprise are, is being revealed to people who log in. So that's why we have that right here on our, on our homepage.

Another piece of functionality, which um, you can see on our homepage here is this little section here, which

has a newsletter, it's actually a form that we've pulled in from our CRM using HubSpot for that, um, users can sign up to receive different types of product news and industry news and some micro-learning as well.

So one thing we try to do is obviously bring people back to the Community and tell them about what's new. So we do that through the Community itself, where we send weekly forum posts, for example, to let people know, okay, this is what's new in the Community, but we also send. Newsletters and microlearning from another tool called HubSpot.

Um, and that's another great way to think about that communication strategy. Um, how will you get that information to your users? How will you tell people about new courses, webinars, anything you're doing? So that's how we do it in the Community.

Do you have any advice for people wanting to set up their platform to create an extended enterprise model?

The first piece of advice really would be just to think about how you segment your audience. So thinking about the types of information that needs to go to different groups of people and then how you can only build that once if possible. So, for example, for us, Our certifications, our programs are available to partners and they're available to customers.

We only build those once. We only build the courses once and the programs once, but we make them available to different groups of users. And as Matt showed we even have kind of pieces of hidden content that are only there for our partner audience. So I think just thinking through what's the structure



of your content, what's the structure of your audience and the people that you need to get this information out to, and how can you do that in the kind of easiest and slickest way possible.

The audience feature in Totara is really powerful. It allows you to really control and personalise that user experience for whoever it is you're trying to show information to. Also multitenancy in Totara allowing you to completely theme the site in different ways, even have a different login experience for those different brands that you have coming into your platform. That's another great way to do it.

Another piece of advice I think that I'd highlight, it's really thinking about that communication strategy. Um, if you are trying to educate customers or partners, how are you gonna keep telling them about training that you have? Or about any performance management activities? How will you get people to come back to the system? And that's somewhere

that Totara Engage, for example, can be a really great communication tool. So you can create like these private workspaces, you can at tag people, you can use notifications, so you can keep bringing people back to your platform so you can keep training them, keep updating them about your products, your product offerings, um, and let people know really what great things you're doing. But using Totara is your main platform to be the sort of inspiration for your extended enterprise solution and use the Totara Community always. That's the best advice I can give.

So I suppose my final tip for anyone looking to do something similar would really be just to have a great team in place to support it. Um, so we are really lucky at Totara that we've got not just our lovely Community team who are responsible day to day for managing the site, um, making sure that everything's working, building course content, all of that kind of stuff.

But also the wider Totara team. So there are so many people behind the scenes as well as people that you might see in forums and on webinars and you know, we are really lucky to be supported by a great, talented and engaged team across the business who contribute to our Community and who really kind of make it what it needs to be.

So I would say if you are, if you're building something like this and you're bringing in your customers and you're bringing in your partners, you actually need a really engaged internal team as well to make sure that you are delivering the best service to those customers and partners as you can.

End