Project 3 - Education and Training - aka Adilas University

Overview

Everyone knows that training and education are valuable, possibly even more valuable then the product itself. Both education and training are about helping people to be successful utilizing the Adilas application. We see education as one of the legs of a three legged stool. The three legs would be one - the system and it’s features, two - the clients and the users, and three - the education and the training to make the system usable for the clients.

Adilas has spent immense amounts of time building new pieces and features and can do a ton of different things. It is amazing what the system can do! However, there has been a lack of building out the education and training to match what the application can do. Training does exist but has mainly been accomplished by independent reps working with clients to help them use the system. In order for the Adilas application to become more usable we need to start focusing on this education and training aspect of the three legged stool.

The Adilas University project will end up covering both internal and external training options to fit the growing needs and wants of the Adilas community. Our plan is to create this Adilas University website as the standard place to come for all training needs. There we will simplify ways and processes to get to training, organize and categorize training, have focused video tutorials on specific tasks, offer virtual training events, help to coordinate live training offerings, give industry specific training, store and share SOPs (standard operating procedures), and more. This is just a sample of what this project will contain because it has so much potential and depth we may not even scratch the surface here. This will be super cool!

Notes:

Some points pulled out from reading it:

-where we are (briefly)

-one by one versus bulk,

-3 legged stool,

-reps filling in the gap,

-size of our system and how it is used
- what the plan is going forward (where we are heading)
- scale

-ease of entry
- interface
- organized

-focused, organized, simplified

-flags and tags to help organize things

-giving everything a spot - internal, external, old, new, etc.
- growing too fast

-patterns

-how can we break out of these patterns?
- how to get started - getting fully trained

-place to go for training, help, and education
- standardized and easy

-we now know where we are going, we can see the bigger picture we couldn’t see prior

-iceburg (top) versus mountain view (from the bottom and taking in the whole thing)
- industry specific options

-this could change everything….

-even people we had commissioned from this industry could help provide the training, that would be so fantastic!
- user friendly and more consumable

-back to user specific skins

Notes and Brainstorming:

Where things currently are:

* Education is important!
* Right now we train one by one - lots of energy - if we had a more intuitive, in breadth training we could send people here to get more training themselves
* To train multiple people we have to have an element of scale - we need to be able to get needed info to people to use it - but not overdo it with too many pieces or details
* We have hundreds of hours of training - but we don’t have it broken up so that people can use it
* Focused, organized, simplified training
* Right now our training is outdated somewhat, too much at a time, too bulky, not task focused,
* User-guide - very weak, hashed together, not ever finished
* We build so fast we don’t even take time to train anyone on it - our team doesn’t even know what is possible or what features we offer anymore!
* We have internal and external needs for training
	+ The adilas university project will end up covering both internal and external training options to fit the growing needs and wants of the adilas community.
* Main topics under the current online outline:
	+ video library
	tracking education and progress
	sop's (standard operating procedures)
	internal and external needs
	online and in-person training events
	dynamics and white labeling options
* This deals with helping people
* People trying to just learn on their own do not have a good success rate - there is just too much and no knowledge of where to go, how to get started, what to do
* People that have been successful and stayed are those that have had good reps that help them get up and going, trained and using the system, those tend to be successful and continue
* We have tried a few videos but not because some of them haven’t been very successful it has been considered that they have been a failure, but we have not given a good effort here
* People pay to learn in lots of areas but they have to see the benefit to themselves
* Also, if someone is already paying for our system, they expect to know what to do, or not to have to pay further for educating them on a product they have already “bought”, because they bought “the system”
* Terrain park analogy - sometimes education and maintenance are more valuable than new features
* We don’t have industry specific skins setup, which makes it so hard for people to just hop on and be successful - there is such an investment of time and energy setting up and training any clients that are ultimately successful
* We have tried to do a few little things for videos and training - but how many people use those, or know where they are, to access them,
* People don’t know where to go to get training
* Right now, the two legs of our 3 legged stool are much longer - these are out of proportion and our foundation is wobbly
	+ Systems & features - huge marks here - we have a giant, robust system that we have built and built and built upon
	+ Clients & monies - less here, but a huge lack on training them - all has been filled by reps
	+ Education & training - this one is the smallest leg by far - the reps used to fill this area and now we have taken that away in many ways
* You need to find yourself a helper - someone to help get through the challenges that we keep having come - internal team and developers as well as clients and users
* We keep seeing the same patterns play out over and over again - for years, decades now, we keep going through these similar patterns and then it is so frustrating and discouraging that we feel so stuck here. No one wants to keep repeating the same frustrating patterns again and again - it is so frustrating and exhausting for everyone!
* We have increased our vision certainly as we have kept going but ….
* We think we still need company structure first
	+ Company structure - one of the most important things we can do to help things move forward
		- Who are we and who is taking care of what?
	+ Value add-on core, number 2 - master plan and product development
		- What is our plan? Where are we headed?
		- With industry specific skins or BI - we want to create dashboards, so that we don’t have to have people jumping to so many different homepages
	+ Education and training - this is probably one of the 3rd most important things we can figure out
		- How we can get users to be able to use our product successfully
		- This valuable piece is missing right now, but it is so valuable
* The reps used to be in the hot spot - the most valuable spot and definitely making the most money because there is a need there
* We have not been able to pick up that money right now because we don’t have anyone who can help take over that area
* We get too busy doing other things, so we never make some of these other projects happen, that limit us from moving forward
* Lots of people probably don’t mind marrying multiple products together if the ease of entry is accessible
* Adilas ease of entry is too hard - we lose people here - it can do so much more than most other systems but the barrier to entry is huge
* The example of City of Rocks - too many routes being put up, couldn’t keep track, no one knew where or ratings, weren’t in guide book - they put a moratorium on adding new routes and so that stopped there but people went to another place nearby and kept doing it …. This is to say, I don’t think people will stop their demands, or ideas, or want for custom - and we want to keep idea farming and providing these options. But at what level and at what cost to other things. What else needs to be built up with it.
* Being so flexible is our strength and also our Achilles heel
* The original goal was can we make it work - now we need to make it pretty and …. and … and ….
* Even a plan won’t stop all of the add-ons - that will still likely happen but we have to standardize it and make it navigable
* We built it this way to make it work and because we didn’t know where it was going - but now that it is built we need to figure out how to make it organized, usable, and consumable,
* We have the underlying structure and currently we are showing everything because it has been built that way, but if we can hide things, turn them off, then we can make it more approachable - playing at the tip of the iceberg, instead of from the bottom of the mountain looking up and trying to figure how to tackle it
* We do need education but we also need some of these other pieces. If we only put education first we wouldn’t be able to support it still. We need this but we need some other pieces first
* We have SO MANY pages - it becomes really big and really overwhelming!
* We have this feeling of a new start up in ways, like a new business, but technically we’ve been around for quite a few years and on the code side we have thousands of pages. So code wise and application wise we are really big - but company structure and client wise we are more like a start up company. There is a disconnect here.
* Size of our application seems to create a barrier for US and our CLIENTS to enter and use our product. It feels overwhelming for us to organize it, teach it, make it consumable for them. Interesting point - it is hard on both sides.
* We were building media/content out over 10 years ago so that we could have somewhere for videos and training. We have seen this need for a long time. We know we need this,
	+ 3 levels deep of flags and tags on media/content was created for the purpose of us making our training and education more accessible
	+ It also can be tied into the system generically, to a section, or to the details/object - we tried to make it versatile for this
	+ A bunch of planning went into this project

Where we want things to go - future plans/hopes:

* Having Adilas University would establish having a place to come for training
* Setting up with lots of different modes - learning mode, different views, different industry skin training that they can learn for their industry
* Straight forward ways to use it
* Dynamic ways to change, adapt, and then learn to use it
* Education could be so different if it was done on an industry specific levels
* We could cater and focus things to the industry
* We still need the general what does Adilas do - what is the base layer, what can we do
* Then have training specific to those industries - that would feel so much easier instead of having to reinvent it every time
* We have internal and external needs as well
* We need training for our team members
* We don’t have a standard place for our people to go either
* We want somewhere for everything to go, so that people can get to it and find it quickly
* Got to set up a standard spot for how to find training and get educated on the pieces of Adilas, new pieces and old pieces, all of it.
* If you can make it easy and standard, you can make it scalable. We need it to be able to scale to our client base
* \*\*\*Part of the work of Adilas University for education and training is making the interface easier to use!!!\*\*\* Making the product easier to consume and use.
* If we can make this more consumable and user friendly then we can make training and education so much easier for the clients
* If we can get industry specific skins and BI levels - then we can really cut down on the amount of education clients need - building it easier to use and improving things with the interface will make education more successful
* We need education but it cannot be the first piece it seems like - an important piece yes, but that is why we put it at 3rd - we need those other pieces first (1 - company structure, 2 - master plan, value add-on core, 3 - education & training)
* Steve would love to take his plane and fly around to major cities and teach classes on how to manage businesses
	+ With that they would use Adilas to show and demonstrate what he is mentioning
	+ He also wants to go around the country and meet with accountants and show them how much more can be accomplished by using Adilas
	+ CPA with clients on Adilas - single login, can access all your clients, do oversight on business happenings and needs, this is another byproduct that could exist
	+ Doesn’t have to take up a license on Quickbooks, etc. Having clients on Adilas would make accountant’s lives SO MUCH easier at tax time - it could add so much value and ease to so many people
* Adilas Marketplace is supposed to be our next subject - all of the people that can help and play and support - all of the byproducts

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2/8/24 - Another note before Brandon and I got back into things today. From the meeting with Steve and Alan this morning --- some of the themes coming out even in this meeting are:

* Industry specific skins
* Business intelligence
	+ Job costing
	+ Manufacturing costs
* Byproducts - hopefully it can start to become even more apparent to everyone that there are so many byproducts that can be picked up and we can gain revenue from
	+ Talking about the Florida dog pedicure lady - so many byproducts that are already happening, how can we pick up more revenue on that??
		- Business consulting, training, education, custom code, etc., etc.
* Then the meeting with county for trails - what they kept asking was - what is your overall plan? What is the vision? What is the plan? They want to help if they see there is a good plan in place?
* Education and maintenance - such a need! There is as much value here as there is with new features, sometimes more.
* Keep encouraging ideas that are in line with the master plan, with where we want to go and head - don’t have to force feed things, we can just help encourage that natural needs they are starting to see
* Instead of forcing ideas or agendas, maybe staying just slightly out in front with forming a light plan, allow creativity and for others to fill in the details, but help encourage things to keep going in the direction we want it to go in