



FORGEROCK®

ForgeRock Customer Case Study

BY KIM MORRISON

Administrative

CUSTOMER CASE STUDY

ForgeRock and Administrata

| 01 |

[ForgeRock](#) have been an Administrate customer since 2014 and are still one of our biggest customers today. ForgeRock was founded in 2010 by a group of ex-Sun Microsystems employees who were keen to continue to develop Sun's open source identity software. ForgeRock aim to transform the way organisations approach identity and access management to make sure they can deliver the best customer experience possible.

ForgeRock makes use of Administrate's Training Management Platform on two levels. Not only do they use it to run their external training business, [ForgeRock University](#), but they also use it to help run their internal training department, to make sure their own staff receive the best training experience possible.

We're proud to have ForgeRock trust us to handle both sides of their training offering, and even prouder than ForgeRock are always extremely vocal in their praise of Administrate and their favourite parts of the system.



CUSTOMER CASE STUDY

ForgeRock and Embracing Administrative's Software

| 02 |

“Administrate lets me know within minutes the health of my global training business.”

**KEVIN STREATER,
FORGEROCK**



Taking on new software to help run your business can be scary, especially if you're planning on putting it in control of quite a lot of the day-to-day running of your business – and that's exactly what we want Administrate to do for you! Our Training Management Platform is designed to save you time by completing lots of administration tasks for you, so your time can be better spent on other tasks, like the things that make your business money!

We spoke to Lo Wright, Global Delivery Operations Manager at ForgeRock, about how she dealt with some of these fears about implementing a new system, and how Administrate proved there was no need to be worried about making the switch – all our software does is make you more successful!

6 Common Training Software Myths Dispelled

Most training operations have common objectives – namely, keeping better track of learner progression and the training itself, reducing time spent on admin tasks, delivering exceptional eLearning and of course, in the case of training companies, increasing course bookings.

However, the commonality can extend beyond their objectives. Training professionals often share the same concerns and objections to the adoption of new software and systems. We thought it might be helpful to share 6 of our most commonly encountered myths associated with training management software, along with some fantastic countering rationale from Administrate customer, Lo Wright, Global Delivery Operations Manager at ForgeRock University.

For context, [ForgeRock](#) is a multinational identity and access management software company headquartered in San Francisco, and a long-standing customer of Administrate. Training has always been an integral part of their company and they offer a global curriculum through ILT (Instructor Led Training), VILT (Virtual Instructor Led Training) and eLearning within the Administrate LMS (Learning Management System) to deliver self-paced training.

1. Fear of Change, New Systems & Loss of Control

It's so tempting when we have a set way of doing things to avoid 'rocking the boat'. If it's not broken, why try and fix it? The truth is, our established processes form the basis of our agreed norms and day-to-day routines. Naturally, breaking out of these routines to try something new or innovative is challenging and often not a top priority.

Even if you do accept that there might be a better way to do things, how do you decide the right direction to take and the best software for the task at hand? What if you choose something that can't scale with your business? These are all common fears and indeed, a study by Tversky and Kahneman, suggests that our brain's desire for loss aversion often alters our choices or stops us making decisions altogether. Lo suggests:

“ I've never really been one to fear change, change is a good thing. My fear came from a loss of control – could I trust Administrate to a) do what it needs to do and b) do it right

With the incredible pace of technological advancement and ever-evolving, [digital learners](#), the real risk isn't in the change itself, but in standing still and lagging behind your competitors. As Lo notes, “to progress or improve you need to change and grow with the times”.

2. Software Will Make Jobs Redundant

Hang on, if this software can do all these manual day-to-day tasks that I'm responsible for? What will I do?

It's true, one of the main advantages of software is the automation aspect – but rather than a threat, it's an opportunity. Another of our customers, Amarachi Okemiri of [CA LGMA](#), was delighted that software “eliminated several tedious tasks”. Making use of software removes the need to update endless spreadsheets and run through multiple manual processes, freeing up time to focus on



the bigger picture tasks – new course development, improving course delivery, updating course content etc. The key message? Software enriches jobs, rather than endangering them. Indeed, Lo's story would reinforce this:



I suppose there is a fear of software/technology making jobs redundant, but I never really felt that with Administrate, if anything it's actually helped me be able to do my job. I'm now able to dedicate my time to the projects that before had to take a backseat. Ultimately, my job has improved since using the software and ForgeRock University has been able to go from running 1x class every 4-6 weeks to running multiple classes each week. This is something we only dreamed of being able to do pre-Administrate.

In addition, Kevin Streater, Global Training Sales Director at ForgeRock, affirms:

"We've gone from having somebody who spends their entire time compiling emails, sending out emails, tracking spreadsheets... to someone who is now managing event delivery. They're overseeing the events rather than having to get into the deep details of each event."

3. Software Can't Help Us!

Of course every business has challenges unique to them and their industry, but you'd be surprised at the commonality we've observed within training operations, be they training companies, training departments or educational establishments. There's a very good chance that your burning issue, previously disregarded as unsolvable, has already been experienced by others and blood, sweat and tears have resulted in a solution or workaround.

We often hear a belief that 'off-the-shelf software' won't be able to help with my problem. While that may be true today, any software company worth its salt will continually develop its product and ideally have a visible [product roadmap](#) showing what their future development plan looks like. Most importantly, future iterations of the software should be shaped directly by customer feedback, so even if this new 'off-the-shelf' software doesn't solve your problem yet, a solution may well be in the pipeline. As Lo notes, relying on software is smart business:

Software may not be the answer to all of life's problems, but if we hope to grow as a company we need to know when to ask for help. If there's a platform out there that can enable us to grow how can it be a bad thing?

4. Software is Complicated!

Not true! Of course we can't speak for all software, but well designed software should be intuitive and easy to use once you've been guided through [implementation](#) and received proper training. Leonardo Da Vinci is [credited](#) with suggesting that "simplicity is the ultimate sophistication" and while our software isn't quite a renaissance masterpiece, we are certainly of the opinion that even the most complex problems can be solved with smart and simple solutions. Oh and we're proud to say that our software is rated 4 out of 5 for 'ease of use' on independent site [Capterra](#).

As a final blowing of our own trumpet, we're delighted that Lo agrees:

 *With any new piece of software there is always the fear of not being able to understand it, luckily Administrate is incredibly intuitive. It's very easy to use and before you know it, it becomes second nature.*

5. Software is Expensive!

We talk a lot about ROI (Return on Investment) within training businesses – it was even the subject of a [recent post on evaluating your training](#). The same principles should apply to your software too – the cost shouldn't outweigh the value delivered. Balance the cost of software with the potential to scale your business, if you could save 50% of your admin time and deliver 75% more courses, what would that do your bottom line?

Importantly, pricing should be [transparent](#) too. When evaluating software, be aware of any hidden costs in the form of surprises, maintenance commitments, or opportunity costs. Our pricing is simple, a cost per administrator, a cost per active learner and an implementation cost.

Also something to be aware of if you're considering building your own software, any development costs are exclusively yours. With bought software, costs are effectively shared across a customer base, rather than you picking up the tab.

6. I Could Build Something Better

Building your own software, bespoke to your exact needs, could well achieve the desired outcomes but as we discussed in our [build vs. buy post](#), the debate is lengthy and there's definitely an argument to exercise caution here. That said, we're aware of the irony, Administrate being born from a training company building their own solution due to a lack of any viable commercial alternatives being available at the time!

Scan the feature list of potential software solutions, do they contain at least 65% of your must have feature list? If they do then odds are it's going to be successful in achieving your overall objectives.

Finally, don't forget that [integrations](#) expand the rationale for using a bought software solution. What if you could manage your Xero invoicing and training operation within a single platform? Established integrations with other essential tools means more time saved and a simpler overall solution!



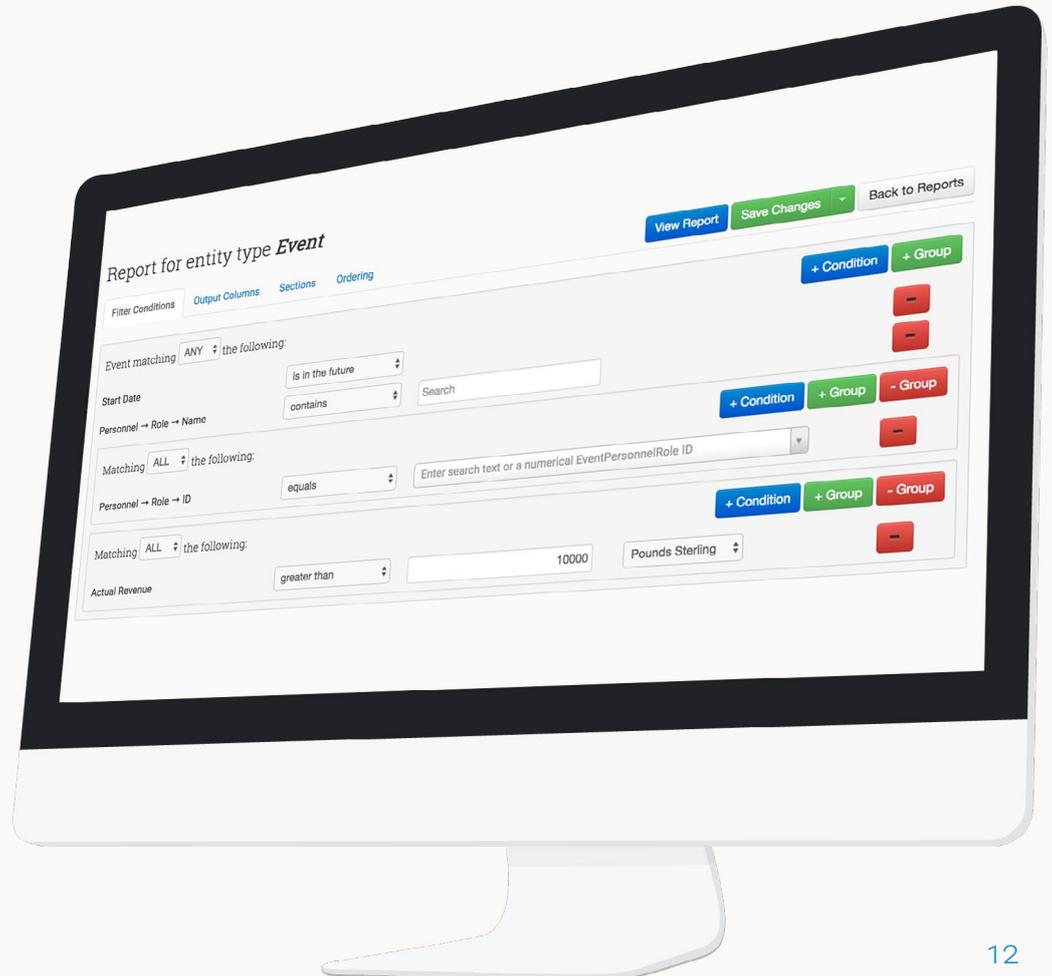
CUSTOMER CASE STUDY

ForgeRock and Administrative Reporting

| 03 |

One particular feature that makes the staff at ForgeRock's lives much easier is our reporting system.

"I love the reporting feature. The one thing that people will always say to you is it's always very difficult to find accurate statistics on any kind of training intervention, or use data effectively to provide ROI - you can do that in Administrate. Because it reports at such a molecular level it allows you to drill right down into the information that you need to get to, and do it really quickly - it's almost like a wizard. It allows you just to build reports and build data in a really easy to use interface. One thing that I love about it more than anything though is it's so easy, it's so intuitive - it thinks like a training person thinks, you know. It follows the way that they would do things."



How it Works

Building a report within Administrate is really easy. To get started follow these simple steps:

1. Choose: Choose the data entity you want to start the report from. There are lots of different entities, all of which have numerous fields, within Administrate, but it's easy to find the one you're looking for with our data browser.

2. Constrain: Add constraints to the data you're looking at. For example, if you're looking at the Contacts entity, you might want to add a constraint to only show those Contacts within a specific city. We have a huge number of constraint options to choose from to help you get the exact data you're looking for.

3. Present: Now that we have the data we're looking for, choose the fields (and how they're sorted and named) that you want to display.

4. Save (optional): You can save the report for later viewing and sharing with colleagues. Reports are accessible through our Document Management System and also from the master report list.

5. Distribute (optional): Set up a distribution list and schedule to automatically email people in your organisation reports that you've build within Administrate. We asked Kevin Streater, Director of Global Training Sales at ForgeRock, to give us what he thought were the 5 Essential Training Management Metrics that every training company needs to be able to see and use to measure their performance.

All of these reports can be pulled together using the data you have stored within Administrate, and ForgeRock use these reports every day to make their business run smoother and continue to be successful.

5 Essential Training Management Metrics

It's a familiar problem – data. Lots and lots of data. A spreadsheet for one customer, another for a group of students/learners, one for that project and so on. The wealth of data that a modern training operation generates can be

quite overwhelming and data overload is rapidly becoming one of the principal productivity barriers for training managers. It's a problem that isn't going away – as Business Data Expert Bernard Marr [highlights](#), experts are predicting a 4,300 percent increase in annual data production by 2020:



If a company is already struggling to store and analyse its own data now, it will be drowning in data in the next few years.

Cutting through the high volume of data and determining the vital metrics that can make a tangible difference to your business has never been more important. We recently sat down with one of our customers, [ForgeRock](#), to discuss how they use our [reporting engine](#) to do just that on a daily basis. It's worth noting that before they started using Administrate, reporting was a significant business challenge. As Kevin Streater, Director of Global Training Sales at ForgeRock laments: *"We had mountains of spreadsheets to go through, so we didn't do it"*

To stop you drowning in data, here's 5 essential metrics to help evaluate the success of your training:

1. Student Days

Keep a close eye on the amount of learning days you're delivering to students each month. Evaluate your current resources and set yourself a target so that you have a realistic goal for your team to aim for. Measuring the number of 'Student Days' on a monthly basis gives you a clear understanding of your training departments output, allowing you to quantify the organisational impact of a training department or capacity gaps and the opportunity to increase sales within a training company. An important metric, Kevin of ForgeRock notes: *"The Student Days report runs the business"*

2. Average Fill Rate

Do you know how full your classes are? Are courses consistently under capacity? Monitoring your Average Fill Rate helps you understand the answers to these questions and quickly establish whether your courses are over or under subscribed.



Make qualified decisions on whether you need to run additional courses based on high existing course fill rates, or cancel courses that have low attendance. Give informed quick decisions when asked for a discounted or free course placement by partners. Reporting on your Average Fill Rate also helps establish if courses aren't profitable – perhaps they're running below minimum break-even thresholds (see point 5).

3. Average Course Duration

While some courses you run may well have a defined start and end date, others may be more open-ended – for example when making use of a self-paced eLearning approach. In these instances, understanding the Average Course Duration can help you determine any stumbling blocks for your learners. Are some learners stalling? Can you help get them moving again? Perhaps some students are completing your course ahead of schedule and would benefit from the provision of additional eLearning material so that they can ['go beyond the course'](#).

Understanding Average Course Duration helps keep track of learner progression and optimising the delivery of your training courses.

4. Class Cancellations

Are you noticing a high rate of students withdrawing from their courses? Monitor trends in Class Cancellations to help establish whether you've built enough flexibility into your courses. For learners with particularly busy or erratic workloads, consider offering self-paced courses or training delivered through eLearning to help fit around their schedules.

5. Break-Even Reporting

Not strictly a metric in itself, but vitally important in running a profitable training company – evaluating your weekly, monthly or quarterly break-even points will ensure you maintain high level of profitability across all the courses you're running. Get a clear handle on resource allocation and outgoing costs alongside incoming fees to understand the true cost of running a course and whether cost recovery strategies need to be in place. Establish your break-even points and quickly understand which courses are your most profitable.

The Value Of Reporting

Access to this business-critical data helps training companies understand resource allocation, costs and ultimately the profitability and productivity of their training operation. It can help accelerate company growth and, properly disseminated, it ensures that everyone in the business has a clear understanding of their role and impact on performance.

In addition to the above, this level of reporting is especially useful at improving a training department's visibility and transparency within the wider organisation. Training company or training department, reliable reporting is essential in order to make informed business decisions. Use these metrics to get a better understanding of seasonal training trends to help with forecasting/staffing, but remember that increasing head count isn't always the right solution when the strains start to show with a growing training operation. As Kevin of ForgeRock notes:

One of the most common problems when you're running things manually from spreadsheets is scaling your operation. The standard response is to expand the team and hire new staff. Actually the answer should be to invest in your system infrastructure.



CUSTOMER CASE STUDY

ForgeRock and “How Administrative Changed our Training Business”



Kevin Streater

We were lucky enough to have Kevin Streater attend LITE 2017 and speak to our attendees about how Administrate changed their training business, which further cements the great relationship we have with ForgeRock as a customer, and helps showcase all the positive effects we have had on their business in the past few years.

Here are some of the main points which Kevin discussed, and how Administrate has helped them achieve these changes.

It's All About Identity

What's important to ForgeRock and how does that relate to our training business...it's very much about identity.

One thing that ForgeRock thinks is really important is the identity of the people they interact with as a business, as well as security and keeping all your details and connected devices secure. As ForgeRock consider their learners and the technology they are using, they need to think even more about the connect environment they are in.

ForgeRock think it's extremely important for customers to just have one record and one identifier so you can keep track of all their information in one place, without worrying about it getting lost or jumbled. In the identity world, this identifier is usually someone's email address, which is what a lot of Single-Sign On (SSO) services use to allow you to login and use one account to access lots of different platforms and websites.

Administrate actually teamed up with ForgeRock to [introduce SSO for our Training Management System](#), because it was a feature that Kevin recognised was vital for us to provide. We love working together with our customers to tackle any problems they might be having and coming to a solution together!

Customers Are at the Centre of Everything

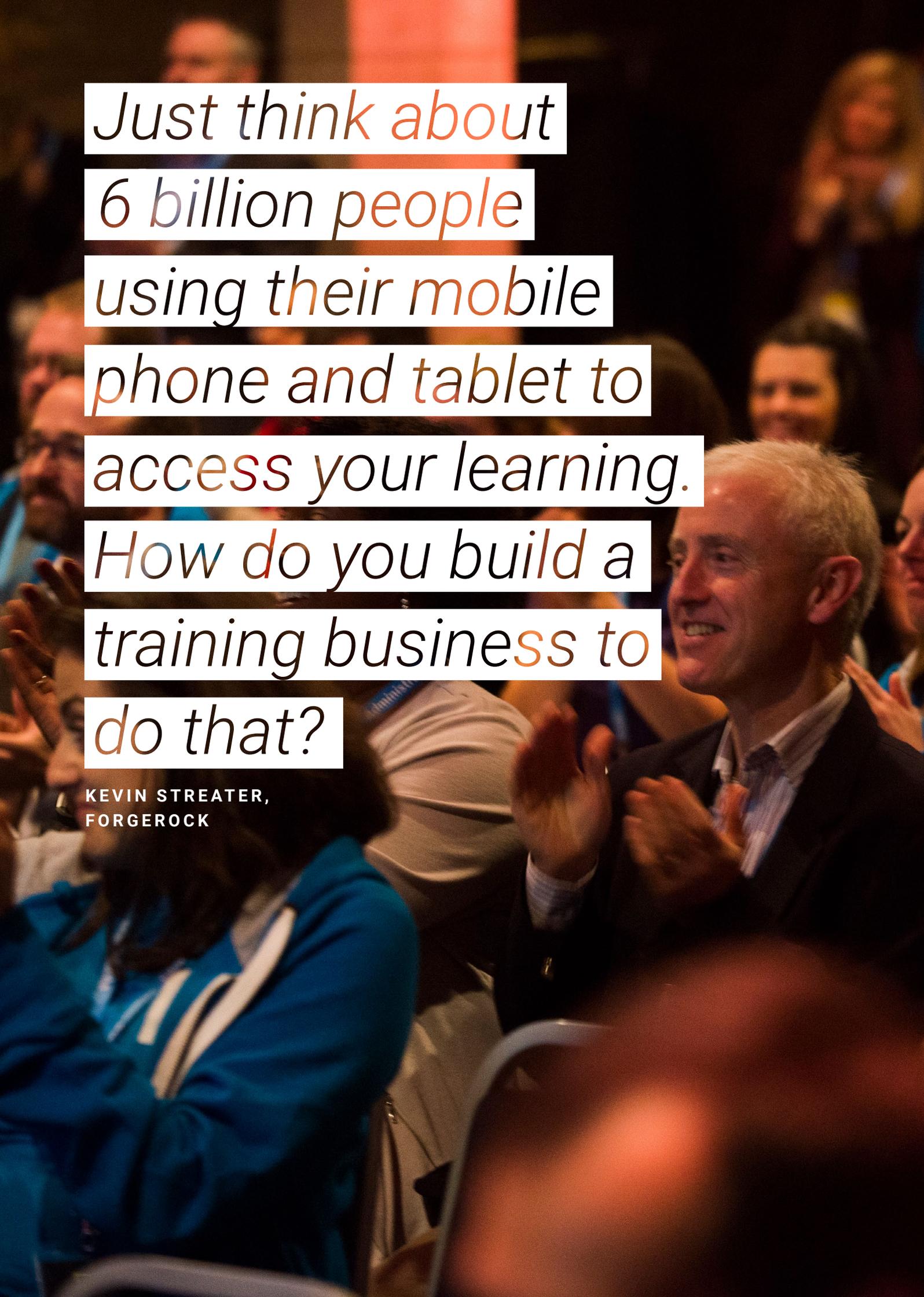
Customers are extremely important to ForgeRock. They have over 500 customers, which are all large, global, enterprise customers, so it's vital that ForgeRock maintain a good relationship with them at all times, as well as putting their needs first.

Customer retention is extremely important to ForgeRock, because the cost of on-boarding a new customer is so high compared to the cost of retaining an existing customer. This means doing everything possible to make sure that your customers are happy with you, your product, and their experience with your business.

How do you make your training experience personalised...so that they feel like the training programme/education experience they're coming on is the one that's been built for them? Because if you don't do that, then your customer experience isn't going to be what it could be.

For ForgeRock the customer experience needs to be frictionless, personalised, and connected – and that's where Administrate comes in. We allow you to personalise all your interactions with your students, including each student's individual instance of your LMS, communications sent to students from Administrate, certificates sent to students, surveys sent to students, etc.

You can also create personalised [learning tracks](#) for your students, which work to track a specific path of content, courses, and objectives for your students which



*Just think about
6 billion people
using their mobile
phone and tablet to
access your learning.
How do you build a
training business to
do that?*

KEVIN STREATER,
FORGEROCK

you want them to achieve. This can be different for every student if you need it to be, so each student is always working through the path that is the most relevant to them as an individual.

Keep Track of Everything

We have to identify our customer. Then we have to start creating a profile around that customer...we need to know what classes have they been on, what communications have we had with them, have they taken any certifications... what's the profile of each of our users?

Using Administrate allows you to [keep all your information about each of your customers](#) in one place. On their contact record you can store all the information you have about them, such as their contact details, and you can also view all the communications they have been sent over time, as well as which courses they are booked on to or have been booked on to in the past. This means you always have a complete picture of your customer, and every piece of information you have about them as a business is stored in one central reference point!

Building a Training Business to Support Growth

Just think about 12 billion people using their mobile phone and tablet to access your learning. How do you build a training business to do that?

Not only does Administrate offer you a complete training management solution, we also provide our customers with a [Learning Management System](#) (LMS), meaning they can offer eLearning to their customers. This is a great option if your training doesn't have to be based in a classroom, and gives you a chance to attract a much wider audience of customers than just those people who can physically make it to your training venue.

It is also a lot more convenient for your students, as they can complete their learning at their own pace, wherever they want to! Administrate will keep track of all the learning your students have completed, so it's easy to track and get an overview of where all your students are in the learning process at any time.

Make Sure Your Admin is Slick

It's all about slick administration...When Sun Microsystems was at the height of its growth, around 2000/2001, I looked at the number of staff we had to deliver the same amount of content and the same number of students, and it was 10x the number of staff that I have globally. To do the same job.

Kevin lists a few things that an efficient training administration must have:

- Be run on The Cloud.
- Be able to [maintain your relationship with your customers](#) so you can track the journey they are on. This all needs to be captured within your Training Management Software so you can create a rich customer profile.
- You also need to be able to [contact your customers](#), and the best way to do that is still email.
- Be able to [connect your suppliers](#) to this Cloud environment.
- Be able to tell me how well the business is running with good [reporting](#).

Luckily Administrate is able to check all these boxes for ForgeRock!

Not only this, but a huge benefit for ForgeRock has been out amazing administration reducing skills have meant they have been able to reduce their headcount requirements significantly.

The big benefit, certainly for ForgeRock has been, I've not increased the headcount in three years, and yet the business has grown 100% or more every year. And it's only because we've been able to bring in technology using this approach that's enabled us to grow the business at that rate.

This is obviously a huge benefit for any business, as it means being able to complete even more work that you could before, but not having to spend additional money to hiring and paying new staff members.

Outstanding Reporting

The reporting – actually understanding what the business is doing – is really critical.

As mentioned earlier on in this case study, ForgeRock love our reporting system, and consider it a vital feature to ensuring their business runs effectively.

Administrate



Administrate

Interested in Administrate?

We would love to show you just how Administrate can work as well for your business as it has for ForgeRock over the years!

Our Training Management Platform is designed to tackle all of your administration work for you, leaving your business free to tackle other important tasks, while ensuring everything that needs to get done still gets done!

If you're interested in seeing how Administrate could work specifically for you and your business, why not book a personalised demo with one of our team?

UK: +44 131 460 7350

EMAIL: INFO@GETADMINISTRATE.COM

USA: +1 (406) 322 3312

WEB: WWW.GETADMINISTRATE.COM

MENA: +961 71 419 404