

What is **Training Management Software**?

In this comprehensive guide you'll discover what training management software is, why they were created in the first place, and how one could help you transform your training operation.



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Part One

What is **Training Management Software**?



Part One: What is a Training Management System

A general overview...

Training management systems (TMSs) or training management software are a relatively new thing. Hey, you might not even have known they existed until now. But, regardless of whether the name rings a bell, every existing training operation will already have some sort of management system in place, including yours. Your current system might not have a flash interface – it might just be a collection of spreadsheets that you use to manage your training operations – but it still does the job.

The question is – is your current system merely helping you to scrape by, or is it providing you with the competitive advantage that you need in order to excel in your industry?

Definition:

Simply put, a training management software is a streamlined version of what you already do on a daily basis. It's designed to organise your training delivery and optimise the commercial aspects of your training business.



Part One: What is a Training Management System

How does a training management system work?

Imagine being able to manage your entire training business from one central hub. In reality, this is totally achievable – instead of stitching together a patchwork system of programmes to manage different tasks, a TMS offers one unified solution.

Gone are the days of manually inputting the same data across multiple platforms – time and time again; a training management software allows you to schedule courses and presenters, track payments and business growth, and provide relevant marketing, all under one roof.

Having one software as top dog means your data stays fresh and responsive to changes made in real-time, plus automating manual processes like the ones listed above is seamless and stress free as all aspects are already connected and in sync with one another.

Time saved on administration can be spent on transforming your training business. With a TMS at the core of your operations, you can gain valuable insights that give you the edge over your competitors.

The end result:

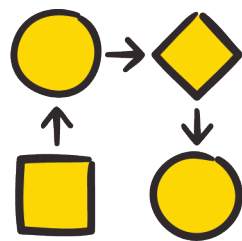
An up-to-date, responsive, efficient training provider business.



Part One: What is a Training Management System

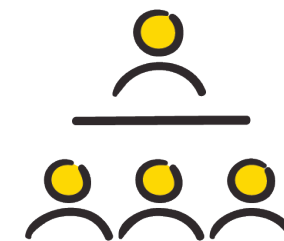
What features are included?

Broad definitions aside, let's get an idea what a pure, purpose-built training management system for training providers might look like:



Back-office administration features: (to make your employees' lives easier)

- **Organise course logistics and resources** – for example, schedule courses, presenters and rooms
- **Automate manual tasks** – e.g. send registration confirmations, reminder emails and surveys
- **Manage finances** – for example, capture orders, accept payments online and issue invoices
- **CRM and record management** – store each customer's upcoming and past training, financials, and sales interactions
- **Reports and business intelligence** – run reports to provide information to make data-driven business decisions



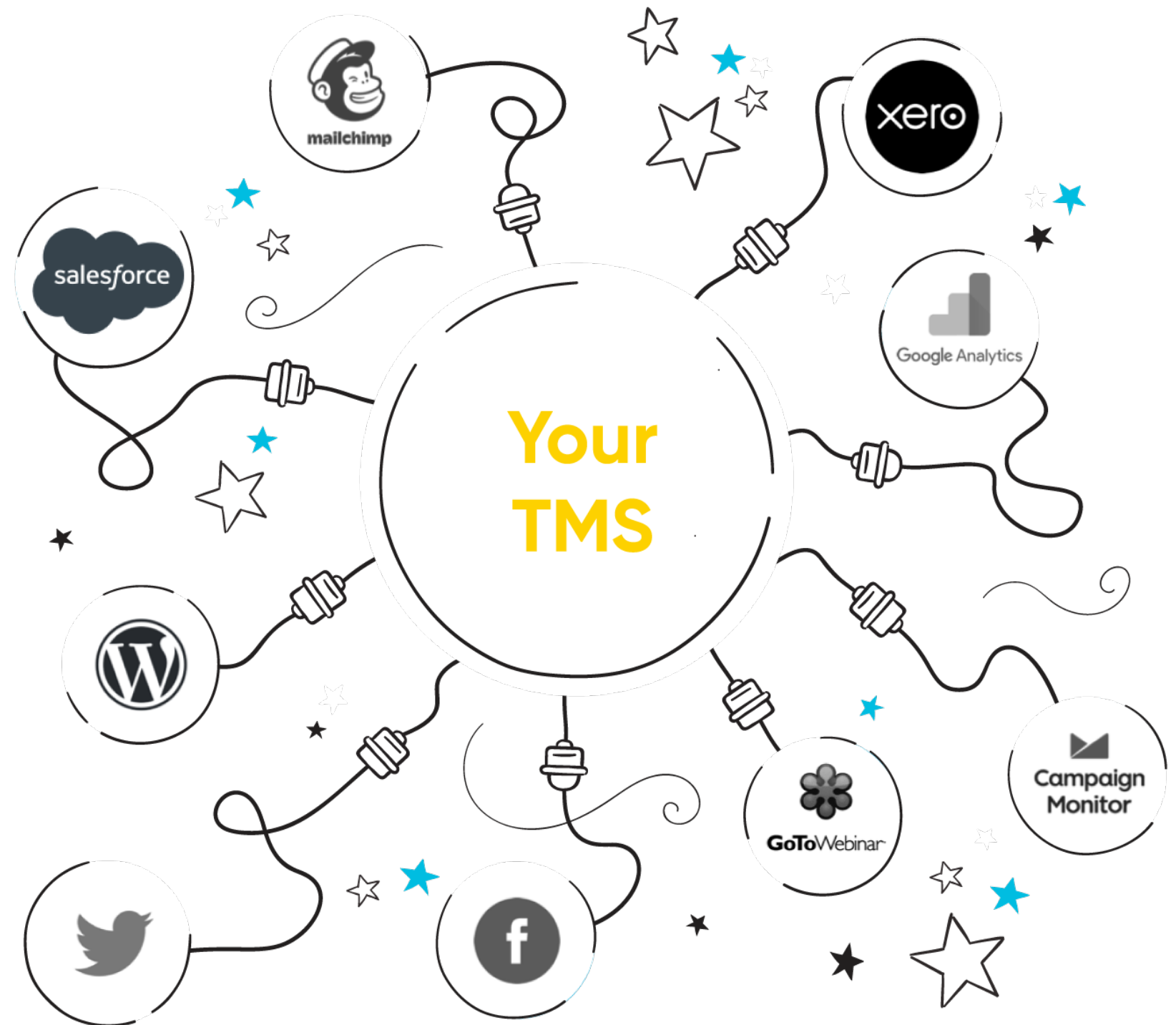
Front-of-house features: (to make your customers' lives easier)

- **Website** – build a website from scratch or integrate a TMS into an existing site
- **Online registration** – accept online registrations and make your shopping cart a stress-free experience
- **Customer portal** – provide a self-service portal for registrants and a company portal for team managers

Part One: What is a Training Management System

Integrations to complete the puzzle

A good training management software will also allow you to integrate with a suite of specialist software systems. Think of a training management system as a strong foundation upon which you can build. This means it isn't necessarily the only tool in the kit, however it is the key one. You may use other tools in your business, but it's a training management software that ensures all these parts talk to one another.



Part One: What is a Training Management System

Integrations to complete the puzzle

Building blocks to add to your tech stack:

- Accounting system – keep on top of transactions and breeze through your bookkeeping duties with an accounting system that ties in with your training management software.
- Advanced CRM – synchronise and track your customer interactions so you never miss a lead.
- Learning Management System (LMS) – host engaging online course content that can be accessed anytime, anywhere.
- Webinar delivery – increase your reach with remote learning delivered live online.
- Marketing tools – build newsletters and campaigns that deliver registrations to your doorstep.
- Online survey tools – get answers fast and use this customer feedback to improve future user experience



Part One: What is a Training Management System

A TMS is not a...

Niche CRM

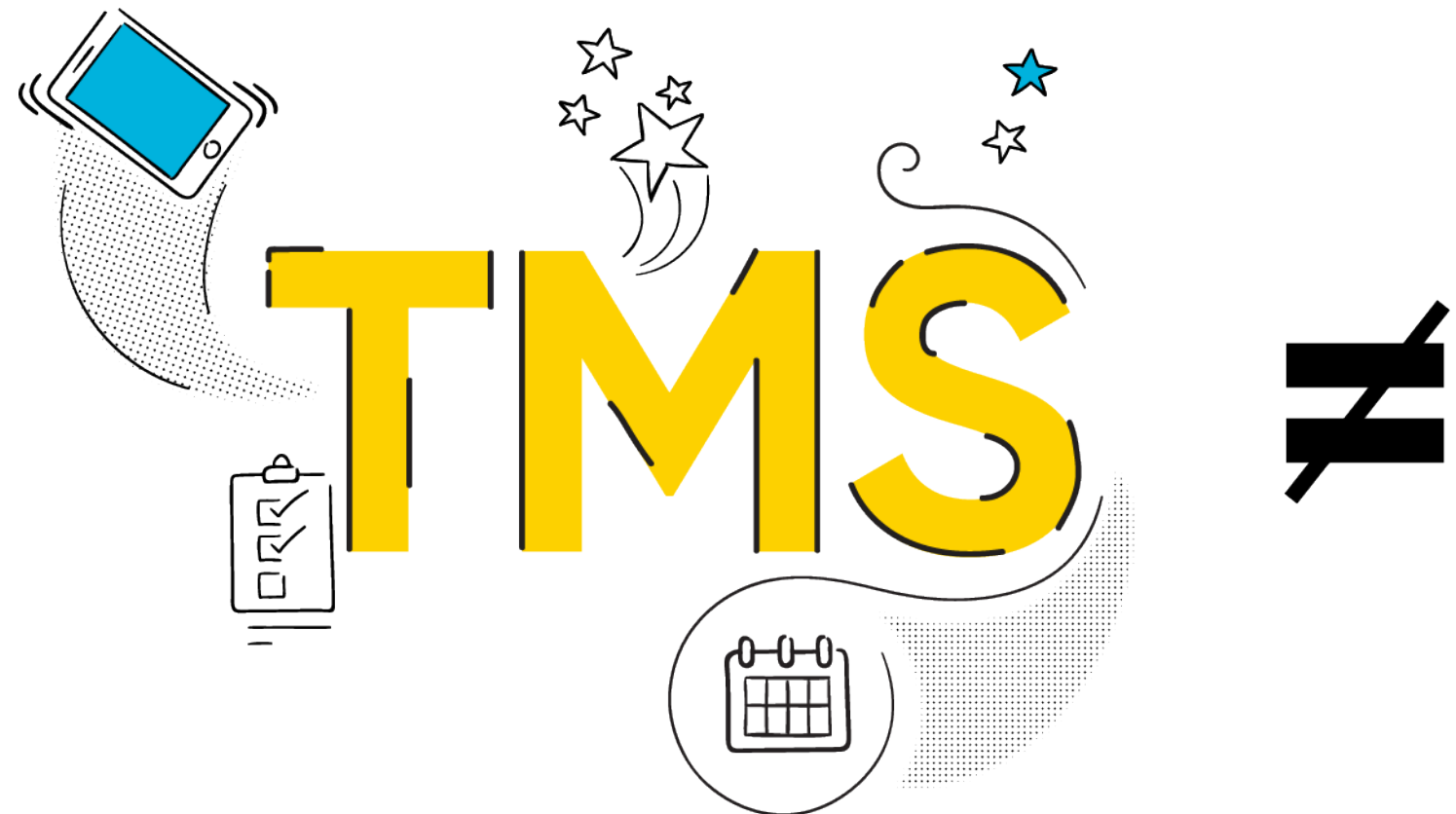
A training management system may have an inbuilt CRM, but that's just the tip of the iceberg. A CRM manages customer relationships, whereas a TMS will help you with your entire training journey.

Purely an administrative tool

A training management software will help reduce the day-to-day administration tasks, but let's think about the bigger picture here. To run a successful training business you also need to grow registrations and create competitive advantages. A good TMS will help you do this.

A solution that requires no effort

Purchasing a TMS won't automatically transform your business; you cannot buy it, leave it, and expect it to do all the work. What you put in is what you get out, so to see real value in your investment you must upskill staff and use it in conjunction with a good business strategy.



Part One: What is a Training Management System

A TMS is not a...

A one-size-fits-all solution

Training management systems are built with training providers in mind, but every training organisation has its own unique requirements. Therefore, it's impossible for one TMS to cater for all. When you're choosing, aim for one that hits 80-90% of your requirements. Nothing is perfect, and there's always room for improvement. This brings us on to our final point...

A static solution

Unlike a spreadsheet, expect your training management software to evolve. One benefit of using a cloud-based SaaS solution like a TMS is that it is constantly being re-released with new features. This will keep you up-to-date and responsive to your customers' needs. That 10 – 20% you don't get today may come in the future.



Part One: What is a Training Management System

Who uses a TMS?

We've given a brief shout out to the front-of-house features of a training management software, however it's first and foremost a staff-facing platform. Therefore, the people that get up close and personal with it on a daily basis are generally training managers, administrators and the staff involved in selling instructor-led training (ILT).

A TMS can cater to training organisations of all sizes, however, every training organisation has its own special needs. You may find that a TMS can slightly favour one type of audience over another; it's up to you to identify your requirements so you know what boxes to tick.

1. Internal training

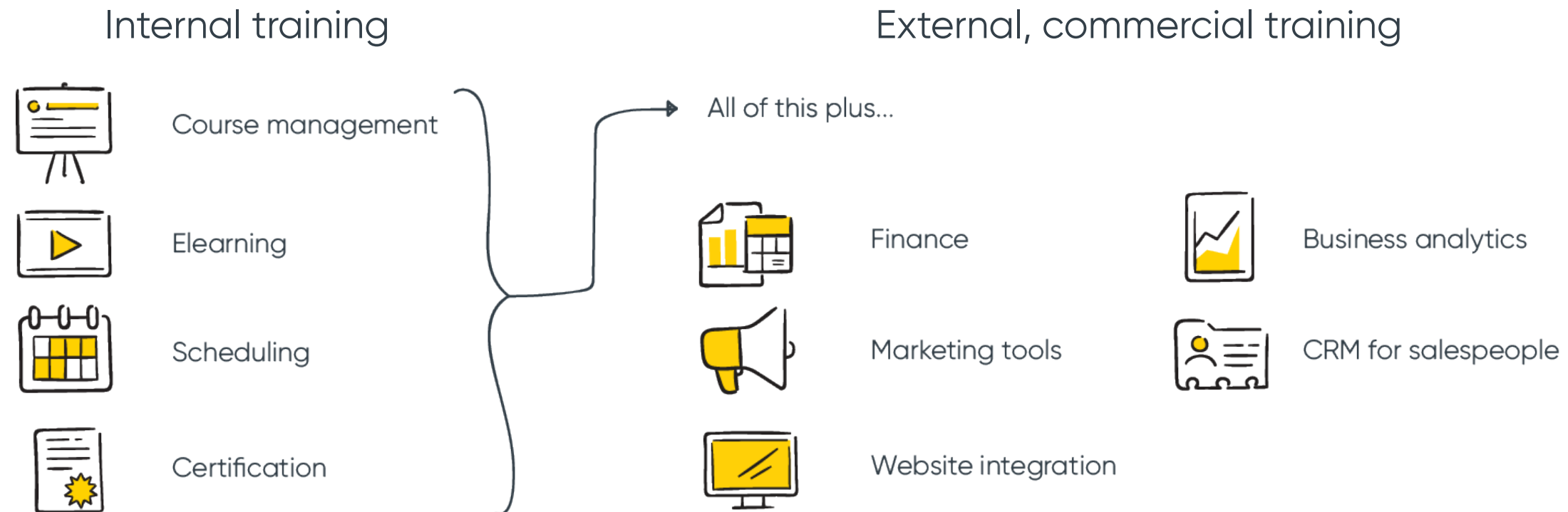
Training people who do not pay to attend a course, for example upskilling your staff.

2. External, commercial training

Training people who pay to attend a course

Part One: What is a Training Management System

Who uses a TMS?



The key practical differences between these two audiences is that external, commercial training requires additional features that internal training operations may not need, such as:

- Financial – capture payments and integrate with your accounting system.

- Website integration – an ecommerce website is usually your store front.
- Marketing tools – social media, email marketing, discounts.
- Business analytics – understand costs, revenue, profitability and breakeven points of scheduled courses.
- CRM – for your sales team.

Part One: What is a Training Management System

Who uses a TMS?

Within both of these two broad audiences, there are a plethora of training operations, including:



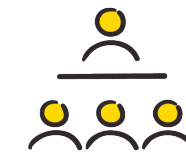
CPD training providers

Educate professionals as part of a formal continuing education (CPD/CLE) programme.



University short course departments

These often operate quite separately from an institution's main faculty/undergraduate departments.



B2B training providers

If a profession or workplace task exists, there will likely be specialist training providers to service it



In-house training/L&D teams

These will be focused on providing in-housing training and learning and development opportunities for their staff and partners.



Community education providers & not-for-profits

Focused on helping people or growing awareness. Their needs will be less focussed on financial gain.



Part Two

Why is a **TMS** so important?



Part Two: Why is a TMS so important

Five problems in the training industry

Training operations around the globe are using systems that are not fit for purpose, and this leads to unnecessary work and wasted growth opportunities.

There is an administrative gap

Do you still use spreadsheets to store and sort data? Ditch the unnecessary manual processes and utilise your staff in areas that cannot be automated.

This administrative gap is expensive

Delivering instructor-led training (ILT) is resource-intensive. Whether you're offering face-to-face sessions, virtual learning, or a mixture of both, there's a ton of administrative tasks to juggle in order to pull off a smooth, successful course.

Staff costs, whether salaried or contracted, are by far the largest cost in most training operations. Every hour spent in administration is costing your business money and brain-power that could be better spent elsewhere.

Generic systems are used to fill this gap

Training providers often make-do with a handful of generic pick'n'mix solutions, such as CRMs, event management tools, website CMS plugins and survey administration apps. These softwares all work as standalone solutions, but if you want to make your data flow between them it can be difficult and expensive.



Part Two: Why is a TMS so important

Five problems in the training industry

There is no training data

If the different systems in play don't communicate with one another, you will experience a disjointed back-office, which will impact your users' experience.

Example: does your email marketing tool allow you to create and send personalized emails based on course attendance data and accreditation levels? If the answer is 'no', then you might be guilty of bombarding your registrants with generic, irrelevant messages.

Training companies are struggling to get ahead

Users now expect a slick online experience for everything, from managing their online banking, to scanning personalized deals on Amazon. Consumers have become accustomed to interacting with online retailers that have intuitive websites, apps and portals, and this sets the bar high for training companies.

Training companies generally lack the business intelligence and reporting needed to improve their business. Many are missing out on having key SEO and CRO features that help drive traffic to a website and increase website conversions. On top of this, even with adequate website traffic, training websites may not have the processes in place to scale their business; e.g. they may lack the payment facilities required to grow course registrations.



Part Two: Why is a TMS so important

These problems can result in...



Inefficient business operations:

- Simple tasks being carried out manually.
- Duplication of data when manually moving it between systems.
- Double booking of presenters or venues because there is no system in place to manage availability.
- Data entry from paper attendance sheets.

Stunted business growth and registrations:

- Too much time spent on tasks that don't add any long-term value to the business.
- The majority of revenue being used to pay staff costs instead of being invested in long-term efficiency and growth.
- No marketing tools available to generate leads and increase brand awareness.

Poor user experience:

- Tasks being missed or delayed and registrants experiencing the knock-on effect of this.
- A website that is out of date, hard to navigate, or non-existent.
- No option for registrants to self-manage their details, transfer to other courses, download their past certificates or check the CPD/CLE points they've earned.

Part Two: Why is a TMS so important

Benefits of a purpose built TMS

The world's leading training organisations are scaling up faster and more efficiently by putting training management systems at the heart of what they do. If you decide to follow suit, a training management system will help you:

Save time

Wave goodbye to a 'to-do' list full of invoices, emails, paper attendance sheets and website content updates. The extra time you shave off your daily chores can be used to drum-up new leads and partnerships.

Crush sales targets

Go that extra mile by choosing a training management software that not only reduces administration, but boosts sales and crushes targets. Look out for polished marketing tools, friendly registration forms, and features that help you with your website's SEO and CRO.



Part Two: Why is a TMS so important

Benefits of a purpose built TMS

Pull out all the stops for your customers

Automate your basic admin tasks and your customers will see a world of difference. Make sure your registrants are always kept in the loop by informing them of course changes in real-time, sending them relevant emails, and transforming your website into a helpful, accessible course resource.

Be scalable

Size needn't matter — you can double your operations with a scalable training management software. It can be hard to compete with other training organisations in your industry, especially if they have size on their side, but a TMS can help you level the playing field by streamlining your training delivery, and optimising the commercial aspects of your training provider business.



Part Three

How is a TMS different from...



Part Three: How is a TMS different from...

Learning Management System (LMS)

The general software market is saturated with systems – each designed to do a different job – however the training management software industry is tight, and there are only a handful of genuine solutions specifically built for training organisations. As it currently stands, the majority of training providers make-do with a range of systems; we've run through three of the typical options used to fill the TMS-shaped gap.

What is an LMS?

A learning management system (LMS) is a type of software dedicated to delivering online learning. Unlike a training management system, an LMS is mainly focused on the experience of the end-user. This type of system allows you to create and manage e-learning content, enrol and communicate with students, and track and assess their performance.



Part Three: How is a TMS different from...

Learning Management System (LMS)

Who uses an LMS?

- Universities who manage their students' learning within a degree programme.
- Large corporations who provide and track the learning journeys of their internal staff.
- Training companies who host self-paced or blended learning modules online.

Do I need an LMS?

You will need an LMS if you provide some form of ondemand e-learning. It will help your business create personalised learning experiences that can be completed anytime, anywhere.



Part Three: How is a TMS different from...

Learning Management System (LMS)

Can an LMS run my training business?

The short answer – no.

Learning management systems are great for managing individual learning journeys, but they fail to cover the complex back-office processes involved in face-to-face instructor-led training (ILT) – and often don't include ecommerce features to sell your elearning content. An LMS is focused on the delivery and tracking of virtual courses, and these requirements are very different to the wide range of resources needed to run a commercial training business.

An LMS would allow you to provide an engaging, varied collection of course material for your online learners, but would leave you empty handed when it comes to the e-commerce, logistics, administrative and financial aspects of your training business.

Examples of LMSs



Litmos
by CallidusCloud



Part Three: How is a TMS different from...

Event Management System (EMS)

What is an EMS?

From planning to post-production, an event management system can oversee the entire event lifecycle whilst also micromanaging the mundane processes. It allows you to reduce administration by automating your registration, ticketing, seating maps and analytics. Planners who use event management systems see success through attendee satisfaction, revenue and integrated social marketing tools.

Who uses an EMS?

- Conferences and summits who run one big event and need to manage delegate experience.
- Organisations who run forums, award ceremonies, and expos.

Do I need an EMS?

If you run one-off events and courses then an event management system would be a sufficient tool to use on its own. However, a TMS includes this operation within its function, so it wouldn't be practical or cost-efficient to have both.



Part Three: How is a TMS different from...

Event Management System (EMS)

Can an EMS run my training business?

Short answer — maybe.

On the surface, events and courses are similar in nature: they both require a venue booking, a smooth registration process, effective marketing and the ability to run reports and surveys. Dig a little deeper and you'll find they differ in a crucial way: event management tools focus on managing one-off events, whereas training providers deliver recurring courses.

Why does this matter? Each course is treated as its own entity in an EMS, whereas a TMS treats them like a family.

The benefit of having all your courses related to one another lies in the ability to share information and processes; this, in turn, reduces the amount of administration you need to do. Running a programme of recurring training in an EMS doesn't scale, therefore you wouldn't be able to run multiple courses at an efficient rate.

Additionally, EMSs focus mainly on the ticketing tasks in an event; this is not so good for growing repeat business through a loyal customer base.

Most TMSs will be able to handle your recurring courses and your one-off events. So why adopt both when you can kill two birds with one TMS shaped stone.

Examples of EMSs

cvent

BIZZABO

eventbrite



Part Three: How is a TMS different from...

Customer Relationship Management Software (CRM)

What is a CRM?

A CRM is a central system that stores every piece of information and interaction relating to your customers. Additional features include the ability to add notes, schedule follow-ups, deliver actionable insights and integrate with social media.

A CRM is a great reference to help staff provide personalized customer service and close sales; it ensures the quantity of your database doesn't affect the quality of your service.

Who uses an CRM?

Every organisation that maintains an ongoing relationship with customers or stakeholders uses a CRM of some form.

Do I need an CRM?

It's all about scale. If you're only managing a handful of customers, you may not need a dedicated CRM to keep on top of your relationships. Many TMSs have inbuilt CRMs that would be sufficient for the needs of even a medium-sized training businesses.

On the other hand, if you're a much larger corporation with a big sales team then you may need a CRM to keep track of your business leads.

CRMs can often be integrated with TMSs. This is handy if you are part of a business that offers services outside of the training industry, as it lets you have a single view of a customer across all of your business units.



Part Three: How is a TMS different from...

Customer Relationship Management Software (CRM)

Can a CRM run my training business?

Short answer — unlikely.

Think of a CRM as a big phonebook; its main purpose is to record customer data, purchase history and communications. A CRM doesn't have the commercial tools you need to grow your business; nor does it have the functionality to simplify tasks involved in managing courses, presenters or accreditation.

Examples of CRMs:

HubSpot



Checklist

Are you ready for a TMS?

- ✓ Are you sending out emails, generating invoices, updating your website, or reporting on your training operation manually?
- ✓ Have you got the same information sitting in multiple systems?
- ✓ Do you use spreadsheets to record registrations, track attendance or tasks?
- ✓ When you change the time of an event, does your website automatically reflect that?
- ✓ Are you making avoidable, human-errors due to the amount of calculations or manual processes you need to do?
- ✓ Do all your systems talk to each other, or do you find yourself having to manually ensure they contain the same information?



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