

# Process Training Works:

**Making System Changes Stick  
for Pension Funds**



# Our Speakers



**CAROLE JARVIS**

**Sr. Training & Development  
Specialist**

Carole is a seasoned Learning and Development Specialist with over 20 years of experience in public sector training.

She has led training for nearly 10 pension system implementations, working with multiple PAS vendors to design strategic, process-driven learning programs that enable sustainable organizational change.

# Our Speakers



**NICOLE MATTHEWS**  
Sr. Training Specialist



A seasoned Learning and Development Specialist with nearly a decade of experience designing impactful training programs that drive organizational transformation.

She has led major pension system training initiatives and specializes in creating role-based learning pathways that support both onboarding and continuous improvement.

# Agenda



- 01 What is Process Training?
- 02 Why System Training Alone Isn't Enough
- 03 Bridging the Gap with Process Training
- 04 Designing Engaging Process Training
- 05 Key Takeaways & Lessons Learned
- 06 Q&A & WrapUp

# Who We Are: Linea Solutions



**Linea Solutions** is a consulting firm specializing in modernizing and improving operations for pension and benefit organizations.

## What We Do:

- Guide clients through business transformation, from strategy to execution.
- Support major system implementations and process improvements.
- Deliver customized training and change management solutions.

## Our Expertise:

- Pension and benefit administration systems.
- Business process reengineering.
- Stakeholder engagement and training.

We bridge the gap between technology and the people who use it.

# Let's Hear From You

POLL # 1

What best describes your current role or focus area?



# Webinar Objectives



BY THE END OF THIS SESSION, YOU WILL BE ABLE TO:

Differentiate between process training and system training to better plan for your team's success.

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Recognize common pitfalls when relying solely on vendor-led system training.

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Apply process training concepts to bridge the gap between system functions and day-to-day workflows.

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Design more engaging, scenario-based process training aligned with user roles and business operations.

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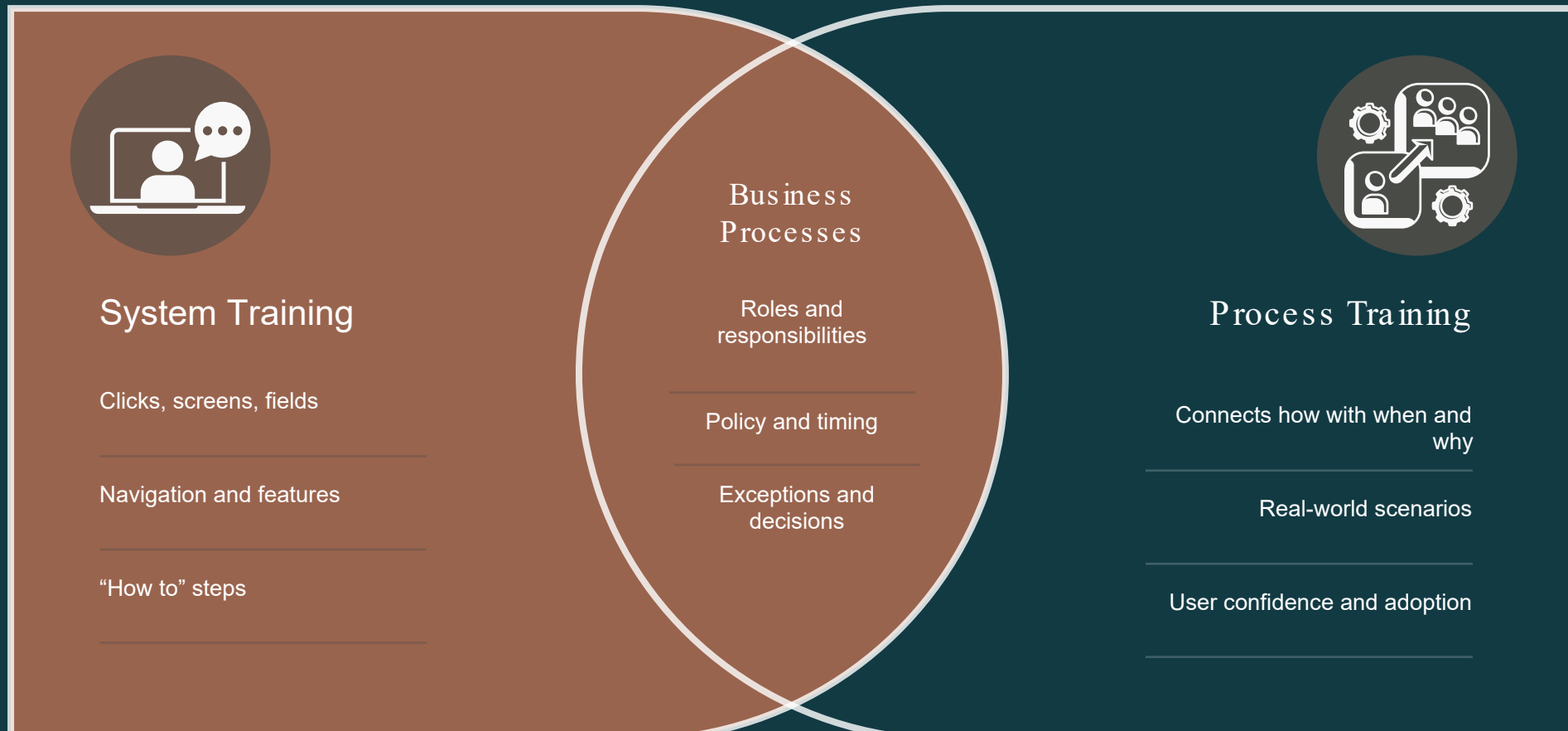
Plan for training reinforcement strategies to support long-term adoption and minimize backsliding.

# What is Process Training?



## UNDERSTANDING PROCESS TRAINING

- ✓ System Training = How to use the system
- ✓ Process Training = When and Why to use the system within a business process



# Let's Hear From You

POLL # 2

What do you believe is the biggest challenge when transitioning to a new system?



# Understanding Process Training

Process training helps users understand more than just clicks—it gives them the confidence to know:

- ✓ When to use a system function.
- ✓ Why it matters in the larger workflow.
- ✓ How it supports business outcomes.



It empowers users to make decisions, follow procedures, and adapt to changes with clarity.



# Why System Training Alone Isn't Enough

System training teaches users how to navigate a system — but without process context, users may:

- ✗ Click through steps without understanding why they matter.
- ✗ Rely on outdated workflows because the system alone doesn't explain what's changed.
- ✗ Miss key decision points or compliance issues.
- ✗ Feel uncertain or overwhelmed during go-live.



## Result



Even well-built systems fail to gain traction when users don't understand how new processes align with their daily tasks.



# Common Pitfalls of Vendor-Led Training

## Why Vendor-Led System Training Falls Short

Vendor-led training often focuses on features, not functions in context. This can lead to:



**One-size-fits-all content**– not tailored to your roles or workflows

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**Clickby-click demonstrations**– little focus on decision-making or exceptions

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**Compressed timelines** rushed walkthroughs that skip over practice or reinforcement

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**Misaligned use cases** scenarios don't reflect your actual business processes

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**No integration with business change** technical training but no behavioral support



# Let's Hear From You

What's one challenge you've seen (or can imagine) when applying system training to real work?

Chat Prompt # 1



# Real-World Impacts of Missing Process Context

*When the system doesn't align with real work, confidence and performance suffers.*

Without process training, users may struggle to translate system steps into successful outcomes:



Revert to old, familiar ways of working.



Miss critical compliance or procedural steps.



Hesitate when real-world exceptions arise.



Over-rely on help desks or super users.



Reduced confidence → lower adoption → wasted investment.



# Ready to Make System Changes Stick? Let's Talk Process Training.

Organizations that successfully implement process training often:



Align system training with real-world decision points.



Equip users with role-based scenarios and just-in-time tools.



Reinforce adoption through super users and post-go-live support.



Reduce support calls and increase user confidence.



## Not sure where to start?



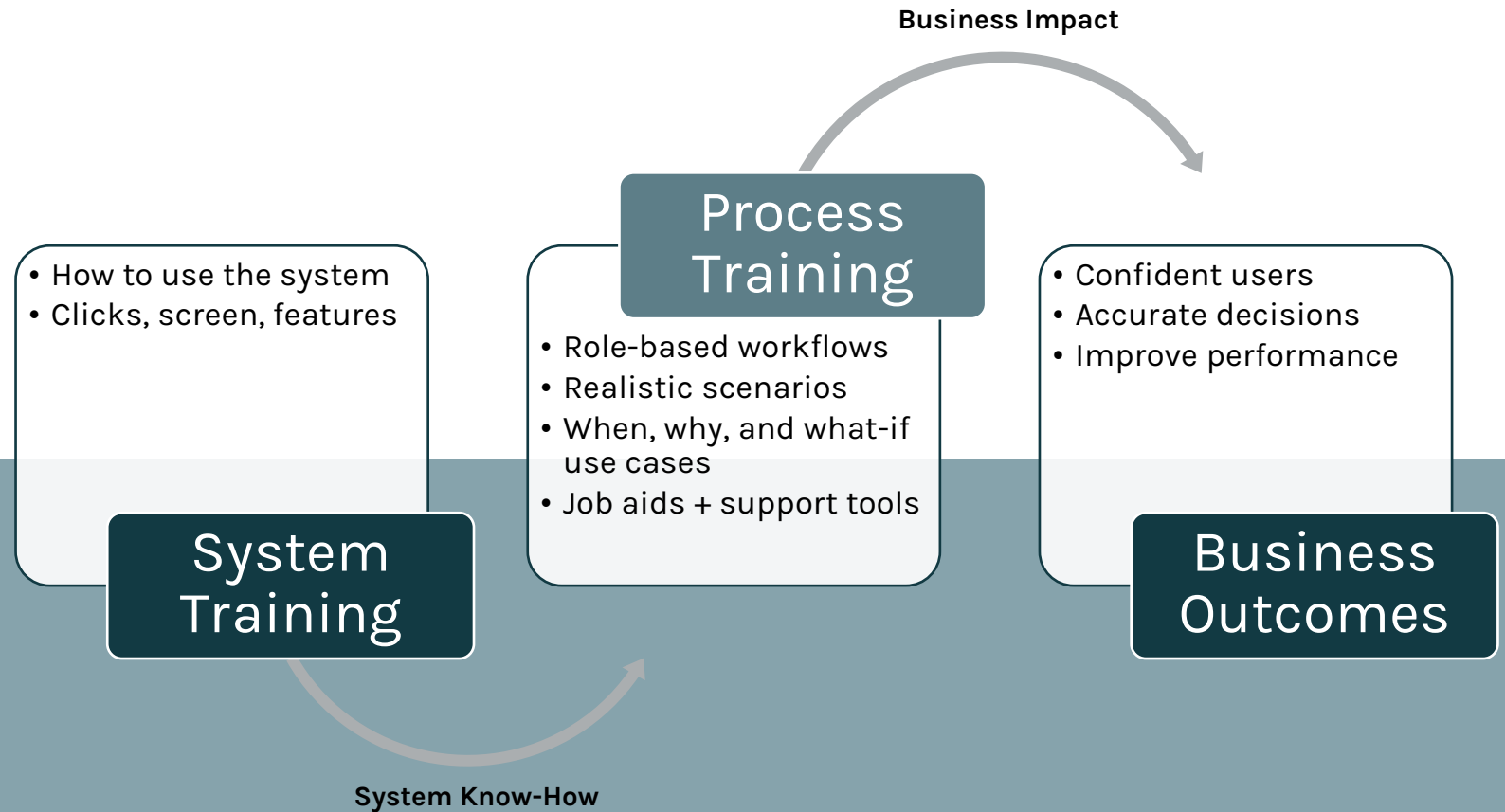
Let's talk about how Linea can help tailor process training to your system, your people, and your outcomes.

# Bridging the Gap with Process Training



System training tells users *what to click*.

**Process training** helps them know *when to click, why it matters, and what to do next*.



# Let's Hear From You

To your knowledge, has your organization ever launched a new system without dedicated process training?



POLL # 3



# Designing Engaging Process Training



## WHAT MAKES PROCESS TRAINING ENGAGING AND EFFECTIVE?

	Core Elements	Why They Matter
	Analyze Roles & Tasks	Focus on what users actually do - not just what the system can do.
	Design Realistic Scenarios	Use real-world examples, exceptions, and decision points they'll recognize.
	Develop Job Aids & Tools	Reinforce learning with tools they'll actually use at their desks or in the system.
	Deliver with Engagement	Blend instructor-led, self-paced, and hands-on practice.
	Reinforce with Support	Use internal support to boost credibility and realism.



# Let's Hear From You

Chat Prompt # 2

What types of training tools have worked well for your organization?



# Key Takeaways



## *How to Move Forward Successfully*

### What Works



- ✓ Customize training based on real roles and processes
- ✓ Use scenarios and decision points to reflect real work
- ✓ Provide support tools (job aids, quick references, cheat sheets)
- ✓ Reinforce training before and after go-live

### What to Avoid



- ✗ Rely solely on system walkthroughs
- ✗ Deliver one-size-fits-all training
- ✗ Assume users will “figure it out” after go-live
- ✗ Skip training on exceptions, edge cases, or decision logic



# Want to Connect?

If you're considering a system upgrade or facing adoption challenges, we're happy to chat.



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