



A trainer's view: Some good reasons for getting up to speed with Microsoft Office 2007 – by Optimum's Maggie Hill

Overview

I have been supporting and training office applications for twenty odd years - and I've seen some changes. The introduction of Office 2007 is probably the biggest since the move to Windows itself.

Office 2007 is intended to be intuitive, task-based and visible. And it is – there are no commands buried in a complex menu hierarchy – it's all there, on the ribbon. Easy enough for casual users but more of a challenge for experienced users.

Expert users will often resist changing systems because they think that their carefully built-up knowledge will be wasted or that they will have to spend time re-learning those skills alongside all the new features.

This is where a short, 'getting up to speed' training course can save time and money.

Maggie has worked for Optimum for 12 years. She specialises in training on desktop application courses and has years of experience with Excel, VBA, PowerPoint, Access and Word. She is a certified product specialist in Word and Excel and an IITT accredited trainer.

Before working for Optimum she worked for 8 years in training support for a financial services organisation.

A case study

An 'up-to-speed' project with Aon Benfield has confirmed that a little coaching goes a long way. I know that Office 2007 is intended to be 'discoverable' and 'intuitive' and up to a point it is. But most people have demanding jobs, and discovering new techniques isn't usually part of it. They know that their efficiency is going to drop while they consolidate their skills and a short update session can save hours of pointless searching, and frustration.

'Wow' factors that emerged during the Aon Benfield sessions included:

- Excel tables – anyone who works with 'lists' of data will appreciate the functionality of Excel tables (the fancy formatting is nice but the least important aspect of tables).
- Pivot table and conditional formatting enhancements. The functionality is still there but significantly improved and much appreciated (when they know it is available!).

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- Something as simple as being able to ‘pin’ a document to the recently used list was much appreciated, particularly for Aon Benfield staff who deal with annual renewals.
- Document parts and building blocks in Word – if people have been using AutoTexts to store paragraphs, tables, even addresses they will be frustrated to find that it no longer exists. Knowing how to make best use of building blocks (and quick tables) was very well received and lots of participants resolved to spend an afternoon creating their building blocks. I imagine that this feature is heavily used by law firms to compile legal documents like leases, wills and so on.
- ‘Old’ features, such as Data Validation, caused a bit of a stir because some participants were not aware of it in the ‘old’ version as it was buried in the menu structure.
- SmartArt and other design elements.

On the other hand, a lot of the style enhancements available in Office 2007, such as themes and quick styles, weren’t of much interest to Aon Benfield because they had their own corporate style guide.

Summing up

Most users acquire expertise in applications such as Excel and Word in order to carry out their daily tasks effectively. Most people – especially ‘top feeders’ in the City – just want to get their work done. Changing to a new system brings with it the risk that they will waste time re-learning their skills whilst completely missing out on exciting new features.

A short ‘step-up’ session will save busy people hours of time, and eliminate much of the frustration that accompanies system changes.



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