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ClubExpress Complements Live Training and Cuts Support Calls by Delivering a Modern Documentation Website Built with MadCap Flare

Streamlined Training and Educational Content

🌐 www.ClubExpress.com

📍 Schaumburg, IL

INDUSTRY Membership Management Software

Across North America, clubs and associations rely on volunteers to keep their operations humming—from professional guilds to sports groups, community services, political coalitions, and more. Increasingly, they are turning to ClubExpress and its intuitive, full-featured membership management platform to take the drudgery out of running and growing their organizations.

The clubs and associations supported by ClubExpress typically see regular turnover among their volunteer ranks, whether due to the elections of new board officials or annual membership renewals. To help new volunteers get up and running quickly, ClubExpress provides a modern documentation website where volunteers can educate themselves by accessing interactive Help topics and how-to guides online or downloading PDF mini-manuals. Today, ClubExpress relies on MadCap Flare and its single-source publishing to create an intuitive environment where volunteers can easily get the information they need in the format they want.

GOALS

- Replace ClubExpress' four large print product manuals with more segmented modern web and print documentation.
- Create an intuitive, easy-to-navigate web experience for ClubExpress' customers.
- Reduce support demands on ClubExpress' support customer success team.
- Support ClubExpress training and education efforts.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software
- MadCap Capture for image capture and editing

BENEFITS

- **Modern content in print and on the web:** Using topic-based authoring, multi-channel publishing, and conditional text functionality in MadCap Flare, ClubExpress delivers a modern website with interactive documentation and how-to guides plus downloadable mini-manual PDFs.
- **Intuitive User Experience:** Advanced search, micro content, and multimedia features in MadCap Flare help users to easily navigate to topics and learn about ClubExpress software functions.
- **Reduced support demands:** Role-based topics on software functions with MadCap Flare enable more users to get started using the documentation and let the customer success team send links to documentation, cutting both the length and number of support calls.
- **Richer training materials:** Content reuse with MadCap Flare enables the education team to create one-page handouts and course content PDFs for ClubExpress' bootcamp training sessions.

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Growing Need for Easier Information Delivery and Access

The ClubExpress software platform handles several functions and resources for clubs and associations, including the website, membership database, accounting, communications, and security, among others. For years, the company delivered two manuals to help customers use its comprehensive capabilities: one for administrators and another for end-users, which were written in Microsoft Word and then published as PDF files. Over time, this documentation grew to four manuals totaling more than 1,000 pages, making them difficult for users to navigate and burdensome for the ClubExpress team to maintain.

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>
> **DAN EHRMANN**
> CEO | ClubExpress

"Using Word to produce these large manuals took a lot of time, and we realized we needed a faster way to get information to our customers," recalled Dan Ehrmann, CEO of ClubExpress. "We also wanted to create a modern Help website that would allow users to more easily find answers to their questions."

After researching several solutions, the ClubExpress team decided that MadCap Flare was not only the simplest software to use; it also provided the richest set of functionality. By contrast, other offerings were either clunky to use or lacked some features the team wanted.

Tuning Content and Deliverable for Different Audiences

As a first step, the ClubExpress team used MadCap Flare to build the new documentation website, move the entire set of documentation with close to 1,500 pages of instructions to the site, and organize the content to make it searchable.

Since then, the company has used MadCap Flare to create various sections on the site organized by different types of users and what information they might need to access. For example, the section for administration Help provides information on accessing the backend of their ClubExpress-based website, as well as various databases and reports. Meanwhile, different end-users, such as the club's treasurer or membership chair, each have their own "Getting Started" section to help walk them through the basic functions.

"There's so much functionality in our platform, but with Flare, it's easy to create new sections of our site to help people based on their role within an organization," said Samantha Horia, director of education at ClubExpress. "I or someone else on our team will get an idea of something that we want to do, and using Flare, in short order we have a whole new way to target and help the right people."

At the same time, some customers prefer to read manuals. But rather than the large PDFs of the past, ClubExpress now uses MadCap Flare to take all of the online content and create mini-manuals for different functions, which are delivered as downloadable PDFs.
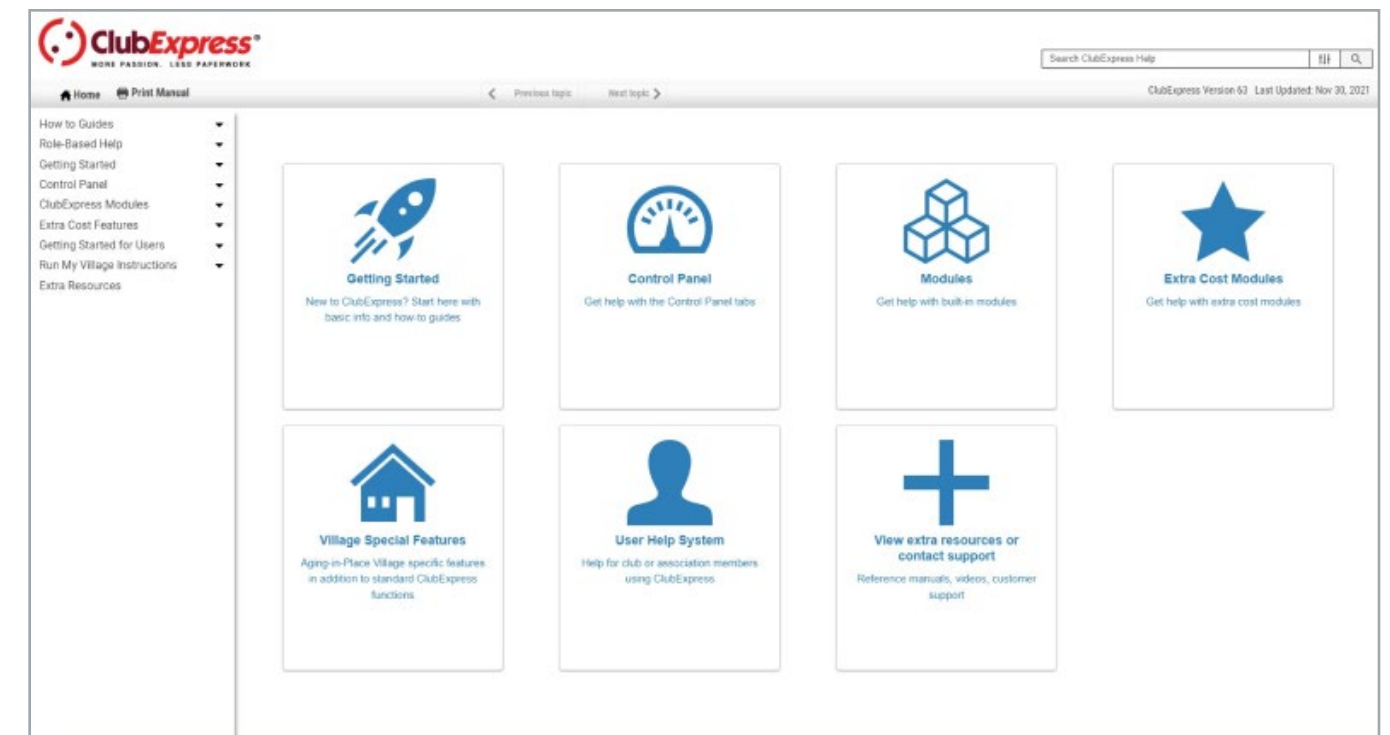
A modern documentation website built using MadCap Flare allows ClubExpress users to educate themselves through interactive Help topics, how-to guides and PDF mini-manuals.

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"Our customers are constantly downloading miniature manuals for all the topics," Samantha notes. "The fact that I can take the exact same content with Flare and spit it out in a PDF is incredibly helpful. It's a huge time saver."

"One of the things I love with screenshots in Flare is having a thumbnail version that you click on to pop up to full size. That alone was amazing," Samantha says. "Visually, it's nice to not have to scroll through a full-size screenshot just to get to my content."

Delivering How-to Guides and Multimedia

Recently, ClubExpress has begun using MadCap Flare to produce how-to guides that offer complete step-by-step instructions. These how-to guides are different from the basic reference set of documentation and have their own section on the website. The guides provide a self-education option that complements the live virtual training sessions that ClubExpress conducts over Zoom.

Because ClubExpress has a very large library of tutorials and webinars, the team also uses MadCap Flare to either embed or link videos to relevant topics. For example, anytime the company hosts a role-based webinar, the team creates a page to pair with the topic, list out everything that the user will need to touch, and embed the video. Similarly, when an organization gets a new membership director or a new communications director, the team sends them a link to one page that includes everything that they're going to need, including one or more videos. On pages where there are three or four different videos, the team can link to a YouTube playlist.

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"The ability to add videos with Flare makes it easier for users to get everything they need on one page, and the next iteration of our documentation website is going to include more embedded videos," Samantha says.

Additionally, ClubExpress helps customers visualize how to use the membership management software by adding screenshots. To create these graphics, the company takes screen grabs and then uses MadCap Capture to edit the images and add them to MadCap Flare topics.

Providing a Modern Web Experience

ClubExpress has put a priority on creating a modern documentation website that provides an attractive, intuitive, and easy-to-navigate experience for users with navigation, advanced search functionality, and a handful of "cards" that serve as quick access points to common topics. Moreover, the responsive design of the HTML5-based site enabled by MadCap Flare complements the ClubExpress platform's support for both desktop systems and mobile devices.

"Making everything more accessible has been key, and we continue to fine tune our content to this day," Samantha notes. "What you see now on our documentation website is very different than when we first launched it."
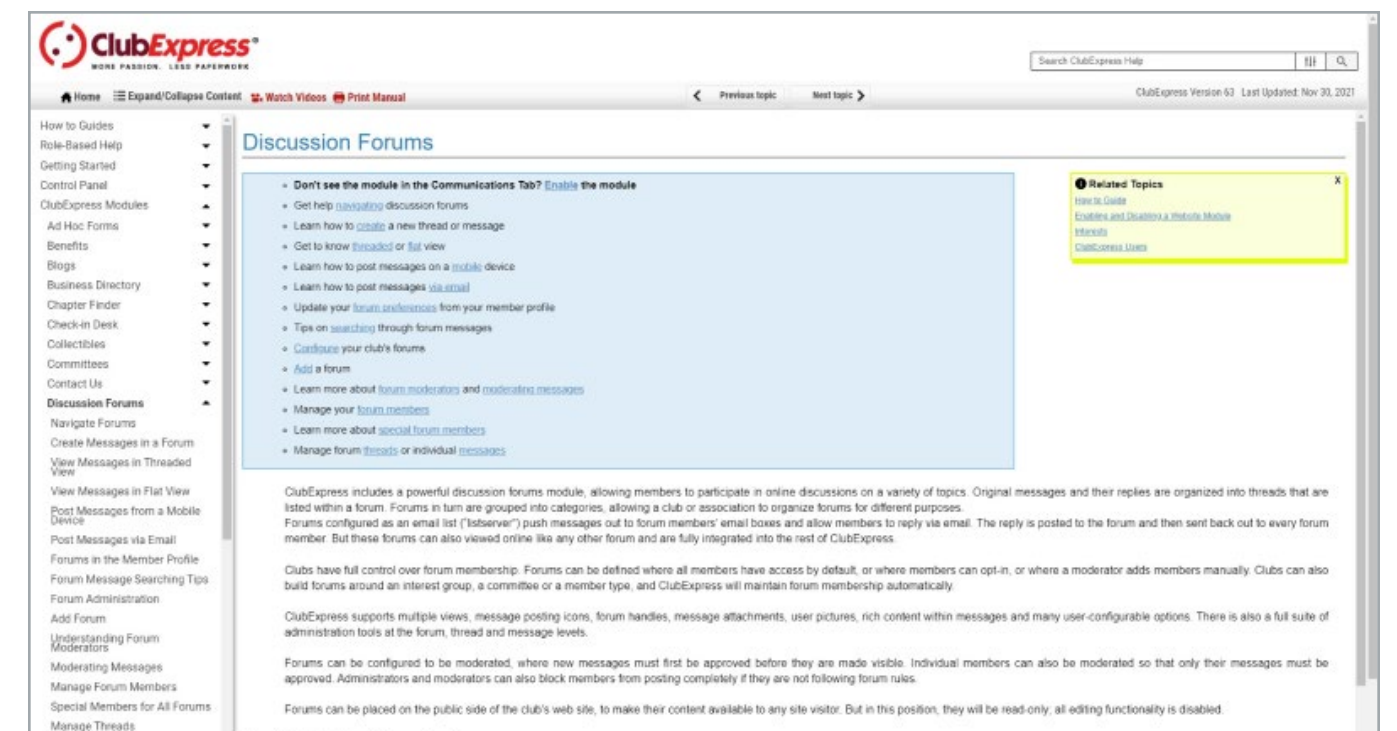
ClubExpress has been able to streamline the team's efforts and ensure consistency through content reuse enabled by features in MadCap Flare.

One of the most popular MadCap Flare-based features is micro content—the short answers that pop up at the top of search results. In many cases, they quickly give customers the answer they need, and there is a link to the full topic for users that want more detail.

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Director of Education | ClubExpress

"The micro content functionality in Flare has been one of the greatest things. It's something our users look to all the time, and we constantly get compliments from them that there's so much information at their fingertips," Samantha observes. "With Flare, it's so easy to cross-link, and that makes it easier for users' to find everything, while it just takes a couple of minutes on my end to add the cross reference."

The team also makes extensive use of MadCap Flare's functionality for publishing expandable content that lets users easily scroll down to find the topic they want and then expand the text they want to read.

"When someone reaches a page that looks like it's going to take them 45 minutes to read, it deters them," Samantha explains. "The expandable content with Flare lets us keep the look of our pages clean, so we're not inundating our users."

Reducing Demands on Support

An important role of the documentation website has been to reduce support demands on the ClubExpress customer success team. The turnover rate among volunteers means clubs and associations continually have to retrain members of their organizations. Moreover, many clubs tend to have their board elections in the same time period, creating peak periods of demand for assistance.

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"We wanted to create some breathing room for our customer success team because around the same couple times every year, they notice a huge uptick in phone calls," Samantha recalled. "Since rolling out our modern documentation website with Flare, we've enabled a new level of customer independence that has eased the burden on our support team. Our average call time has dropped by about a minute, and the monthly average number of calls has dropped by about 130 calls."

ClubExpress also relies on MadCap Flare to help the customer success team respond to users' requests. Now, members of the customer success team can go into the documentation website,
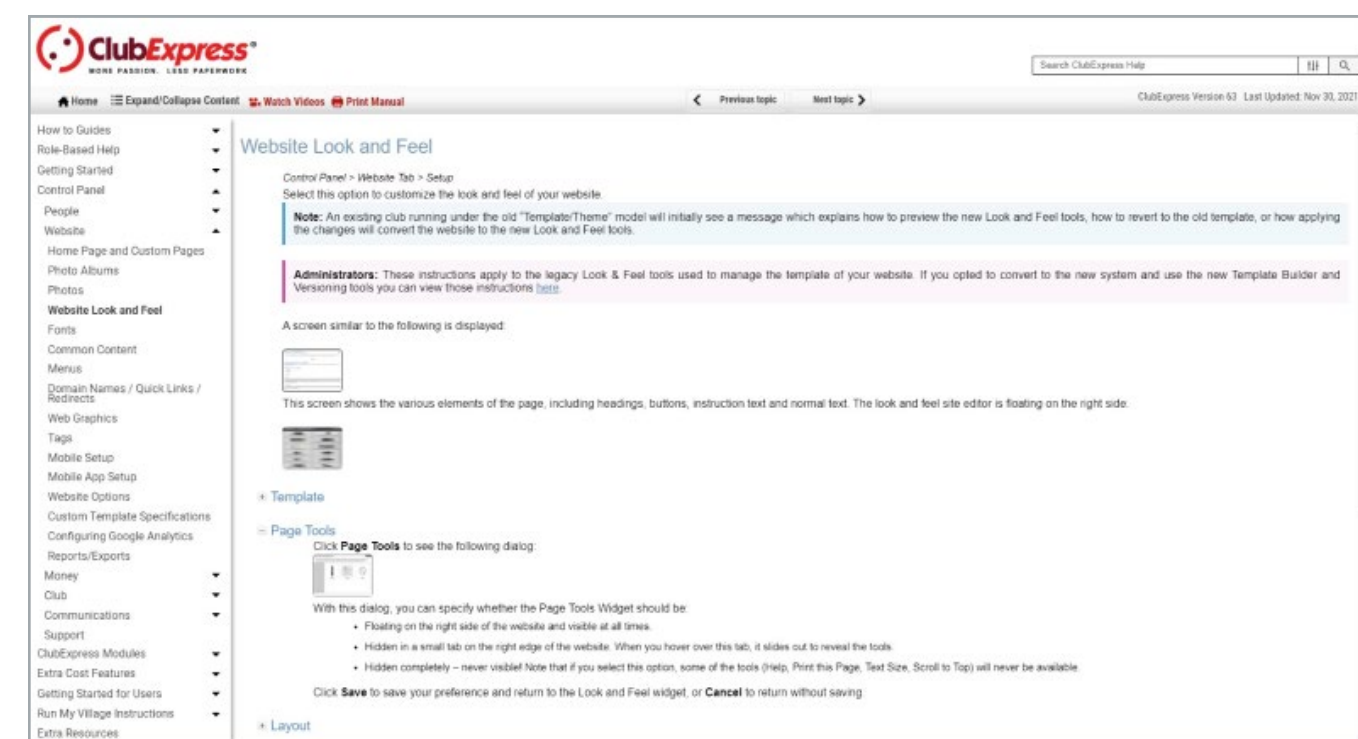
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grab a link to a topic that will help the customer they are assisting, and then drop the link into email or chat. They can also easily look up exact instructions to guide customers over the phone.

The customer success team also recommends topics to add to the documentation system based on customer questions, as well as helping to test and provide feedback on documentation when there is a software update.

Providing Enriched Training

In addition to supporting the customer success team, ClubExpress has tuned pages in the documentation website to augment the company's live training sessions.

"Instead of asking customers to read 20 pages, we can ask them to look at a one-page topic that will provide a really good jumping off point," Samantha explains. "Then, when we show up to do training, this isn't the first time that they're seeing some of these features; they have a little background."

ClubExpress recently has even gone further in using MadCap Flare-based content to help educate customers with a one-day training Bootcamp.

> We're using Flare to create most if not all of the documentation for our training Bootcamp—pulling content from different places and then using colors, boxes and other visual features to put us on a whole different tier. We're not just showing up to a webinar and giving everyone a copy of our Microsoft PowerPoint slides.

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"We're using Flare to create most if not all of the documentation for our Bootcamp—pulling content from different places and then using colors, boxes and other visual features to put us on a whole different tier. We're not just showing up to do a webinar and giving everyone a copy of our Microsoft PowerPoint slides," Samantha notes. "It's another way we can show customers

that we respect them and want them to feel not just comfortable with the software but also like we're paying attention to their needs."

Streamlining Content Delivery

In developing content for the documentation website, ClubExpress has been able to streamline the team's efforts and ensure consistency through the content reuse enabled by features in MadCap Flare, such as topic-based authoring, conditional text, and single-source publishing. Instead of having two different manuals for administrators and end-users as in the past, there is now one set of instructions that is the same no matter how the content is delivered—whether interactive web pages, PDFs of mini-manuals, or printed hand-out pages at training sessions.

"I'm a stickler for consistency and want to see the same thing everywhere I go," Samantha says. "The content reuse with Flare has saved us a good bit of time, and it has saved us from the headaches of users coming with a different understanding of how the software functions because they were working off an old manual."
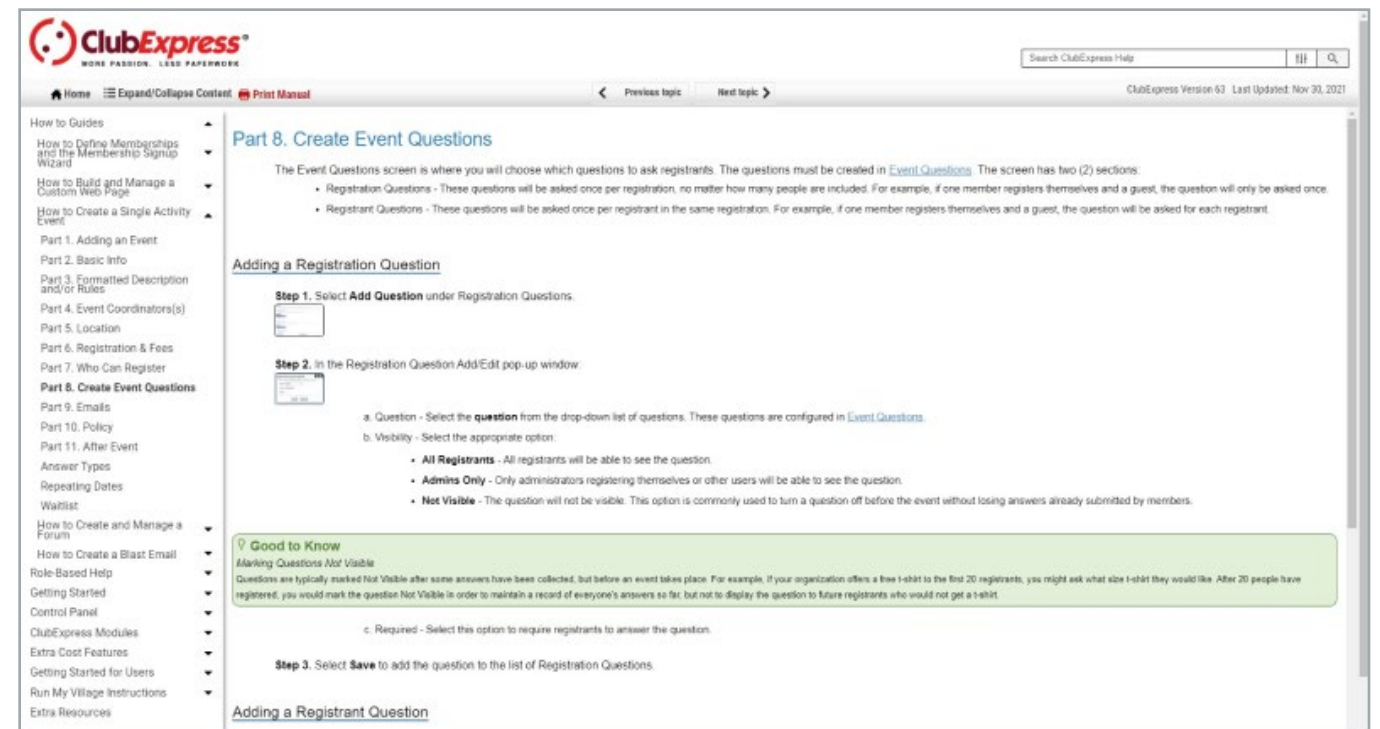
The use of topic-based authoring helps ClubExpress keep pace with developers by releasing different portions of the documentation as new features are introduced.

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The use of topic-based authoring also helps the team keep pace with developers by releasing different portions of the documentation as new features are introduced, rather than having to compile everything into a single document. Meanwhile, conditional text lets the team write content in advance and then publish it only once the software has been released.

"If I'm working on documentation for software from two different developers, and I'm expecting both to release at the same time and one of them doesn't, I can easily use conditional text to tell Flare, 'Publish this, but don't publish that.'"

Finally, cascading style sheets in MadCap Flare help the ClubExpress team to ensure that all the documentation and deliverables are consistent with and meet the company's branding guidelines.

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> Director of Education | ClubExpress

"It's really is nice to have the ability to make everything an extension of our brand with Flare," Samantha says. "I always have our branding guide open when I'm creating anything, and everything just lines up perfectly."

> I look at our documentation website as a living, breathing entity that's still growing, still changing, and can always be improved and refined. With all the functionality in Flare, I can have an idea and say, 'Let's go ahead and give that a try'.
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Samantha adds, "I look at our documentation website as a living, breathing entity that's still growing, still changing, and can always be improved and refined. With all the functionality in Flare, I can have an idea and say, 'Let's go ahead and give that a try'."

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