

# Process Review Workshop



Looking to streamline your organization's training? Process optimization is the key. The SumTotal Process Review Workshop helps you eliminate time-consuming duplication and unnecessary controls—so you can boost efficiency as you accelerate learning.

This two-day workshop is part of the SumTotal implementation methodology, which blends a tailored mix of processes, supporting technologies, corporate culture dynamics, and human interaction to deliver improved compliance, skills development, and corporate savings.

## Prerequisites

Prior to participating in this workshop, you should:

- Review the Requirements Survey
- Prepare any documentation about training processes and roles
- Prepare representative cases that create delays, duplication, and any other conflicting situation
- Ensure that all key players in your training processes attend this workshop and that they are ready to present and discuss current processes and relevant cases

## Collaborative discussion sheds light on processes and objectives

During this two-day event, your training managers, stakeholders, and specialists work directly with a SumTotal team to analyze the critical processes that make your training tick. Our qualified consultants encapsulate their industry and SumTotal product experience in valuable case scenarios, giving you proven best practices in your specific fields of interest. Through collaboration, our teams arrive at a mutual understanding of your company objectives, challenges, practices, culture, and risks. This common ground increases our awareness of your business needs, so we can better assist you through our overall implementation methodology.

## Recommendation workbook reveals path to process optimization

After the workshop, our specialists will prepare a process review document offering recommended practices and specific actions that will close existing gaps and mitigate your most pressing pain points. By optimizing processes from the outside in, we can best focus on your end users.

Our process review workbook presents a summary of tasks performed during our engagement, along with a list of any on-the-spot configuration changes made while we were on site. More importantly, we offer customized tasks to help ready you for your ongoing implementation and rollout, along with specific ideas for process

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improvements, configuration changes, or additional educational offerings that will help your organization realize the full potential of its Learning Management System (LMS). Furthermore, because the process review workbook is a living document, it can be

adjusted during the implementation to track process changes and incorporate new metrics. As a result, we'll be able to evaluate your success over time for more effective optimization.

## Agenda

### Day 1

- 1. Definition of concepts and methodology.** We will explain relevant key concepts, while providing a detailed look at the methodology of both the workshop and our implementation process
- 2. Current processes.** Our specialists will offer insight into your current key training processes. Our goal? To determine which processes are most vital to your learning program
- 3. Definition of pain points and gaps.** As we begin our analysis of your processes, your team will identify known pain points and discuss potential gaps. Where do you see specific areas of inefficiency?

### Day 2

- 1. Customer roles.** We start the day by discussing the roles of your key players and how they participate in different processes. Which roles matter most? Do you have needs not currently being met?
- 2. Goals and critical success factors.** Next, we work together to define your specific training and learning objectives. How will you measure success after the rollout?
- 3. Future considerations.** Looking ahead in your implementation, participants discuss the reality of your potential opportunities and risks
- 4. Action items.** We'll create a to-do list geared toward filling information gaps and preparing us for the next steps of the implementation process
- 5. Exit interview.** Before we conclude, we will cooperatively review what we accomplished, offer our initial findings, and present our immediate recommendations

For more information, please contact the Services Operations Coordinator at +1-866-768-6825 ext. 5603.