

The Ultimate Customer Training Program Checklist

Awareness and Promotion

- Are leadership and management aware of the customer training that is going to be available?
- Have you made customer-facing teams (Sales, Customer Success, Support, Marketing, etc.) aware of the training that is going to be available?
- Have you made your customer-facing teams aware of the process of how your customer training will work for their customers? (e.g. timelines, course topics, benefits, instructors, etc.)
- Have you planned how you will make customers aware of the training available?

General LMS Portal Configuration

- Are the default Language/Dates/Times set to the geographic areas where you expect the majority of learners to login from?
- Have you familiarized yourself with the LMS Knowledge Base?

Branding & White-labeling Your Learning Management System

- Have you requested your business's logos in the correct sizes from the necessary teams (Marketing/Design) that you need for branding your LMS portal?

- Have you uploaded your business's logos to your LMS?
- Have you requested your business's colors from the necessary teams (Marketing/Design) that you need for your LMS portal?
- Have you updated your LMSs colors (headers, background, links, etc.) to match your branding?
- Have you named your portal? E.g. "Company A University"
- Have you selected course thumbnail? These are Images for each course to indicate the subject matter.
- Do you need to white-label your portals? White-labeling places the LMS on a custom domain that you control.
- Have you set-up and tested your White-labelling, if using this feature?

Your LMS Portal Structure

- Have you worked with your Customer Success Representative/LMS provider to determine the best portal structure for your needs?
- Have you configured your top portal to your requirements? (The top-level portal is the controlling portal)
- Have you chosen how many sub-portals your business needs to set up?
- Have you configured and branded each sub-portal based on your audience's requirements?

Roles in your LMS

- Have you selected which team members will be administrators in your LMS? Typically, this role is given to a select few. They oversee the LMS configuration, reporting etc.

- If using, have you selected managers in your LMS so they can manage groups that they are assigned? A manager's permissions can be adjusted granularly. They can run reports on their groups ensuring steady progress or follow up on under performance.
- If using, have you selected the instructors in your LMS? Instructors create and manage courses, receive assignments and facilitate your Instructor Led Training (ILT).

Courses and Content

- Is the course content you need for launch fully designed and ready to be uploaded to your learning management system? Have you uploaded your course content to your LMS?
- Do you have at least one course set-up and showing a status of "Published", "Cataloged" or "Sellable"?
- Have you added all of the course details including description, objectives, content, Catalog/sales, instructors (if needed)?
- Have you added a course description, learning objectives and course thumbnail images within the details section of your course?
- Have you added relevant reminders and notifications for learners?
- If your content was created using an authoring tool, are the eLearning standards (SCORM, xAPI) compatible with your LMS?
- Have you tested the course with a test learner? We suggest using a free email account to test with.

Learner access to the LMS:

- Have you decided how customers will access the LMS? Is it one of the below choices?

- Single sign-on: learners to click through to the LMS from another system without a second set of login details
- Self-registration or third-party login
- Batch upload of CSV file

- Have you set-up a few test users (through Invite/Create and Batch Upload) and walked through the process you intend to follow for new users?
- Have you added custom data fields for any further information you want users to add when creating a profile?
- Have you considered adding Auto-Assign Rules to automate some processes?
- Have you reviewed the test user profiles to ensure all the information you expect is available?

Notifications & Reminders

- Have you set up email notifications in your LMS for your learners?
- Have you added your own custom wording to the email templates?
- Have you added cc & bcc email addresses, where appropriate?
- Have the templates been enabled so that your customizations are used?

Course Delivery

- Are you using Learning Paths? (A selection of courses tied together for learners to progress through, mastering a particular subject or program)
- If using, have you setup your Learning Paths?

- If required, have you enrolled your learners individually and/or by group into their appropriate courses? The learner will find the course on their dashboard ready to take.
- If using, have you enabled your Course Catalog for learners to select the training they wish to take?

Groups

- Have you considered how groups might be helpful for your organization? (similar training needs, manager requirements, API integration needs)
- Have you enrolled your groups into the courses you would like members of that group to be automatically enrolled into?
- Are there any groups all learners should be assigned to? Are these set up for default group membership for all new users in the settings? (Auto-Assign Rules)
- Have managers been assigned to the groups that they should be allowed access to?

Reporting

- Have you familiarized yourself with the different report types and how you can use these to track learner progress and course enrollments, for example?
- Have you set up a scheduled report (if needed) to monitor course activity?
- If required, have you set up a third-party system (HR system, CRM etc.) so that reporting data can be sent?
- Have to checked reporting after testing to ensure scores and statuses track as expected?

Integrations

- Have you chosen the third-party systems you want/need to integrate your LMS with? (CRM software like Salesforce, webinar tools etc.)
- Have you talked to your LMS provider and internal tech team about the integrations you want/need?
- Have you set-up your integrations?
- Have you tested your integrations to ensure they are working?

Gamification

If you choose to use it, gamification is a perfect method to engage and motivate learners with badges and points.

- Have you talked to your LMS provider to decide if gamification is the right choice for you?
- If required, have you enabled the gamification feature in your LMS?
- If required, have you uploaded custom badges?

eCommerce

If you want to sell courses online, you can create a storefront where you can make your courses available for purchase.

- Have you branded and configured your storefront?
- Have you connected your payment gateway? E.g. Stripe, Authorize.Net, Paypal
- If required, have you integrated with Shopify?
- If required, have you integrated with your SEO tool and Google Analytics?
- If required, have you set up bulk purchasing and coupons?