# Resource Planning

## Prepare your Team for Onboarding

Launching a new learning management system takes careful planning, including the assembling of a dream team of superstars who will make the implementation happen smoothly and efficiently. If you're a small organization, your internal dream team may be a mighty party of one. If a larger, then roles are likely distributed across different departments and people.

In addition to an onboarding specialist, a team leader, eLearning developer, training administrator and an IT expert are good to have as part of your LMS implementation crew. Here's what each role brings to the table, regardless of who does the work.

## Contents

# Preparation

- Evaluate the amount of time required to prepare and create your Course Content.
    - Want help? Ask us about available Content Libraries.
- Determine your LMS Project Team and responsibilities. For more information, see below.
- Determine your Reporting Goals, and plan to set up your courses and content with that in mind!
- Testing Testing Testing
    - Take advantage of your Demo portal and ensure you provide your Team adequate time and resources to review your content, especially for data integrations.
- Review potential roadblocks.
    - For example, do you need to receive data from your previous LMS? Do you have a dedicated System Administrator?

# Roles

| Role | Description |
| --- | --- |
| Client Onboarding Specialist | Your main point of contact at Absorb during Onboarding. Oversees successful implementation of your projects, through milestone delivery and periodic check ins. Advises best practices through knowledge and experience. Provides training and support to ensure understanding of features and capabilities of the system. |
| Implementation Analyst | Member of the Absorb team who will walk you through scoping and implementation of complex integrations via phone or email.<br><br>E.g. Scheduled/Historical imports and exports.<br>Setting up the Salesforce app or the Absorb Inform tool |
| Project Manager/System Admin | A Project Manager/System Admin is the highest administrative position within the LMS and can make changes to all aspects of the system. Provides insight on system utilization within their organization. Ensures the right team members are working on the right jobs. Works in conjunction with the Client Onboarding Specialist to meet milestones and implement a solid framework. |
| Content Creator | The Content Creator or L&D Specialist is responsible for the creation and management of training data. In some cases, this is also the Project Manager/System Admin. |
| Executive Sponsor | An Executive Sponsor is typically a member of the executive team with the organizational responsibilities for workflow improvement. E.g. Decision Makers, etc. |
| Stakeholders | Stakeholders are other team members (or administrators) that are affected by the set up and results of the LMS. They are often other admins who would be available to test and provide feedback on key decisions. |
| IT Resource | Technical resource available to assist with Absorb integration and set up. This could include the setup of SMTP, SSO, FTP, Custom URL. |
| Marketing | The person who will ensure that branding of the LMS aligns with corporate branding guidelines. Supplies mock-ups/images. |
| Database Admin | Someone skilled in the use of another database used by your organization, HRIS or Active Directory. This could include the setup of Scheduled Import/Export, Historical Data Import or HRIS Turnkey solution |
| API Developer | Someone with knowledge of API based systems who can help build an automated dataflow to/from Absorb. |

# Activity

| Activity | Description | Required Resources |
|---|---|---|
| Kick Off Call | Introductions, identify key deliverables & establish target completion timelines. | Project Manager/System Admin<br>Executive Sponsor<br>Stakeholders |
| Branding | Review the branding & tile guidelines. Gather branding requirements & send to Project Manager/System Admin/System Admin. | Project Manager/System Admin<br>Marketing |
| Absorb Engage | News Articles, Billboards, Polls & Contests Configuration. | Project Manager/System Admin<br>Marketing |
| Training | Provides 1 on 1 training to System Admins and can deliver focused training to other members of the admin team after successfully completing Absorb Academy | Project Manager/System Admin |
| Integrations | Data Imports/Exports<br>Transferal of data into or out of Absorb using a combination of CSV files, our Data Mapping guide and logic coded by our Implementation Specialists. Scheduled Import/Export, Historical Data Import or HRIS Turnkey solution | Project Manager/System Admin<br>Implementation Specialist<br>IT Resource(s) |
| | HRIS Connector<br>Enable HRIS connector with your Onboarding Specialist and determine data mapping and sync rules. | Project Manager/System Admin<br>Executive Sponsor<br>Database Administrator |
| | Third Party Content<br>Determine Content Subscription contacts. Select Third Party Content Provider, determine content package, assign licenses, and configure course content. | Project Manager/System Admin<br>Executive Sponsor |
| | API<br>Restful API can be used to create, update, or retrieve 1000's of records in seconds, in real time or on a scheduled basis. An API developer and compatible API software is required. | Project Manager/System Admin<br>IT Resource(s)<br>API Developer |
| | SSO<br>Single Sign On allows you to seamlessly access multiple systems going into or out of Absorb with one set of login credentials. An IT resource and SSO provider is required. (Absorb does offer its own proprietary SSO) | Project Manager/System Admin<br>IT Resource(s) |
| Portal Settings | Adding basic system admin contact information, deciding to force users to complete certain activities upon first login, configuring User profile, configuring Custom Fields & configuring Default Evaluation. | Project Manager/System Admin |
| System Configuration | Configuring Message Templates, Translations & FAQs. | Project Manager/System Admin |

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| | Custom URL<br>Adding a Custom URL means your learners can access their portal through a URL of your choosing that often matches your company's brand. You must own the domain of your chosen URL and will need to involve your IT Resource(s) to update your records accordingly. | Project Manager/ System Admin<br>IT Resource(s) |
| Course Configuration | Add images, course content, certificates, and evaluations.<br>Control who can access the courses, which notifications are sent, allow the users to leave comments and add terms and conditions.<br>Configuring Question Banks, Venues,<br>Global Resources, Competencies & Tags. | Project Manager/System Admin<br>Content Creator |
| User Configuration | User Import, Role creation, Department creation, Groups creation & Enrollment Keys. | Project Manager/System Admin |
| Reports Configuration | Create new layouts to speed up navigating to useful data. Learn how to share and schedule custom reports and get more from Absorb's ready-made reports. | Project Manager/System Admin<br>Stakeholders |
| User Acceptance Testing (UAT) | Verify that the course and user behavior is as expected, Availability rules trigger enrollments, emails are sent, links are accessible, certificates generate on completion. | Project Manager/System Admin<br>Stakeholders |
| Implementation Review and Go Live | A Meeting to confirm that the key deliverables have been met and to discuss support moving forward. | Project Manager/System Admin<br>Executive Sponsor<br>Stakeholders |