

Learning Platform Toolkit Implementation Starter Guide

You've assembled your business case for your learning platform. You've facilitated an executive discussion. You're even starting to evaluate learning platform vendors. Your executive team is just about to give you the executive "yes", but before they do, they need to know one more thing...

What Happens After The Purchase?

Even if you already have a learning platform in place, you may have had an unnecessarily lengthy or negative implementation experience. Or, perhaps your system is so old that no one has any expectations whatsoever regarding the implementation process. It goes without saying that neither of these situations is ideal.

It's important to set expectations regarding timelines, milestones, level of support, and responsibilities so you can allocate the appropriate resources and ensure a smooth implementation process. After all, the faster your implementation, the faster you'll be able to have your learning platform up and running, and the faster you'll experience all of the excellent benefits.

To set expectations related to implementation timelines and internal resources as a way to further satisfy any decision-maker concerns, use the example implementation guideline below:





Your Implementation Journey Towards an AI-Powered Learning Platform begins today.

Implementation Services

Our Docebo Implementation Specialists know how to get your platform off the ground as quickly and efficiently as possible, so that you can start delivering personalized and unparalleled learning experiences sooner.

Here is what you can expect from our team and our implementation structure:

Enterprise Gold
(90-Day Onboarding)

12 1-hour weekly meetings

KICKOFF

Your new ride is here! Introductions are made, we review your use case, apps, and services that have been purchased, along with an overview of your Docebo customer journey.

DISCOVERY

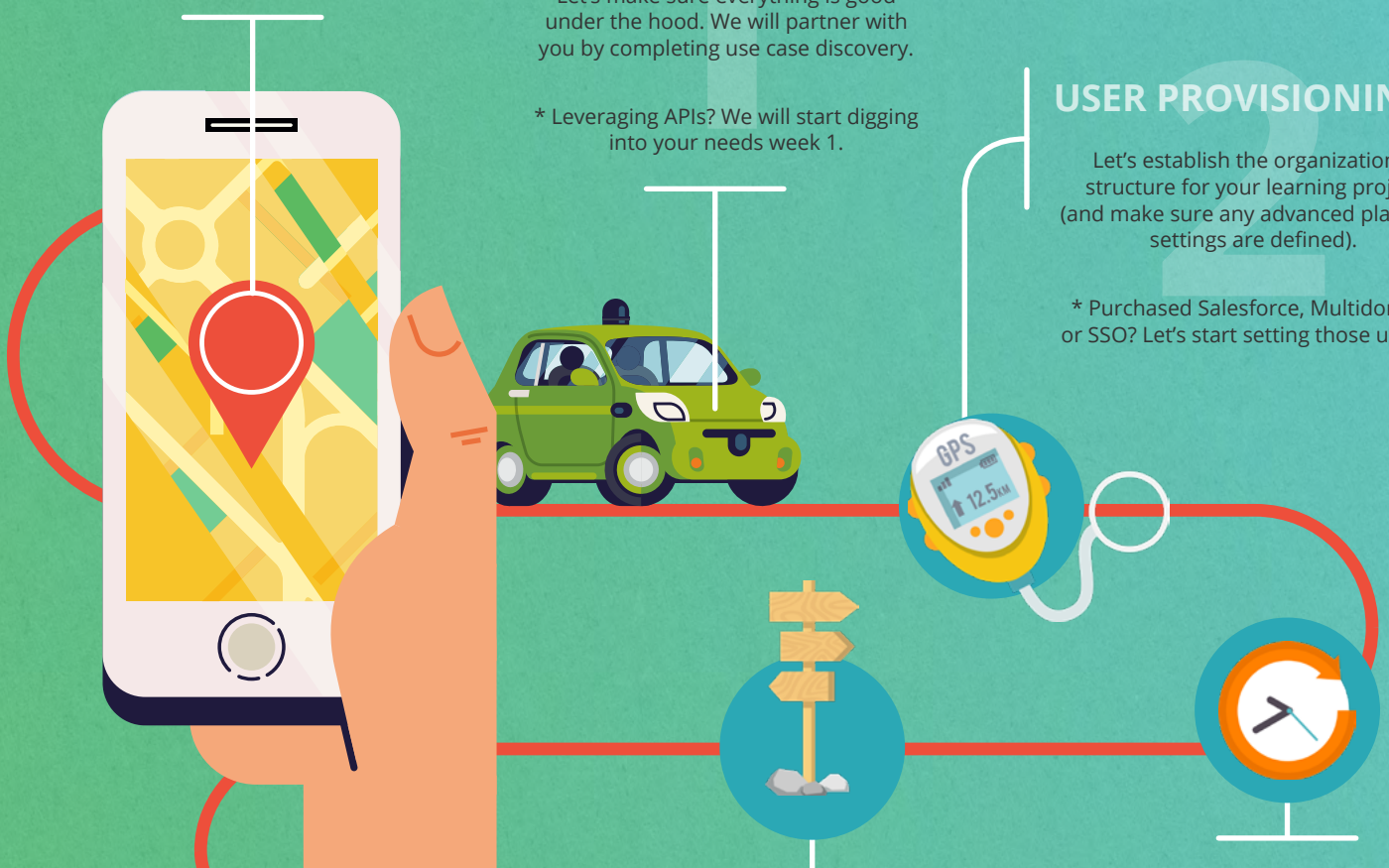
Let's make sure everything is good under the hood. We will partner with you by completing use case discovery.

* Leveraging APIs? We will start digging into your needs week 1.

USER PROVISIONING

Let's establish the organizational structure for your learning project (and make sure any advanced platform settings are defined).

* Purchased Salesforce, Multidomain or SSO? Let's start setting those up too!



CONTENT MANAGEMENT/ARCHITECTURE

Time to create, build, and import your courses, learning plans and learning objects.

CONTENT MANAGEMENT/ARCHITECTURE (CONT'D)

But you are not ready to hit the road just yet. We will educate you on how to create and assign course categories, and firmly establish your learning plans.

UX/UI

Time to bring your learning platform to life by creating Pages and Menus, and configuring its overall look and feel.

*Thinking about adding social learning to the mix? This is the perfect place to start configuring Coach & Share.

AUTOMATION AND REPORTING

Here, we will get some admin tasks out of the way, including enrollment rules and understanding what metrics you would like to collect in your advanced reports.

PRE-SOFT LAUNCH TRAINING

We are taking this thing for a test drive. Testing begins here on your platform (all user levels) including content and notifications.

NOTIFICATIONS

Keep checking those admin tasks off the list – let's establish notification requirements and create certificates for any compliance training.

SOFT LAUNCH ADJUSTMENTS

If something feels a little wobbly - let's take it back to the shop for a tune-up.

SOFT LAUNCH

Let's get behind the wheel and see how this baby drives.

FINAL CONFIGURATION

We are all tuned up – let's rock and roll.

CSM TRANSITION/WRAP

Time to transition over to your Customer Success Manager, who will help you make sure you keep your platform between the lines.

Enterprise Platinum Plan includes 4 additional sessions (16 total)

Use these additional sessions to deep dive deeper into topics that are more challenging.

Throughout the onboarding journey, your implementation specialist will be available via e-mail for on-going support and Q&A.

How to Avoid Hidden Costs

The last thing you want is hidden fees piling up when it's time to launch your learning platform project – after all, you've already confirmed a budget and are making a huge investment in your new system.

Use the following checklist to ensure your implementation process goes as smoothly as possible and you don't run into any unexpected costs.

IDENTIFY ASSETS: WHAT RESOURCES DO YOU HAVE?

Evaluating the e-Learning assets and content at your disposal will help you determine which learning platform features you need, as well as which support services and additional resources you will require.

PINPOINT OBJECTIVES: WHAT ARE YOUR NEEDS?

Discuss the needs and preferences of your learning audience(s), as well as your organizational goals. Make a list of the features and capabilities you need to execute with your learning platform.

ASSESS SKILLS: IS YOUR ELEARNING TEAM PREPARED?

Ensure your L&D team is prepared to take on the task of working with your learning platform. Ideally, your learning platform's UX/UI will be intuitive for both learners and administrators, so little training on how to use the system will be needed.

MEET VENDORS: ASSESS POTENTIAL VENDORS

Evaluate learning platform vendors thoroughly so you understand the exact costs associated with their system. Ask questions to find out if there are surplus charges for specific feature sets, capabilities, or support. Using an RFP (Request for Proposal) can help you figure out if a specific vendor is aligned with your budget, support, security, and feature requirements.

EVALUATE SUPPORT: UNDERSTAND SUPPORT OPTIONS AND COSTS

Don't assume that your learning platform package comes with pro bono support – some vendors charge extra for basic or personalized support services for implementation (and, often, upgrades and regular maintenance).

ASSIGN ROLES: DESIGNATE PROJECT LEADS

Your entire L&D team will be part of the implementation process (and beyond). Assign their implementation roles early on so that they understand their responsibilities and so they can adopt the platform more efficiently.

TEST SOFTWARE: USE TRIAL VERSIONS

If there's one thing you absolutely must do when implementing a learning platform it is to test drive the system. Most learning platform vendors offer free trials (and many will extend the trial period if you need more time to evaluate). Take advantage of these trials to understand where you might run into technical glitches or unforeseen problems. It's also important to ensure you have access to the vendor's customer support during your trial period – not only will this make the trial more valuable, but it will also help you to gauge the level of responsiveness, knowledgeability, and thoroughness that the vendor will provide in your learning platform journey.

A photograph of three people (two men and one woman) sitting around a table in a meeting, looking at a tablet. The image is overlaid with a blue tint.

IF YOU WANT TO GIVE DOCEBO A TEST DRIVE,
TRY THE LEARNING PLATFORM, FREE, FOR 14 DAYS.

START A TRIAL

What Kind of Support Should You Expect During (and After) Implementation?

Best-in-class solutions will provide customer success programs to ensure their customers excel and continually meet their goals with the vendor's solution.

CUSTOMER SUPPORT

Support should be offered in-person or over-the-phone according to specific requests (e.g., a ticketing system). Customers should also be encouraged to seek self-support, offered through a knowledge base, FAQ collection, or forum.

CUSTOMER SUCCESS

Customer success is much more than ensuring the successful installation, configuration, and implementation of a customer's learning platform. It also goes beyond offering high-quality training and support. Customer success is about helping an organization to consistently achieve their business goals.

Modern learning technology providers place their customers' success as the central item of their mission as a company. They understand that ultimately, their success as an organization depends on the success of their clients and customers.

Learning platform vendors should gain a thorough understanding of your goals, as well as the way you will measure these goals, and help you set benchmarks. Without setting quantifiable or tangible objectives, it's difficult (if not impossible) to know whether or not customers are on track to meet their goals.

As an example, Docebo's enterprise customers are assigned to a Customer Success Manager at the beginning of their Docebo learning platform journey. Their Customer Success Manager will work with the customer to:

- Understand, track, and report on business and training goals via KPIs and dedicated business reviews
- Get the most out of Docebo, helping customers to map specific use cases or quickly adopt new features in their ecosystem
- Empower a customer's team beyond what is expected, sharing industry-based best practices and market-driven expertise
- Liaise with Docebo's product team, enabling customers to influence Docebo's product roadmap, while providing information about what's coming next.

Beyond Implementation: Finding Your Learning Platform Business Partner

Your chosen learning platform vendor should be viewed and treated as a business partner. An effective learning platform business partner should be:

INNOVATIVE

Learning platform vendors must always be on the cutting-edge of learning technology and be able to support the needs of today's and tomorrow's learners.

LEARNER-CENTRIC

If your learning platform's user experience isn't designed to put the learner first, your learning programs aren't going to be effective.

MOBILE-FRIENDLY

As mobile adoption increases and millennials enter the workforce, it's more important than ever to have a mobile-focused learning strategy to increase accessibility.

SUPPORTIVE OF FORMAL & INFORMAL LEARNING

Your learning platform should be able to support learning as it actually happens – that is, both formally and informally. It should also be able to track how both formal and informal learning practices impact organizational performance.





Implementation is key to succeed in launching your learning platform project. Ensure that you set thorough and accurate expectations to promote a smooth and efficient implementation process.

Together, let's 'Get The Yes' – and make learning your competitive advantage

Join 1,500 organizations around the world who are using Docebo and artificial intelligence to change the way their people learn, produce better learning outcomes and generate measurable business value.

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