CLIENT IMPLEMENTATION CHECKLIST

☐ ## Brand Your Site

Tip: *Before roll-out, ensure that your branded site is set up how you want. You will send out the branded site link at the time of roll-out. You can also customize the homepage with graphics and messages for different teams!*

☐ ## Add Learners

Tip: *Learners can be added to the temporary import team to grant them access to the system. Once your teams are built, then add the learners to their correct teams.*

☐ ## Create Teams in the System

Tip: *Teams are a foundational element of the platform. It's best to discuss how you plan to report over and assign content to teams before creating your structure.*

☐ ## Messages

Tip: *Ensure that you have all scheduled messages that you plan to use created in the system before you roll it out to learners. For example:*

- Learner Created: Could be used as a welcome message for all new learners added.
- Content Assigned: Will send out when content is assigned.
- Content Completed: Will send out when content is completed.
- Content Due Before: Determine how many days, weeks, or months before the due date the message will be sent.
- Content Due After: Determine how many days, weeks, or months after the due date the message will be sent.

☐ ## Upload Content (*BizLibrary LMS Only)

Tip: *If you have any content that must be uploaded prior to your roll-out, you will want to upload it now. First, create the topic areas that your content belongs in – this will provide structure to your custom content library. Once you've built your structure, upload the courses.*

☐ ## Get Content Ready

Tip: *Once you have all content in the system, you can begin to make assignments. You will want to preview the content in Curriculum Builder to determine which courses you want to roll-out with. A great starting place would be to assign the new learner welcome video so users can get familiar with the system.*

☐ ## Decide How to Assign Content

Tip: *Once you have the courses in the system, decide how you want the assignment to go out. For example:*

- Content Assignment: Not in any order but will be assigned with a due date to place the content on the learner's to-do list
- Certification: Structured learning path that you will also assign with a due date
- Playlist: Not required training, more recommended content that show under the learner's Featured Playlists

☐ ## Roll-Out

Tip: *Decide how you plan to roll out your training program and then execute! Working with your Client Success Manager for tips on rolling out and marketing your program is encouraged!*