Checklist

✓ Implementation

☐ Have training objectives that are SMART (specific, measurable, achievable, realistic, and timely), relevant to your organization's goal of user adoption, and fit the organization's overall change management goals.

☐ Have a process to update the training plan incrementally as necessary to reflect scope, changes, risks, and dependencies to ensure adoption and engagement.

☐ Consider what to include regarding system process and business process, so that the training provides the best possible foundation to end users.

☐ Clearly define the match between personas and roles, and business processes and user level, for each training session, so users receive relevant training.

☐ Ensure the training schedule accounts for key project milestones, resource requirements and availability, dates, and tasks, and is in alignment with the overall project plan.

☐ Consider different types of content, the time to create it, the effort to deliver and maintain it, storage, and the skillset of the authors and trainers.

☐ Set up the training environment with realistic data, user profiles, and scenarios. Refresh and clean it after training sessions to maintain quality.

☐ Ensure trainers and super users are trained well in advance of end-user training, which should ideally occur prior to UAT.

☐ Ensure the training plan appropriately addresses accessibility.

☐ Define a process for feedback and continuous improvements to training materials.

☐ Identify a process to provide for continuous training in alignment with updates and changes to the solution as well as changes in roles and responsibilities.