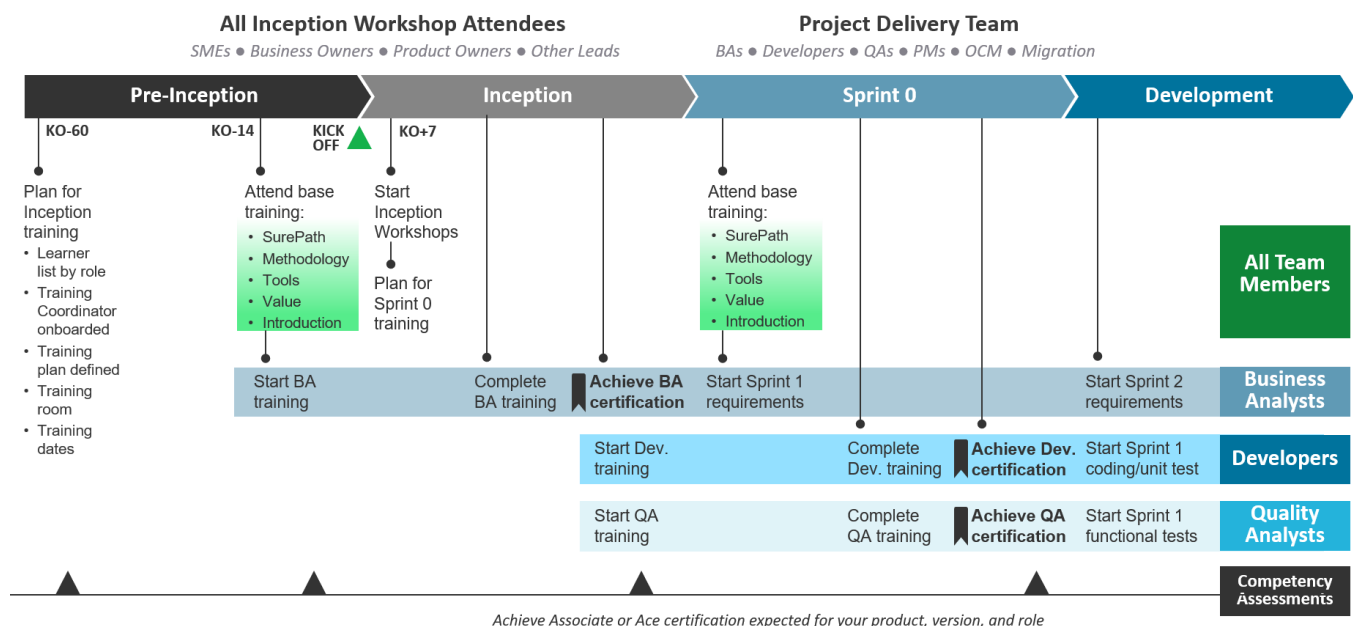# Planning for Training
Guidewire PolicyCenter Implementations

> **Customers invest in Guidewire products to transform their business, but that transformation requires proficient teams who understand how to optimize capabilities in the InsuranceSuite products and apply best practices during the implementation. The timing of training is also important to enable team members to achieve self-sufficiency sooner and elevate product competency. This datasheet provides guidance on key considerations when planning training for your team.**

Training by Project Phase and Role

All Inception Workshop Attendees
SMEs ● Business Owners ● Product Owners ● Other Leads

Project Delivery Team
BAs ● Developers ● QAs ● PMs ● OCM ● Migration

Pre-Inception	Inception	Sprint 0	Development

KO-60   KO-14   KICK OFF ▲   KO+7

Plan for Inception training
• Learner list by role
• Training Coordinator onboarded
• Training plan defined
• Training room
• Training dates

Attend base training:
• SurePath
• Methodology
• Tools
• Value
• Introduction

Start Inception Workshops

Plan for Sprint 0 training

Attend base training:
• SurePath
• Methodology
• Tools
• Value
• Introduction

All Team Members

Start BA training — Complete BA training — **Achieve BA certification** — Start Sprint 1 requirements — Start Sprint 2 requirements — **Business Analysts**

Start Dev. training — Complete Dev. training — **Achieve Dev. certification** — Start Sprint 1 coding/unit test — **Developers**

Start QA training — Complete QA training — **Achieve QA certification** — Start Sprint 1 functional tests — **Quality Analysts**

Competency Assessments

Achieve Associate or Ace certification expected for your product, version, and role

Who Needs Training?

To prepare teams for success, Guidewire Education offers a variety of training options for the following audiences and job roles who support the implementation and deployment of Guidewire products:

- **SMEs/General** team members include subject matter experts (SMEs), business owners, product owners, change management leads, other Inception workshop participants, and any other team members who will be actively involved in the project. To help the SMEs and general team members make informed decisions quickly,

they will complete our base training content. This training focuses on Guidewire's proven SurePath methodology, available tools to accelerate project outcomes, ways to maximize product value during the project, and overall functionality in the Guidewire product.

- **Analysts/PMs** include business analysts/architects, quality analysts/testers, project managers/analysts, and data/reporting analysts. Their training begins with the same base training that SMEs and general team members complete. It continues with training on platform-level best practices, followed by key product and testing considerations to help them be successful in their role. This training will help them document requirements using Guidewire methodology and tools, test functionality in an efficient way, analyze data in the PolicyCenter product, and apply best practices along the way.

- **Configuration developers** work with the user interface, business logic, and product data model. They start with the base training mentioned above and continue with training on platform-level fundamentals and development best practices. They continue with product-specific configuration training to help them hit the ground running when development activities begin.

- **Integration developers** create integrations to share data between Guidewire applications and external systems. Like all roles, they start with base training, followed by the same platform-level fundamentals and development best practices training as their configuration developer peers. They continue with InsuranceSuite integration training to learn APIs and other topics that are critical for their role.

What Training Happens in Each Project Phase?

To enable key activities, Guidewire recommends training across several phases of the project timeline. It is best to start planning for training at least 60 days before the Project Kickoff to allow time to finalize all logistics.

Pre-Inception

Most of the project training plan will be built during Pre-Inception. The first priority is scheduling training for all Inception workshop attendees. This includes SMEs, business owners, technical owners, and other key team members who will provide high-level requirements and important business insight during the project. It should also include business analysts who will start gathering requirements during the Inception workshops and Sprint 0.

All Inception workshop participants need Introduction training to understand the features and functionality in their InsuranceSuite product. This product knowledge will accelerate productivity during the Inception workshops and help the team refine the scope, scheduling, and staffing needs.

Inception workshop attendees will also complete training on Guidewire SurePath methodology, tooling, and maximizing product value. By the end of training, learners will understand how the Inception process works, how to prepare for activities in the Development phase, and how Guidewire's methodology and tools can help the team accelerate productivity and optimize the value of Guidewire products.

Most customers schedule instructor-led training during Pre-Inception. This focuses the team on learning so they are ready to be productive in the all-important Inception workshops.

An instructor-led approach also strengthens team building and creates a common understanding of methodology, terminology, and functionality. All Guidewire instructors are *Certified Trainers* with deep product expertise and extensive teaching experience.

The following table reflects the sequence, duration, and audiences for each course during the Pre-Inception phase. Click any link to view the course description and agenda.

G | Education

Training during Pre-Inception

Course	Audience				Duration (days)
	SME/General	Analyst/PM	Configuration	Integration	
SurePath Overview	●	●	●	●	1.0
Implementation Methodology	●	●	●	●	1.0
Implementation Tools	●	●	●	●	1.0
Maximizing Product Value	●	●	●	●	1.0
PolicyCenter Introduction [1]	●	●	●	●	4.0
PolicyCenter Rating Introduction [2]	●	●	●	●	1.0
Digital Introduction	●	●	●	●	1.0

[1]   *These courses are offered for Personal/Commercial lines of business, as well as Workers' Compensation options.*

[2]   *These courses are only required for customers who purchase these add-on modules or implement these capabilities.*

Inception

Once Inception workshops are underway, it is important for the rest of the project team to complete training so they can be effective in their roles. This includes core project team members such as configuration developers, integration developers, business analysts, and quality analysts. It may also include project managers, organizational change management team members, and those in specialist roles.

All project team members will need to complete the courses listed in the Pre-Inception section above. Developers and analysts will continue with platform and product courses that are specific to their role. Most lessons include hands-on lab exercises to help learners build confidence and self-sufficiency. Guidewire also offers exams and certifications to validate understanding and proficiency along the way.

Guidewire encourages all business analysts to earn the Associate certification during Inception to prepare them for their first project assignment in Sprint 0. This certification validates knowledge of tools and best practices that business analysts will need to be effective and productive in their role. Business analysts may also achieve a Professional certification which deepens knowledge and accelerates project outcomes. Those who become both Associate and Professional certified earn the esteemed Ace certification, a product-specific certification that deepens product knowledge and accelerate project outcomes. Certification is required for business analysts working on Guidewire Cloud implementations.

Training during Inception and Sprint 0

Course	Audience				Duration (days)
	SME/General	Analyst/PM	Configuration	Integration	
All base training listed in Pre-Inception	●	●	●	●	*See above*
InsuranceSuite Analyst Fundamentals		●			1.0
Quality Analyst Basics		●			2.0
PolicyCenter Functional Requirements		●			2.0
InsuranceSuite Fundamentals			●	●	4.0
InsuranceSuite Best Practices			●	●	2.0

G | Education

Course	Audience				Duration (days)
	SME/General	Analyst/PM	Configuration	Integration	
[InsuranceSuite Integration](#)				●	4.0
[PolicyCenter System API](#)				●	1.0
[PolicyCenter Configuration](#)			●		3.0
[PolicyCenter Rating Configuration](#) [2]		●	●		1.0
[Advanced Product Designer (APD)](#)		●	●		2.0
[InsuranceSuite Contact Management](#) [2]		●	●	●	2.0
[InsuranceSuite Reinsurance](#) [2]		●	●		1.0
[InsuranceSuite Data Migration](#)				●	3.0
[PolicyCenter Data Migration](#)				●	2.0
[Policy Migration Tool Configuration](#)		●	●	●	2.0
[Migrating to Guidewire Cloud](#)				●	1.0

[2]   *These courses are only required for customers who purchase these add-on modules or implement these capabilities.*

Sprint 0

While business analysts gather requirements during Sprint 0, developers and quality analysts are focused on completing the training they need for their product and role.

To strengthen proficiency, Guidewire encourages all developers to earn the Associate certification during Sprint 0. This certification validates platform-level best practices and considerations that help improve the long-term health of the customer's implementation. Developers with an Associate certification write code that is up to 75% healthier than non-certified developers. Developers may also complete the Ace certification for their relevant product track. The Ace certification deepens product knowledge and accelerates productivity by up to 70%.

Quality analysts should also earn their Associate certification during Sprint 0. Similar to business analysts, this certification validates knowledge of tools and best practices that quality analysts will need for their role. Quality analysts will continue with [Quality Analyst Basics](#), which teaches testers how to be more effective and efficient when testing Guidewire products.

These certifications are best achieved during Sprint 0, before developers and quality analysts begin their first project assignment. Certification is required for developers and quality analysts working on Guidewire Cloud implementations.

Development

During the Development phase, the team will apply what they learned in training to complete prioritized tasks in each sprint. Learners can access their course materials to review important topics or learn about the latest product features.

Occasionally, new team members join the project after Inception and will need training and certifications appropriate for their roles. Learners may want to consider Guidewire public training, led by an experienced *Certified Trainer*. This is an affordable, effective way for new learners to build knowledge and skills, without affecting the velocity of their peers who are already building project deliverables.

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Stabilization

When the project team begins Stabilization testing, it is important to train the production support engineers and other center of excellence (COE) staff. These team members need to understand best practices and base product behavior to help troubleshoot issues. They also need to know how the product was configured—and why—so they can better support enhancement requests after go-live.

Most production support team members benefit from the same training and certification that developers and analysts completed during Inception. Guidewire's Global Support team may recommend additional knowledge transfer activities to help the customer team become more self-sufficient and effective when monitoring the health of their Guidewire implementation.

Ongoing Learning

As new Guidewire product releases become available, learners will need access to training on the latest features and functionality so they can maximize new capabilities and avoid reinventing the wheel. Guidewire Education offers convenient eLearning courses to help team members stay current with each release.

Guidewire Education subscriptions provide access to all existing eLearning content, automatic access to future eLearning content, and open-book exam attempts. Subscriptions are grouped by product and role. Customers may also add virtual machines to their subscription so learners can complete hands-on lab exercises to strengthen competency in Guidewire products. All virtual machines include pre-built training data to support lab exercises and are managed by Guidewire Education, allowing learners to focus on learning rather than installation steps or troubleshooting.

Ready to Start Planning?

Now that you understand which roles need to be trained and when, you can start to build your training plan. Contact us for guidance on how to personalize the best training plan for your implementation team.

Additional Resources

Guidewire Certification Options | Certification Options for Developers | Certification Options for Analysts

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