

CHECKLIST – ESSENTIAL TECHNOLOGY FEATURES TO MANAGE A TRAINING COMPANY

To offer the best quality of service to their clients, training companies need to ensure efficient and smooth collaboration between all employees from sales representatives and administrative support to trainers. Yet, organizations often mix different tools (CRM, spreadsheets...) which do not scale into a growing organization. This checklist is intended to guide you through the features needed to improve the efficiency and profitability of your training company, and help you assess the performance of your current technology in each domain.

LOGISTICS FEATURES	Absent	Partial	Complete
<input type="checkbox"/> Course Scheduling			
<input type="checkbox"/> Graphical schedule with drag-and-drop capability			
<input type="checkbox"/> Visibility over session occupancy rates and color-coding of sessions for status tracking			
<input type="checkbox"/> Easy access to session information from the main schedule			
<input type="checkbox"/> Resource management			
<input type="checkbox"/> Capability to integrate and schedule any type of resources in the system			
<input type="checkbox"/> Multiple and highly flexible timeline and agenda views to monitor sessions, instructors, venues and resources			
<input type="checkbox"/> Built-in conflict-management			
<input type="checkbox"/> Global visibility over resource usage rate			
<input type="checkbox"/> Registration management			
<input type="checkbox"/> Streamlined process for registrations, waitlists, and cancellations			

ADMINISTRATIVE FEATURES	Absent	Partial	Complete
<input type="checkbox"/> Automated administration			
<input type="checkbox"/> Full-web portal accessible anywhere by managers and administrators			
<input type="checkbox"/> Real-time collaboration through shared dashboards			
<input type="checkbox"/> Easily create and send administrative documents (training agreements, attendance sheets...) to multiple audiences			
<input type="checkbox"/> Ability to store, track, annotate and retrieve documents in the system			
<input type="checkbox"/> To-do list consolidation			
<input type="checkbox"/> Ability to define and track all tasks needed before and after each training session			
<input type="checkbox"/> Global support			
<input type="checkbox"/> Multi-language and true multi-currency support (exchange rates integration)			
<input type="checkbox"/> Integration of state, country and industry training regulations			
<input type="checkbox"/> Visibility over the activity at different levels: enterprise-wide as well as broken down by countries or business units			

PROFITABILITY FEATURES	Absent	Partial	Complete
<input type="checkbox"/> Real-time cost tracking			
<input type="checkbox"/> Access to precise cost-breakdown per session as opposed to per learner. Most ILT-related costs are fixed costs (rooms, instructor fees...) which need to be amortized, hence this requirement			
<input type="checkbox"/> Computation of costs based on actual resource usage and attendance			
<input type="checkbox"/> Tracking of expenses for each performed training action and consolidated computation of training expenses			
<input type="checkbox"/> Profitability monitoring			
<input type="checkbox"/> Real-time computation of session profitability from actual costs and sales			
<input type="checkbox"/> Automated alerts to track session profitability			
<input type="checkbox"/> Reporting on global sales and expenses to monitor overall profitability			

REPORTING FEATURES	Absent	Partial	Complete
<input type="checkbox"/> Real-time KPI			
<input type="checkbox"/> Unified, shared database updated in real-time, including relevant KPIs consistent with industry best-practice			
<input type="checkbox"/> Customizable dashboards to include business specific insights			
<input type="checkbox"/> Fully customizable reports			
<input type="checkbox"/> Native, fast and intuitive reporting tool using real-time data			
<input type="checkbox"/> Extensive data structure easily accessible with drag and drop			
<input type="checkbox"/> Unlimited data refinement capability with all system fields readily available for extraction (eg, breakdown by learner profile or business unit)			

SALES FEATURES	Absent	Partial	Complete
<input type="checkbox"/> Sales cycle management			
<input type="checkbox"/> Streamlined process from order to invoice to optimize the B2B sales cycle			
<input type="checkbox"/> Information shared in real-time between sales and administrative teams eg. validated orders are directly transferred to scheduling			
<input type="checkbox"/> Live indicators for pending orders and invoices			
<input type="checkbox"/> Mass invoicing process and support for multiple flexible invoicing terms			
<input type="checkbox"/> Accounting export capability to ensure financial information compliance			
<input type="checkbox"/> Training catalog and customer portal			
<input type="checkbox"/> Online training catalog with direct ordering process			
<input type="checkbox"/> Ability to sell annex services and products such as consulting			
<input type="checkbox"/> Ability to offer adjusted prices based on offers and framework agreements			
<input type="checkbox"/> Tracking of customer history and activities to improve customer follow-up			

Looking to consolidate your training processes and improve the performance of your company?

*Training Orchestra is a leader in **Training Resource Management System**, providing an integrated full-web solution to help Training Companies increase efficiency, improve profitability and develop customer loyalty. The solution covers the whole training process: logistics, administration, reporting, sales and portal.*

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