



Planning Live Training at Scale

Strategies for planning live training that
boost training ROI.



Introduction

You're responsible for scheduling hundreds of live trainings next quarter. All of them have slightly different requirements. Compared to elearning, live training is very expensive with added pressure to show ROI. But you also know, live training works.

How do you stitch all of these trainings together into a manageable plan? One that you can solve in a day, not a week?

This guide will help.

- See some tips to make bulk scheduling easier.
- Understand what are the biggest blockers to scheduling at scale.
- Explore technologies made for bulk planning.



About Administrate

Administrate is a learning technology company based in Edinburgh, Scotland. Administrate is also the name of our training management system, which is the only TMS dedicated to live training.

Our training management system helps enterprise training teams manage live training. We've helped customers like Maersk Training, Roche Diagnostics, and Siemens Healthineers train thousands of learners every year.

Their live training programs typically involve planning hundreds of sessions every quarter. Many of their sessions involve complex, high-value equipment like medical devices, simulators, and in one case, a burning helicopter. Yes, we want a video of that one, too.

We know what it takes to deliver live training at this level. This guide book breaks down that knowledge so you can hit the ground running with next quarter's planning.

Our planning methodology

Our methodology prioritizes repetition, data-driven decision making, and business goals.

Repetition

Teams often replicate a large part of last quarter's training, but with small tweaks and changes. Sadly, many training management tools (especially the venerable LMS) are terrible at replicating and editing training schedules in bulk, forcing you to start over every quarter. We are going to help you reuse your hard work.

Data-driven decision making

Training data is a gold mine, but many training teams don't use it as well as they could. We think a lack of tools is once again a problem here, but data literacy among training teams can't be ignored. We are going to walk you through how to use your training data to make better scheduling decisions.

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- Booking 67 instructors
- Booking 439 resources

Create events and book

“Through repetition, data-driven decisions, and a clear focus on business goals, our customers reduce scheduling time by 45% but more importantly—it keeps training aligned with top down business objectives.”

Gilles Benyon-Bell

VP of Customer Success at Administrate

Business goals

Every session you plan is connected to a business goal. Right? We've found teams can easily lose sight of the larger business goals they are working toward when planning training. It may seem too far removed, but these goals are going to help you make hard decisions and establish priorities while planning.

As we lay out our advice for planning live training in bulk, we will keep this methodology front and center.

Think about planning as a data problem

First step is to start thinking about course planning as a data problem. Many training teams try to brute force their way through a problem. What's that look like? Are you spending several days planning schedules? Are you doing it late into the evening, locked away in a room with whiteboards filled to the edge with notes? Are there sticky notes everywhere? Are you constantly referencing instructor calendars?

All of this is a sign that there's not much structure to course data, and that makes planning a bigger problem than it should be.

Build a course template

We suggest you start building a template for your courses. Most teams we work with keep this template organized in a spreadsheet. We aren't fans of spreadsheets, because they are error prone and cumbersome, but we realize that's the tool most people are familiar with. Even if it is painful.

The template should include the following basic info:

Course type

Define the type of course: instructor-led, virtual instructor-led training (vILT), self-paced, blended, etc. This helps in understanding the format and logistics required.

Instructor requirements

Detail the qualifications and credentials instructors need to teach the course. This could include certifications, experience levels, and any other specific requirements.

Learner qualification

Specify if learners need to have completed other courses, possess certain credentials, or have specific knowledge or skills to participate in the course.

Equipment and resources needed

List any high-value equipment, training aids, or special locations needed for the course. This could include anything from medical devices to specialized software.

Course goals

Outline the common business goals that the live training aims to achieve. This helps in aligning the training with organizational objectives.

Scope your plan

How many classes will you need?

Scoping training volume is usually where training teams start, and it can take a long time with lots of back and forth.

Ask yourself:

- Where are learners on their journey? Get hard numbers and cohort data to know where to send your learners next.
- Are you reusing courses from last quarter/year? If so, how many did you need then? What has changed?
- Are there external factors driving training demand? Legal and security compliance are the top culprits here but what about new business initiatives? How will these factors increase training volume?

What about instructors and resources?

Now you need to understand if you have enough qualified instructors, resources, equipment, and facility space. If you have a course template already built out, it will be easier to answer these questions.

- Do you have enough instructors available?
- Do the instructors have enough availability?
- Are the instructors properly qualified?
- Do you have enough resources?
- Do your available resources meet requirements?

Use your course template to help

With your course template in hand, you should be able to quickly filter your list of courses to get some useful information such as learner qualifications and instructor requirements.

When you are scoping your plan, you need to really have a grasp of your data, and use it to make these decisions.

Starting with a previous training plan is a good start, but also look at your organizational goals and KPIs. What's doing well? What isn't? Let these act as posts to help you ground your plan to meaningful action.

Schedule your plan

So if you have a course template, perfect clarity on how many classes you need, and a list of instructors and resources you can book - it should be easy to schedule, right?

No way. This is where the real challenge starts.

Tips for manually scheduling live training

- 1. Create a master schedule:** Start by creating a master schedule that includes all training sessions, instructors, and resources. This will help you see the big picture and identify potential conflicts.
- 2. Use color coding:** Utilize color coding for different courses, instructors, and resources. This visual aid can make it easier to spot overlaps and gaps in the schedule.
- 3. Automate where possible:** Use automation tools for repetitive tasks such as sending reminders and confirmations. This can save time and reduce errors.
- 4. Regular check-ins:** Schedule regular check-ins with your team to ensure everyone is on the same page and to address any issues that arise promptly.
- 5. Buffer time:** Include buffer time between sessions to account for overruns and to give instructors and

The screenshot shows a scheduling interface for 'Medical Imaging Training Q1'. At the top right is a 'Solve' button. Below it is a calendar for the month of January, with days 1 through 12 labeled (Mo, Tu, We, Th, Fr, Sa, Su, Mo, Tu, We, Th, Fr). The interface lists resources: 'Inventory', 'Resources 16', and 'MRI Simulation Lab 4/4'. Under 'MRI Simulation Lab', there are four rows representing different labs: Atlanta Lab, Boston Lab, Edison Lab, and Las Vegas Lab. Each row has a column of colored blocks representing scheduled sessions. Atlanta Lab has sessions on Mon, Tue, and Wed. Boston Lab has sessions on Tue, Wed, and Thu. Edison Lab has sessions on Wed, Thu, and Fri. Las Vegas Lab has sessions on Thu, Fri, and Sat. A hand cursor is hovering over a session in the Atlanta Lab row on Wednesday.

learners a break.

- 6. Centralized communication:** Keep all communication centralized through a single platform to avoid miscommunication and ensure everyone has access to the latest schedule.
- 7. Flexibility:** Be prepared to make adjustments as needed. Flexibility is key to handling last-minute changes and unexpected issues.

Right tool for the job

Sadly, training teams are inundated with learning technology that just isn't built for planning live training at scale.

This is the biggest blocker preventing most enterprise teams from improving the scheduling function.

Here's why they don't work.

Calendars

Calendars are terrible. Often they require manually syncing, especially if instructors and resources are different calendar apps or lack visibility to each other. Spreadsheets are going to be needed to manage all of this data.

Spreadsheets

Spreadsheets are error-prone, slow to use, and not scalable. They require manual updates and are prone to mistakes, which can lead to scheduling conflicts and missed sessions.

LMS

Learning Management Systems (LMS) are not built for live training. They often require the use of spreadsheets for scheduling, do not scale well for live sessions, and the data is often siloed. LMS are good at solving immediate pain but struggle to connect to top-down business objectives.

The limited capability of an LMS means most training teams don't even bother using an LMS for planning anyway. But, it may house a library of courses, training content, and learner data.

TMS

Training Management Systems (TMS) that are designed for live training can provide a one-stop shop for planning. They can actually use training data to do something useful like show you scheduling conflicts.

The best TMS options on the market can replace spreadsheets, manual calendar syncs and the management capabilities of an LMS. However, you're going to need a TMS that's designed for live training.



What works? Administrate's Scheduler

Administrate's [Scheduler](#) is designed to handle the complexities of live training at scale. It integrates seamlessly with your existing systems, allowing you to plan, schedule, and communicate training plans efficiently.

The Scheduler offers real-time updates, automated notifications, and a user-friendly interface that simplifies the scheduling process. It helps you manage resources, avoid conflicts, and ensure that every session aligns with your business goals.

Finalize your plan

Identify growth opportunities

Keep growth opportunities in mind as you plan your schedule. Planning is a great time to set your program up for success, at least in a few key areas.

It also a good time to do a serious retro on previous plans. What worked? What didn't? Can you identify why some KPIs improved? What can you keep, and what can you build upon?

Our customers often find fill rate, learner engagement, revenue, and ROI to be solid KPIs that be improved during planning. We suggest you start with a hard look at those metrics.

Share your training schedule

Communicating your live training plan effectively is crucial for approval and collaboration. Here are some steps to ensure everyone is on the same page:

1. **Use a centralized platform:** Share the training schedule on a centralized platform where all stakeholders can access it. This ensures everyone has the most up-to-date information.
2. **Regular updates:** Provide regular updates and reminders to keep everyone informed of any changes or adjustments.
3. **Clear communication:** Clearly communicate the objectives, expectations, and any specific requirements for each training session. This helps

avoid confusion and ensures that everyone knows what to expect.

4. **Feedback loop:** Establish a feedback loop where instructors, staff, and stakeholders can provide input and ask questions. This helps in identifying potential issues and making necessary adjustments.

Use Administrate's Scheduler to plan live training in minutes

Our Scheduler tool uses machine learning to solve complex schedules in just minutes. Purpose-built for live training, it uses your course, instructor, resource, and calendar data to solve complex scheduling challenges.

Want to see Scheduler in action? Get in contact or book a demo below.

**Book time to see
Scheduler in action**

Get a demo

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