

Online Training Maintenance Plan

To Do Checklist

Run Your End of Year Reports

- ☐ **Run your annual reports and print it for your records.**
Check the course: Getting Started – Administrators – Reports – 45m

- ☐ **1.** Verify your team completed all required courses, especially those that are compliance requirements.

Do Your Users' Accounts Maintenance

- ☐ **1.** Always inactivate users who are no longer with your company. Their accounts count towards our system cost.
How To: Find the user, click the green Status icon. It will turn gray indicating the account has become inactive.
- ☐ **2.** If you have user accounts that were never used, send us the usernames and we will delete them for you.

Update All Learning Plans

- ☐ **1.** Review retired courses and replace or remove them in your learning plans.
- ☐ **2.** Review new courses developed this year and add the relevant ones to your store learning plans.
- ☐ **3.** If you are using the Learning Plans tool (**Curriculum Coordinator**) in the system, create new learning plans for the next year. View the course: Getting Started – Administrators – Learning Plans – 35m

Miscellaneous

- ☐ **1.** Update your Job Descriptions. This may trigger revisiting your learning plans.
Check the ones we have available for you: Getting Started – Administrators – Job Descriptions
 - ☐ **2.** Print and post promotional flyers to engage and motivate your team.
Check available flyers in the Resource Center, Marketing Materials section
<https://retaillearning.net/resource-center/>
 - ☐ **3.** Check-in with managers and supervisors to learn about their plans for the next year. Ask about their and their team's experience with the program, their needs and suggestions to improve your program.
 - ☐ **4.** Update your training manual and communicate any changes and updates to management and staff.
 - ☐ **5.** Check out the Course Catalog as we highlighted some core courses for your online training program.
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