



Saba Cloud and Higher Education:

A Roadmap for a Successful Implementation at Your College or University

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Introduction: Experience Matters

Institutions of Higher Learning (IHEs) share many characteristics with non-educational organizations, but distinctive features of colleges and universities present special challenges and opportunities when implementing talent management systems. Saba Cloud offers a wealth of innovative functionality to meet the complex and diverse needs of IHEs, and Saba has teamed with The Educe Group to implement learning management systems (LMSs) at leading universities. The experience from these implementations provides a roadmap for success, and some of the key IHE lessons learned are summarized here.

The Roadmap

1. Establish Clarity around Institutional Goals

There are numerous factors that drive IHEs to invest in Saba Cloud and the decision to move forward is often the result of a months- or years-long deliberative process. What are the critical drivers behind the search for a new LMS at your institution? What are the priorities versus the nice-to-haves? Establishing clarity around institutional pain points and aspirations for learning should be baked into the governance and implementation processes from the start. Below are a few of the key drivers identified from previous IHE implementations by Saba and Educe.

- Consolidation of existing systems. Many IHEs rely on a decentralized array of systems to manage learning. These systems may have significantly different capabilities and likely are configured to accomplish unit-specific goals. The proliferation of multiple systems can lead to a complex landscape for any individual learner to navigate in addition to cost and process inefficiencies. Thus, a common goal cited in the desire to move to a new LMS is the consolidation of all learning into one enterprise-wide platform.
- Intuitive user interface for end users and system administrators. Another priority for IHEs is ease of use. With its intuitive dashboard-based user interface (UI), ease of use is an obvious strength of Saba Cloud. Learners, managers, administrators, and instructors have dashboard views that allow for easy access to learning and performance plans, transcripts, and reports. Saba Cloud also utilizes machine learning algorithms that incorporate observations of user behavior and can deliver proactive and personalized recommendations for content, connections and courses.
- Delivery of learning to the right audience with robust notification capabilities. The assignment of learning at colleges and universities often can be a resource-intensive and frustrating exercise prone to inconsistencies. To the extent that existing systems lack integration or require manual processes to ensure that required learning is delivered to learners, moving to Saba Cloud will reap great benefits. Saba Cloud allows system administrators to create prescriptive rules to dynamically assign learning to individuals based on attributes such as location, organization, job/position, expertise and more. This automatic assignment process places learning directly onto a learner's personal learning plan and is supported by a robust notification engine that includes the ability to configure automated emails from the system. These notifications ensure that the right learning is delivered to the inbox or calendar of the right people at the right time. Whether it is registration confirmations, reminders for compliance training deadlines, or notice of certification expirations, Saba can automatically send emails and calendar invites that are accessible via Outlook or Google's mail and calendar solution. Recent system enhancements allow for the digesting of learning notifications delivered in one consolidated email on a monthly basis.

- Integration of learning with other talent management functions. The challenges presented by inefficient and decentralized learning processes not only present the opportunity to consolidate and establish uniformity across units, but also to integrate learning with performance management and other strategic human resources imperatives. Saba Cloud is a fully integrated talent management suite with learning management at its core. Is having performance management fully integrated with learning a goal of your institution? Can other modules in the full Saba Cloud talent development suite—Compensation, Career Planning, Recruiting—add value to your strategic plan for human resources? If so, then your LMS implementation should reflect your comprehensive long-term goals for talent development.

2. Conduct a Thorough Inventory of Existing Learning

A consistent theme encountered by Educe and Saba in prior IHE implementations is the need for the university team to conduct a comprehensive inventory of existing learning. In addition to courses, content and transcripts residing in legacy learning systems, it may be necessary to account for manual processes where, for example, learning history is tracked via spreadsheets.

The inventory also should cover integrations with third party systems and vendors, like Skillsoft, Lynda.com, the Collaborative Institutional Training Initiative (CITI) and the American Association for Laboratory Animal Science (AALAS). For example, how does your institution interface with CITI and AALAS now? Do learners utilize external systems to complete required compliance courses? If so, how does the university obtain and manage learner records?

Finally, no inventory is complete without a clear understanding of existing content. Web-based content may have been created internally, purchased, or outsourced for development, and it is important to assess the extent to which it will integrate while providing the maximum flexibility with regard to tracking and reporting. An upgrade to Saba Cloud may be the perfect opportunity to establish guidelines for all content that will be uploaded into the LMS, including the preferred standard(s) (e.g., SCORM 2004, SCORM 1.2, or AICC), the names and versions of approved authoring tools whose content has already been tested and integrated, and preferred vendors who understand and have successfully followed your internal processes.

3. Develop a Plan for Governance

Good governance will play a critical role in the success of your implementation. The importance of balancing sufficient input from stakeholders with streamlined decision-making cannot be overstated. Garnering too little input from stakeholders risks missing critical implementation requirements prior to the start of the project, while requiring configuration decisions to be vetted by a relatively large group can have a serious impact on project timelines and lead to added costs. A common model for success includes vertical integration between project sponsors—typically upper-level administrators—a steering committee representing different university schools, departments or units, and a smaller core project team with the authority to make timely decisions about system configurations. System governance is another level that is important to consider. Will the core project team have authority to determine who the system administrators will be?

4. Allocate Sufficient Resources for Change Management and System Sustainability

The importance of allocating sufficient resources plays out at several levels throughout the implementation life-cycle. It has already been noted that the general investment in good planning and governance will pay long-term dividends, but specific attention also must be given to ensuring that team members can devote time to attending implementation workshops and completing project deliverables on time. The implementation process is designed to be collaborative from the start and the expectation is that those who will assume system administration roles will be in the system early and often, thereby developing knowledge that will feed post-Go Live sustainability.

Due to the inherent de-centralization of university training, a potential pitfall in IHE implementations is lack of preparation for system and user acceptance testing. Testing teams must be organized, understand their roles, and have sufficient time scheduled to develop appropriate test scenarios, test them thoroughly and report issues for resolution. It is not uncommon for testers to have insufficient time allocated for the testing phase and/or to procrastinate, leading to a bottleneck of issues and potentially extending the testing period.

Sometimes the adoption of an LMS itself is threatening. Stakeholders may be understandably invested in existing processes and resist change. It is incumbent upon university implementation teams to educate stakeholders about the need for change at the macro-level and how existing roles will be transformed once the new system is in place. Failure to invest in change management can lead to low buy-in and decreased adoption.

Effective training can be an important element of the change management process. The intuitive nature of Saba Cloud and integrated online help may diminish the need for extensive end user training, but each college or university must determine for themselves the nature and extent of such training and prepare to deliver it. Educating the project team prior to the start of the implementation also may be a smart investment. Most IHEs take advantage of Implementation Readiness Training (IRT) offered by Saba and delivered by Educe. IRT is designed to review basic functionality and develop a shared Saba vocabulary, preparing teams for the Configuration Workshop in which key system decisions will be made.

5. Know your Learner Data

The integration and migration of people data is a key aspect of any implementation and at colleges and universities these tasks can be particularly complex. Among the factors that contribute to the complexity is the fact that there are numerous types of learners—for example, faculty, staff, undergraduate students, graduate students, post-docs, visiting researchers, external learners, summer camp counselors—whose credentials for access to university systems may be provisioned in various ways and whose learning data may reside in different legacy systems. Solving for the use cases that these different types of learners and engender can be challenging, and in some cases IHEs may utilize identity management solutions to process the people data before it feeds the Saba system.

Beyond identity management, another layer of complexity relates to the manner in which people are grouped for the assignment of learning. One particularly thorny problem relates to research administration and the manner in which compliance training is assigned. Existing processes may involve the Principal Investigator of a study or her designee(s) manually assigning required training based on grant requirements, equipment utilized, human or animal subjects, or the lab space to which the

student or researcher has access. In such situations, there may be no set of criteria that would allow required learning to be pushed via prescriptive rules.

6. Consider a Phased Implementation

The complexity of LMS adoptions and the potential strain on resources they may produce speaks to the wisdom of considering a phased implementation, especially if the goal is to implement additional Saba Cloud modules beyond Learning. Recent IHE implementations provide instructive examples of phased approaches. In one instance, the initial phase was focused on Learning related to research compliance only. Later phases were planned for the expansion of learning university-wide and the implementation of Performance. Another variation solved for all university compliance requirements from the beginning with an eye towards Performance implementation in the future. Regardless of the path chosen by an institution, Educe and Saba can play important roles in guiding the configuration process so as to ensure that Phase I decisions conform to long-term goals.

7. Tailor the Platform for a Perfect Fit

One of Saba Cloud's most powerful benefits is its extensibility. Organizations often have unique requirements related to regulatory compliance or talent management and universities are no exception in this regard. Saba Cloud anticipates and accommodates these circumstances by allowing the information and workflows of IHE-specific requirements to be incorporated into the solution via web service integrations with other web-based applications. These types of "customization in the Cloud" allow IHEs to blend the speed and efficiency of deploying Saba's best of breed cloud talent suite with the type of solution tailoring that was possible in legacy on premise enterprise installations.

For example, it is possible to pull data from other sources and display it within Saba Cloud to enhance learning functionality by integrating a small, custom application called a "micro-app." Educe developed a micro-app called the Compliance Profiler to streamline the assignment of learning for research administration at Washington University in St. Louis. The Compliance Profiler included a dynamic survey instrument that learners accessed through their Saba ME page. Once survey questions are answered and submitted, it updates custom fields on the learner's profile. Those fields, in turn, are read by prescriptive rules which automatically push required compliance training to the learner. The Compliance Profiler enhanced the accuracy and reduced the administrative burden of assigning and tracking the status of compliance training at Washington University.

Next Steps

Saba and Educe have established themselves in the higher education space as the leading LMS vendor and implementation team, respectively. If talent development at your institution needs an overhaul, explore how Saba's industry-leading cloud software suite and Educe's experienced higher education implementation team can bring innovative solutions to the challenges faced by your college or university.

About the Educe Group

Educe helps organizations implement talent management technologies that enable people to reach their potential. Our clients span many industries including health care, finance, higher education, pharmaceutical, federal and state government, manufacturing, retail, resorts, and professional services. By focusing on implementation and adoption of systems that enable the development of people, we have grown specialized expertise that allows us to provide solutions that are relevant and sustainable. Many of our professional consultants have background in organizational learning and development and bring that knowledge to bear. Educe was founded in 2003 and is headquartered in Bethesda, MD with consultants across the United States. For more information about the Educe Group, please visit www.educegroup.com.