

# ANCILE Professional Services Health Check



As your ANCILE uPerform™ implementation matures, business changes make it necessary to take a step back and rethink your environment. An independent assessment is a great way to ensure that uPerform is supporting the latest changes and your organization's requirements.

To help you get the full potential out of your uPerform investment, ANCILE offers a Health Check to assess your current needs and identify areas to drive additional return on investment.

## The Value of a Health Check

- Secure long-term return on your investment by identifying obstacles and receiving recommendations to successfully maximize the full potential of uPerform.
- Obtain a comprehensive analysis of your current situation against your overall learning and development strategies.
- Increase effectiveness and efficiency of your uPerform solution by deploying ANCILE best practices.

## The Health Check Offer

Our Professional Services Consultants, who have supported and advised our large global customer base for over 15 years, will facilitate a three-day engagement to discuss the current state of uPerform and how you are using uPerform to support your overall learning and development strategy. This engagement is divided into three main areas:

### Technical Review

Our consultant works with you to get an overall snapshot of your current situation. We perform a technical review of your current uPerform implementation, looking at configurations, customizations, system settings integrations, and templates. After review and discussion, our consultant will then present improvement recommendations regarding uPerform.

### Processes and Content Review

During this phase, our consultant reviews the functional processes you're using with uPerform. We review content development and management (including workflow and publishing), localization and translation, glossary, reporting, and uPerform server management. This phase includes interviews with the stakeholders of each process.

### Report and Findings Presentation

Based on the reviews, we'll provide a detailed Health Check report of the current status, identify any risks, and propose recommendations on next steps and action items. Our consultant will present the report findings, and provide best practices to implement the suggested improvements.

# Typical Agenda – ANCILE uPerform Health Check

Activity/Participants/Duration	Tasks
<p><b>Kick-Off Meeting (onsite) - Day 1</b></p> <p>Suggested participants:</p> <ul style="list-style-type: none"> <li>• uPerform Product Administrator</li> <li>• uPerform Application Owner</li> <li>• uPerform Administrator</li> </ul> <p><i>This activity will take approximately 2 hours.</i></p>	<ul style="list-style-type: none"> <li>• Discuss and align on the Health Check objectives.</li> <li>• Discuss current status of the uPerform project.</li> <li>• Discuss future business goals and objectives to support corporate learning and performance support requirements.</li> </ul>
<p><b>Technical Review (onsite) - Day 1</b></p> <p>Suggested participants:</p> <ul style="list-style-type: none"> <li>• uPerform Product Administrator</li> <li>• uPerform Application Owner</li> <li>• Windows Server Administrator</li> <li>• Database Administrator</li> </ul> <p><i>This activity will take approximately 4 hours.</i></p>	<ul style="list-style-type: none"> <li>• Review ANCILE uPerform server setup:               <ul style="list-style-type: none"> <li>• General settings</li> <li>• Project(s)</li> <li>• Template(s)</li> <li>• Glossary</li> <li>• Reporting</li> <li>• User management and authorization</li> </ul> </li> <li>• Review context-sensitive help setup.</li> <li>• Review website customizations and branding.</li> <li>• Review server technical specifications.</li> <li>• Review backup strategy.</li> </ul>
<p><b>Process and Content Review (onsite) - Day 2</b></p> <p>Suggested participants:</p> <ul style="list-style-type: none"> <li>• uPerform Administrator</li> <li>• uPerform Application Owner</li> <li>• uPerform Key Author</li> </ul> <p><i>This activity will take approximately 6 hours.</i></p>	<ul style="list-style-type: none"> <li>• Review current content development and management process.</li> <li>• Review translation and localization process.</li> <li>• Review uPerform example content.</li> <li>• Review current author guidelines.</li> <li>• Discuss current uPerform enablement and training requirements.</li> </ul>
<p><b>Report Preparation (remote or onsite) - Day 3</b></p> <p><i>This activity will take approximately 6 hours.</i></p>	<p>Prepare the Health Check, documenting current status, list of findings, risks, recommendations, next steps and action items, and a management summary.</p>
<p><b>Findings Presentation (remote or onsite) - Day 3</b></p> <p>Suggested participants:</p> <ul style="list-style-type: none"> <li>• Training Project Management</li> <li>• uPerform Project Manager</li> <li>• uPerform Product Administrator</li> <li>• uPerform Application Owner</li> <li>• uPerform Administrator</li> </ul> <p><i>This activity will take approximately 2 hours.</i></p>	<p>Present report findings of:</p> <ul style="list-style-type: none"> <li>• Enhancements to technical configurations, customizations, and settings of uPerform.</li> <li>• Recommendations to improve the functional use of uPerform.</li> <li>• Recommendations on how to roll out improvements.</li> </ul>