## What we do

Proleven offers training courses to client companies. The courses are related to 4 different areas:

- **Workplace health & safety:**
  - Courses (such as first aid training) held at a Proleven Academy (some also get live streamed on Zoom) – managers of client companies enroll participants through our website → this means that participants are from different companies
  - Courses held at the client company's premises
  - Courses held on Zoom, Microsoft Teams, Google Meet
  - Courses held at the client company's premises + on Zoom/Teams/Meet (some people take part physically, some join by videoconference)
- **Corporate well-being:**
  - Held at the client company's premises
  - Held on Zoom, Microsoft Teams, Google Meet
- **Hard & soft skills:**
  - Held at the client company's premises
  - Held on Zoom, Microsoft Teams, Google Meet
- **Team building:**
  - Held at the client company's premises
  - Held on Zoom, Microsoft Teams, Google Meet

## Who our clients are

99.99% companies. This means that we speak with 2/3 managers of the company and they define which courses their employees have to attend and then enroll them.

Every once in a while, we also have private persons as clients, but only for our workplace health and safety courses held at the Proleven Academies.

**IMPORTANT** → we also offer e-learning courses, but it's **NOT** our core business and they are currently managed through a separate LMS (due to Italian legislation, right now this cannot be changed).

For this reason, the LMS /software we are currently interested in developing must only manage the other types of courses mentioned above (on Zoom/MS Teams, physically at the company's premises, physically at a Proleven Academy) and <u>NOT e-learning ones</u>.

**Workflow | Courses held at a Proleven Academy (physically + Zoom livestream)**

1. Our training specialists create new courses on the LMS, setting date, place, duration, assigned trainer, minimum attendance, maximum number of participants, meeting room. They bulk-create courses by uploading them to the LMS via an excel file.
    a. The courses they have created are automatically added to a shared Google Calendar. The trainer who's been assigned to the course is invited in the calendar meeting (in this way, he will receive a calendar invite).
    b. The courses they have created (having been previously marked as "public" in the LMS) also appear on the proleven.com website, so that clients can see the full yearly program and enroll their employees. When the maximum number of participants has been reached, the course must appear as "full" and users must no longer be able to enroll participants.
2. The manager of client company creates an account for his company on the proleven.com website.
3. The manager of client company enrolls participants to the courses he selected through his account on the proleven.com website by filling in the required fields.
    a. The manager of the client company can also un-enroll participants whenever he wants through his account.
    b. Our training department can see the list of participants who have been enrolled to each course on the LMS.
    c. No payment is processed upon enrollment, the company will receive an invoice at the end of the month from the accounting department.
    d. The LMS must monitor the number of enrolled users in each course and display an alert in the Proleven user's dashboard when:
        i. the maximum number of participants is about to be reached (based on a rule that we will define)
        ii. the maximum number of participants has been reached
        iii. certain courses take place at the same time (for example "first aid course – first time training" and "first aid course – refresh"). In this case, the LMS must take into consideration that the maximum number of participants (35) is split over all courses happening at the same time, as there are a fixed number of chairs in each room. The rule could be that all courses taking place on the same day with the same trainer must have maximum 35 participants ALL TOGETHER.
4. Workplace safety legislation requires that we issue certificates only to attendees who totalled more than 90% attendance. It may happen that an attendee needs to leave the course earlier than its finish time. When this happens, our training specialists mark the attendance percentage for that specific attendee in the LMS and set a make-up date for the portion of the course that they missed (it's as if they moved the person's enrolment to another course, but just for the portion of the course that they missed).
5. The LMS automatically creates a Zoom link (if the course has been set for both physical and livestreaming mode).
6. On the working day before the course, the LMS automatically sends out the reminder emails:
    a. Reminder #1 goes to the manager of the client company
    b. Reminder #2 goes to the attendee (if the manager has filled in the attendee's email field)
    c. Reminder #3 goes to the trainer

    The reminder email for the manager and the attendee includes the following information: reminder that the course starts tomorrow at … am, link to the Zoom meeting (if the manager enrolled the attendee for livestreaming mode), additional standard information.

The reminder email for the trainer includes the following information: reminder that the course starts tomorrow at … am, link to the Zoom meeting (if the course is livestreamed), link to the final exam that participants have to pass, additional standard information.

7. On the day of the training course, our training specialists launch the Zoom meeting (if the course is also livestreamed) directly from the LMS.
    a. The LMS keeps track of users logging into Zoom, their names, last names, email addresses, time they joined, time they left the meeting, total time they stayed connected (in minutes).
8. On the day of the training course, the trainer collects signatures of all attendees.
    a. He goes to the proleven.com website using a tablet and logs into his account (it is a "trainer" type of account, thus different from the client accounts). Once logged in, he sees the list of the courses assigned to him on that day. He clicks on the course which is starting and the system displays the attendance sheet. This is made up of the following columns: name of the attendee, "codice fiscale" (= some sort of social security number), company, signature at the beginning of the course, signature at the end of the course. The trainer clicks on "signature at the beginning of the course" and a signature field pops-up in full-screen mode. The attendee can sign there using a touch pen. The signature is automatically saved. The trainer clicks on "ok", closes the pop-up window and moves on to the following attendee, doing the same thing.
    b. If an attendee is not on the attendance sheet, the trainer clicks on "+" and adds the attendee, by having him/her fill in all fields: name, "codice fiscale", company (the system suggests names of employees /companies that are already registered in the LMS as the user types the company name / their first name).
    c. Our training specialists can see the signed attendance sheet in the LMS.
9. Before the course ends, it's time for attendees to take a final exam in writing.
    a. The trainer logs into his account on the proleven.com website, sees the list of the courses that have been assigned to him on that day and clicks on the one he is doing. In addition to the attendance sheet (seen previously), he can access a QR code that the LMS has automatically generated.
    b. This QR code leads to a web page which contains the following sections:
        i. Section #1: the final exam (it is a fixed set of multiple-choice questions which are assigned to each course, but we must be able to change these questions manually in the LMS when needed). Before answering the questions, the system must prompt the attendee to enter his full name and signature.
        ii. Section #2: the satisfaction survey. This section is anonymous.
    c. The LMS must import the answers to section #1 (final exam) and match exam results to each attendee, so that our training specialists can see if someone did not take the test or pass it. If so, they will not be able to issue the certificate. If the attendee, when filling in the final exam, makes a spelling mistake in their name, the LMS must display this test as unmatched and our training specialists will need to match it manually to the corresponding attendee.
    d. The LMS must import data from the satisfaction survey and keep track of it. Our training specialists must be able to filter satisfaction results by: trainer's name, date, period, category of course (e.g. safety). The average satisfaction results are displayed in each training specialist's dashboard in the LMS. The LMS must also display an alert if the satisfaction results of a certain course were below a certain threshold.
10. At the end of the course, the trainer collects signatures for the column "signature at the end of the training" using the exact same method.
11. At the end of the course, our training specialists check the attendance sheet (for people who attended physically) and the total time users stayed connected (for people who attended via zoom).

They click on "course completed" beside each participant's name (for participants who totalled minimum 90% attendance). This automatically generates a certificate for each participant (based on the Microsoft Word template we had previously uploaded to this specific course on the LMS). Our training specialists now click on "send certificates".

12. The LMS automatically sends an email to the manager of the client company which informs them that the certificate has been generated and can be found in their account on the proleven.com website. If more than one employee from the same company have attended the course, the LMS sends just one email to the company manager (and NOT an email for each attendee).
13. The manager of the client company logs into their account on the proleven.com website, goes to the "my courses" section, selects the specific course they are interested in (he can filter by course title, date, etc.) and downloads the certificate.

## Workflow | Courses dedicated to just one company / group (arranged physically AND/OR by videoconference)

1. The manager of the client company requests a course dedicated just to their company or group of companies. Our Sales reps manage the sales process. When the deal is won, they post a card on the training department pipeline (which is currently in Trello, but we would like to integrate directly into the LMS). They currently post a card in Trello automatically from Pipedrive (the sales CRM). There is a specific column in the pipeline which is dedicated to the courses that still have to be organized (it's called "Date requested").
2. The training department checks the pipeline every day and sees the new cards that have been added. Every new card is automatically assigned to one of our training specialists by the LMS itself.
3. The training specialist to whom the new card has been assigned looks at the attached quote to understand what type of course it is, how many sessions, how many people, where, etc. They also check the notes provided by the sales rep (which also appear in the card).
4. The training specialist searches for matching trainers in the trainers database within the LMS. This database includes name, last name, geographical area, client satisfaction score, notes, courses he/she can teach and filters can be used to find the best match.
5. The training specialist reaches out to trainers who are aligned with the project by email, giving them details about it and asking on which dates they would be free. This email is tracked in the pipeline card. In this way, whenever a person opens a card in the pipeline, they can see what's been done so far.
6. When the trainer responds, the training specialist creates a course for this specific client on the LMS and marks it as "option" (this means that the course is not confirmed yet). The course can be created as: "fully in person" – "fully in videoconference mode" – "both in person and in videoconference mode". Even if the trainer has provided more than one possible date, the training specialist will create just one course in the LMS. The training specialist also adds the trainer to the course and the involved "resources". By "resources" we mean, for example, the car, the fire extinguisher simulator, etc. that we will provide the trainer with on that day.
7. The course is then added to the shared Google Calendar automatically. The fact that it is an "option" must be clearly visible, as well as the mode ("fully in person" – "fully in videoconference mode" – "both in person and in videoconference mode"). The trainer is added as an invitee, so that they receive a calendar invite for that day.
8. Now the training specialist must send the proposed dates to the manager of the client company. This should be done automatically from the LMS and it must also be reflected in the pipeline card.

The training specialist clicks a “propose date to client” button next to the course he has previously created. This triggers an automatic email to the client which says “New dates have been proposed for your course […course title…]. Access your account on the proleven.com website to either accept the proposed dates or refuse them.”

9. Once the manager of the client company accesses their account, they are able to navigate to a section called “My courses awaiting confirmation”. There, they can see the course that the training specialist has created for them in the LMS with its corresponding dates. Next to the course, there should be 2 buttons: “accept proposed dates” and “refuse proposed dates and ask for new ones”. If the client clicks on “refuse” a text box pops up asking why they refused and to provide useful information to identify the best dates for them.
10. If the client company has not yet registered on the proleven.com website (and thus on the LMS), there is no account and no email in the LMS. If this happens, the training specialist manually creates the client company’s account in the LMS by filling in all the requited fields.
11. Now that the dates have been proposed to the client, the pipeline card must automatically move to the next column, which is called “date proposed”.
12. When the client responds through his account, there are 4 scenarios:
    a. **Scenario A** - Client clicks on “accept proposed dates” next to the course:
        i. the corresponding course in the LMS gets automatically marked as “confirmed” and this is immediately reflected on the shared google calendar.
        ii. The pipeline card must automatically move to the next column, which is called “date confirmed”.
        iii. An automatic email is sent to the manager of the client company saying “thanks for confirming the dates. The following course is now confirmed [all data of the course]. <u>Please upload participants to the course in your account.</u>”
        iv. The manager of the client company accesses his account on the proleven.com website, navigates to the “my confirmed courses” section, clicks on the course and either manually selects the participants from the list of the employees who are already on our systems OR manually adds the employees one by one OR uploads an excel file with the required data of all missing participants. If they choose to upload an excel file and some employees are already on the system, it must simply allow him to upload all employees except for the ones who were already there.
        v. Once the manager of the client company has uploaded participants, the training specialist receives a notification.
    b. **Scenario B** - Client clicks on “refuse dates and ask for new ones”:
        i. the corresponding course in the LMS gets automatically marked as “new dates requested” and the previous dates are removed from the course so that the course is also automatically removed from the shared google calendar.
        ii. The pipeline card must automatically move back to the previous column, which is called “date requested”.
        iii. The training specialist reaches out to the trainer once again to ask for new dates or reaches out to another trainer to do the same process. When the training specialist gets new dates from the same trainer, they propose them to the client using the same process as above (the only thing that changes is that they do not create a new course in the LMS but simply open the one they had already created and change the date). If they need to propose new dates to the client from a different trainer, they follow the same process as above, but they open the course that they had already created and change the assigned trainer + the date). All of these changes are automatically reflected on the shared google calendar.
        iv. The process continues exactly as in scenario A until the dates are confirmed.

    c. **Scenario C** - Client clicks on "refuse dates and ask for new ones" and writes in the pop-up text box that they will need to postpone the course but they don't know when to do it yet:
        i. the training specialist marks the course as "stand-by" and it automatically moves to the "stand-by" column in the pipeline.
        ii. The training specialist is prompted to set a date in which to reach out to the client (this creates a to-do activity on that day which will appear on the training specialist's dashboard).
        iii. The course marked as "stand-by" must be automatically deleted from the shared google calendar. In this way, the trainer is free on those dates.
    d. **Scenario D** - Client clicks on "refuse dates and ask for new ones" and writes in the pop-up text box that they no longer want to organize the course:
        i. the training specialist marks course as "cancelled". This automatically removes the course from the shared google calendar and moves the corresponding pipeline card to the "cancelled" column, so we can keep track of the courses that have been cancelled by clients.
13. The LMS automatically creates a Zoom / MS Teams link depending on client's requirement (if the course has been set for both physical and videoconference mode or fully videoconference mode).
14. Workplace safety legislation requires that we issue certificates only to attendees who totalled more than 90% attendance. It may happen that an attendee needs to leave the course earlier than its finish time. When this happens, our training specialists mark the attendance percentage for that specific attendee in the LMS and set a make-up date for the portion of the course that they missed (it's as if they moved the person's enrolment to another course, but just for the portion of the course that they missed).
15. On the working day before the course, the LMS automatically sends out the reminder emails:
    a. Reminder #1 goes to the manager of the client company
    b. Reminder #2 goes to the attendee (if the manager has filled in the attendee's email field)
    c. Reminder #3 goes to the trainer

    The reminder email for the manager and the attendee includes the following information: reminder that the course starts tomorrow at … am, link to the Zoom/MS Teams meeting (if it is in videoconference mode), additional standard information.

    The reminder email for the trainer includes the following information: reminder that the course starts tomorrow at … am, link to the Zoom/MS Teams meeting (if it is in videoconference mode), link to the final exam that participants have to pass, additional standard information.
16. On the day of the training course, if the course is available in videoconference mode, our training specialists launch the Zoom/MS Teams meeting directly from the LMS.
    a. The LMS keeps track of users logging into Zoom/MS Teams, their names, last names, email addresses, time they joined, time they left the meeting, total time they stayed connected (in minutes).
17. On the day of the training course, the trainer collects signatures of all attendees who are taking part physically.
    a. He goes to the proleven.com website using a tablet and logs into his account (it is a "trainer" type of account, thus different from the client accounts). Once logged in, he sees the list of the courses assigned to him on that day. He clicks on the course which is about to start and the system displays the attendance sheet. This is made up of the following columns: name of the attendee, "codice fiscale" (= some sort of social security number), company, signature at the beginning of the course, signature at the end of the course. The trainer clicks on "signature at the beginning of the course" and a signature field pops-up in full-screen mode. The attendee can sign there using a touch pen. The signature is

    automatically saved. The trainer clicks on “ok”, closes the pop-up window and moves on to the following attendee, doing the same thing.
    b. If an attendee is not on the attendance sheet, the trainer clicks on “+” and adds the attendee, by having him/her fill in all fields: name, “codice fiscale”, company (the system suggests names of employees /companies that are already registered in the LMS as the user types the company name / their first name).
    c. Our training specialists can see the signed attendance sheet in the LMS.
18. Before the course ends, it’s time for attendees to take a final exam.
    a. The trainer logs into his account on the proleven.com website, sees the list of the courses that have been assigned to him on that day and clicks on the one he is doing. In addition to the attendance sheet (seen previously), he can access a QR code that the LMS has automatically generated.
    b. This QR code leads to a web page which contains the following sections:
        i. Section #1: the final exam (it is a fixed set of multiple-choice questions which are assigned to each course, but we must be able to change these questions manually in the LMS when needed). Before answering the questions, the system must prompt the attendee to enter his full name and signature.
        ii. Section #2: the satisfaction survey. This section is anonymous.
    c. The LMS must import the answers to section #1 (final exam) and match exam score to each attendee, so that our training specialists can see if someone did not take the test or pass it. If so, they will not be able to issue the certificate. If the attendee, when filling in the final exam, makes a spelling mistake in his name, the LMS must display this test as unmatched and our training specialists will need to match it manually to the corresponding attendee.
    d. The LMS must import data from the satisfaction survey and keep track of it. Our training specialists must be able to filter satisfaction results by: trainer’s name, date, period, category of course (e.g. safety). The average satisfaction results are displayed in each training specialist’s dashboard in the LMS. The LMS must also display an alert if the satisfaction results of a certain course were below a certain threshold.
19. At the end of the course, the trainer collects signatures for the column “signature at the end of the training” using the exact same method.
20. At the end of the course, our training specialists check the attendance sheet (for people who attended physically) and the total time users stayed connected (for people who attended via zoom/MS Teams). They click on “course completed” beside each participant’s name (for participants who totalled minimum 90% attendance). This automatically generates a certificate for each participant (based on the Microsoft Word template we had previously uploaded to this specific course on the LMS). Our training specialists now click on “send certificates”.
21. The LMS automatically sends an email to the manager of the client company which informs him that the certificates have been generated and can be found in their account on the proleven.com website.
22. The manager of the client company logs into his account on the proleven.com website, goes to the “my courses” section, selects the specific course he’s interested in (he can filter by course title, date, etc.) and downloads all the certificates.

**Final note:**

- For some courses (such as well-being, soft & hard skills, team building) often clients do not request attendance sheets or certificates. This means that some steps identified above must <u>not</u> be mandatory when using the LMS.