



WELCOME!

**CORE**<sup>®</sup>

HIGHER EDUCATION GROUP

## Thank You

Thank you for trusting CORE Higher Education to serve the unique needs of your company. We pride ourselves on offering industry-leading technology paired with exceptional client support. We hope this welcome packet helps you get to know us a bit better and provides you with a clear understanding of what to expect throughout the implementation process. We are very excited to have you as part of the CORE family, and we look forward to growing our partnership together.

## Our History

The CORE Software Suite was launched in 2006 to help colleges of pharmacy better manage their experiential processes, student competency assessments, and ePortfolio needs. Due to the positive response from our clients and the versatile nature of our software, we expanded beyond pharmacy in 2010 and beyond higher education in 2020. Today, our renewal rate is 99%, and we are proud to support nearly 200 institutions throughout the U.S. and Canada with their experiential, recruiting, and eLearning needs.



**Greg Cianfarani RPh**  
Founder/CEO

## Our Team

Our team works diligently towards providing customer service of the highest quality. We appreciate the breadth of clients we have the opportunity to work with and value our relationship with each and every one. We strive to be more than a software vendor, but rather a pivotal member in each client's departmental functions and conversations.

## Communication is Critical

Your feedback is important to us. We will be sending client success surveys throughout the year, as well as meet with you at various conferences, including our annual Users Conference. At CORE, we are committed to supporting your team in the most effective ways possible, and we are always open to your suggestions on how we can support you best.



# The CORE Technology Suite

The CORE Technology Suite is comprised of six integrated software applications, two of which we offer to companies to support clinical and externship management, eLearning, and student recruitment.

## CORE<sup>®</sup> ELMS



From student placement and scheduling to evaluations, compliance, and preceptor management, CORE ELMS software manages every aspect of your externship/clinical education process. CORE ELMS is flexible enough to serve an entire health system or company, yet comprehensive enough to handle your department-specific details.

## CORE<sup>®</sup> READINESS



READINESS is an eLearning management platform hosting custom eLearning centers for employers. Offer an accessible eLearning center to educate students and candidates on your institution's career paths, strengthen employer-of-choice branding, support your onboarding process, and identify top-performers.

# CORE ACADEMY

CORE is here to support you! CORE ACADEMY provides dozens of eLearning activities for our client administrators to train on CORE's software applications, and to even learn new ways of managing some of the critical functions within your department.

**CORE ACADEMY:** <https://core readiness.com/learning-center/i/P75061112>



# Client Success Team

It is now time to transition to your Client Success Team which will be led by your Client Success Representative. Depending on the timetable and complexity of your implementation, your Client Success Rep may be temporarily supported by Implementation Specialists, Data Specialists, and Product Consultants during the implementation phase.

## Implementation Stages

Over the years, we have refined the implementation process to ensure our clients experience a smooth transition. Below are the five stages you will be lead through by your implementation lead.



# Implementation Deliverables

Our goal is to make your transition a simple and seamless one. Below is a list of deliverables we may need to configure your account (which may vary). Providing these deliverables in a timely manner helps ensure that your account is configured correctly and in line with your timeline. Our team will provide templates for these deliverables. Should you have any questions, we will be here to help you through the process every step of the way.

## CORE<sup>®</sup> ELMS



- Programs/Locations (Excel)
- Student, Preceptor, and Site Information (Excel)
- Admins (Name, Email, Title, Program)
- List of Rotation Types and Rotation Dates
- (Optional) Student Schedules, Preferably Listed by Student
- (Optional) Student and Preceptor/Site Requirements (Immunizations, CPR, Affiliation Agreements, etc) (Excel)
- Evaluations, Surveys/Forms (Word or PDF)

## CORE<sup>®</sup> & READINESS



- Admins (Name, Email, Title, Program)
- User Information (Excel) if Not Integrated with ELMS or CompMS
- Activity Choices for Initial Playlist Set-Up

## Implementation Tips

1. Extract historical data from your current software as soon as possible. (If applicable)
2. Provide deliverables at least 2-3 days prior to your deliverables deadline.
3. Create a “test” student account and preceptor account in order to view and experience what the end-users will experience.
4. Budget 1-2 days in between your training calls to allow time for “homework.”
5. Bring up processes to your Client Success Representative that you were not able to perform previously, or you currently perform manually – we may be able to help!
6. Don't see a report you currently produce? Send us an example, and we may be able to recreate it.





## Next Steps

Once again, we are grateful for the opportunity to work with your company. We are committed to ensuring that you know what to expect throughout your implementation process and during the entirety of your partnership with CORE. Should you have any additional questions on the information in this packet, please let us know.

Below, please find next steps needed from you to continue the implementation process:



### 1. Take the pre-implementation survey.

<https://www.surveymonkey.com/r/COREpreimplementationsurvey>

This survey will guide our pre-implementation call and includes:

- Points of Contact
- Key Dates and Timelines
- Desired Modules Within Each Product

### 2. Your Client Success Representative or Implementation Specialist will contact you to set a 90-minute pre-implementation call (for ELMS implementation).

### 3. To get the most out of your pre-implementation call, please be prepared to discuss the following:

- Confirm and possibly elaborate on the answers from the survey.
- Decide on the best training week for your staff.
- Decide on your optimal "Go-Live" date (software configured, data imported, and administrators trained).
- Explain your various internal processes in detail.
- Determine software module priorities.
- Determine which staff member will be responsible for providing data/deliverables.
- Establish a data/deliverables deadline date (two weeks prior to start of training).

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