



Plan Training Faster

How to use Administrate's **course templates** to plan hundreds of trainings in minutes.



Introduction

Managing classroom training, especially at scale, is a logistical challenge.

It's your job to coordinate schedules, instructors, rooms, equipment, and learner requirements, all while ensuring that everything runs smoothly. This complex web of work can overwhelm teams and lead to errors, inefficiencies, and frustration.

In this guide, we are going to show you how to use Administrate's course templates to make the process faster, easier, and less error-prone.

Don't have Administrate? Don't worry, there are actionable tips here for you, too.

But if you downloaded this guide, maybe it's time to see what Administrate can do for you.



ABOUT ADMINISTRATE

Administrate is a training management system purpose built for managing live training at scale.

Teams that plan training with our TMS see dramatic boosts in time saved. Teams that deliver thousands of trainings (especially instructor-led training) will save as much time with Administrate as if they'd hired about 8 full time employees.

Why live training management is such a burden.

Training managers often face a long list of administrative tasks when planning classroom sessions.

These tasks include assigning instructors, booking rooms, managing equipment, and tracking learner attendance. When done manually, this process can be error-prone, time-consuming, and exhausting, especially when training programs grow or involve multiple locations and complex requirements.

Without automation, every new training session requires recreating the same tasks: booking resources, assigning instructors, sending out communications, and more.

This repetitive work not only slows down

operations but also increases the likelihood of errors, such as double-booking rooms or failing to notify instructors of schedule changes.

In a fast-paced environment, such inefficiencies delay training delivery, increase costs, and lead to miscommunication.

The result is a heavy administrative burden that overwhelms training teams, reduce productivity, and hinders the organization's ability to scale its training programs effectively.



What are course templates?

Administrata's course templates are designed to streamline the entire process of setting up and managing training, with a special focus on instructor-led training.

By allowing training managers to pre-configure key elements of each course, course templates eliminate the need to start from scratch every time a new session is scheduled.

Course templates are pre-built structures that define all the necessary components of a course.

This includes basic course information, required resources, instructor requirements, schedule patterns, and even automated communication workflows.

Key Elements of Course Templates

Basic Course Information. The course template begins with foundational details such as the course title, description, categories, and expected fill rates. This ensures every course created using the template maintains consistent and accurate information. By

entering this data once into the template, training managers don't have to re-enter it each time a new session is scheduled.

Instructor Assignments. The template allows training managers to assign instructors who are qualified to teach the course. This list of approved instructors is pre-configured, so when a new course is created, the system automatically recommends or assigns instructors based on availability and location. Templates will filter instructors by their availability and location, ensuring that the right instructor is assigned to the right course without any manual intervention.

Predefined Resources. Course templates allow training managers to specify the rooms, equipment, and materials needed for each session. For example, if a training session requires a specific type of room, like a laboratory, or specialized equipment, such as forklifts or augmented reality headsets, these can be pre-assigned in the template. This eliminates the need to book resources manually each time, ensuring that all necessary equipment and materials are ready when needed.

The screenshot displays the 'Course Templates' interface. At the top, there is a search bar with a 'Search' button and a 'Filters' button. Below this is a table with columns: Status, Code, Title, Categories, Pricing, and Course Level. The table lists three templates: 'IT Security 200' (Status: PUBLISHED, Code: com_sec_200), 'LMS Expiration' (Status: PUBLISHED, Code: expiry), and 'MI Pack Induct' (Status: PUBLISHED, Code: GEN02). A modal window titled 'LMS' is open, showing a list of resources with 'READY' status and details like 'Cybersecurity 100 | Module 1, File: Cybersecurity_M'.

Status	Code	Title	Categories	Pricing	Course Level
PUBLISHED	com_sec_200	IT Security 200			
PUBLISHED	expiry	LMS Expiration			
PUBLISHED	GEN02	MI Pack Induct			

LMS

- READY :: Cybersecurity 100 | Module 1, File: Cybersecurity_M
- READY :: Cybersecurity 100 | Module 2, File: Cybersecurity_M
- READY :: Cybersecurity 100 | Module 3, File: Cybersecurity_M

Task Workflows. Administrate's course templates also include task workflows that automate the administrative tasks involved in running a course. This can include tasks like setting up the venue, preparing course materials, sending reminders, and conducting post-course follow-up. The tasks are linked to the course schedule, meaning they trigger automatically at the appropriate times, based on the session's start and end dates. This feature helps reduce the chance of forgetting critical tasks and ensures that training sessions are always well-prepared.

Scheduling Patterns. One of the most powerful features of course templates is the ability to set recurring scheduling patterns. For example, a course might typically run on Mondays, Wednesdays, and Fridays, from 9 a.m. to 5 p.m. Instead of manually inputting this schedule each time a course is

planned, training managers can set it once in the template. When a new session is scheduled, the system automatically applies this schedule, reducing manual input and the risk of scheduling conflicts.

Communication Triggers. Course templates also streamline communication with learners and instructors by automating email notifications. For example, when learners register for a course, an automatic confirmation email is sent. Similarly, reminders can be sent to instructors about upcoming sessions or to learners about course evaluations after the event. These communications are fully customizable and can be scheduled based on key dates relative to the course's start and end times.

The screenshot shows the 'Email' template editor in the Administrate system. At the top, there are fields for 'Template Name' and 'Audience'. Below these, the 'Email' tab is active, showing options for 'English (US)', 'Spanish', and 'Create Translation'. A dropdown menu is open for the 'Spanish' option, showing 'Spanish', 'English (US)', and 'Swedish'. The 'Subject' field is empty. The 'Body' field has a rich text editor with buttons for bold (B), italic (I), underline (U), link, unlink, and a 'Normal' style dropdown. Below the body field, there is an 'Attachments' section with an information icon, stating 'No Attachments selected' and a link to 'Add Attachment'.

How course templates work.

The key benefit of course templates is that they allow training teams to set up everything in advance. Once a template is created, training managers can simply reuse it for future sessions. This eliminates the need to repeat the same administrative tasks over and over again.

When a new course session is created using a template, all the information stored in the template—such as instructor assignments, resource requirements, and scheduling patterns—is automatically applied to the session. The training manager only needs to input specific details, such as the event's location and start date, which are unique to that particular session. Everything else is pre-configured, saving time and reducing the risk of human error.

Example of a Forklift Operator Training Course Template

Basic Information. The course title is "Forklift Operator Training," with a maximum of 20 learners and a target fill rate of 90%.

Instructors. The course template includes a list of certified forklift trainers who can teach the course, all pre-approved and filtered by location.

Resources. The template specifies that each session requires a training room, two forklifts, and four augmented reality headsets for the final session.

Schedule. The course is scheduled to run on Mondays, Wednesdays, and Fridays, from 9 a.m. to 5 p.m., across two weeks.

Task Workflows. Tasks are set to automatically remind the team to check with caterers three days before the course

starts, ensure that the room is prepared, and send a post-event survey five days after the course ends.

Communication Triggers. Automated emails are sent to learners upon registration and to instructors a week before the course begins, with all necessary information attached.

By configuring all these elements once in the course template, training managers only need to make minor adjustments when scheduling a new session. This automation significantly reduces the manual workload involved in setting up and running training courses.



Automation = efficiency.

One of the most powerful aspects of Administrate's course templates is their ability to automate repetitive tasks. By automating processes such as instructor scheduling, resource allocation, and learner communication, training managers can save hours of administrative work for each session.

Automated Workflows and Notifications

Course templates are designed to take the guesswork out of classroom training. When a new session is scheduled, the system automatically:

- Notifies instructors about their assignments and provides them with relevant materials.

- Books all required resources and rooms, ensuring that everything is available for the training session.

- Sends reminder emails to learners, instructors, and administrative staff at key points in the training process, such as registration deadlines, course start dates, and post-training evaluations.

These automated workflows reduce the chances of human error and ensure that all administrative tasks are completed on time. This helps training teams stay organized and focused on delivering high-quality training rather than managing logistics.

Tackling Complex Training Scenarios with Ease

Classroom training often involves managing complex logistics, especially when training

programs are large-scale or involve multiple locations. Course templates allow training managers to handle these complexities effortlessly.

For example, a multi-day training event spread across different locations can be easily managed using a course template. The system automatically books the necessary rooms and resources for each location, assigns instructors based on availability, and ensures that all logistical details are taken care of in advance. This level of automation reduces the administrative burden, allowing training managers to focus on the quality and content of the training rather than the logistics.

Supporting Blended Training Solutions

As training increasingly moves toward blended learning—combining classroom and online components—training managers need tools that can manage both environments seamlessly. Administrate's course templates make it easy to integrate online learning modules with classroom-based sessions.

Training managers can configure course templates to include both online and in-person components. The system tracks learner progress across both modalities, ensuring a smooth transition from virtual to in-person learning. Automated communication ensures that learners receive the necessary instructions and materials for each part of the course, whether it's online or in the classroom.

CASE STUDY: ROCHE DIAGNOSTICS REDUCES PLANNING TIME BY 80%

Roche Diagnostics, a leader in healthcare and diagnostics, faced challenges managing the complex schedules of its medical training programs. Before implementing Administrate, Roche relied on manual processes to coordinate instructor availability, room bookings, and equipment needs, which required multi-day planning sessions and caused delays.

With Administrate's AI-powered Scheduler and course templates, Roche streamlined their scheduling process, reducing the time required to create a master schedule by 25%. By pre-configuring all key elements—such as room and resource bookings and instructor assignments—Roche's training team could quickly create and adjust training sessions as needed.

Key Results

25% Faster Scheduling: Roche reduced the time needed to plan training sessions by 25%, allowing for more agile responses to changes in training requirements.

300% Increase in ROI: By eliminating under- and over-booking of high-value equipment and ensuring optimal resource utilization, Roche achieved a 300% increase in training program ROI.

Centralized Data: With all training data consolidated in Administrate's system, Roche's training team gained full visibility into their operations, enabling better decision-making and more efficient use of resources.

Get the full case study

Download the complete case study at

<https://www.getadministrate.com/resources/case-studies/roche-diagnostics/>

How to Templatize Planning

The best way to templatize training and speed up planning is to be an Administrate customer, of course, but there are ways to think about training management as a data problem, not a capacity problem, that can help you plan training faster.

Analyze Existing Workflows to Identify Bottlenecks

Training teams often experience inefficiencies caused by repetitive manual tasks, such as coordinating instructor schedules or booking resources. These bottlenecks slow down operations, create frustration, and leave little time for strategic planning.

Map your team's current workflows, including how you assign instructors, manage equipment, communicate with learners, and schedule sessions. Identify the most time-consuming or error-prone tasks. This baseline will clarify where course templates can automate processes, such as scheduling or sending automated notifications through your LMS or ChatGPT.

Create a Business Case to Get Stakeholder Support

To invest in new processes or tools—whether using an LMS, ChatGPT, or other solutions—your organization may need clear evidence of ROI. Stakeholders will want to know how course templates will save time, prevent errors, and support long-term business goals.

Develop a business case showing how automation will reduce time spent on repetitive tasks and eliminate errors like double-booked instructors or missed communications. Use reports or audits from your LMS to highlight current inefficiencies and project how much

time and effort the new workflows will save. If your team is scaling training, emphasize how templates will allow you to grow operations without adding headcount.

Centralize Instructor and Resource Data

Course templates rely on accurate, up-to-date information about instructors, resources, and schedules to function effectively. Inconsistent or fragmented data will create errors in scheduling and resource management, undermining the automation.

Collect all instructor availability, resource requirements (e.g., rooms, equipment), and learner data into a central repository. If your LMS stores some of this information, ensure it is current and synchronized with any other tools you use, such as scheduling software or a CRM. Use AI tools like ChatGPT to help consolidate data by generating task lists and schedules based on your inputs.

Pilot the Templates with a Small, Low-Risk Training Program

Testing your course templates in a controlled environment helps identify potential issues early. A small pilot program will also allow your team to gain confidence in the new process and see the benefits firsthand without disrupting large-scale operations.

Select a recurring course with straightforward requirements for your pilot. Use the template to pre-configure instructor assignments, room bookings, and automated communications (like reminders sent through your LMS). Incorporate AI tools such as ChatGPT to generate email templates or notifications. Monitor the pilot closely, gathering feedback

from staff and learners to make adjustments before scaling the templates to your entire training program.

Address Resistance and Build Team Confidence

Change can be challenging, especially if your team has experienced frustration with previous software implementations. Staff may worry that adopting new tools will increase their workload initially or expose inefficiencies they'd rather not highlight.

Communicate openly with your team about how course templates will reduce administrative work over time. Run internal training sessions demonstrating how AI tools, like ChatGPT, and automation features in your LMS can simplify tasks such as sending reminders or scheduling updates. Reassure your team that these tools are designed to support—not replace—their roles, helping them focus on strategic activities rather than routine tasks.

Align Course Templates with Business Goals

Templates are more than just logistical tools—they should align with broader business objectives, such as improving compliance, reducing downtime, or accelerating onboarding. Ensuring that your training program supports these goals will justify the

effort spent on implementation.

Collaborate with business stakeholders to understand which metrics are most critical to the organization (e.g., compliance rates, time-to-productivity, or learner satisfaction). Configure your templates to track these metrics through your LMS or business intelligence tools. Use AI platforms to generate reports and insights that link training outcomes with business KPIs, demonstrating the impact of your program.

Summary of Key Steps:

- Analyze workflows to identify areas where automation will have the greatest impact.
- Create a business case to secure support from stakeholders by highlighting how templates align with business goals.
- Centralize your data on instructors, resources, and schedules to ensure smooth template operation.
- Pilot templates in a low-risk environment to build confidence and address any initial challenges.
- Communicate openly with your team to reduce resistance and emphasize how templates will ease their workload.
- Align training outcomes with business metrics, using AI and LMS tools to track and report results effectively.

Plan hundreds of trainings in minutes.

Administrate will help you plan hundreds of trainings—self-paced, classroom, or vILT—in just minutes. No errors, no conflicts.

[Book a demo](#)

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