The **6 Rs** of Totara upgrades
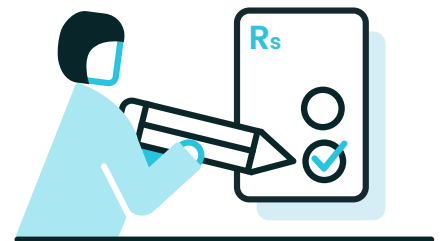
Upgrading software can seem a daunting task and is often deprioritised by organisations with the assumption the process will be complicated, time consuming, involve a significant cost or cause disruption to your users for a period of time.

Depending on the software, your implementation, your project approach, technical team and your timeframes for upgrading, none, some or all of these assumptions may be correct. Whatever the case, an upgrade is also a great opportunity to redesign and refresh your site, and retrain and re-engage users with your solution.

1 Re-think

Is delaying an upgrade the best option for your organisation and your users? Software updates are designed to maintain ongoing security, optimise performance and improve user experience. This might be in the form of minor or major improvements or entirely new features that offer a solution to an ongoing challenge faced by your organisation.

The costs involved in maintaining an older version might seem comparatively lower than that of an upgrade project, but in the longer term is this the most cost effective approach? Will the time and effort required to upgrade your site in the future continue to increase over time? Will any disruption to your users be lessened by waiting?

2 Re-consider

The next step is to take a moment to critically review your software and solution. Are you still addressing your users' needs with your current site? Are there other approaches that could be implemented to improve the end-user experience? Is it time to consider an extended enterprise solution? Is there a need to support social learning and encourage collaboration with Totara Engage? Do you want to foster a culture of ongoing learning, development and career support by enabling Totara Perform?

Now is the time to consider your overall approach and confirm you're doing the best for your organisation and your users.

3 Redesign

As part of your upgrade, you may consider updating your site's branding, look and feel, imagery and/or layout. If the upgrade introduces substantial improvements, modifications to workflows, or changes the way users access certain areas of the system, updated navigation might be required to help guide users through the site. Improvements to the design and navigation of a system often act as a trigger for users to explore the software and better understand the benefits of an upgrade.

4 Refresh

Refreshing your software might involve turning off functionality or areas that are no longer used or relevant, turning on functionality that was already available within the system but hadn't yet been utilised, or introducing new functionality available within the upgrade. You may also look at adding new authentication options such as single sign-on, integrating or connecting to systems like Microsoft Teams, Zoom or LinkedIn, or tidying up old users, data and content.

Alongside the introduction of functionality and features in new versions of software, you will also see improvements to user experience, accessibility, performance and security. New versions will include bug fixes, access to new language translations and new or updated APIs. Refreshing your site as part of the upgrade process allows you to 'piggy-back' these changes alongside other updates, reducing user disruption and change management costs.

6 Re-engage

An upgrade is also a great time to consider how to get more users active and contributing within the system. Software that is working ok can be left to languish with little or no maintenance for extended periods of time. This will likely result in drop-offs in use and engagement as users become, at best, stuck in a rut and no longer exploring the system, or, at worst, bored with the system.

Reigniting the interest of users and encouraging the exploration of the system might be through enabling new engagement and collaboration tools. You may also look at running workshops or presentations on exemplar and creative uses of the software. Consider publishing or sharing articles or white papers on ways to use the system effectively to help inspire users to re-engage with the application - or even better, encouraging your users to share resources themselves. This would be the perfect use for Totara Engage!

An upgrade is also a good opportunity to re-engage with your Totara Partner and take full advantage of their knowledge and experience around Totara functionality and the upgrade process. Working together is the best way to ensure a smooth and efficient upgrade so you and your users can enjoy all the benefits of your updated software.

5 Retrain

Depending on the scale of the upgrade and number of changes implemented, you may need to offer training sessions on the new features and functionality of the system. This is also an opportunity to offer refresher training to those users who haven't been using the site since their initial training or advanced training to those who aren't yet tapping into the full potential of the system. Making the best use of your software ensures you see a better return on your investment.

The Totara Academy offers a range of free courses covering the different functionality of the Totara Talent Experience as well as practical 'use case' courses outlining how to leverage Totara to meet various needs such as onboarding or compliance training.