SmartSuite

SmartSuite Training & Enablement Services

Professional admin and GRC program training for SmartSuite teams

Overview

SmartSuite Training & Enablement Services help your teams build the **skills** to design, run, and expand SmartSuite—both as a **platform** and as a **GRC solution**. We combine:

- **Platform admin training** – for admins and builders who configure Solutions and automations
- **GRC program training** – for risk, compliance, audit, third-party, and resilience teams who run programs day-to-day
- **SmartSuite Academy & certifications** – self-paced learning and role-based credentials
- **Enterprise training & workshops** – private sessions tailored to your environment

The result: your admins, builders, and GRC teams can confidently use SmartSuite not just for one workflow, but as a **long-term platform** for risk, IT, PMO, and enterprise operations.

Who Training & Enablement is for

SmartSuite Training & Enablement is ideal if you:

- Want **strong internal admins and builders** who can safely design and maintain workflows
- Are running or planning **GRC programs** (ERM, TPRM, compliance, audit, operational resilience & BCM) on SmartSuite
- Need to onboard **larger teams or multiple regions** at once

Want more than ad-hoc demos—**structured education** with clear outcomes

Faster, safer configuration

Trained admins and builders make better design decisions, reducing rework and risk.

GRC teams that "get it"

Risk, compliance, audit, and TPRM teams understand both the discipline and how it runs in SmartSuite.

Consistent, scalable patterns

Shared models for Solutions, relationships, automations, and reporting make it easier to roll out new workflows.

Better adoption & retention

Teams who see SmartSuite as a tool they understand—and helped design—are more likely to use it and expand it.

Clear growth path for power users

Academy and certifications give admins and GRC champions a way to grow their skills and careers on SmartSuite.

Training & Enablement pillars

Platform Admin Training

Live courses and workshops that move admins and builders from fundamentals to advanced configuration, automations, and integrations—often with a GRC lens.

GRC Program Training

Functional training for risk, compliance, audit, third-party, and operational resilience teams on how to run their programs in SmartSuite's GRC Solutions.

SmartSuite Academy & Certifications

Self-paced learning paths and role-based certifications that support ongoing skill development and recognize expertise.

Enterprise Training & Workshops

Private virtual or onsite training tailored to your environment, Solutions, and rollout plan—ideal for larger Enterprise deployments.

Platform Admin Training

Audience: workspace admins, builders, and platform owners

Goal: give your internal SmartSuite owners the skills to safely design, configure, and extend the platform.

Admin Essentials

Introductory live training for new admins and builders. Covers navigation, Solution and field creation, basic views and dashboards, simple automations, and core permission concepts. Often used as a baseline for all new admins.

Admin Foundations – GRC Edition

Deeper admin training for Enterprise and GRC-focused customers. Covers modeling GRC data (risks, controls, issues, vendors, audits, policies), designing relationships across GRC Solutions, building dashboards for first/second/third line, and configuring automations tailored to GRC workflows.

Advanced Admin – Automations & Integrations

For senior admins and platform owners. Focuses on advanced automation patterns, integration design with key systems (identity, ticketing, CRM, security tools, etc.), and governance best practices for administering SmartSuite in larger, regulated environments.

GRC Program Training

Audience: GRC program owners and practitioners (risk, compliance, audit, TPRM, operational resilience/BCM)

Goal: help GRC teams understand how to run their programs in SmartSuite—not just how to click through the UI.

GRC Program Foundations on SmartSuite

A cross-functional workshop for risk, compliance, audit, operational resilience/BCM, and business stakeholders. Covers how SmartSuite's GRC Solutions map to common frameworks, what "good" looks like for risk, control, issues, vendor, and resilience workflows, and how to use dashboards and reports for executives, boards, and regulators.

Domain-specific GRC workshops (examples)

- **Enterprise Risk Management (ERM) on SmartSuite** – risk identification, scoring, aggregation, appetite, and executive risk reporting.
- **Third-Party Risk Management (TPRM) on SmartSuite** – vendor onboarding, due diligence, questionnaires, risk scoring, issues and remediation.
- **Compliance & Policy Management on SmartSuite** – policy lifecycle, control mapping, compliance assessments, and evidence tracking.
- **Audit & Issue Management on SmartSuite** – audit planning, testing, findings, recommendations, issue tracking and closure.
- **Operational Resilience & Business Continuity on SmartSuite** – impact analysis, critical process mapping, scenario planning, incident response, and recovery tracking.

Each workshop combines GRC best practices with hands-on exercises in a SmartSuite environment.

SmartSuite Academy & Certifications

SmartSuite Academy

Self-paced, always-on training:

- Role-based learning paths for admins/builders, GRC practitioners, IT/service owners, project leaders, and end users.
- Short, focused lessons on core concepts, configuration patterns, views & dashboards, and starter automations.
- Ideal for onboarding new team members and refreshing skills between live trainings.

Certifications

Role-based credentials that validate SmartSuite skills, such as:

- Admin-level certification for platform configuration
- A roadmap for GRC-focused certifications (e.g., SmartSuite GRC Admin, GRC Practitioner)

Today, Academy content and certifications are available at no additional cost for customers, with the flexibility to introduce advanced, paid courses in the future.

Enterprise Training & Workshops

Audience: larger Enterprise customers with multiple teams/regions

Goal: provide private, customer-specific training using your Solutions, data structures, and examples.

Examples include:

- **Private admin workshops** – dedicated sessions for your admin/builder community, combining Admin Essentials, Foundations, and Advanced topics with your actual environment or a cloned sandbox.
- **Private GRC program workshops** – customized versions of GRC Program Foundations and domain workshops using your data model and reporting needs.
- **Combined "bootcamps" for major rollouts** – multi-day programs that bring admins and business users together (e.g., Admin Foundations + ERM + TPRM), aligned to your go-live plan.

Enterprise training can be delivered virtually or onsite, and is often bundled with Solution Launch Packs and Expert on Demand.

Quick FAQ Snapshot

Do we need Training & Enablement if we've already done Onboarding?

Onboarding includes foundational training for your initial workflows and teams. Training & Enablement builds on that with deeper admin tracks, GRC program workshops, private enterprise training, and ongoing self-paced learning and certifications.

Who should attend admin training vs. GRC program training?

Admin training is for **admins and builders** who configure SmartSuite. GRC program training is for **business-side teams** (risk, compliance, audit, TPRM, resilience/BCM) who run their programs day to day.

What formats are available?

We offer a mix of **live virtual sessions, onsite workshops,** and **self-paced Academy content**, depending on the course and your preferences.

How Training & Enablement fits with other services

- **Onboarding Services** – get your first workflows and teams live.
- **Advisory & Implementation Services** – design your roadmap and architecture; implement broader GRC, IT, PMO, and operations programs.
- **Training & Enablement Services** – build the skills of admins and GRC teams to own and expand SmartSuite.
- **Managed Services (Expert on Demand)** – provide ongoing capacity to evolve your implementation month by month.
- **Premium Support** – elevated incident-focused support with SLAs and a Technical Account Manager.

Training & Enablement ensures that the **people side** of your SmartSuite program keeps pace with the platform.

Ready to design a training plan for your teams?

Talk with your SmartSuite account team to:

- Identify which roles (admins, builders, GRC practitioners, IT/PMO leads) need training
- Choose the right mix of **admin tracks, GRC workshops, and Academy paths**
- Plan **private enterprise sessions** for upcoming rollouts

Turn SmartSuite from a platform your teams use into a platform they truly understand and own.