**Deliverable 8: Training and Adoption Strategy — Safaricom Digital Customer Service Portal**

**1. Purpose**

The Training and Adoption Strategy aims to ensure all users of the Safaricom Digital Customer Service Portal are fully equipped with the knowledge, skills, and confidence to utilize the platform effectively. This strategy supports fast onboarding, reduces support load post-launch, and drives long-term adoption.

**2. Objectives**

* Ensure timely training before go-live.
* Provide multi-channel, role-based learning experiences.
* Enable staff to support customers confidently.
* Drive platform usage and minimize resistance.
* Establish support mechanisms for continuous learning.

**3. Target Audience Segmentation**

| **User Group** | **Training Focus** |
| --- | --- |
| Customer Service Agents | Ticket handling, chatbot escalation, CRM usage |
| Supervisors | Reporting, quality control, team workflows |
| IT & Admin Staff | System management, configuration, analytics |
| Sales/Marketing Teams | Integration touchpoints, customer insights |
| End Users (Customers) | Navigation, feature use, support options |

**4. Training Methodology**

Training will follow a **blended learning** approach that combines instructor-led sessions with self-paced materials to cater to diverse learning preferences.

| **Format** | **Description** |
| --- | --- |
| Classroom Training | In-person sessions for core teams |
| Live Virtual Webinars | Online walkthroughs with Q&A |
| E-Learning Modules | Interactive video lessons on LMS |
| Quick Reference Guides | Printable PDFs for each process |
| Simulation Labs | Hands-on practice in a sandbox environment |
| Microlearning Videos | Short “how-to” clips for task-specific help |

**5. Training Timeline**

| **Phase** | **Activity** | **Timeline** |
| --- | --- | --- |
| **Pre-Training** | Needs analysis, content prep | Weeks 1–2 |
| **Pilot Training** | Run training for test group | Week 3 |
| **Mass Training** | Company-wide rollout | Weeks 4–5 |
| **Go-Live Support** | Floor walkers, helpdesk boost | Launch Week |
| **Post-Go-Live** | Refresher sessions, updates | Ongoing for 3 months |

**6. Training Content by Role**

| **Role** | **Key Topics** |
| --- | --- |
| Agents | Logging tickets, chatbot handoffs, FAQs, SLA awareness |
| Supervisors | Dashboards, reporting, ticket escalation, agent analytics |
| IT/Admins | Backend controls, audit logs, user management, data backups |
| Sales/Marketing | CRM touchpoints, lead tracking, campaign tagging |
| Customers | Portal access, chat usage, ticket creation, feedback submission |

**7. Adoption Strategy Components**

1. **Change Champions**
   * Designate tech-savvy ambassadors in every team to drive peer learning.
2. **Gamification and Incentives**
   * Leaderboards for early adopters
   * Completion badges/certificates
   * Recognition during staff meetings
3. **Onboarding Journey**
   * A structured 30-60-90 day plan for new users with milestones and learning paths.
4. **Self-Service Support**
   * Searchable knowledge base, chatbot support, and tutorial library.

**8. Support Structure**

| **Support Channel** | **Description** |
| --- | --- |
| Helpdesk/Support Team | Tier 1 support via phone/email/chat |
| Peer Learning Circles | Team-level group check-ins for Q&A |
| "Ask an Expert" Sessions | Weekly drop-in sessions hosted by trainers |
| Learning Management System | Centralized access to all training content and tracking |

**9. Tools & Platforms**

* **LMS**: Moodle or TalentLMS
* **Webinar Platform**: Zoom/MS Teams
* **Knowledge Base**: Confluence or Zendesk
* **Training Tracker**: Excel dashboard or HRIS integration

**10. Success Metrics**

| **Metric** | **Target** |
| --- | --- |
| Training Completion Rate | 95%+ of all target users |
| Customer Service Agent Proficiency | ≥ 85% on post-training tests |
| LMS Usage Engagement | ≥ 80% logins within 7 days |
| Platform Adoption | ≥ 80% within 30 days |
| Reduction in Support Tickets | 30% drop post-training |