



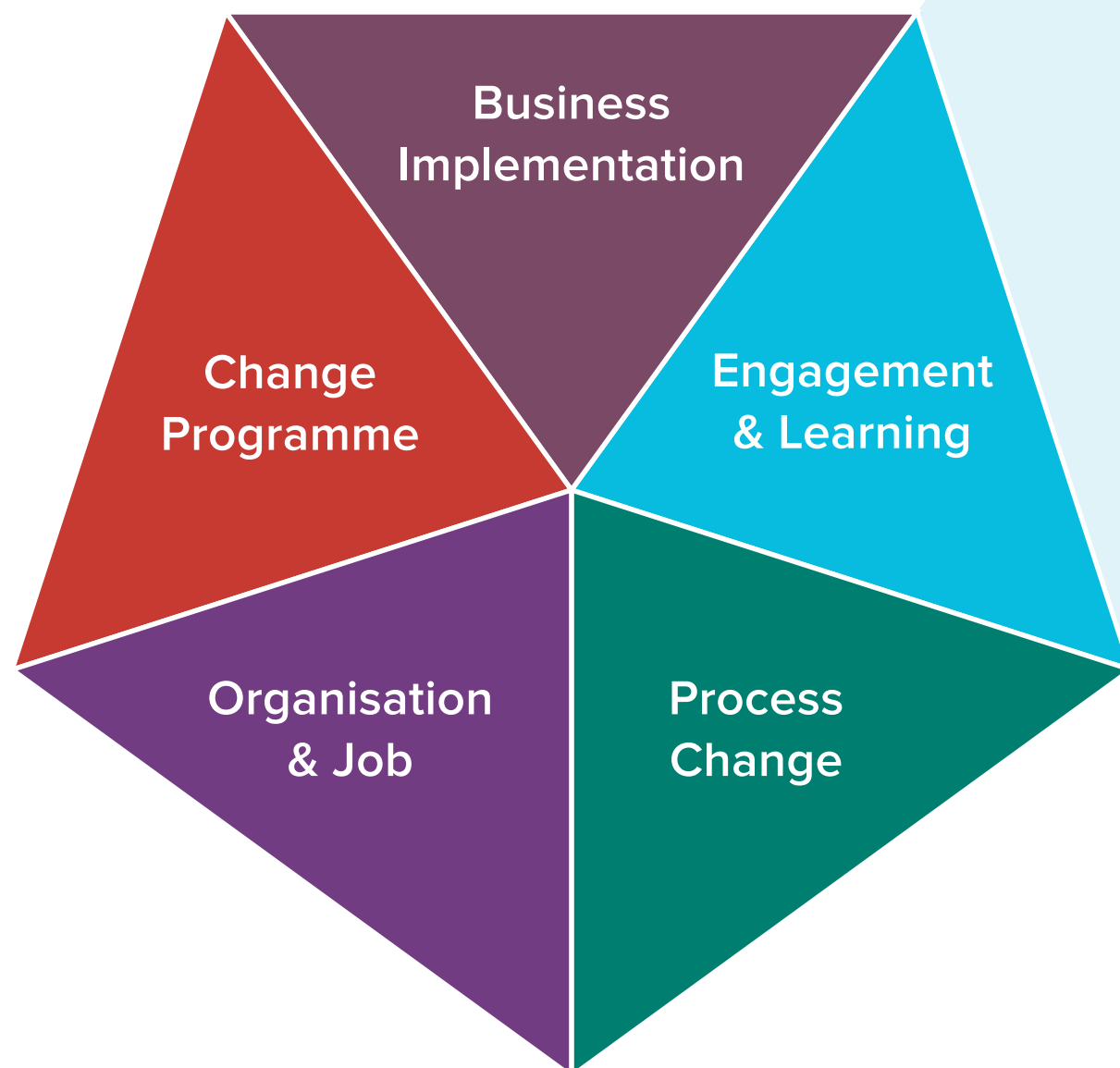
# Engagement and Learning **Accelerators**



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## Our accelerators and programmes



### Engagement and learning

Use these accelerators to plan, manage, deliver and evaluate great communication, engagement and learning events.



Evaluate which channels or methods are going to be available to you, and find out what has worked in the past.



The engagement and learning plan helps to engage the project team and the impacted businesses.

Assess audience needs

Outcome and message focus

It is important to review audience needs and select the best channels or techniques for engagement and learning. However, we need to take that to the next level. Work out what specific outcomes you want to get from the engagement - for training what do we want specific roles to do differently? Think clearly about the messages and channels that would achieve those outcomes.

Stakeholder Group	No. of People	Business Areas	Complexity	Language	Usage %	Frequency	Typical Channels
SALES							
Order Administration	25	Germany, Construction	Medium	German	80%	Daily	Notice board
Order Administration	30	Germany, Packaging	Medium	German	80%	Daily	Newsletter
Order Administration	40	France, Packaging	Medium	French	80%	Daily	Daily Brief
FINANCE							
Cost Centre Managers	1,000	UK	Low	English	0.05%	Monthly	Notice board
AP Accountant	50	UK	Medium	English	90%	Daily	Newsletter
General Ledger Managers	5	UK	High	English	50%	Daily	Daily Brief

Audience and channel analysis

- Split the stakeholder groups into appropriate audience groups
- Understanding the numbers of people and their geography will help to determine appropriate channels
- A good audience analysis will contain logical groupings of audiences, very outcome focussed messages, and characteristics that will allow you to select the best methods of delivery
- Channel analysis provides an assessment of the communication and training methods that are typically used for those audiences and asks – how successful are they?

ENG 1

For communication and engagement messaging, identify impacted people, sponsors and influencers and use a project timeline to identify what you specifically need them to do during the project. For all audiences, identify location, numbers of people and other characteristics. For learning, identify how complex the future stake tasks are and how frequently they will be used.

Confirm strategy and approach

Engagement timeline

The definition of stupidity is doing something over and over again and expecting different outcomes. A good engagement and learning strategy will contain a mixture of methods that have worked with those types of audiences before, and additional formats where required. Creating a single view with audiences, messages, formats and timings brings together all of these things.

ENG 2

Using the audience groupings and a timeline, confirm the messages that need to be communicated, or engagement activities at points along the timeline. Create a single view of this which will show how audiences are impacted by all types of events. For the engagement and learning events, include details such as formats, who the developers are and who will deliver if you can.

Message / Event		Format	Frequency / Timing	Developed by	Delivered by	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
IS Directors																	
Steering Groups																	
Monthly Steering Group	Expectations about next month, progress of key initiatives, resource requests	4 slides in presentation	Monthly	Project Manager	Project Manager												
Cascade materials																	
Preparing for Blueprint	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	September	Project Manager	IS Directors												
Preparing for UAT	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	October	Project Manager	IS Directors												
Preparing for Training	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	December	Project Manager	IS Directors												
Preparing for Go-Live	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	February	Project Manager	IS Directors												
Super Users																	
Cascade materials																	
Project Benefits and Scope	Support running out, standardisation required, overall impact by month timing, who is involved	cascade email - prototype	October	Project Manager	Super Users												
Results of Blueprint	Key areas impacted by more than just screen changes, data for working with these areas	cascade email - prototype	October	Project Manager	Super Users												
Key Impacts and changes	Summary of key changes for those areas impacted to make them screen changes	powerpoint pack	November	Project Manager	Super Users												
Progress Report - Blueprint	Overall results of Blueprint, summary of next steps	cascade email - prototype	December	Project Manager	Super Users												
Progress Report - UAT	Results of UAT, summary of next steps	cascade email - prototype	December	Project Manager	Super Users												
Preparing for Training	Training options available for areas impacted by more than screen changes	cascade email - prototype	December	Project Manager	Super Users												
Progress Report - Training	Training options available for areas impacted by more than screen changes	cascade email - prototype	December	Project Manager	Super Users												
Preparing for Go-Live	Key events, customer impacts, how to get support	cascade email - prototype	January	Project Manager	Super Users												
Results of Pilots	Success stories from Pilot Implementations	cascade email - prototype	January	Project Manager	Super Users												
Key Steps, Starts and Continues	Summary of small changes (eg. GUI) and a timeline not to call out backwards for 2006	A4 PDF file for cascade	February	Project Manager	Super Users												

Engagement and learning plans

- Headline event name and primary purpose
- As event draws nearer ensure resources are named and agreed
- Colour coding using RAG status shows progress at a glance



The catalogue should be the basis of promoting the events and courses to stakeholders and recipients.



Create a matrix that maps the courses or events to departments, teams and people.

Confirm catalogue and standards

Engagement catalogue

For complex engagement and learning events, a communications catalogue can ensure that each item has been well considered. Getting into a ‘catalogue’ state of mind can really focus the attention on delivering professional quality events and interactions. It can put a stake in the ground about what audiences, sponsors and other stakeholders can expect from the project.

ENG 3

For extended engagement and learning events create a catalogue which specifies in detail what each course will cover. For technical or process based courses, work with the process team members to define what will be covered. Ensure that you are clear on what people need to be able to do differently after each course or event. Think about ‘what people will do differently when they come into work’.

VS0001: Customer Care	
<b>Objectives</b> <ul style="list-style-type: none"><li>To learn how your behaviour can be used to improve customer's attitudes and to create new sales opportunities</li><li>To understand what 'customer focus' means</li><li>To understand what excellent customer care feels like.</li></ul>	
<b>Who should attend</b> Customer facing staff.	
<b>Course benefits</b> Improved customer service levels and satisfaction.	
<b>Content</b> <ul style="list-style-type: none"><li>Understanding customer needs</li><li>Why do we fail to give good service</li><li>Communication methods and skills</li><li>The Kano Model – Delighting the customer</li><li>Good customer service: a 5 step approach.</li></ul>	
<b>Format</b> Presentations and exercises involving role-playing within a group.	
<b>Schedule</b> 1 day workshop on request.	

A catalogue of brilliant formats

- Consider pre-requisites. Refer back to the engagement and learning plan to confirm these
- Consider what you want people to have the desire and capability to do after the event
- Consider what outcomes should be delivered as a result of the event

Prepare logistics and develop

Develop brilliant formats

We cannot always give people enough notice that they are required to attend an event. If you start early by mapping events to departments, and then to teams, and then to people, you will eventually finish up with a mapping of people to events. This can be used to create a full engagement or training curriculum, which is a basis for invites, and also for development plans for the materials.

ENG 4

Create a matrix that maps the courses or events to departments, teams and people. This information can then be used to build up a development plan for any materials, based on the delivery dates of each of the courses. Ensure that the subject matter experts (SME), trainers, content developers and audiences are all on the same page, issue the plan, and monitor the development closely.

Course	Topics	Format	Duration	Development Ratio	Development Time	Developer	Draft	Design	Develop	Review	Deliver
Accounts Payable Accounting	1. Invoice Verification 2. Journal Entry 3. Inter-company	Classroom with system	16 hours (2 days)	18 hours' development: 1 hour's delivery	16 x 18 hours	John Smith	03 March	17 March	31 March	07 April	14 April
Accounts Payable Online Manual	As Above	Intranet	8 procedures	1 day for procedures	8 x 8 hours	Peter Gibbons	03 March	10 March	17 March	24 March	31 March
Accounts Payable Accountant: End to End Process Training	1. The Procurement Process 2. The AP Process 3. Procure to Pay	Seminar	16 hours (2 days)	8 hours' development: 1 hour's delivery	8 x 8 hours	Jane Moore	03 March	10 March	17 March	24 March	31 March
Customer Service Representative		Classroom	16 hours (2 days)	4 hours' development: 1 hour's delivery	16 x 4 hours	Anna Roberts	03 March	10 March	17 March	24 March	31 March

The development plan and course mapping

- Summarise the curriculum
- Changes or delays should be reflected in the engagement and learning plan
- It is critical to build in time for review as last minute technological changes are able to be incorporated

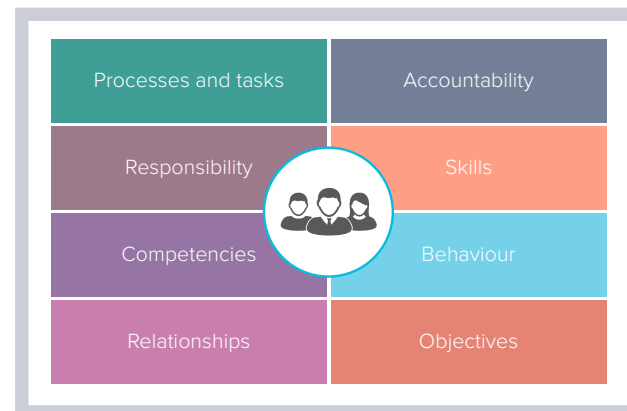


Deliver the messages or events with passion and in the most engaging ways possible.

## Confirm catalogue and standards

### Develop brilliant material

Wherever change is concerned, we often face resistance from the people who are impacted. As the person sending out these messages or scheduling the courses, the way that you deliver the events is just as important as the messages within them. Ensuring that delivery of the messages and events have achieved the outcomes, be prepared to adapt if necessary.



### ENG 5

If you are distributing the messages via a technology, such as eLearning, make sure that people know how to access and use it. Evaluate the success of the messages or events, assess on the traditional measures such as quality of the room, instructors and materials, but assess whether the individuals are ‘job ready’ – can they go back to work and perform the key tasks that are expected of them?

### Role based materials

- Accountability
- Responsibility
- Skills
- Competencies
- Behaviour
- Relationships
- Objectives
- Processes and tasks

## Find out more

We provide organisational change management for process and technology projects, and to provide excellence in operational consultancy, products and training to align the people changes required to such programmes. We focus on the following five areas:

- Change Programme Management
- Process Alignment
- Organisational Alignment
- Learning and Engagement
- Business Implementation

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