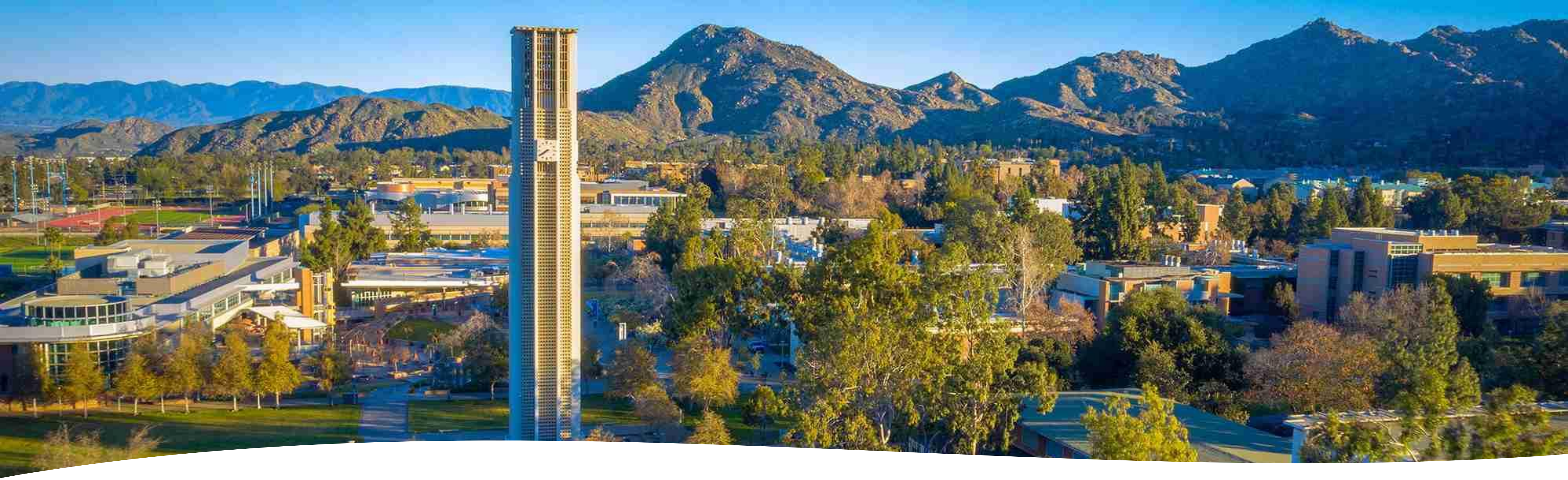
University of California Riverside

Engagement and Training Introduction

May 30, 2024

ATTAIN Partners



Agenda

- Engagement Approach Strategies
- Discovery of Communication Practices
- Crafting Customized Engagement
- Current Training Practices
- Training Approach Development

Engagement Approach Strategies

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Engagement Approach Overview

Engagement is Communication

This Engagement Approach creates organizational support for the *ascend* implementation by informing and educating stakeholders about the changes they will face. It will provide insight into the plan to:

1. Communicate **critical reasons** and **target key benefits** for the project
2. Maintain **cohesive communication at regular intervals** to avoid excessive volume, overly varied, and/or splintered communications
3. Communicate **what is expected** from the stakeholders and **when it is expected**
4. Leverage **diverse engagement methods** to **ensure information is received**
5. Maintain **two-way communications** so that information is understood, and questions are answered

Engagement Goals

Engage Cohesively

End users will experience seamless change regardless of the tool, project, or program.

Attain will work closely with all engaged project teams and stakeholders to ensure that the *ascend* OCM efforts sync with the tools and activities delivered throughout the course of the system implementation.

Change Creatively

We will leverage unique, fresh, and effective OCM tactics to reach peak adoption.

Communication, training, and engagement efforts will modernize alongside the *ascend* implementation. Relaying information and knowledge to end users is more effective when done in an exciting way.

Meet Stakeholders Where They Are

Each stakeholder group will receive engagement that allows them to accept change with ease.

Not all end users need to adopt *ascend* the same way, so our Change Management approach will flex based on the stakeholders' backgrounds, roles, use of tool, and complexity of change.

Measure Success with 360º Lens

We will use ascend reporting and end users' feedback to define and measure success.

Pairing objective and concrete data with subjective and anecdotal feedback will give us great insight into whether our solutions have been adopted by our stakeholders.

Approach Assumptions

The following assumptions are taken into consideration and guide the execution and expectations for the Tactical Matrix presented in this Engagement Plan.

1. In addition to stakeholder needs, the timing of communications are driven by project progress, and in some instances, by estimated dates
2. Most communications will be planned and scheduled in advance, but some communications may be performed as needed or on short notice
3. Communication will encourage two-way conversations and collection of feedback
4. Communication to be delivered to stakeholder groups will fall into one or more Prosci ADKAR categories:
    - Awareness
    - Desire
    - Knowledge
    - Ability
    - Reinforcement
    - Damage Control/Resistance Management

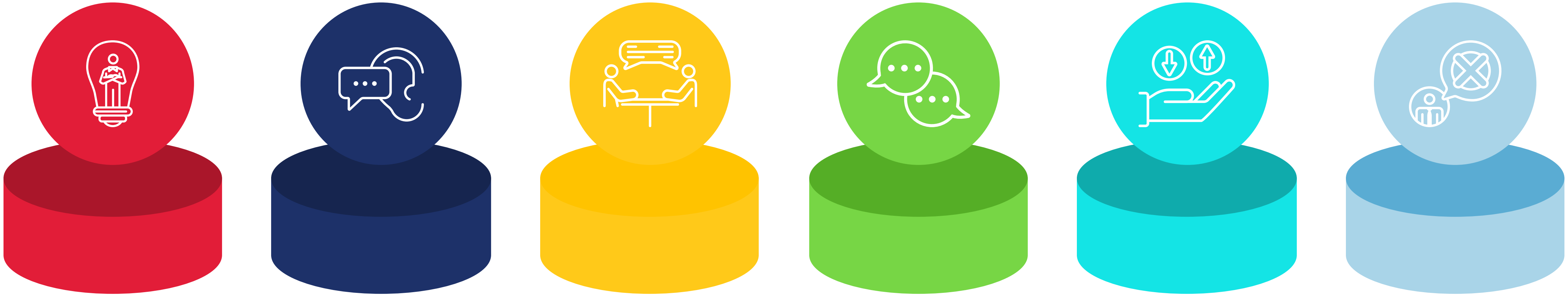
Categories of Information Communicated

AWARENESS	DESIRE	KNOWLEDGE	ABILITY	REINFORCEMENT	DAMAGE CONTROL
Introduction of Technology • What is it? • Why is it great? • When will we go-live? **Project Updates** **Deployment Announcements** **Feedback**	**Change Impact by Stakeholder group** • How will the technology affect me? • Reiterate key benefits **Benefits** *(Stakeholder-wide)* • How do stakeholder groups interact with one another? • Why are we adopting? **Benefits** *(Stakeholder-specific)* • Will become more detailed once stakeholder assessment complete	**Training Announcements** • What training do I need/can I get? • When and where will I be trained? • How much training will I receive? **Training Materials** • Quick reference guides • How-to videos • FAQs • Presentations	**Help Desk Information*** • Access to helpdesk • Topics covered • Where else can I go for support? **Feedback*** • Issues • Engagement Measurement **Change Agents** • Updates • Reminders about Resources, etc. ***Pre- and mid-Implementation***	**Help Desk Information**** • Access to helpdesk • Topics covered • Where else can I go for support? **Feedback**** • Issues • Engagement Measurement ***** Post-implementation***	**AKA Resistance Management** **See next slide**

Resistance Management

Natural Resistance to Change

Project Implementation Risk



Anxious

- Candid explanation of the project needs
- Desired benefits for the university and employees
- Bring them along in the journey

Has Complaints

- Frequent and transparent communication of the effect on the employee's daily work
- Confirmation that concerns are heard and being accounted for

Uninformed

- Regular cadence of informational sessions and updates
- Maintain two-way communication
- Communicate clear timelines

Disengaged

- Communicate clear timelines
- Offer assistance and open lines of communication
- Provide sufficient resource planning
- Host outcomes driven facilitated meetings

Unequipped

- Ensure appropriate training is offered so resources can complete their duties on the project
- Ensure all stakeholders have appropriate access, permissions to complete role responsibilities

At Risk of Turnover

- Effective training to instill confidence.
- Appropriate resource planning to avoid burnout.
- Consider employee incentive programs to help with retention.

Discovery of Communication Preferences

Roles and Responsibilities (1 of 3)

1. Client Project Sponsor

   The Project Sponsor will fulfill the role of the communication sponsor for the success of the *ascend* implementation. Responsibilities for this role include:

   - Provide direction and input to the project manager
   - Deliver communications at a senior level as needed
   - Deliver clear and credible messages at every organizational level
   - Resolve issues and concerns as they relate to the project
   - Report progress of the communications to the Project Team (and other relevant groups as needed)
   - Provide content for communication materials and review as needed for further input

2. Program/Project Manager

   The Program/Project Manager(s) will be responsible for providing appropriate communication materials, while ensuring communication messages are timely, accurate, and consistent throughout the project. They will continually evaluate the results of the communication efforts and evaluate the overall success of the project.

   - Drive the changes required for engagement
   - Validate communication collateral
   - Hold team members accountable
   - Assure all project team members understand their role and accept their responsibilities in partnership with Project Sponsor
   - Deliver status updates to appropriate committees in collaboration with Attain Partners Project Management and the Project Sponsor

Roles and Responsibilities (2 of 3)

3. Change Lead and Change Consultant

The Change Lead and Change Consultant will be responsible for overseeing all change management activities and working with the Functional Lead to develop the Engagement plan and communication collateral. Responsibilities for this role include:

- Change Lead (Attain Partners)
  - Develop the Engagement Plan and integrate activities, tasks, and milestones into the Project Plan
  - Manage the development of communication activities and collateral
  - Quality assure all communication materials for delivery to internal and external stakeholders and interested parties
  - Draft communication templates (collateral) and support draft communication messaging for distribution client
  - Monitor and report on the efficacy of communication activities
- Change Lead (Client)
  - Assist with the development of the Engagement Plan
  - Integrate activities, tasks and milestones into the Project Plan
  - Support the development of and manage the coordination of communication templates, activities, and collateral
  - Quality assure all communication materials for delivery to internal and external stakeholders and interested parties
  - Draft communication templates (messaging and collateral) for distribution by client to internal and external stakeholders
  - Monitor and report on the efficacy of communication activities

Roles and Responsibilities (3 of 3)

4. Change Management Agents

These individuals (identified as members of the change committee) support the change management activities for the project, representing different user types and roles. They typically interact with the targeted business processes and software routinely.

They provide informal reinforcement of all change communications and real-time insights into the benefits and challenges of change. They can also provide their colleagues with ad-hoc guidance on adhering to the new business processes and adoption of the new software. Their responsibilities include:

- Support the Change Lead in identifying small wins
- Support the Change Lead in identifying change impacts to their respective groups
- Support the development of communication collateral as needed
- Provide ad-hoc guidance to their peers on adopting the new technology
- Serve as feedback loop to the Change Lead and project team

Feedback and Engagement Metrics

Feedback is key to understanding how well the communication went throughout the implementation. Key Performance Indicators (KPIs) are the metrics that show how well communication has been received and understood by the stakeholders. This information can be used to improve future communication so that it is optimally utilized.

KPIs for OCM include:

- Numbers of views on emails and messages
- Engagement in groups and forum discussions (i.e., registrations, attendance, etc.)
- Participation in messages and chat forums
- Participation in training sessions
- Frequency and number of questions
- Engagement through pulse surveys

Communication Feedback

Communication feedback will be analyzed and, if necessary, discussed with the Project Team. Activities resulting from feedback may include:

- Updates to the project specific communication plans
- Updates to the Tactical Communication Matrix for any areas of concern
- Additional discussions with other team members impacted
- Documented Frequently Asked Questions (FAQs) published for reference

Engagement Strategy

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Engagement Strategy

The Engagement Strategy the communication strategy for engaging stakeholders and stakeholder groups and addresses the following information:

1. What types of information and key messages will be communicated?
2. Who will receive key messages and various types of communications?
3. How will the information be delivered and where will it be communicated?
4. When will the information be communicated?
5. Who will perform the communication?
6. Will feedback be collected and measured? How?
7. What communications are necessary to ensure knowledge transfer, i.e., are stakeholders supported post-implementation?
8. What is the process for escalating issues?

Engagement Strategy

The Engagement Strategy shows the communications that will be delivered throughout the *ascend* implementation project to all key stakeholder groups. It demonstrates what type of communications are being delivered to who and by what channel, the timing, owners, the objectives and metrics that will be used to measure the success of the communication.

Item	Status	Send/Present Date	Audience	Mode	Subject
for reference on materials sent to group	Not Started, In Progress, Complete	Date that affected stakeholders receive information	Which affected stakeholder groups/personas will receive the communication?	What kind of communication/ engagement tool will be used?	What is a short summary of the communication?

Key Message/Objective	Sender/Speaker	Drafted By	Draft Due Date
At a high level, what points need to be hit in the communication?	Which key stakeholder will send the communication?	Who will create the communication?	When is draft due to approvers?

Approved By	Approval Due Date	Distribution List?	Additional Notes
Who will offer feedback and give the go-ahead to send?	When is approval of draft due?	If the communication's mode is email, is there a distribution list available? If so, what is the address?	Anything else important to know about the communication?

Current Training Practices

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Current Training Practices

How is training delivered at UCR?

Online	vs.	In-person
Hands-on	vs.	Lecture
Guided	vs.	Independent study
One time	vs.	Multiple sessions

Training Preferences

What training practices have worked well?

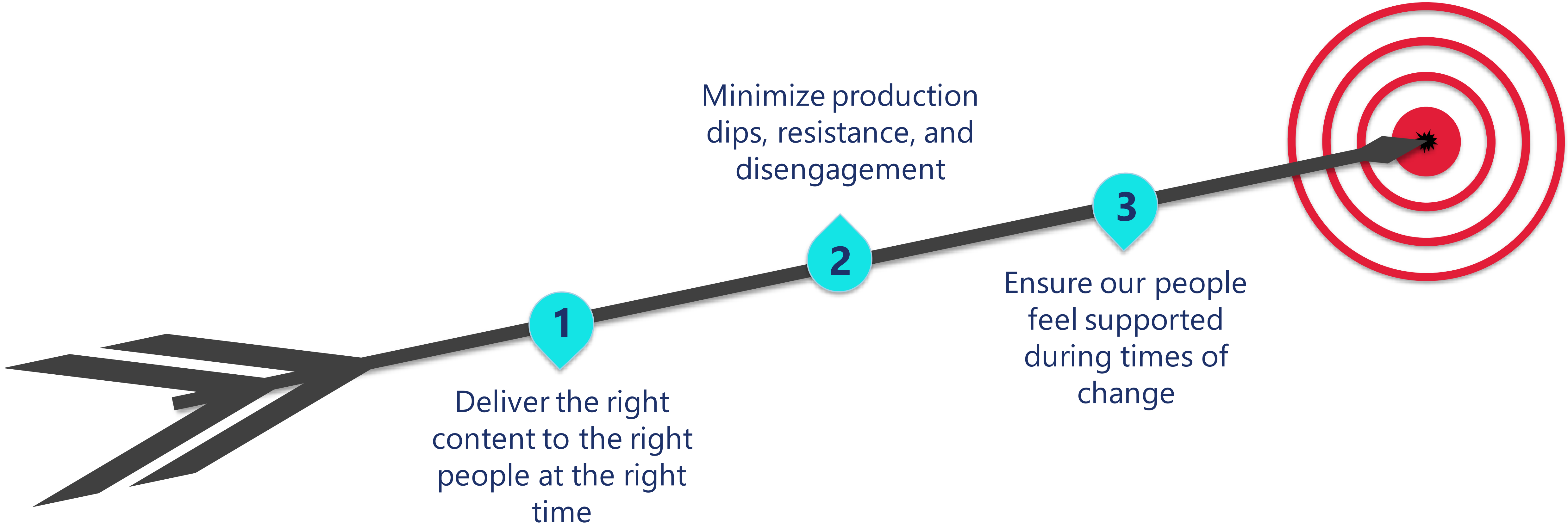
What has NOT worked well?

What else do we need to know to deliver effective training at UCR?

Do you want to use your LMS (Canvas) for training content?

Training Approach

Training Objectives



Training Philosophy

Training is not one-size-fits all.

To ensure all stakeholders absorb the right information at the right time, we must:

- Understand how stakeholders learn
- Create materials that are relevant and accessible
- Provide varying levels of support
- Monitor training's efficacy and course correct if needed

Training Approach

1 **Analyze** stakeholders and the degree of impact this change will have on individuals, their teams, and their role in the organization

2 **Conduct** training needs analysis to determine the content that must be trained to each group and the most effective way to train them (e.g., system admins, end users)

3 **Build** QRGs for each task, item, and feature in the new system

4 **Ensure** training delivers content on how to use the tool in addition to how the new features will fit into stakeholders' roles and processes.

5 **Deliver** training and ensure its effectiveness through close monitoring of data, feedback, and user engagement

Training Strategy: Dependencies & Impact

Purpose

- Developed to describe how training will be rolled out to all SSH users
- Defines the high-level training strategy and activities for engaging stakeholders build awareness and understanding for the change
- A good training plan will cover:
  - Status
  - Audience/ Stakeholder Group
  - Training Method
  - Materials
  - Date of Training
  - Agenda/ Schedule
  - Registration Required?
  - Location
  - Content Owner
  - Trainer
  - KPIs

Dependent On

- [ ] Stakeholder Analysis
- [ ] Change Impact Assessment
- [ ] Survey or meet with stakeholders to understand their training preferences
- [ ] Understanding of training methods employed at OSU and their efficacy
- [ ] Delivery date and any other milestones so that training timing can be planned

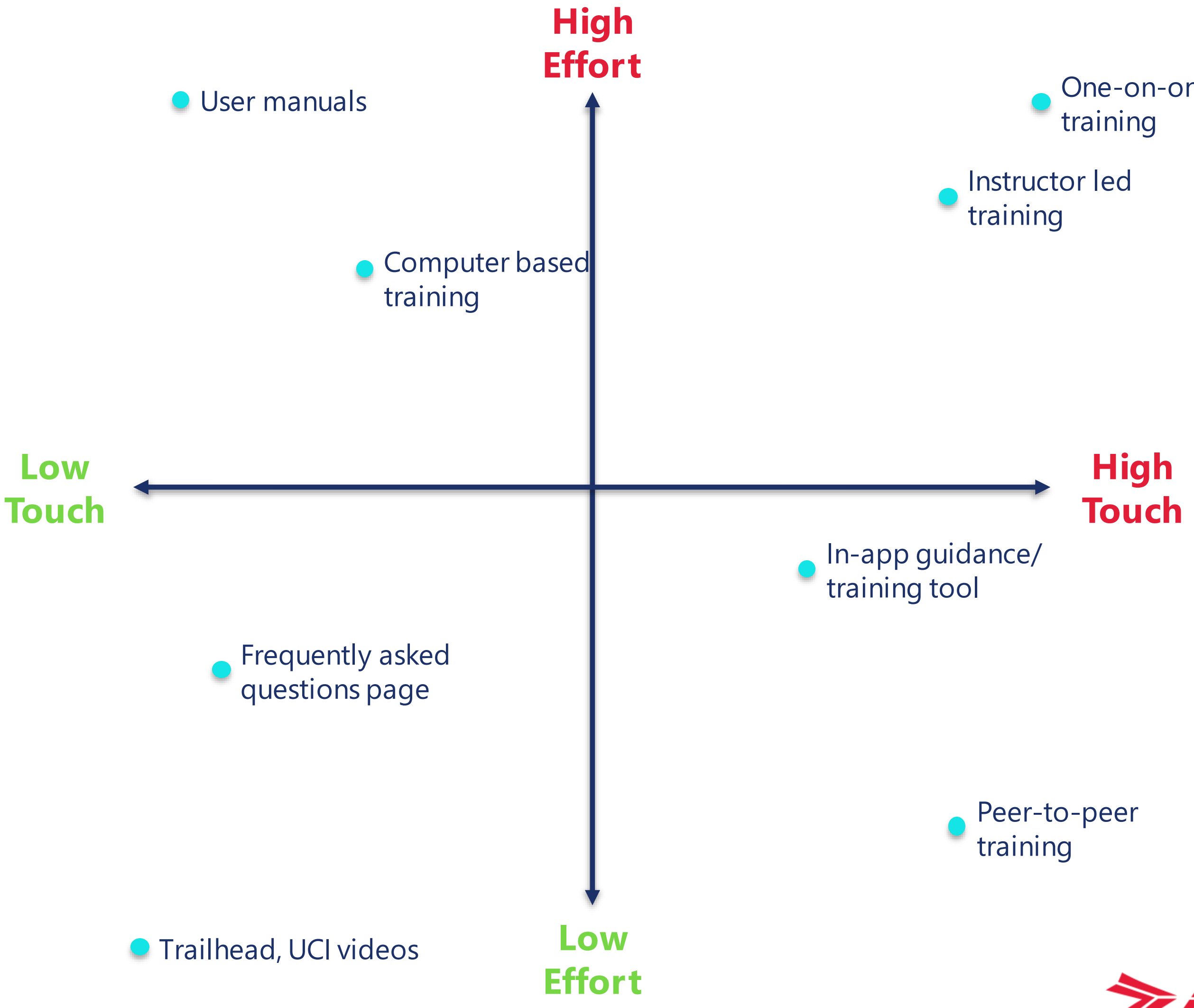
Downstream Impact

- Without effective training, stakeholders will be unable to use the tool that we deliver
- Training will allow us to fill any gaps in the process that technology doesn't cover with manual/analog solutions

Training Effort vs. Impact

Touch:
How engaged must learners be in training?

Effort:
How much time and energy is spent managing training?



Sample Approach

Activity	Sample
ascend/SF 101 trainings	Activities Training Video, *ascend* 101 Training Video
Build end to end user manuals by feature with screenshots	Gift Processing User Manual
Determine what content each group needs based on personas	Training Schedule with Permissions, User Process
Develop user group training content with correct tasks, functionality, and practice scenarios	Gift Processing: How To
Deliver trainings	Training Outline

THANK YOU!

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