Facilitation support

OneCRM Roll-out
Go-Live Master Training

On the fourth day of the go-live master training we focus on how to facilitate

Go-live master training – facilitation support

Master Training: Facilitation support

- **How to prepare the sessions (go-live)**
  - Team discussion: How did preparation go during the Pre Go-Live? *15 min.*
  - Team discussion: How would you prepare for your training sessions? *20 min.*
  - Facilitation support materials (go-live) *10 min.*
  - Preparation process (Prep-Call, Mails, etc.) *10 min.*
  - Considerations during the training (grouping participants, local processes, Q&A) *10 min.*
- **How to practice facilitation**
  - Dry runs *120 min.*

Total: ~190 min.

Agenda

1	**How to prepare the sessions**	60 min.
2	**How to practice facilitation**	120 min.

Now that you've gone through all the content we would like to focus this session on the methodological aspect of being a trainer

The roles of a trainer

RECAP

Trainers are trained…

- **Received training** for all (pre) go-live packages
- **Understood** the **potential-driven sales approach**
- Learned how to **deal with change**

Done in the last days

…and provide training to their teams

- Know what it takes to **be a good trainer**
- Understand how to **use the support materials**
- Are able to **prepare for each session**
- Know **what to do** and **how to conduct** a session
- Get how to **handle** and **react to learners**

Focus of this session

Team discussion

How did preparation go during the Pre Go-Live?

Did you do dry runs? (How) did they help you?

How was it to be teaching?

How well did your team members understand the content? Do you need to change your style to avoid having to explain multiple times?

15 min.

Team discussion

If you could go back in time, what would you do differently?

10 min.

Team discussion

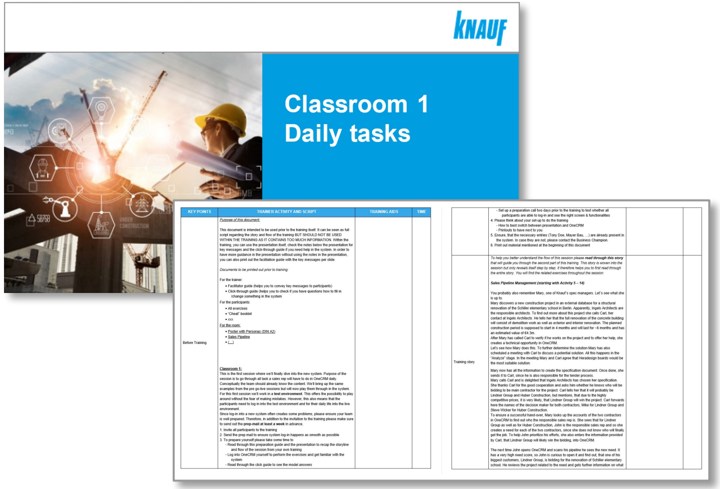
How do you think the setup will be different for the Go-Live?

10 min.

The goal of the Go-Live training is to learn how to use OneCRM as part of the potential-driven sales approach – the system is part of training

Difference in training setup Pre Go-Live vs. Go-Live

In addition to the presentation and the facilitator guide which you already know from pre go-live ...

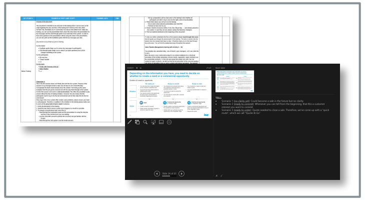


... you will need to handle the system activities which require working in OneCRM – the click guide will help you in preparing

For each of the trainings there is a variety of supporting material – plan ahead that some of these materials will have to be printed out

Training asset overview

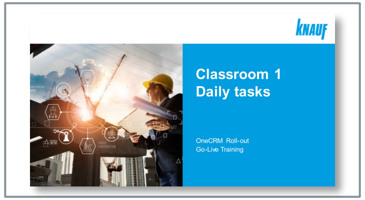
Material for trainers



Facilitator Guide

- Contains in-depth information to each slide
- Needs to be fully read **before the training**
- **A short version** of the Facilitator Guide is in the 'Notes' section of the presentation

! Print out Facilitator Guide



Presentation

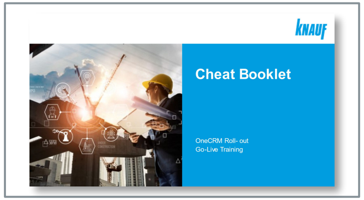
- Main document of the training
- Used to guide participants through the session and explain all concepts
- Facilitators should be familiar with the presentation **before** the training
- Make available to trainees after training

Click Guide

- Help the facilitators to **prepare for the 'in-system' tasks** during the go-live sessions
- Explains exactly what to do or click

! Print out

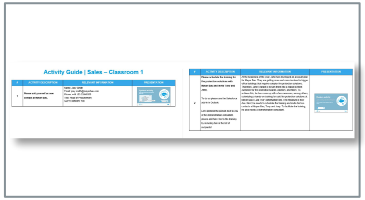
Material for trainees



Cheat Booklet

- Collection of key information on OneCRM system usage, naming conventions (and reporting for sales)

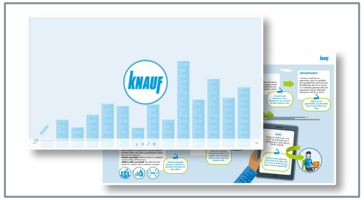
! Print out for each participant



Activity Guide

- Collection of all tasks of the session
- Each participant should receive on printed version of the guide in the beginning

! Print out for each participant



Other training materials

- Will be different for each session, e.g.:
  - Videos
  - Posters (e.g. Infographics)

! Print out as required

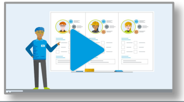
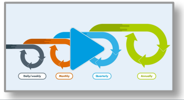
! Required   ! Recommended

To make the sessions more lively and illustrative we've developed videos and infographics that serve different purposes

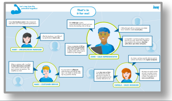
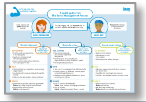
Usage of videos and infographics

RECAP

Videos

Title		Usage
My life as a sales rep		Pre go-live team package 1
My sales pipeline		Pre go-live team package 4 Classroom session 3
Sales Management Process		Pre go-live team package 5

Infographics

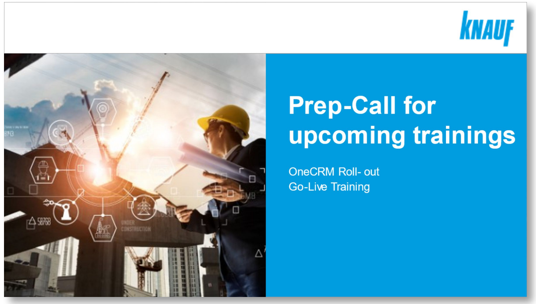
Title		Usage
Key terms		Print out and hang somewhere visible in your office buildings
That's in it for me!		Pre go-live team package 1 (Sales and Customer Service) Print out and hang in office
My life as a sales rep	Screenshot TBD	Pre go-live team package 1 Replace with "The life as a sales rep" slide in all training sessions
My sales pipeline	Screenshot TBD	Pre go-live team package 4 Classroom 1 and 3
A quick guide for the Sales Management Process		Print out to always have it with you Use for preparation of the SMP meetings

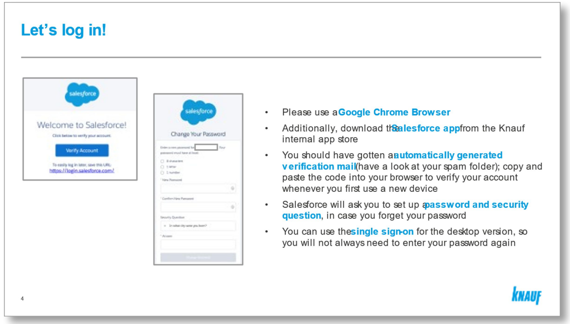
Materials should be provided to you by your Business Champion

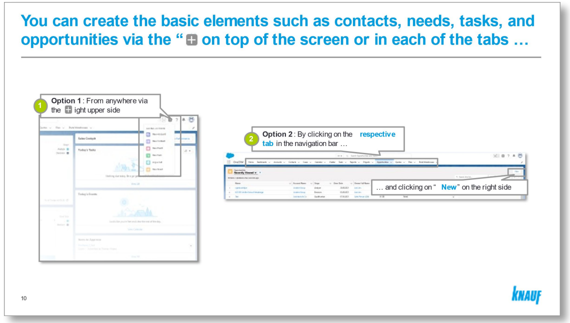
KNAUF

Before Go-Live trainings, there will be so-called Prep-Calls for trainers to ensure the system works and you know the basics of Salesforce

Prep-Call for (Master) Trainers







System Preparation

- Logging into OneCRM
- Preparation of the system and ensuring all is working

Salesforce basics

- Introduction to basic elements of OneCRM
- Instructions how to perform basic tasks in the system
- Will be repeated in the training to bring everyone on the same page

To ensure logging in works during the training, send an email with instructions to participants – no worries, it‘s already prepared

Preparation mails to participants

From: Team leader / Facilitator

Subject: Classroom 1 | Daily tasks

Dear All,

we are one week away from classroom 1. During the classroom we will be doing a lot of exercises in a training version of OneCRM to make ourselves familiar with its functions and how we do our daily tasks in the system. To make sure everybody is ready for the session, please complete all of the following tasks beforehand:

1. Please make sure you have **Chrome as your internet browser** running on your laptop (in case of problems, please contact the IT service responsible for you)
2. Download the **Salesforce app** to your mobile phone from the Knauf internal app store
3. You should have gotten a **verification mail** (have a look at your spam folder). Copy and paste the code into your browser to verify your account and to be ready to log-in
4. For the desktop version, you can already setup the **single sign-on,** so you do not need to enter your password again at the beginning of the classroom

Please do not hesitate to reach out to me in case you have any questions before the training. I am happy to support you in any way to ensure a smooth procedure of the classroom.
Best regards,

! You can find the pre-formulated email in the materials you will receive

Who are the recipients?

Team members participating in the classroom session

Who sends it?

Team Leader

What’s the purpose of the email?

- Give the participants instructions how to prepare for the upcoming classroom
- Ensure the technical readiness of the participants to avoid loss of valuable training time

Make sure all the accounts and contacts you need for the training are in the system – otherwise create them before the training

Check & preparation of the system – accounts & contacts

- **Accounts & contacts** mentioned in the training story around sales rep John need to be available in the system when you give the training
- **Please check** if the relevant accounts and contacts are **existent in the training environment ahead of time** – details can be found in the document 'Prerequisite Entries'
- In case of doubt or questions contact your Business Champion

! When participants create new objects, they should **always add your last name at the end so we can prevent duplicates**!

Naming convention: *Object name_Last name*

Minimum requirement for objects created before training

Accounts	Mayer Bau
	Lindner Group
	Huber Construction
	Ingels Architects
	CCF
	Kraft Building Materials (Inc. / Rosenheim)
	Fast Delivery Company
Contacts	Tony Doe (Construction Site Manager, Mayer Bau)
	Mike Mason (Construction Site Manager, Lindner Group)
	Carl Henriksen (Architect, Ingels Architects)
	Sarah Miller (Head of Procurement, Lindner Group)
	Steve Wicker (Decision maker, Huber Construction)

To ensure a smooth start into the training, ensure the technical system setup is working properly for all participants

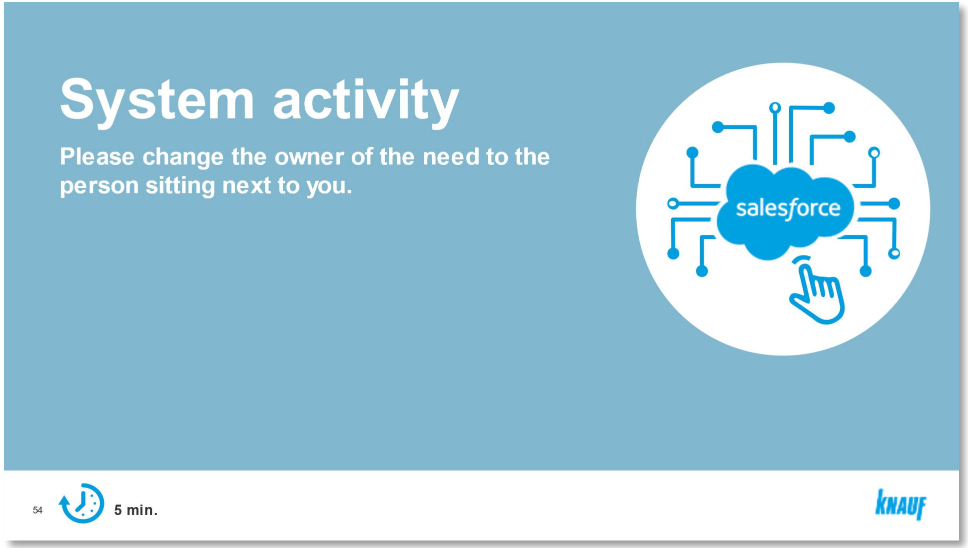
Check & preparation of the system – technical setup

Check-list for technical system setup – during the training

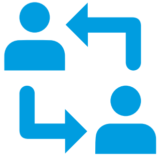
- ☐ Ensure the login works for everyone
- ☐ Ensure participants are assigned the right persona (sales / customer service)
- ☐ Ensure participants are assigned to the correct sales organizaton
- ☐ Ensure participants see product lists & pricing lists

When performing system activities, let participants group themselves in pairs to replicate ‘real-world’ processes as best as possible

Grouping of participants during ‘System activities’



- To best simulate real-world situations, let participants **pair up for exercises which would involve colleagues in real life** (e.g. “assign a task for John to follow up on a potential opportunity”)
- For example, in the exercise on the left, **let participants group themselves** in a pair of 2 each and assign each other a need in the system



Take time to explain local processes and connect the system to it – think about possible workarounds for local processes in the system

Local processes in OneCRM

What to think abut ahead of trainings

- ? How are local processes different from the global training materials?
- ? How are the processes reflected in OneCRM?
- ? Is the local process feasible in OneCRM?
- ? If the process is not (entirely) feasible in OneCRM, can we change it?
- ? If there is no possibility of changing the process, what are possible work-arounds?

- **Take time in trainings to explain local processes and how they will be reflected in the system**
- **Prepare for questions of the participants and be confident in answering them!**

If there are questions you can't answer, don't worry – during the trainings there will be frequent Q&A sessions to answer them

Q&A sessions during trainings

What to do if you don't know the answer to a question…

- If there are questions you can't answer, **openly admit** to it
- **Note down** the question and **address** it **during the Q&A**
- **Follow-up** on the question during the **next session**

Master Trainer to Team Lead	Daily Q&A session after trainings during the training week
Team Lead to Team Member	Regular Q&A sessions in between trainings

Q&A

Dry run

As we have talked a lot about dry runs let’s practice our training and do a dry run

120 min.

Discussion

What went well? Where can you still improve?

10 min.

Discussion

Do you have any direct feedback regarding the system / the training you'd like to pass on?

10 min.

Thank you

for your attention