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"How to book" persona journeys

Learning Frameworks

Introduction

The purpose of this document is to help the Learning and Development SPOC community provide advice and support for users to access learning. It describes a selection of example journeys for different users to follow to book learning.

Tracy – Individual Learner making Open Booking

Crystal – Line Manager submitting a New Learning Request

Trish – Individual Learner making Public Booking

Tom -– Administrator making Bulk closed booking

Claire – L&D lead making Bespoke learning request

Kathy – Talent Management lead making a New Requirement request

Eva – Professions Lead making closed off the shelf booking

Mark – Department head booking a development coaching

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Meet Tracy

Learner details

Example role:

Learner

Example booking:

Open course booking *(when a civil servant makes a single booking onto an event that will be attended by other civil servants).*

Why this persona?

As an individual learner, I am interested in booking a virtual or face to face course to help me to develop within my current role.

Enablers to booking

- Prospectus Online allows you to see what's available in one place
- Ability to contact Helpdesk if unsure how to book.

Barriers to booking

- Knowing where to find the correct Purchase Order number
- Unsure of who the departmental contact is to raise a Purchase Order.

Individual learner　　**Open booking**

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What does Tracy need to do?

I identify relevant curriculum area(s) by checking learner profile or searching Prospectus Online.

I find the relevant topic and navigate to the page on the learning website, via the link on Prospectus Online.

I note down the cost and future date(s) of the course.

I speak to my line manager to seek approval to attend the course and contact the Helpdesk for advice on how to book.

The Helpdesk answer the call within 20 seconds and advise on the booking process, including that a Purchase Order (PO) will be needed to pay.

Before I book my course, I need to raise a PO. I check my department/organisation's process for this.

When I receive a PO number, I go back to the learning website page for the course, and submit a booking, adding the PO details.

My department uses a bulk 'call off' PO, so I don't need to send a pdf copy to the Helpdesk*.

I submit my booking 4-7 weeks before the published course date. Booking early minimises the risk of cancellations if insufficient numbers of learners book onto the course.

I receive an acknowledgement after submitting my booking and when my payment has been validated, I receive confirmation of my booking from the Helpdesk within 10 working days.

Ten working days before the course, I receive joining instructions, confirming the arrangements, along with a link to the independent learning I need to complete before the course.

After I have attended the course, I receive an evaluation to assess the impact of the learning and how useful it was to me. I complete this as I know my response will help maintain quality for other learners.

*Where departments do not have a call off PO arrangement in place, learners need to submit a pdf copy of their PO to ukfmcslpo@kpmg.co.uk in order to secure their booking.

Key: | Learner/booker   Helpdesk   Timeframes   Supplier

Meet Crystal

Service user details

Example role:

Line manager looking for a new learning requirement

Example booking:

New learning requirement

Why this persona?

As a Line Manager I would like discuss a new learning requirement for my team to develop their skills, which are specific to the work they, as a team, do.

Enablers to booking

- Ability to speak to a curriculum expert on Helpdesk to explore options (including knowledge of consortium partners who may be SMEs) for learning
- Support in completing the New Requirements form
- Helpdesk have visibility of similar requirements to provide better value for money.

Barriers to booking

- Knowing how to access the New Requirements form
- Knowing how to seek budget approval
- Understanding of spend control guidance.

Line manager **Closed booking**

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What does Crystal need to do?

I check Prospectus Online and can't find a topic to meet the needs of my team.

I have found another supplier who offers a product which does meet the needs of my team.

I speak to my departmental L&D team who advises me of my options, including contacting the Helpdesk.

I call the Helpdesk for further guidance and they confirm that there are no suitable products available as part of the current offer.

The Helpdesk assist me with completion of a New Requirements form to ensure that I am compliant with Cabinet Office Spend Controls and allow my request to be appropriately routed.

At the end of the call, I am asked to validate the information via email, as well as ensure that I have financial approval in place for them to proceed with my request.

I return the completed form to **support@governmentcampus.co.uk**. The cost of the course with my chosen supplier falls under £10,000*, so within 5 working days the Helpdesk approve that I can locally procure the course for my team directly from the supplier.

The Helpdesk team will include my request in reporting to GSCU so if there are any similar requests in the future from other departments, a decision may be made to add the course to the offer.

*And the same/similar course is not currently available as part of the offer

Key: 👤 Learner/booker   💬 Helpdesk   ⏱ Timeframes   🛒 Supplier

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Meet Trish

Learner details

Example role:

Learner

Example booking:

Individual off the shelf public course

Why this persona?

As an individual learner working in the Digital, Data and Technology profession, I'm keen to keep developing my technical knowledge.

Public booking

- Ability to seek advice on the curriculum via the Helpdesk
- Prospectus Online has with all topics held in one place
- Booking portal allows self serve access
- Prices included in the booking portal.

Barriers to booking

- Knowledge of how to raise a Purchase Order
- Unable to view specific dates for courses.

Individual learner   **Public booking**

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What does Trish need to do?

I contact the Helpdesk for advice on courses which are available and how to book them.

The Helpdesk agent advises me that there is a wide range of technical courses available, including off the shelf topics which may be of interest.

They direct me to Prospectus Online to search for specific topics (such as technology and software, or data and analytics).

I want to book as an individual, so I need to complete a booking request, using the booking portal. As this is a 'public' course it may be attended by learners from outside of the Civil Service.

In order for my booking to be progressed, I need to submit a valid Purchase Order (PO) for the amount stated on the booking portal for the topic I want to book.

I decide which topic I want to book. I speak to my line manager to seek approval to attend the course and raise a PO using the process outlined in my department.

When I receive a PDF of my PO, I complete the request on the booking portal, including accepting the Terms and Conditions. I then click 'Submit'.

I send a copy of my PO, to **support@governmentcampus.co.uk** and within minutes I receive a message which acknowledges receipt of my booking.

Within a few days of sending the request, the Bookings Team contact me, via email, to say my booking has been validated and the request passed to the relevant supplier.

I am told that the supplier will contact me directly in order to confirm the date of the course with me, as well as send me the joining instructions along with any relevant independent learning.

The supplier contacts me and gives me a range of potential dates for the course. I choose the most convenient date and the supplier confirms my place is now booked.

Ten working days before my course, the supplier sends me my joining instructions, confirming the date and time of my course, as well as including a link to join the course virtually.

I attend the course with other learners from a wide range of organisations which also helps me to further build my professional network.

After I have attended the course, I receive an evaluation to assess the impact of the learning and how useful it was to me. I complete this as I know my response will help maintain quality for other learners.

Key: | Learner/booker   Helpdesk   Timeframes   Supplier

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Meet Tom

Service user details

Example role:

DWP L&D administrator

Example booking:

Bulk closed booking

Why this persona?

Creates Purchase Orders and codes to allow learning to be bought and may book large closed courses.

Enablers to booking

- Prospectus Online has all topics held in one place
- Booking portal, allowing self serve access
- Ability to submit regular bulk bookings
- Access to Power BI to assist with forward planning.

Barriers to booking

Sending delegate list to Bookings team

Bulk closed bookings learner   **Booker**

What does Tom need to do?

Following our departmental process, I liaise with our internal finance department to secure bulk/call off Purchase Order (PO).

I sign into the booking portal to raise the booking requests. If this is my first time on the portal, I follow the registration process.

I can add multiple topics and events (including dates and preferred locations) to the booking portal request.

I add a 'Host' (point of contact) against each event.

I submit the request and email a PDF copy of the PO to **support@governmentcampus.co.uk**.

I receive an acknowledgement of booking request immediately after I click submit on the booking portal.

I receive an update on the booking status from the Bookings team 2 working days after sending the booking.

The Bookings team notifies me when tutors have been assigned to each event, asking me to confirm that I wish to proceed with the events as requested.

I confirm all the events, knowing that Terms and Conditions are now applicable if I was to cancel an event 22 days or less before the specific event date.

I send the Bookings team a list of delegates for each event a minimum of 3 weeks before the event start date. This means they can send joining instructions directly to learners to prepare for the event.

Ten working days before the event, learners receive their joining instructions, along with independent learning to be completed.

After the event, learners receive an evaluation to assess the impact of the learning.

Members of the L&D team are able to access attendance data through PowerBI, which is helpful in planning future learning for the department.

Key: | Learner/booker | Helpdesk | Timeframes | Supplier

Meet Claire

Service user details

Example role:

HMRC L&D Lead

Example booking:

Bespoke new learning requirement

Why this persona?

Requires the creation of learning topics which are not currently available in the curriculum.

Enablers to booking

- Can easily access the New Requirements form from **gov.uk**
- Whole learning offer included in the Prospectus Online
- Dedicated Account Manager.

Barriers to booking

Lead in times to create a bespoke learning product.

Bespoke learning   New requirement

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What does Claire need to do?

I have oversight of the full learning offer across the Civil Service and identify that there is a need to develop a **bespoke programme** for the property profession. It would not be suitable to be delivered more widely across the Civil Service.

I complete a New Requirements form (accessed via **www.gov.uk**) in order for the bespoke requirement to be progressed further. I know that the cost of designing a bespoke programme will exceed £10,000 so the Helpdesk team will not allow the requirement to be locally procured in line with Cabinet Office Spend Controls.

I submit the New Requirements form to **support@governmentcampus.co.uk** and within 5 working days, I am contacted by the Helpdesk team, inviting me to a call to further discuss the requirement and allow them to progress it to the most appropriate provider.

The Helpdesk were very knowledgeable about other topics which may have been suitable, but after discussing the whole requirement, we agreed that it was likely that a brand new bespoke programme would need to be designed to achieve all of the desired learning outcomes.

The Helpdesk assigned the requirement to the appropriate provider and within 2 working days I am contacted by the provider to arrange a detailed conversation with me about my requirements. They have an awareness of the requirement based on the details on the New Requirements form.

The Account Manager shares the partners currently in the consortium and sets out an overview of the process if a new partner needs to be found. We also discuss the different options for exploring solutions, for example approaching one supplier directly or alternatively seeking proposals from several consortium partners. We discuss the timeline implications of each option.

The Account Manager engages with the appropriate consortium partners and keeps me updated on this. I am then invited to a call with some selected consortium partners to hear about the solutions that could help meet my need.

Based on my feedback, the team work with the consortium partner to develop a proposal for my review.

I first agree the qualitative aspects of the proposal (i.e. scope and deliverables), then within 5 days I receive confirmation of the price.

Once the proposal and pricing is agreed, the team prepare the Work Order which captures the scope, pricing and other relevant contractual terms. As part of this, IP options are discussed with me, and the agreed position is captured within the Work Order.

I review and sign the Work Order and work commences to design and deliver the learning to the property profession.

Key: | Learner/booker | Helpdesk | Timeframes | Supplier

Meet Kathy

Service user details

Example role:

Talent Management Lead

Example booking:

New Learning Requirement with a specific supplier

Why this persona?

L&D lead who has existing close network of highfliers and wants to deliver learning that will accelerate their development.

Enablers to booking

- Can easily access the New Requirements form from **gov.uk**
- Whole learning offer included in the Prospectus Online ability to speak to New Requirement experts via the Helpdesk.

Barriers to booking

Little oversight of consortium partners available through the learning framework.

New requirement   **Wants specific supplier**

What does Kathy need to do?

I have oversight of the full learning offer across the Civil Service and identify that there is a need for a group of learners to attend some project delivery courses.

There are some similar topics on offer through the learning frameworks but I've already approached a supplier who can deliver a slightly different topic at a price exceeding £10,000.

As I want to procure learning outside of the learning framework, I must make sure I am compliant with the Cabinet Office spend controls.

I complete a New Requirements form with all of the relevant information and send it to the Helpdesk.

Within 5 working days, I am contacted by the Helpdesk team in order to discuss the requirement further. The team tell me about similar topics available, explaining the learning outcomes and why these may be suitable to meet the needs of my learners. I am told I should follow the standard booking process for these.

However, I do not want to book any of the topics which the Helpdesk team have proposed. I decide to continue with my new requirement.

The Helpdesk inform me they will progress my request to the relevant provider to review and advise whether they can meet the requirements. If they can't, it will be referred to GSCU to consider whether local procurement is appropriate.
The reasons for referral to GSCU are:
- The requirement costs more than £10,000 (and therefore could not be referred to local procurement without GSCU approval), and

- There are similar topics available as part of the learning offer.

When GSCU have made their decision, the Helpdesk get in touch with me once again to say that my New Requirement has been declined.

The Helpdesk explain that as there are similar topics available as part of the offer which will achieve the desired learning outcomes, I should book one of the topics they suggest in their response.

The Helpdesk team provide me with information and advice on the booking process, along with information on the relevant booking process.

I am able to proceed with booking one of the alternative topics which the Helpdesk have suggested.

Key: | 👤 Learner/booker   👥 Helpdesk   ⏱ Timeframes   🛒 Supplier

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Meet Eva

Service user details

Example role:

Intelligence Analysis Professions Lead

Example booking:

Closed group off the shelf topic

Why this persona?

Booking specific off the shelf training for a large group within this profession.

Enablers to booking

- The booking portal allows for self serve access for making booking requests
- Options to enable bulk bookings
- Prices visible within the booking portal.

Barriers to booking

- Unable to submit preferred dates within the booking portal
- Lack of visibility of dates offered by consortium partners.

Booker   **Closed off the shelf course**

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What does Eva need to do?

A professions contact asks me to make a group booking for an off the shelf course.

Firstly, I follow the internal process for raising a Purchase Order (PO) in order for the booking to be accepted.

I access the booking portal to select the products that I am interested in. I am able to review different options that are available for this product so I can choose the most appropriate one.

On the portal I can see the price for a group up to 16 people.

I do not need to provide the names and contact details of the delegates at this point, however I understand that the Service Center will request this 3 weeks before the event start date.

Once I have completed all of the information (including the Purchase Order number), I click 'Submit'.

I receive an automated message to acknowledge receipt of the booking form within minutes of submitting it.

Within 2 working days, the Bookings team provide an update to me on the progress of my booking. They advise they have sent my request to the appropriate consortium partner, who will contact me directly to confirm the date of the course with me.

The Bookings team notify me when tutors have been assigned to each event, asking me to confirm that I wish to Proceed with the events.

I confirm all of the events, knowing that Terms and Conditions are now applicable if I was to cancel an event 22 days or less before the specific event date.

I send the Bookings team a list of delegates for the event a minimum of 3 weeks before the event start date. This enables joining instructions to be sent directly to learners.

Ten working days before the event, learners receive their joining instructions, along with any independent learning required.

After the event, learners receive an evaluation to assess the impact of the learning.

Members of the L&D team are able to access attendance data through PowerBI, which is helpful in planning future learning for the department.

Key: Learner/booker   Helpdesk   Timeframes   Supplier

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Meet Mark

Service user details

Example role:

HMRC Fraud department head

Example booking:

Booking a coach for my development

Why this persona?

Department head who wants to book coaches for senior leaders in his department.

Enablers to booking

- Overview of coaching offer on the learning website
- Coaching platform and ability to choose a coach.

Barriers to booking

No single sign on to coaching platform

Booking a coach

What does Mark need to do?

I am a Grade 6 in the Civil Service and am interested in progressing further. I would benefit from the advice of a dedicated coach/mentor. I have discussed coaching with my manager, who has approved.

I contact the Helpdesk to seek their advice on how to go about finding and booking a coach who can meet my specific needs.

The Helpdesk agent tells me that there are 3 strands of coaching – Executive, Senior Executive and Premier Executive, along with a brief description of the differences between the 3 strands.

The agent advises me that coaches can be booked either for individuals, or for teams of people.

I am interested in booking a coach for myself as an individual and ask how I would go about arranging this. The Helpdesk advise that there is a comprehensive overview of the coaching offer on Prospectus Online. The agent sends me the link, so I am fully informed.

The agent advises me that once I know which coaching option is right for me, I need to complete a coaching booking form (including a copy of the Purchase Order) and send to the Helpdesk.

I raise a purchase order form in line with my departmental process.

I send my coaching booking form and PO into the Helpdesk who send this through to the Coaching team.

The Coaching team provide me with access to the Coaching Platform and I receive a unique login. I am prompted to add my details onto the platform.

I can see the coaches who I can select and their profiles. I can choose up to 3 chemistry calls with coaches, that are organised through the platform and then hosted on MS Teams.

Once I am sure which coach I would like to select, I choose this through the platform. The selected coach is notified and the Coaching team provide me with work orders to sign.

The work order is signed by my manager as the buyer, and by the coach. I am then notified that I can start my coaching sessions.

These are booked through the platform.

The coach records my notes on the system.

Key: | ⚇ Learner/booker | 💬 Helpdesk | ⏱ Timeframes | 🛒 Supplier

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