

# "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.

<u>Crystal - Line Manager</u> <u>submitting a New Learning</u> Request

Tracy - Individual Learner making Open Booking

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





# **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.



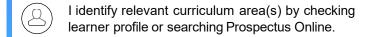
- Knowing where to find the correct Purchase Order number.
- Unsure of who the departmental contact is to raise a Purchase Order.

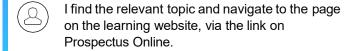




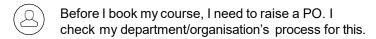


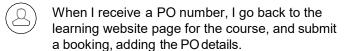
# What does Tracy need to do?





- 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.





- 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. Please refer to Government Campus' terms and conditions.



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.













# **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.

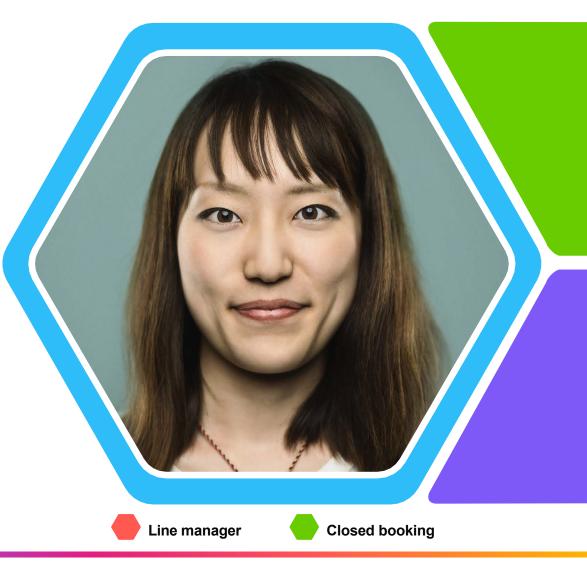


#### **Enablers to booking**

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

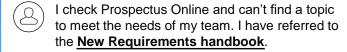


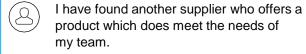
- Knowing how to access the **New Requirements form**
- · Knowing how to seek budget approval
- · Understanding of Spend Control guidance.

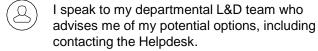


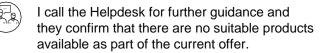


# What does Crystal need to do?



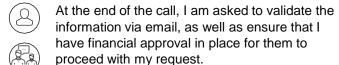






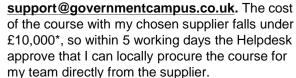


The Helpdesk assist me with completion of a **New Requirements form** to ensure that I am compliant with **Cabinet Office Spend Controls** and allow my request to be appropriately routed.





I return the completed form to

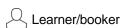




The Helpdesk team will include my request in reporting to Government Skills so if there are any similar requests in the future from other departments, a decision may be made to add the course to the offer.

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

Key:





esk Timeframes







## **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.

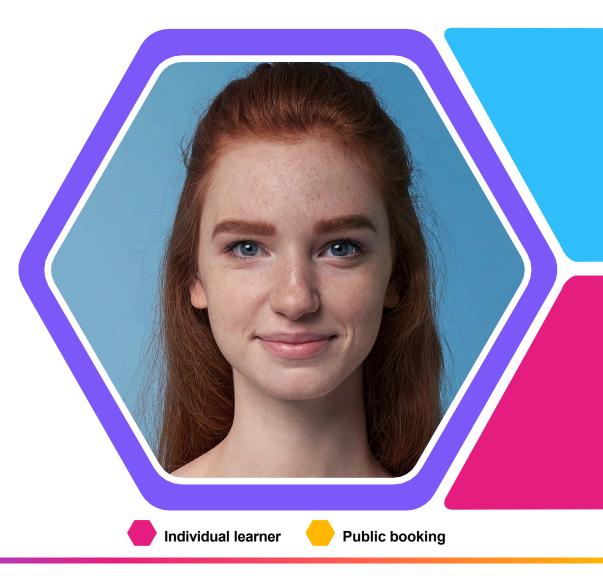


#### **Public booking**

- · 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.



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

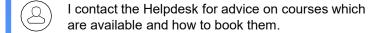


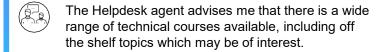


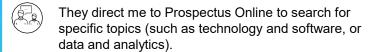


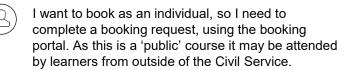


## What does Trish need to do?

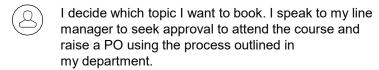








In order for my booking to be progressed, I need to submit a valid Purchase Order (PO) for the amount stated on the booking portal for the topic I want to book.



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 <a href="mailto:support@governmentcampus.co.uk">support@governmentcampus.co.uk</a> 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.

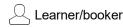
I am told that the supplier will contact me directly in order to confirm the date of the course with me, as well as send me the joining instructions along with any relevant independent learning. T p

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.













## **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.



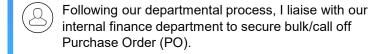
#### **Barriers to booking**

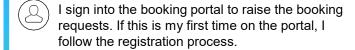
Sending delegate list to Bookings team

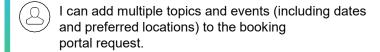


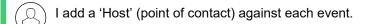


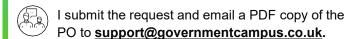
## What does Tom need to do?













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.



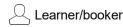
Ten working days before the event, learners receive their joining instructions, along with independent learning to be completed.



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.













## **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**

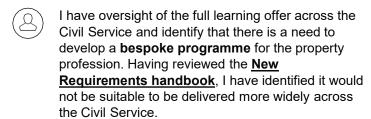
Lead in times to create a bespoke learning product



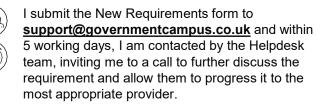




## What does Claire need to do?









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.



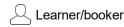
I first agree the qualitative aspects of the proposal (i.e. scope and deliverables), then within 5 days I receive confirmation of the price.



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.













# **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.



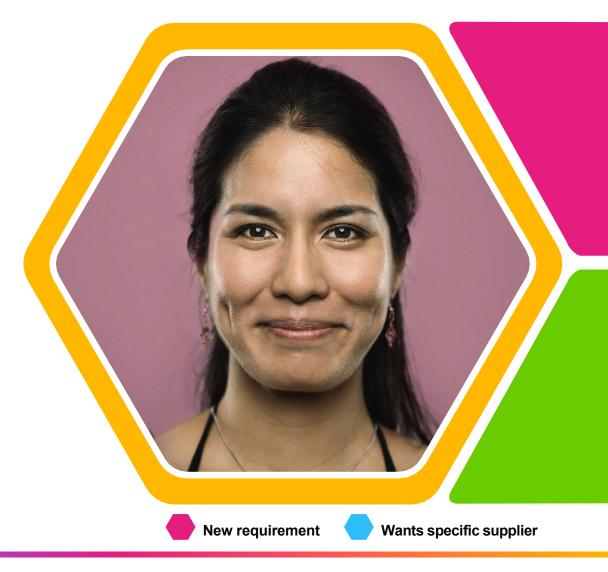
#### **Enablers to booking**

- · 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**

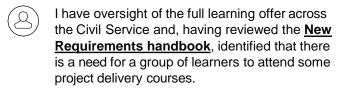
Little oversight of consortium partners available through the Learning Framework.

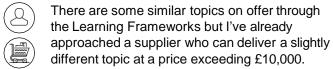


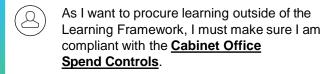


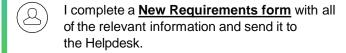


## What does Kathy need to do?











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 Government Skills to consider whether local procurement is appropriate.

The reasons for referral to Government Skills are:

- The requirement costs more than £10,000 (and therefore could not be referred to local procurement without Government Skills approval), and
- There are similar topics available as part of the learning offer.



When Government Skills 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.

Kev:





**Timeframes** 







## **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.



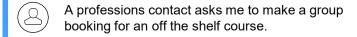
- Unable to submit preferred dates within the booking portal
- Lack of visibility of dates offered by consortium partners.

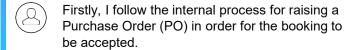


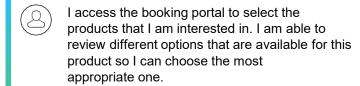


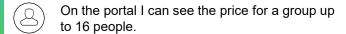


## What does Eva need to do?









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.



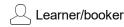
Ten working days before the event, learners receive their joining instructions, along with any independent learning required.



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.













## **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**

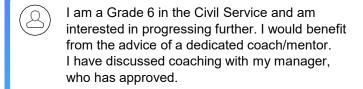
No single sign on to coaching platform

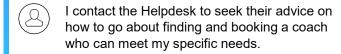


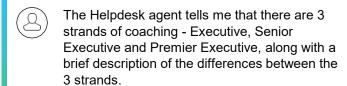


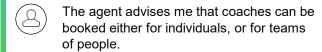


## What does Mark need to do?











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, who 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.



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 via a virtual meeting.



I have 6 weeks from being set up on the platform to select a coach. Once I am sure which coach I would like to go with, I select them on the platform.



The coach is notified and I can begin to book my coaching sessions. These are booked through the platform.



The coach records my notes on the system.

Key:





Helpdesk



Timeframes



