

PURPOSE

SOP and Best Practices for effective post-delivery reporting to support Sales and Shared Services

Post-Delivery Reports drive sales efforts for the RL and supports revenue and operations:

- Provides a record of session logistics, participants, BD opportunities, intel and overall impressions
- Business development opportunities - DCs impression of program, individuals to engage, and intel to guide future sales conversations
- Provides reference material for use in delivery prep and creating findings and recommendations reports for clients
- Supports revenue and operations (Shared Services) in accurate tracking of seminar participants

SOP

Post Delivery Reporting Logistics

1. Reports are to be delivered via email from DC/FAC to RL within 48 hours of delivery using the Quick Part / Template below.
2. Reports must contain the information listed below in the Quick Part Template, plus any additional information the DC/FAC finds relevant.
3. SOP for reporting # of participants:
 - a. > 2-hour seminars (onsite or remote) you will record attendance # at or following the first break
 - b. < 2-hour seminars (onsite or remote) you will record attendance # at the start of the seminar
 - c. Any participants that step away or report having to miss a portion of the seminar can be recorded under #6 below
4. RL and DC/FAC agree to track Post-Delivery Reports in a reference location to support future delivery prep and findings and recommendations reports.

Opportunities for Business Development

While there may be no immediate or direct leads resulting from a seminar, it is the responsibility of the DC to report observations that support future sales conversations:

1. Capture key learnings about the audience (what did you notice re: pain points and what you would recommend the RL consider in programming.
2. Specific participants who were more vocal or engaged than others, their role, and needs that surfaced in their engagement so the RL has the choice to reach out to them directly
3. Reflection - what might the DC do differently to support a more effective seminar.

Intel Gathering

The Pre-call will capture much of the DCs understanding about culture, day-to-day, pain points and desired outcomes. What additional information surfaced in the seminar that would have impacted delivery:

1. Are certain tools being used over others (i.e. using Slack vs. Teams, an internal database as preferred storage, recommendations from internal IT about email retention or best practices)
2. Corporate culture or perspectives from participants that did not surface in the pre-call
3. Anything else unique to participants that the session sponsor does not know

Quick Part Template for Post Delivery Reporting:

This quick part template is to be created and used for all deliveries (core programs, coaching, and training that is provided as part of change management programs.

Quick Part / Template

SUBJECT LINE ONLY: RO: Delivery Report – Client and Session Sponsor – Course Name – Date of Delivery

BODY OF EMAIL:

[Intro to Post Delivery Report – can include audience, sponsor, context, roles or functions represented, pain points and/or desired outcomes for the seminar]

1. What made working with this group enjoyable? (To give RL highlights to share)	
2. Information for the RL (Logistics, tech, culture, prospects, recommendations etc.)	
3. # of participants in attendance	
4. Champions/Leaders?	
5. Evaluation results	
6. Attach roster in excel form, add any commentary required	

RESPONSIBLE

Director of Shared Services

LAST UPDATED

August 31, 2022