

	OCM Toolkit Documentation Scope and Deliverables
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Applies to:	This document covers all existing and prospective OCM documents.
Objective:	Clearly define the scope, structure, processes and guidelines for OCM documentation.
Approach:	By developing and applying a consistent structure to how we approach communications and training activities, we can be more efficient and productive in how we plan and produce materials and communications in support of GGL COE objectives and priorities. Scope of responsibilities: • Program/project communications and user support/training • Sustain communications and user support/training • Change management strategy and execution • Executive/leadership communications • Ad hoc communications

Item	Deliverable/Output	Description
Elements What we do, why we do it, and when we do it		
Strategy	Communications Strategy	Defines the communications direction to be taken to achieve the goals and objectives of the organization, LOB, program, or project.
	Communications Plan	Lays out the tactics and timeframe for accomplishing the communications strategy
	Training/User On-boarding Strategy	Defines the overall direction for supporting the users/audience in taking action or making changes to meet the goals and objectives of the organization, LOB, program or project.
	Training Plan	Provides the tactics and timeframe for accomplishing the training strategy--includes the deliverables and milestones for production and delivery.
	Change Management Strategy	
Management/ Leadership Communications	Memo	Any communications, typically via email, sent out to announce news, facilitate change or solicit feedback.

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Item	Deliverable/Output		Description
	Meeting Agenda		The ordered list of items designed to facilitate progression of a meeting.
	Presentations		Speech and accompanying PowerPoint file, which displays graphics and text to highlight and illustrate the key concepts of the talk. It is NOT a script of the talk.
User Support A program or project too kit could include one or more job aids, support pieces, or training materials.	Job Aids	Summary/Fact Sheet	Brief description of a concept, function, process or policy that highlights the most important information. Usually answers the 5Ws and 1H (and WIIFM), and often includes links to other resources with more details
		Quick Reference Card (QRC)	Provides shortcuts or hints for using an application or function, e.g., keyboard shortcuts and icons in SAP. Usually short enough to be suitable for posting on a cube wall.
		Checklist	List of tasks or action items comprising a complex or infrequently used process to ensure all items are completed, and in the proper sequence.
		Procedure/Work Instructions	Sequence of steps or actions to take to accomplish a specific task. A set of procedures or work instructions typically form the core of a user or admin guide or training module.
		Diagram/model	Visual depiction of a system, process or concept
		FAQ	Frequently Asked Questions serve a similar purpose to a Fact Sheet or summary, but are structured to “answer” common questions about a program, project, application, policy or process. Should be updated from time to time based on feedback via help desk, user communities or review processes.
		Troubleshooting Guide	Provides a list of symptoms, issues and recommendation solutions to problems users and administrators may encounter in using an application or function.

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Item	Deliverable/Output		Description
		Glossary	A list of key terms and accepted definitions related to an organization, program, project, application, or industry.
		Catalog	Collected list, with detailed descriptions, of resources available to support an organization, program, project, or process (e.g., course catalog, job aid catalog, etc.)
	Support	User guide	Detailed document comprising conceptual, contextual and sequential information to assist users in performing a task or set of tasks, usually in a software application. Typically includes procedures/work instructions, diagrams/models, screen captures, and other relevant information and links to other resources.
		Administrator guide	Specialized type of user guide, geared towards system/application administrators or super users, which provides instructions on system-level or advanced functions such as security, roles and profiles, and configuration.
		Reference guide	Usually a lengthy document with very detailed information on configuring and using an application. Can include very detailed data dictionaries, maintenance procedures, and release notes.
		Newsletter	Material produced at a set frequency (weekly, monthly, etc) that provides audience/stakeholders with updates, news, upcoming events/changes, and perspectives on the organization, initiative, program or project.
		Super User Community	Group of advanced/expert users in SAP GGL modules/functions who provide support to other users, advocate for enhancements, and participate in development.

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		Online help Topic-based or embedded assistance to support correct use of a function or application. Online help is often considered an electronic form a user manual. However, it is non-linear, often context-based, requiring a different approach to structuring and building than a traditional user manual.
		Simulation/Demo Animated, often interactive demonstration of a software application in use. Can be standalone or incorporated into WBTs to support users in learning functions or actions within an application
		Process Map Visual depiction of roles, activities, decision points that comprise a manual, semi-automated or automated process.
		User Forum Online, threaded discussion of topics and issues related to the use of an application or system.
Training A program or project too kit could include one or more job aids, support pieces, or training materials.	Instructor-led Training	Leader Guide Trainer's in-depth version of the materials provided to participants. Includes objectives, discussion points, instructions, answer keys, related resources, and a group of related work instructions.
		Workbook Participants' guide to the material being covered by trainer/facilitator. Includes objectives, discussion points, quizzes/tests/activities, related resources, and detailed work instructions.
		Activity Pack/handouts Optional set of materials that can include instructions for activities, helpful materials to complete activities, or job aids.
		Work Instructions Sequence of steps or actions to take to accomplish a specific task. Multiple work instructions are grouped together as part of the contents of a workbook and leader guide

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	Web-based Training		Self-paced training users can complete from the desktop/laptop. Usually incorporates objectives, descriptions/instructions, simulations, practice activities and mastery tests. Development follows a storyboard, and reviews incorporate complete audio scripts synched with descriptions or mockups of the corresponding screens
Change Management	Business Impact Assessment		
	Stakeholder Assessment	Assessment Profile	
	Role Design Mapping	Role definition	
		Role/process map	
	Organizational Readiness	Org chart	
		RASIC chart	
		As-is process map	
		To-be process map	
	Change Readiness	Change agent network	
		Change survey	
Benefits Realization			
Web Content	Web Portal (Pulse)		Group of pages, portlets, links and associated materials that provide a full range of information to stakeholders about initiatives, programs and projects
	Portlet content/page		Individual content pieces that support the communications objectives of the related program/project. Often these are distributed memos converted to html, or a set of links to related resources.

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Item	Deliverable/Output		Description
Project documentation	Project logs		Spreadsheet that documents issues, risks, anticipated resolutions, timeframes, results, and owners. Serves to control scope creep and keep the project moving.
	Lessons learned		Document that records results of both anticipated and unanticipated challenges to successful completion and closure of a project. Serves as resource knowledge for future projects.
Processes			
Who does it and how we do it, according to ████ Project Methodology (P/D, C/T/D)			
Plan	Planning & Scheduling		Set of objectives, tactics, tasks and specific timelines and deliverables for executing a project according to the goals set.
	Scoping	Strategy	Determination of overall parameters of plan—what objectives are in scope and what is out of scope, in order to better define tactics and resource allocation
		Program/Project	
		Sustain/Maintenance	
	Needs Analysis	Communications	Process for determining the communications needs of stakeholders to a project, including identifying audiences, pain points, level of knowledge, expected goals, change impact assessments, channels, etc.
		Training	Process for determining the training needs of stakeholders to a project, including identifying audiences, level of knowledge, expected goals, changes to process or procedure, channels, etc
	Roles and responsibilities		Clarification around which team members are responsible for what tasks/deliverables.
	Schedule – milestones and deadlines		Project file, Visio or Excel to indicate specific milestones, deliverables and deadlines.
Define	Task Identification	Job Aid Planning worksheet	Form to help design the parameters of a job aid.

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Item	Deliverable/Output		Description
	Deliverable type and Output formats	Training Storyboard	Traditional method for outlining the flow of the training, supports script and screen development for WBT, and overall lesson development for ILT.
		Communications Task Planning worksheet	Worksheet that helps define objectives, messages, themes, audiences, special concerns related to the task of creating a communications piece.
	Assignment	Lead	Primarily responsible for content creation and shepherding through reviews
		SMEs and resources	People or materials that provide the expert knowledge of the subject of the task.
		Reviewers	Levels of review (internal, business/SME, leadership) may vary from task to task. Each level will be responsible for one or more of the following: Accuracy and clarity of content, adherence to style guidelines, and proofreading.
		Implementers	People responsible for delivery of the task (email distribution, posting to pulse, printing and collating of materials, etc.)
Construct	Drafting	Research, sourcing and reuse	Finding sources for information to be used in content creation, through SMEs, Pulse, share drives, general internet research, etc.
		Content Creation	Developing textual and visual content with the appropriate voice and style that addresses the audiences' needs.
Test	Reviews	OCM Internal	Initial review for content, style (grammar, syntax, etc.) and template application. Reviews should be in accordance with departmental style guide and other style authorities.
		Business/SME	Review by business stakeholders to ensure accuracy of content and thematic approach.

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		Leadership Review by leadership in the business area to ensure alignment with objectives, completeness of content and appropriate voice. Can include a review by corporate communications depending on the subject matter and audience.
	Testing	Message distribution Ensuring that messages going out via group mailboxes are formatted correctly, have attachments, and use an accurate distribution list
		WBT deployment Stages of WBT testing include script and screen, course testing, and final testing of WBTs loaded into the LMS prior to announcing availability
		Web content Review of content, approval through publishing mechanism, testing of links and ability to download documents prior to announcing availability.
		White glove review Final edits that include major typos, grammar and syntax. Should be the final cleanup of a document or memo prior to final distribution/publication.
Deploy	Distribution/publication	Distribution via email, publication on Pulse, or print production of communications and/or training materials.
	Feedback & corrections	Any mechanisms in place to garner feedback on materials, or identify and fix errors.
	Archiving	Process and procedures around expiration and storage of final versions of materials and/or content.
Guidelines Ways to do it more consistently, creatively and productively to achieve goals and objectives.		
Standards & Style Guide	Branding	Brand Center provides guidance on usage of logos, Ally color palette, some templates and use of marketing materials.
	Formatting	Guidelines on creating a consistent look and feel to documents and other communications via the use of style sheets in MS Office.

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	Grammar, syntax and style		Guidance on specific usage, and prioritized general authorities such as Chicago Manual of Style, AP Stylebook, Wired Style guide, Strunk & White, etc.
	Naming conventions		Generic naming conventions to assist with version control, indexing, archiving, search and retrieval of documents.
	Graphics and navigation standards		Standards and guidelines to apply to the choice of clip art and stock photos, and the creation of graphics (including charts, tables, models, process flows and other diagrams), and to the structuring of navigation through applicable sections of and TeamRoom.
Template Development	Structural and format templates		Aids in consistency, internal branding, and streamlines some review and production/distribution tasks. Templates built for specific document types and media, including Powerpoint presentations, word/PDF job aids, training materials, and other collateral.
Leveraging Tools	TeamRoom	Calendar	Can be a useful tool for keeping up with team tasks and activities, including tracking PTO, status meetings, and project deliverables/milestones. Ensures that all OCM team members have access to current information.
		Surveys	TeamRoom has a survey capability that may be useful for collecting feedback from project teams, beta or system tests, and training.
		Task Lists	Tasks lists work similarly to Outlook task lists, can be categorized, assigned, and routed to created a "pseudo workflow".
		Notifications	Anyone can set up notifications for changes to documents in shared libraries. Extremely useful for keeping up with changes to master distribution lists, project logs and other key project documentation.

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Item	Deliverable/Output		Description
	MS Office	Outlook voting buttons	Particularly complex review cycles could benefit from voting capabilities to track approvals and changes requested by the business, PMO or technology partners to content produced by OCM.
		Word style sheets	Style sheets provide consistent look and feel to documents, eliminate a great deal of manual formatting, and simplify other tasks such as TOC generation.
		PowerPoint master slides	Master slides work on the same principles as style sheets, and allow universal elements to be consistently placed and formatted—can apply to headings, bulleted items, charts, placement of logos and other graphics, dates, slide numbers, etc.
	Snagit	profiles	Profiles store information on both the input and output of screen captures. Setting up and using profiles assists with ensuring consistent sizing and inclusion of screen elements.
		Quick styles	Quick styles can be applied to screen capture outputs in the Snagit Editor. They serve as style sheets for the images, controlling drop shadows, coloring, edges, and callouts.