GOCCELERATE™ · D09

Training Program Framework & Adoption Support Kit

[redacted]

Prepared for: Training Facilitator, OCM Lead, People Managers & Project Lead | Initiative: [redacted] *| Assessment Date:* [redacted]

COMPONENT 1 — LEARNING JOURNEY MAP

The Learning Journey Map defines the sequence of learning experiences, by role, that moves each population from their current readiness stage to go-live capable.

Role	Current	Target	Pre-Training Prep	Core Training	Post-Training Practice	Go-Live Support
Executive Sponsor / Leadership Coalition	Interest	Sustainment	Leadership alignment session; AI literacy framing	Change Overview (executive briefing)	Modeling job-security statement delivery	Visible go-live presence
People Managers	Attention/ Interest	Capable + beginning Sustainment	Manager Pre-Briefing; AI literacy framing	Coaching Your Team Through [redacted]; Manager Sustainment Toolkit Orientation	Supervised practice running a team check-in; peer manager practice pairs	Manager Enablement Kit at point of need; OCM Lead escalation line
Contact Center & Branch Phone-Service Colleagues	Attention/ Interest	Capable	Change Overview communication; AI Literacy Foundations	What [redacted] Does/Doesn't Do; Working Alongside AI; How to Evaluate AI Outputs	Two-week shadow-mode practice (tool observes, does not affect customers)	Champion/ super-user network; help desk; job aids
HR/People Org Redeployment Colleagues	Attention (behind baseline)	Capable	Individual redeployment conversation; AI literacy framing	New Servicing Role Onboarding; [redacted] Workflow	Supervised on-the-job practice in new role	Manager and champion support; help desk
Legal & Compliance Analysts	Interest	Capable	Policy briefing pre-read	Policy Overview and Monitoring Requirements; Compliance	Supervised monitoring-workflow practice	Compliance owner support line

Role	Current	Target	Pre-Training Prep	Core Training	Post-Training Practice	Go-Live Support
				Procedures		
IT Platform Engineers	Interest	Capable	Support model briefing	Post Go-Live Support Tools Orientation	Ticket-routing practice scenarios	IT support escalation path

The learning journey for this initiative begins earlier in the readiness curve than is typical: the organization is only at the "aware but uncertain" stage, so pre-training preparation activities — particularly the AI literacy framing and, for the redeployment cohort, individual placement conversations — are not optional prerequisites, they are the first stages of the journey itself. Before any tool-specific training begins, colleagues need a foundational understanding of what [redacted] is, how it produces its recommendations, what it cannot do, and who is accountable when it is wrong; this stage is not optional for this rollout and precedes all other training content. Because this is [redacted]'s first AI implementation, and because the 2025 collections RPA pilot drew informal complaints about being "watched," the journey design must address that specific history directly — colleagues who lived through a rollout perceived as surveillance will not extend the benefit of the doubt twice.

COMPONENT 2 — MANAGER ENABLEMENT KIT

The Manager Enablement Kit provides people managers with the tools, language, and structure they need to support their teams through this change — before, during, and after training.

2A. Before Training Begins — Your Role as a People Manager

What's happening and why you matter most. [redacted] changes how your team documents customer interactions and how their work is monitored for quality and compliance. Manager behavior is the single most predictive factor in whether your team genuinely adopts this or quietly works around it. Visible sponsorship at your level looks like specific behaviors: using [redacted] language accurately in your own team meetings, being present (not just informed) during your team's shadow-mode period, and answering the job-security question the same way every time it comes up.

- Schedule and communicate your team's specific training dates before they see a generic company-wide invitation.
- Hold a brief team conversation before training begins — use the talking points in Component 2C below.
- Address questions before they become rumors; the FAQ in Component 2D covers the questions we expect most.
- We recommend a weekly check-in cadence with your team during the active training and shadow-mode window, moving to bi-weekly once the tool is live.

Signs of engagement: questions, participation, early adopters stepping up to help peers. Signs of resistance: silence, avoidance, persistent skepticism, or a dip in quality scores. When you see resistance: listen first, escalate second — do not dismiss it as "just adjusting."

Who to call when you need help: Route questions about the initiative itself to the OCM Program Lead; route employee-specific HR concerns to your HR Business Partner; route anything involving job security or the redeployment cohort directly to [redacted] office through your HRBP.

2B. While Training Is Happening — What Your Team Needs From You

- The day before: remind your team (use Template 2 below), confirm attendance and system access, and clear workload conflicts where you can.
- On training day(s): check in briefly beforehand to normalize the experience and set the tone; do not pull colleagues out of training for non-emergency work; be available at the end of the day for questions.
- The day after: run a brief 10–15 minute team debrief — what did you learn, what questions do you still have, what are you nervous about — and listen more than you talk. Escalate unresolved concerns to the OCM Lead by end of week.

Recognizing early adoption: when you see someone reviewing an AI-drafted disclosure carefully rather than clicking through it, or helping a struggling teammate navigate the tool, name it specifically — "I noticed you caught that disclosure error before confirming it, that's exactly the kind of review we need" lands far better than generic praise.

2C. After Training — Locking In the Learning (Manager Sustainment Toolkit)

> **⚠ MANAGER SUSTAINMENT TOOLKIT — REQUIRED EQUIPMENT, NOT A SUPPLEMENT**
>
> Post-go-live visibility for this initiative is carried substantially by people managers who are not yet fully equipped for the role — manager readiness is currently rated minimal. This toolkit is therefore a core sustainment instrument, not a supplement. It must be distributed to every people manager before go-live, and the structured check-in guides, reinforcement prompts, and troubleshooting references below are required equipment, not suggestions.

The 30-day reinforcement window. The first 30 days after go-live are the highest-regression-risk period — this is when colleagues who are uncertain about the tool will either build confidence or quietly revert to manual workarounds. Managers must, not may:

- Week 1 post go-live: Hold a team check-in addressing immediate questions; escalate any blocker the same day it surfaces.
- Week 2: Hold individual check-ins with anyone showing signs of difficulty or avoidance — don't wait for them to ask.
- Weeks 3–4: Run a team debrief on what's working and what isn't, and report patterns to the OCM Lead.

Verbatim reinforcement conversation openers managers can use directly:

- How's it actually going with [redacted] this week — not the official answer, the real one?
- I noticed [specific behavior] — walk me through what happened there.
- What's the one thing about this tool that's still slowing you down?
- Is there anything about how this data is used that's still unclear or worrying you?

Regression signals to watch for. For an AI rollout specifically: colleagues ignoring or overriding [redacted]'s outputs without a documented reason, colleagues routing work around the tool entirely, or colleagues completing AI-assisted tasks manually "to be safe" even after training. Given this organization's change-fatigued culture signal, also watch for colleagues describing this as "just the latest thing" or unfavorably comparing it to the 2024 or 2025 rollouts — any pattern of that language in more than one team should go to the OCM Lead and [redacted] since it requires a direct sponsor response about this organization's change history, not a generic reminder email. Given the active displacement-anxiety signal, also watch for colleagues complying visibly while quietly minimizing their use of the tool, or raising job-security concerns indirectly rather than directly — this pattern requires a renewed, specific statement from [redacted] on employment impact, not general reassurance.

What to do when regression happens. Do not ignore it — it is far easier to address at day 7 than at day 60. Step 1: Acknowledge it directly with the individual, curious rather than punitive. Step 2: Identify the root cause — is it a capability gap, a motivation gap, or a system barrier? Step 3: Match your response to the actual cause. Step 4: Escalate to the OCM Lead if the regression shows up across multiple team members or isn't resolving with individual support.

2D. FAQ and Objection Handling — Questions Your Team Will Ask — And How to Answer Them

Question	Recommended Response
Why are we doing this?	Our contact volume has grown without matching staffing, and a recent compliance exam found inconsistencies in how we document disclosures. This tool is built to solve both at once.
Why now — why couldn't this wait?	The compliance finding specifically made this a this-year priority, not a someday project.
What does this mean for my day-to-day work?	You'll review and confirm AI-drafted summaries and disclosures instead of typing them from scratch. You're still doing the judgment work — you're not typing as much of it.
What if I'm not ready by go-live?	That's what the two-week shadow-mode period and post-launch support are for. Tell me if you're behind — we'll get you support, not a penalty.
What if something breaks or doesn't work?	Flag it the same day through the support channel. Don't quietly work around it.
What if I disagree with this decision?	You don't have to agree with the decision to do your part well. I do want to hear your specific concern directly.
Who do I go to with problems?	Me first. If it's bigger than I can answer, I'll get you to the right person.

Question	Recommended Response
Will I still know how to do my job after this?	Yes — the judgment part of your job doesn't go away. The typing part does.
What happens to my data / my work?	Your interaction data is used to generate the summary and for quality/compliance monitoring — the specific performance-metric rules are still being finalized, and we're not going to pretend that isn't true.
What if the system is wrong?	You're the reviewer, not a rubber stamp — that's exactly why the training focuses on catching and correcting AI errors before you confirm anything.
Will this AI replace me?	No one in our contact center or branch service population is losing their job because of this rollout. That's the direct answer, not a soft one.
How does the AI make decisions?	It's drafting suggestions based on patterns in past interactions and our policies — it isn't making the final call on anything. You are.
Who is responsible if the AI makes a mistake?	You're accountable for what you confirm, which is why review matters. If the tool itself is producing bad suggestions, that goes to IT and the AI accountability process, not to you individually.
What if I don't trust the AI's output?	Don't confirm it. Trust your own judgment — that's the whole point of having a human in the loop.
What exactly changes in my role, and what stays the same? (redeployment team)	Your new role and specific responsibilities are [confirmed per your individual placement] — your pay and title are protected through this transition.

COMPONENT 3 — TRAINING COMMUNICATION TEMPLATES

The following templates support the training communication cadence. Customize with initiative-specific details before sending.

Template 1 — Training Registration/Invitation

Subject: [redacted] Training — Your session is [Training Date Range]. Body (150–200 words): names what the training covers, why it matters for go-live readiness, logistics, and registration access, plus who to contact with questions.

Template 2 — Manager Pre-Training Reminder (to team, 24–48 hrs before)

Quick reminder — your [redacted] training is [date/time]. This covers what the tool does, how it changes your documentation workflow, and how to evaluate its suggestions. No prep needed, just show up ready with questions. I'll be checking in with everyone after.

Template 3 — Post-Training Manager Check-In Prompt

Now that training's done: What's one thing that clicked for you? What's still unclear? What are you nervous about heading into shadow mode? Anything you need from me before we go live?

Template 4 — 30-Day Reinforcement Manager Message (to team)

We're a month into [redacted]. I know it hasn't been seamless for everyone, and I appreciate how the team has worked through it. [Name a specific team accomplishment.] Keep flagging what's not working — that's how we fix it. Thanks for sticking with this.

COMPONENT 4 — SUPPORT MODEL DOCUMENTATION

The Support Model defines what help is available to employees after go-live, who owns it, and how long it will be active.

Support Resource	Description	Availability	Owner	Access	Escalation
Manager as First Line of Support	Direct manager is first point of contact for questions and concerns	Throughout	People Managers	In-person / Teams	OCM Lead
Feedback / Help Channel	Surveys, Q&A sessions, dedicated Teams channels	Always open, reviewed daily during active phases	OCM Lead	Teams / Survey link	Sponsor (job-security /trust signals)
Post Go-Live Support Resource	Dedicated support desk for [redacted] questions post-launch	3–4 weeks post go-live per site	OCM Lead + IT	Dedicated channel	IT (technical) / OCM Lead (adoption)
Super User / Peer Champion Network	Peers trained to support adoption in their immediate hub or region	Ongoing from go-live	Champion Lead	In-person / Teams	OCM Lead
Help Desk / Technical Support	System-specific support, owned by IT/implementation partner, not the OCM program	Ongoing	IT	Ticketing system	IT escalation tier
Job Aids and Quick Reference Cards	Point-of-need reference materials	Always available	—	Intranet / printed cards	—
Certification Retake Support	For colleagues who don't pass the disclosure-evaluation certification on first attempt	Per training cohort schedule	Compliance Owner	Scheduled retake session	L&D Team

The OCM Lead reviews support utilization weekly during the first 90 days post go-live and reports gaps to the sponsor; any support resource showing sustained low utilization or high escalation volume is reviewed for redesign at the 30-day mark.

COMPONENT 5 — TRAINING CONTENT REQUIREMENTS CHECKLIST

This checklist defines what training content GOccelerate has produced as part of this OCM program and what must be built separately by the implementation partner, internal IT team, or training vendor. Share this document with the implementation partner as the OCM requirements handoff.

Section 1 — Produced by GOccelerate OCM Program:

Content Item	Owner	Status	Notes
Training Plan (D08)	OCM Lead	✅ Complete	—
Learning Journey Map	OCM Lead	✅ Complete	—
Manager Enablement Kit	OCM Lead	✅ Complete	—
Training Communication Templates	OCM Lead	✅ Complete	—
Support Model Documentation	OCM Lead	✅ Complete	—
FAQ and Objection Handling Guide	OCM Lead	✅ Complete	—
Adoption & Outcomes Dashboard (D13)	OCM Lead	Pending go-live	Activates at first pulse check-in

Section 2 — Must Be Built Separately (Implementation Partner / IT / Training Vendor):

Content Item	Owner	Status	Notes
[redacted] screen walkthroughs and recordings	Implementation Partner / IT	○ Not started	Required before training launch
Role-specific transaction guides and job aids	Implementation Partner / IT	○ Not started	One per role in Training Plan
Process simulation / shadow-mode sandbox	Implementation Partner / IT	○ Not started	Required for post-training practice stage
System-specific FAQ and troubleshooting guide	Implementation Partner / IT	○ Not started	Feeds Component 2D FAQ
Test/sandbox environment access	IT	○ Not started	Required 2 weeks pre go-live
AI model documentation (decisions, data inputs, confidence levels)	AI Vendor / IT	○ Not started	Required for AI transparency communication and training

Content Item	Owner	Status	Notes
AI accountability protocol (who to contact when AI output is wrong)	HR / Legal / IT	○ Not started	Required before go-live

Recommended next step: Share this checklist with the implementation partner in the next five business days and confirm ownership and due dates for all Section 2 items. Content items not confirmed by eight weeks pre go-live should be escalated to [redacted] as a go-live risk.

Prepared by GOccelerate™ | [redacted] | Confidence: Very High (100%)

The GOccelerate People Risk Index (PRI) is a formative, expert-derived index of people and adoption risk across four dimensions — Leadership, Stakeholder, Capability, and Sustainment — grounded in established organizational change management practice. Dimension scores reflect equally weighted, normalized risk points assigned through expert judgment rather than statistically estimated weights. Baseline results derive from a structured intake completed by a single informant and reflect that respondent's knowledge of the organization at the time of assessment; the accompanying Data Confidence indicator reflects the completeness of the information provided. Risk bands are provisional and subject to recalibration as GOccelerate's outcome-validation program accumulates post-implementation adoption data.