Discover2Create Program
Go-To-Market Manager Playbook

Global Field Strategy | March 2021

START

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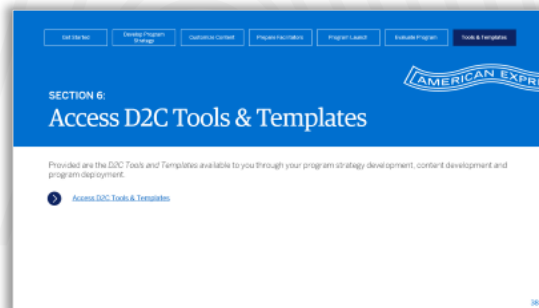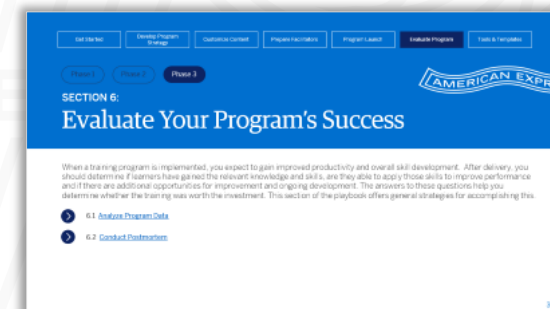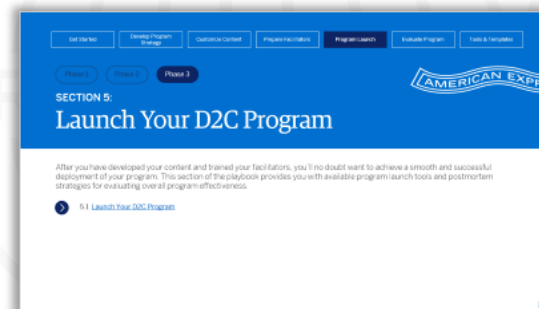SALES FRAMEWORK
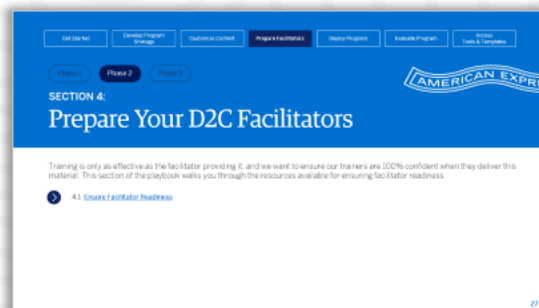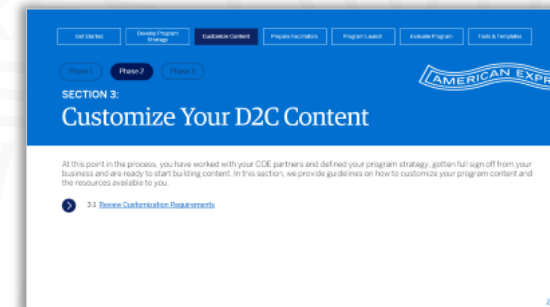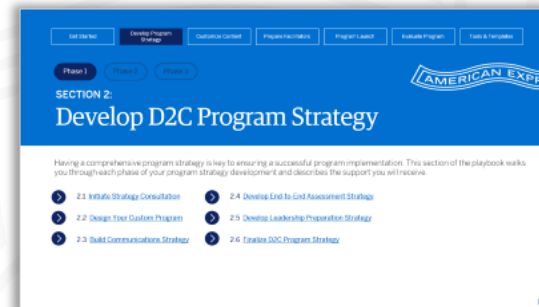DISCOVER · CREATE · BACK

Using This Playbook

The *D2C GTMM PLAYBOOK* will provide a structured approach to building a comprehensive, end-to-end D2C program and provides links to the tools and templates to support it.

ACCESS PLAYBOOK SECTIONS

Click on the *Playbook Section* thumbnails to access each section. Once you have completed reviewing that section, you will be automatically returned to this page.

PLAYBOOK SECTIONS

SECTION 1:
Get Started with D2C

SECTION 2:
Develop D2C Program Strategy

SECTION 3:
Customize Your D2C Content

SECTION 4:
Prepare Your D2C Facilitators

SECTION 5:
Launch Your D2C Program

SECTION 6:
Evaluate Your Program's Success

SECTION 6:
Access D2C Tools & Templates

2

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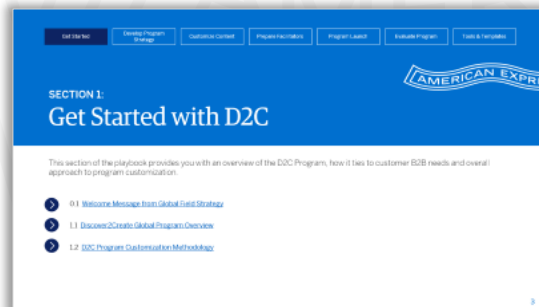
SECTION 1:

Get Started with D2C

This section of the playbook provides you with an overview of the D2C Program, how it ties to customer B2B needs and overall approach to program customization.

0.1 [Welcome Message from Global Field Strategy](#)

1.1 [Discover2Create Global Program Overview](#)

1.2 [D2C Program Customization Methodology](#)

Get Started	Develop Program Strategy	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

WELCOME

We are excited to introduce the **Disover2Create (D2C)** learning experience! This program builds upon the American Express Sales Framework (ASF) by providing practical strategies for executing our sales methodology. The D2C program provides you with practical models and tools for structuring a needs-based conversation, co-creating a solution with the customer and closing the deal.

The *D2C Program* is fully customizable and is designed to meet your learners where they are. This playbook walks you through step-by-step guidance on how to build a comprehensive program strategy with your COE partners, develop your custom content and leverage best practices for launching your program.

We appreciate your ongoing partnership and look forward to working with you on building you custom D2C learning experience!

Global Field Strategy Team

Global Field Strategy COE

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

1.1

D2C PROGRAM OVERVIEW

Program Goals & Guidelines

Top B2B Customer Needs

Customizing Your Program

What is the Discover2Create Global Program?

Our D2C Training Program is designed to bring ASF to life and show our Sales and AD Colleagues how to effectively identify explicit B2B customer needs and collaborate with the client to Co-Create on the right solution(s) that will solve for those needs.

ASF FRAMEWORK   **TOP 5 B2B CUSTOMER NEEDS**   **D2C GLOBAL PROGRAM**

Discover2Create Global Program Goals & Guiding Principles

Program Goals:

- Build Strategic Relationships: identify the right AXP products based on explicit customer need.
- Increase Win Rate: quickly move opportunities through your pipeline and increase signings.

Guiding Principles:

- Needs Based: 5 core needs & drivers, mapped to solution groups that solve for the need.
- B2B Focused: Learners will build their confidence and competence in selling B2B solutions.
- Practical : Relevant learning experiences that strengthen the consultative, holistic approach to supporting our customers.
- Immersive and Virtual: a multi-modal, highly experiential journey with different ways to practice and reinforce.

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

1.1

D2C PROGRAM OVERVIEW

Program Goals & Guidelines

Top B2B Customer Needs

Customizing Your Program

Top 5 Global B2B Customer Needs, Drivers and Aligned Products

To focus on B2B products we first needed to answer the question - what makes a customer a good fit for a B2B solution?
With input from our global frontline and partner teams, we have identified this list of the top 5 reasons a customer would benefit from an Amex B2B solution. In addition to identifying the need, we also conducted an analysis of what business situations drive this need. Finally, we mapped our list of B2B solutions to each need.

	INCREASE EFFICIENCY	GAIN SECURITY AND CONTROL	EXPAND ACCESS TO CAPITAL	OPTIMIZE CASH FLOW	MAXIMIZE COST SAVINGS
Drivers of Customer Need	• Automate Processes • Streamline Processes • Enable Contactless Workforce	• Control Spend • Manage Liability • Visibility Into Spend	• Maintain & Optimize Liquidity • Gain New Sources of Working Capital • Grow Buying Power	• Free Up Working Capital • Extend Payables • Get Paid Faster	• Monetize Spending • Capitalize on Supplier Discounting • Mitigate Risk and Non-Compliance Costs
Products that solve for that need	• FXIP & Accessline • Corporate Purchasing Card • vPayment • AP Automation Solutions (US ONLY)	• Corporate Charge Cards • Corporate Purchasing Card • Corporate Meeting Card & BTA/vBTA • AmexGo (US & AUS) • Tradeshift Go (US Only) • vPayment • Amazon Business (US Only)	• Working Capital Terms (US & CAN Market) • Business Loans (US, CAN & AUS)	• Corporate Charge Cards • Proprietary Business Cards	• Proprietary Business Cards • Corporate Charge Cards • Corporate Purchasing Card

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

1.1

D2C PROGRAM OVERVIEW

Program Goals & Guidelines

Top 5 B2B Customer Needs

Customize Your Program

Create Your Own Discover2Create Program

Every aspect of the D2C program is customizable, allowing you to design the optimal program for your audience. Craft your **own custom D2C Program experience** by selecting from a menu of learning modules.

- Build your own custom D2C curriculum that meets your team where they are
- Control team engagement and the time it takes to deliver the program
- Utilize case studies that are specific to your segment and market

3 Steps for Building a Custom D2C Program

1 Select from LEARNING Modules
These modules provide learners with opportunities to build product knowledge and explore the Discover and Co-create sales approaches.

DISCOVER — Assess Customer Need
CREATE — Co-Create Solution with Customer
PRODUCT — Build Product Knowledge

Avg. time of 4.5 hours over 3 – 5 weeks

2 Select from APPLICATION Modules
These modules provide learners with opportunities to put what they have learned into action.

PRACTICE — Apply Skills & Behaviors
REINFORCE — Continue Learning

Avg. time of 2.5 hours over 2 – 3 months at the discretion of the GTM manager or leader.

3 Select from Leader Preparation COACHING Opportunities
These modules provide learners with opportunities to put what they have learned into action.

COACH — Prepare for Leader Coaching

Input: How much time do you think the leaders can commit to?

Get Started	Develop Program Strategy	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

1.1

D2C PROGRAM OVERVIEW

Program Goals & Guidelines

Top 5 B2B Customer Needs

Customize Your Program

Discover2Create Program Options Overview

Each module provides a variety of experiences, with optional adaptations to meet the constraints of various audiences. You will collaborate with the Global Field Strategy team to identify the appropriate learning activities given you learners' team's experience, tenure and growth opportunity

DISCOVER MODULE

Assess Customer Need

Use the ASF DISCOVER Conversation Funnel to assess the primary needs of your Customer and fully develop a specific need with the Customer

E-learning Courses

Case Study

Virtual Learning Lab

CREATE MODULE

Co-Create Solution with Customer

Leverage the elements of CO-CREATION to match an AXP solution to the customer's needs.

E-learning Courses

Case Study

Virtual Learning Lab

PRODUCT MODULE

Build Product Knowledge

Ensure learners have the requisite product knowledge to successfully link product benefits and capabilities to Customer Need.

Custom Product Virtual Session

Regional trainings

Collateral on FRC

Self Directed Learning Activities

PRACTICE MODULE

Apply Skills & Behaviors

Participate in learning activities that enable learners apply and practice DISCOVER and CREATE skills and behaviors.

Virtual Session

Self Directed Learning Activities

Leader Coaching

REINFORCE MODULE

Continue Learning

Participate in Discover and Create customized follow up learning for ongoing and targeted development.

E-learning Courses

Self Directed Learning Activities

Learning Assessments

Leader Coaching

COACH MODULE

Prepare for Coaching and Reinforcement

Ensure leaders have the knowledge needed to support the end-to-end D2C program and the requisite skills to ensure ongoing coaching and development of their staff.

Virtual Session

E-learning Courses

Self Directed Learning Activities

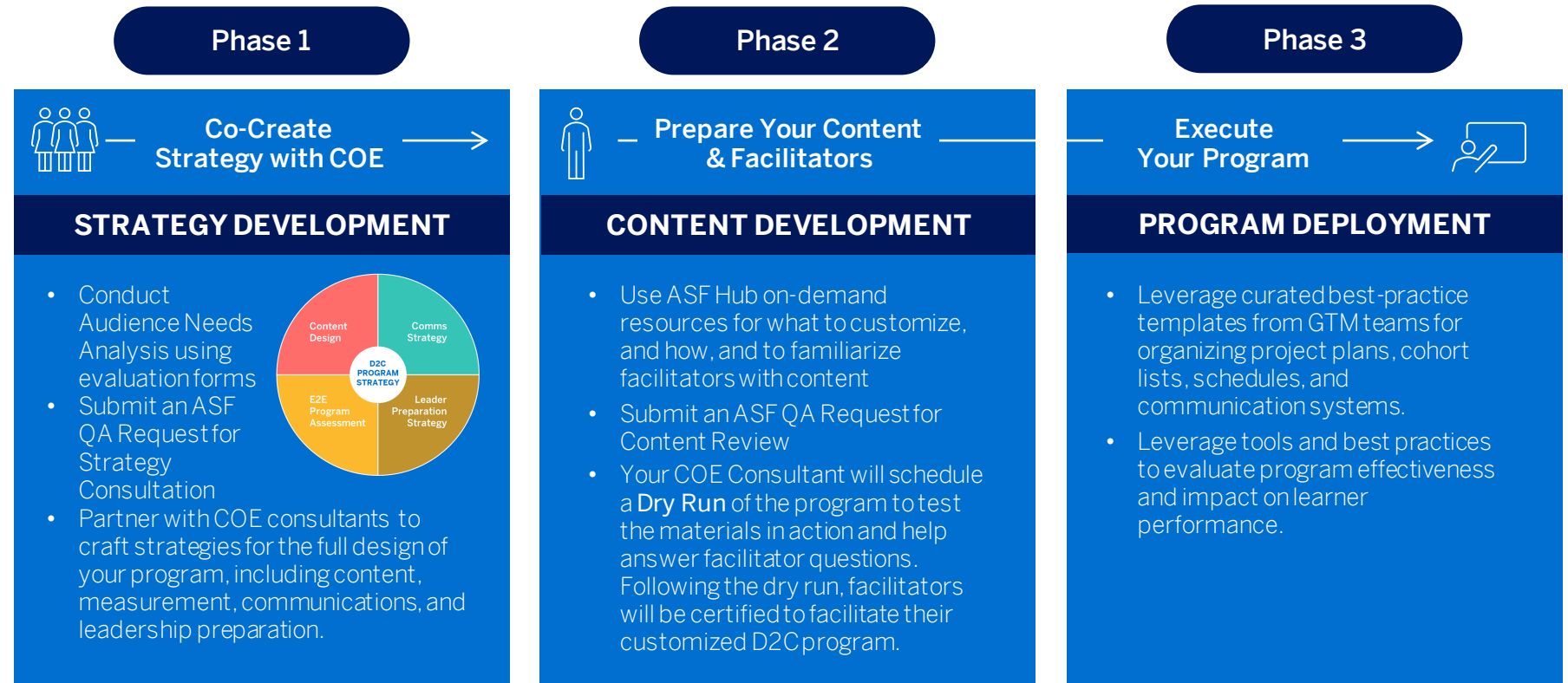| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

1.2

D2C PROGRAM CUSTOMIZATION METHODOLOGY

D2C Customization Process

What is the D2C Customization Process?

Through the ASF Quality Assurance Collaboration process, you'll work with a Global Field Strategy Collaboration partner during different phases of your program. This D2C Customization Process Map describe the 3 key phases for building and implementing your D2C program. This playbook will walk you through in detail, each phase of this process.

Phase 1

Co-Create Strategy with COE

STRATEGY DEVELOPMENT

- Conduct Audience Needs Analysis using evaluation forms
- Submit an ASF QA Request for Strategy Consultation
- Partner with COE consultants to craft strategies for the full design of your program, including content, measurement, communications, and leadership preparation.

Content Design
Comms Strategy
D2C PROGRAM STRATEGY
E2E Program Assessment
Leader Preparation Strategy

Phase 2

Prepare Your Content & Facilitators

CONTENT DEVELOPMENT

- Use ASF Hub on-demand resources for what to customize, and how, and to familiarize facilitators with content
- Submit an ASF QA Request for Content Review
- Your COE Consultant will schedule a **Dry Run** of the program to test the materials in action and help answer facilitator questions. Following the dry run, facilitators will be certified to facilitate their customized D2C program.

Phase 3

Execute Your Program

PROGRAM DEPLOYMENT

- Leverage curated best-practice templates from GTM teams for organizing project plans, cohort lists, schedules, and communication systems.
- Leverage tools and best practices to evaluate program effectiveness and impact on learner performance.

Phase 1   Phase 2   Phase 3

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SECTION 2:

Develop D2C Program Strategy

Having a comprehensive program strategy is key to ensuring a successful program implementation. This section of the playbook walks you through each phase of your program strategy development and describes the support you will receive.

> 2.1 Initiate Strategy Consultation

> 2.2 Design Your Custom Program

> 2.3 Build Communications Strategy

> 2.4 Develop End-to-End Assessment Strategy

> 2.5 Develop Leadership Preparation Strategy

> 2.6 Finalize D2C Program Strategy

| Get Started | **Develop Program Strategy** | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.1

INITIATE STRATEGY CONSULTATION

Conduct Needs Analysis

Request COE Consult

COE Collaboration

Assess Learning Needs for Your Target Audience

The D2C Program enables you to "choose your own learning adventure". In order to choose the appropriate program components, you need to understand what your target audience's learning needs are. Conducting a *Learning Needs Analysis* is the critical in determining current level of knowledge, skill and experience.

Conduct Your Learning Needs Analysis

GTMMs will first leverage the *D2C Learning Needs Checklist* to assess audience current experience and gap in knowledge and skills. This checklist uses a Likert scale (1-5) to determine the strength/intensity of need for that target audience. These first steps are critical in understanding and identifying the appropriate learning for your learners and will shape what your custom D2C program.

① **Complete D2C Learning Needs Checklist**
GTMMs to answer questions aligned to the knowledge, skills and behaviors addressed in each of the 3 learning modules.
D2C Learning Needs Checklist

What do your learners need?

DISCOVER — Assess Customer Need
CREATE — Co-Create Solution with Customer
PRODUCT — Build Product Knowledge

② **COE Consultation**
Once you have completed the checklist, you will submit a request for a COE Consult. The results from this checklist will be used to help structure this consultation.

TOOLS & RESOURCES

D2C Learning Needs Checklist

| Get Started | **Develop Program Strategy** | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.1

INITIATE STRATEGY CONSULTATION

Conduct Needs Analysis

Request COE Consult

COE Collaboration

Request Your D2C Program Consultation with Global Field Strategy

Once you have completed your *D2C Learning Needs Checklist*, Its time to engage your COE consultant to begin your D2C program strategy development.

This will be an ongoing partnership with GFS as you:
- Define your custom program design
- Craft a communications strategy
- Develop an end-to-end assessment strategy
- Determine how best to prepare your leaders to support your program

Here are few quick steps for requesting your COE consultation:

1. Go to **ASF QA Form on SLACK**

2. Complete fields in form

3. For *"What type of request is this?"* dropdown, select *"Strategic Consult"*

4. For the "Please provide a link to the content in SharePoint", include the link to your completed *D2C Learning Needs Checklist* and any other relevant materials.

ASF QA Form

What is the name of your content or project?

D2C Training Program

What type of request is this?

Pick an option

✓ Strategic Consult

Content Review

How will this content be delivered?

Write something

What is the audience time commitment?

Close   Submit

Go-To-Market Manager D2C Playbook

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| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.1

INITIATE STRATEGY CONSULTATION

Conduct Needs Analysis

Request COE Consult

COE Collaboration

Working with Your Global Field Strategy Partners

Once you have submitted your ASF QA Form request, you will be assigned a *COE Collaboration Partner* who will own your request for the lifecycle of your program.

The objective of your partnership with COE is to develop a comprehensive D2C Program Strategy. This strategy is in 4 parts:

1. Developing Your Content Design
2. Building Your Communications Strategy
3. Develop an End-to-End Assessment Strategy
4. Develop Leadership Preparation Strategy

Document Your D2C Strategy

You will work with various COE consultants to build your D2C Program strategy. They will partner with you to craft and document this strategy using the *D2C Program Strategy Template*.

CLICK FOR D2C PROGRAM STRATEGY TEMPLATE

Content Design

Comms Strategy

D2C PROGRAM STRATEGY

E2E Program Assessment

Leader Preparation Strategy

TOOLS & RESOURCES
D2C Program Strategy Template

GLOBAL FIELD STRATEGY PARTNERS
COE Consultants

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.2

DESIGN YOUR CUSTOM PROGRAM

Conduct Needs Analysis

Partner with COE Consultant to Design Your D2C Program

The first step in customizing your D2C program is to sit down with a COE consultant to design what the program content should look like based on the needs of your target audience.

Using the results of your *D2C Learning Needs Checklist* and information you included in the ASF QA form on Slack, you will sit down with a COE consultant to determine what MODULES you want to focus on and what training activities from those modules you will include in your custom program.

D2C PROGRAM MODULES

DISCOVER MODULE

CREATE MODULE

PRACTICE MODULE

REINFORCE MODULE

Objectives of COE D2C Program Design Consultation

The objective of this step in building your custom program is to:

- Discuss target audience and preferred methods of delivery
- Identify specific learning needs and program objectives
- Review relevant MODULES and learning activity options (virtual sessions, e-learning, case studies, on-the-job exercises, etc.)
- Determine appropriate MODULES and training activities to include
- Discuss resourcing and support requirements
- Discuss program length and timing

TOOLS & RESOURCES

1. Completed D2C Learning Needs Checklist
2. D2C High Level Design Document

GLOBAL FIELD STRATEGY PARTNERS

COE, Global Programs, XXXXX

Get Started	**Develop Program Strategy**	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

2.3

BUILD COMMUNICATIONS STRATEGY

Design Comms Strategy

Build Your D2C Communications Strategy

Once your GTM team has consulted with GFS on the *Completed D2C High Level Design Document*, the next step are for the Communications Manager to complete the *D2C Communications Strategy Template.* The GFS Consultant will work with you to define a comprehensive communications plan to support your custom program.

Building a robust communications plan upfront is key to ensuring a smooth and successful program launch. .

Completed D2C High Level Design Document

This design document outlines your target audience, learning objectives, program content and timing. You will use this document to craft your communications plan.

D2C Comms Strategy Template

Partnering with your GFS consultant, you will use this *D2C Communications Strategy Template* to identify the appropriate audiences and individualized engagement strategies for your target audience and key stakeholders.

- Discuss target audiences and stakeholders
- Define appropriate communications channels
- Define roles and responsibilities at each phase of program launch
- Define list of communications which includes - owner, timing, key messaging/objective

TOOLS & RESOURCES

1. Completed D2C High Level Design Document
2. Go To Market Manager D2C Playbook
3. D2C Communications Strategy Template

GLOBAL FIELD STRATEGY PARTNERS

COE, Global Programs, XXXXX

16

Get Started	Develop Program Strategy	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

2.4

DEVELOP END-TO-END ASSESSMENT STRATEGY

Measure Success

Develop E2E Assessment Plan

Understand Options for Measuring Success

This next step in customizing your D2C program is to partner with a COE consultant to develop your end-to-end assessment strategy. The key objectives of measurement are to assess how well the program met your learner's needs and objectives, what knowledge and skills it has imparted to those earners, what desirable change on your learners' performance, and what organizational benefits it has yielded. We also want to be able to demonstrate to senior sponsors a return on the time, resources and efforts invested.

Using the *Completed D2C High Level Design Document* and the *D2C Comms Strategy Template*, the COE Consultant will work with you to define a comprehensive communications plan to support your custom program.

Sample Discover2Create E2E Assessment Matrix

CLICK TO VIEW

Sample D2C E2E Assessment Matrix

This sample matrix suggests some of the various learning metrics, key performance indicators (KPIs) and evaluation methods you can select from for each level of evaluation. **These are only examples. You can work with your COE Partner to choose the most meaningful metrics to you.**

Level 1: Reaction
Level 2: Knowledge
Level 3: Behavior
Level 4: Results

TOOLS & RESOURCES
Sample D2C E2E Assessment Matrix

GLOBAL FIELD STRATEGY PARTNERS
COE, Strategy & Insights, XXXXX

Get Started	**Develop Program Strategy**	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

2.4

## DEVELOP END-TO-END ASSESSMENT STRATEGY

Measure Success

Develop E2E Assessment Plan

Develop Your End-to-End Measurement Plan

Once you have identified how you will measure success, its now time to work with your COE partner to define your plan for gathering and analyzing your D2C program data.

① Finalize Your Metrics

Work with your COE partner to finalize metrics you would like to capture and document them using the *E2E Assessment Plan Template.*
.

② Define Timeline for Data Gathering

Now that you know the metrics you want to capture, determine the appropriate timeline and schedule for pulling that data.

③ Program Data Review

Once you receive your data (per the agreed upon timeline), you can request a data review with your COE partners to ensure data is sufficient, complete and ask any clarifying questions..

D2C Custom Program Launch Overview
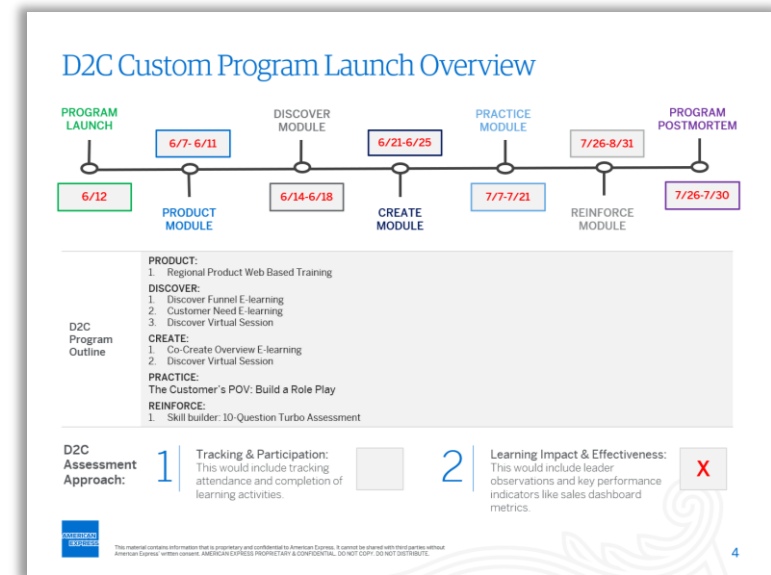
TOOLS & RESOURCES

E2E Assessment Plan Template

GLOBAL FIELD STRATEGY PARTNERS

COE, Strategy & Insights, XXXX

Go-To-Market Manager D2C Playbook

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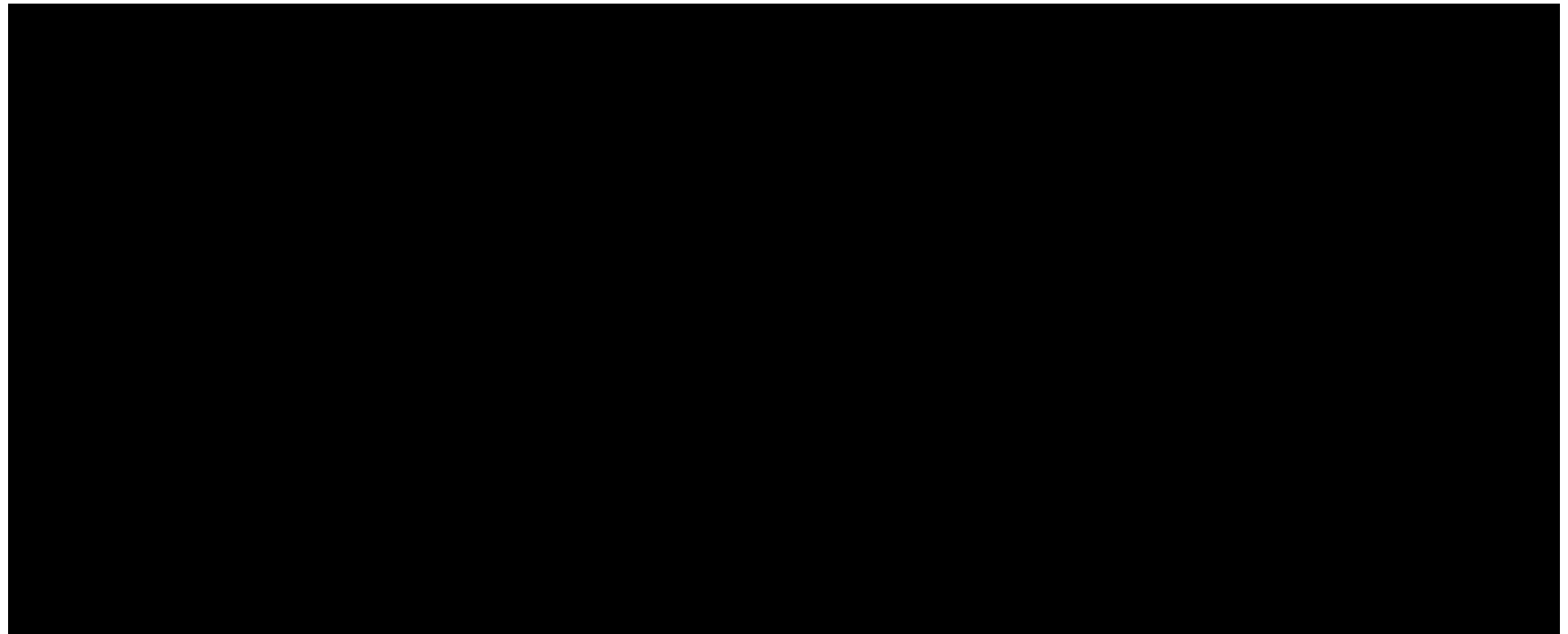| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.5

DEVELOP LEADERSHIP PREPARATION STRATEGY

Assess Coaching Needs

Discuss Leader Prep Strategy

Assess Your Leader's Coaching Needs

TOOLS & RESOURCES

D2C Coaching Needs Checklist

GLOBAL FIELD STRATEGY PARTNERS

COE, Global Programs, XXXX
Global Field Leadership, XXXXX

Go-To-Market Manager D2C Playbook

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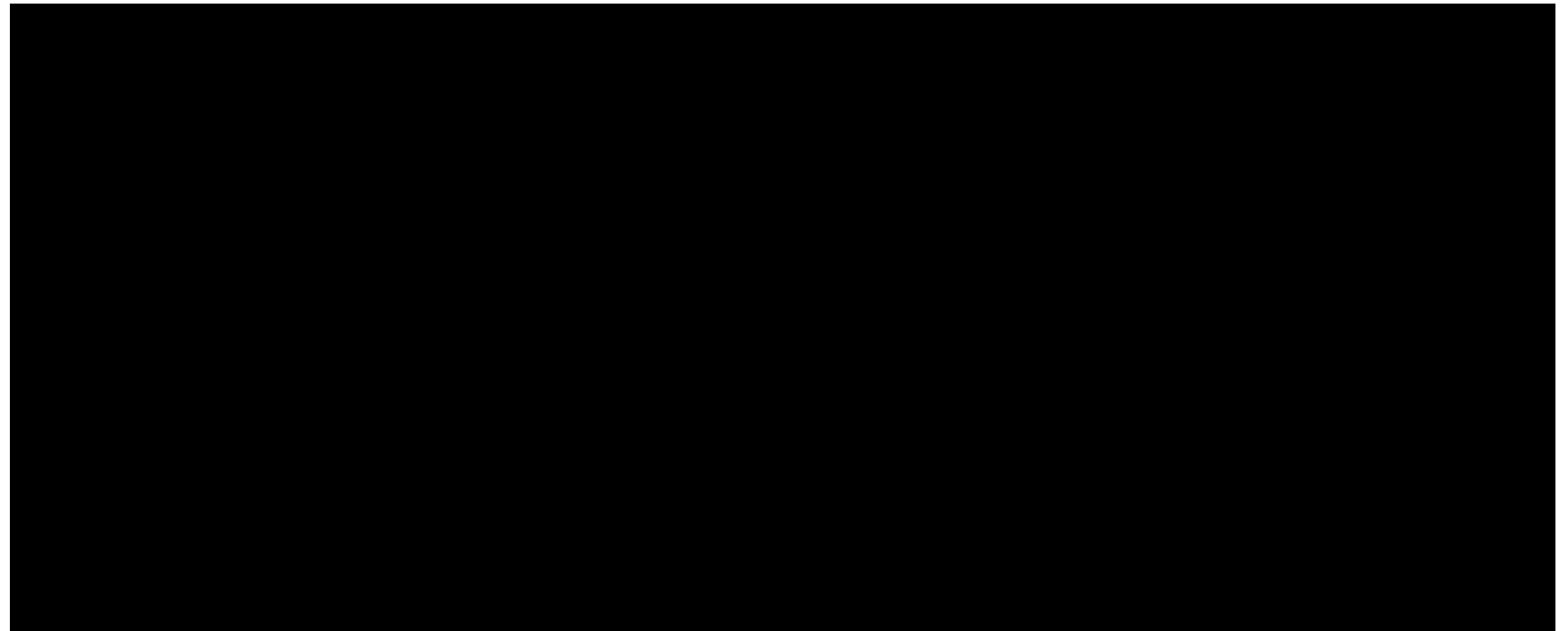| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

2.5

DEVELOP LEADERSHIP PREPARATION STRATEGY

Assess Coaching Needs

Discuss Leader Prep Strategy

Participate in Your Leadership Preparation Discussion with COE Partners

TOOLS & RESOURCES

D2C Coaching Needs Checklist

GLOBAL FIELD STRATEGY PARTNERS

COE, Global Programs, XXXXX
Global Field Leadership, XXXXX

2.6

FINALIZE
D2C PROGRAM STRATEGY

Finalize Program Strategy

Time to Put It All Together

Now that you have met with all your COE partners and designed your custom program, crafted a comprehensive communications strategy, defined an end-to-end assessment strategy, and developed a leader preparation strategy, its time to put it all together! The *D2C Program Strategy Template* puts all those pieces together in a single document.

Content Design

Comms Strategy

D2C PROGRAM STRATEGY

E2E Program Assessment

Leader Preparation Strategy

D2C Program Strategy

When you initiated your strategy consultation, you will have worked with your COE collaboration partner and respective COE specialists to craft a comprehensive strategy. The output from those discussions should be summarized using the *D2C Program Strategy Template.*

TIP: You can leverage this document to socialize your program.

CLICK HERE FOR TRAINING PLAN TEMPLATE

TOOLS & RESOURCES
D2C Program Strategy Template

GLOBAL FIELD STRATEGY PARTNERS
COE, D2C Collaboration Partner

21

Phase 1   **Phase 2**   Phase 3

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SECTION 3:

Customize Your D2C Content

At this point in the process, you have worked with your COE partners and defined your program strategy, gotten full sign off from your business and are ready to start building content. In this section, we provide guidelines on how to customize your program content and the resources available to you.

〉   3.1 [Review Customization Requirements](#)

Go-To-Market Manager D2C Playbook

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| Get Started | Develop Program Strategy | **Customize Content** | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

3.1

REVIEW CUSTOMIZATION REQUIREMENTS

Customization Process
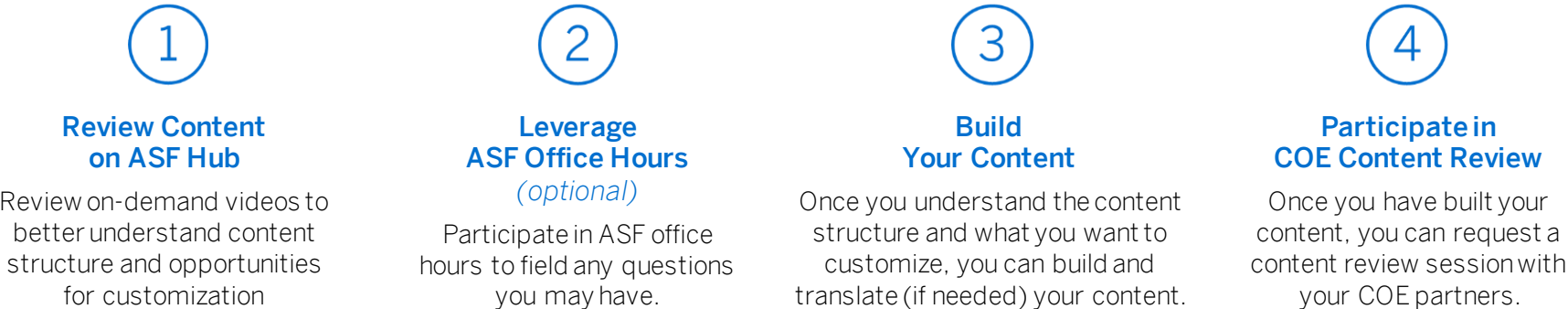
Product Content Development

Request COE Content Review

D2C Content Customization Process Overview

Now that you have your D2C Program Strategy and the requisite approvals for your program, its time to begin content development. The D2C content is designed for a global audience, and we highly recommend local customization.

Examples of the type of customization you may require would be:

- **Case Studies** – The COE team will provide you with a set of case studies to select from. You may want to modify one of these existing case studies to ensure it looks and sounds more like the customers you serve.
- **Presentation Deck and Activities** – You may want to modify the agenda, quiz, exercises, role plays or upcoming activities.
- **Self Directed On-the-Job** – Utilize templates to customize and build your own PRACTICE and REINFORCE activities.

①

Review Content on ASF Hub

Review on-demand videos to better understand content structure and opportunities for customization

②

Leverage ASF Office Hours *(optional)*

Participate in ASF office hours to field any questions you may have.

③

Build Your Content

Once you understand the content structure and what you want to customize, you can build and translate (if needed) your content.

④

Participate in COE Content Review

Once you have built your content, you can request a content review session with your COE partners.

TOOLS & RESOURCES

D2C SharePoint: Customization Tips and Requirements

Get Started	Develop Program Strategy	**Customize Content**	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

3.1

REVIEW CUSTOMIZATION REQUIREMENTS

Customization Process

Product Content Development

Request COE Content Review

Product Content Development Process

Content development for PRODUCT training is a separate process from the rest of the D2C materials. It require engagement with our FIELD PROS and has a separate intake process. Follow the below directions to begin your product training development.

1. To begin the process of communicating your initiative Field PROS requires your
   - Launch Date
   - Affected Audience
   - Point Of Contact

2. Once you are prepared, please submit the **Field PROS Intake Form** with 4-6 weeks of lead time prior to your launch. Field PROS will receive and respond to your submission within 48 hours.

3. Once submitted, a consultation will be scheduled connecting you with the appropriate Go to Market training lead or Field PROS will work with you directly if this initiative spans across multiple segments.

4. Your GFE training lead can provide guidance on modules and activities for pre-training, post-training and leader coaching.

This **Field PROS How-To Video** details why Field PROS must be leveraged whenever communicating with the field.

TOOLS & RESOURCES

Field PROS How-To Video
Field PROS Intake Form

PARTNERS

Product Manager
Field PROS

| Get Started | Develop Program Strategy | **Customize Content** | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

3.1

REVIEW CUSTOMIZATION REQUIREMENTS

Customization Process

Product Content Development

Request COE Content Review

Request Your D2C Content Review with Global Field Strategy

Once you have completed customizing your content, Its time to review your D2C content with your COE partner(s). The objective of the content review session(s) would be to review and get feedback on the content you developed.

Here are few quick steps for requesting your COE consultation:

1. Go to **ASF QA Form on SLACK**

2. Complete fields in form

3. For *"What type of request is this?"* dropdown, select *"Content Review"*

4. For the "Please provide a link to the content in SharePoint", include the link to your customized content.

ASF QA Form

What is the name of your content or project?

> D2C Training Program

What type of request is this?

> Pick an option ⌄

> Strategic Consult

> ✓ Content Review

How will this content be delivered?

> Write something

What is the audience time commitment?

Close   Submit

26

Phase 1   Phase 2   Phase 3

SECTION 4:

Prepare Your D2C Facilitators

Training is only as effective as the facilitator providing it, and we want to ensure our trainers are 100% confident when they deliver this material. This section of the playbook walks you through the resources available for ensuring facilitator readiness.

›   4.1   Ensure Facilitator Readiness

| Get Started | Develop Program Strategy | Customize Content | **Prepare Facilitators** | Launch Program | Evaluate Program | Tools & Templates |

4.1

ENSURE FACILITATOR READINESS

Prepare Facilitators

Conduct the Dry Run

Review D2C Facilitator Readiness Activities

Once you have completed content development, you will need to prepare your facilitators for delivery. The complexity of your custom program will dictate your facilitator readiness approach.

Key recommended activities for ensuring your Facilitators are ready for delivery:

Facilitators Participate in Program Info Session
(in person or recorded)

Discuss facilitator role, responsibilities, program design, launch timeline and readiness approach.

Facilitators Review Program Materials

Facilitators independently review content and watch relevant videos to familiarize themselves with the content.

Facilitator Guide
Global Train-the-Trainer

Facilitators Practice

We recommend facilitators get a peer and practice facilitating assigned content- specifically the role-plays.

TOOLS & RESOURCES

D2C SharePoint: Customization Tips and Requirements

Go-To-Market Manager D2C Playbook

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| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

4.1

ENSURE FACILITATOR READINESS

Prepare Facilitators

Conduct Dry Run

Conduct Your Dry Run Session

The primary objective of a Dry Run is to prepare facilitators to present information effectively, respond to participant questions, and lead activities that reinforce learning.

D2C Dry Run Session

The *D2C Dry Run Session* is a simulation of the specific D2C training session using a compressed timeframe to conduct teach back with a mock audience.

- **Scheduling Your Dry Run Session(s):** Your COE Collaboration partner will work with you to schedule your Dry Run(s) and provide you with a "Producer" for the session.
- **Set Expectations:** The Dry Run is intended to enable Facilitators to practice delivering content. It should not be used as a forum for providing feedback on content. We do recommend that your Instructional Designer is present in the event meaningful feedback does some up that may require the content to be tweaked or amended.
- **Facilitation Practice**: During the Dry Run, each facilitators will present and "teach back" sections of content. This enables them to practice delivery, utilize technology, and better understand how to set up and run activities.
- **Mock Audience:** Because the dry run is to simulate an actual training event; COE members may act as participants/learners and to give both correct and incorrect answers as well as pose common challenges facilitators may experience in a real-life session.
- **Coaching & Best Practices:** During the Dry Run we encourage you to coach your facilitators on best practices delivering virtual or in-person instruction.

TOOLS & RESOURCES

D2C SharePoint: Customization Tips and Requirements

GLOBAL FIELD STRATEGY PARTNERS

COE, D2C Collaboration Partner
COE D2C Program Producer

29

Phase 3:
PROGRAM DEPLOYMENT

Execute Your D2C Program

Phase 1   Phase 2   Phase 3

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SECTION 5:

Launch Your D2C Program

After you have developed your content and trained your facilitators, you'll no doubt want to achieve a smooth and successful deployment of your program. This section of the playbook provides you with available program launch tools and postmortem strategies for evaluating overall program effectiveness.

> 5.1 Launch Your D2C Program

Get Started	Develop Program Strategy	Customize Content	Prepare Facilitators	Launch Program	Evaluate Program	Tools & Templates

5.1

LAUNCH YOUR D2C PROGRAM

Considerations & Experts

Program Planning & Tracking

Program Launch Considerations & Expert Support

Now that you have prepared your facilitators, its time to launch you program. At this point, your communications and leader preparation strategies should be fully implemented.

Key Considerations that Impact Launch

Prior to your launch activities, there are key factors to consider:

- Because each program is custom and different, launch strategies will vary in complexity and effort
- Program is designed to meet the needs of the target audience and may be a series of blended solutions
- Content is focused on a specific customer need and their aligned to B2B solutions that meet that need
- Program components are designed to build upon one another and should be launched accordingly

Engage Your Experts

Provided are general role descriptions for the subject matter experts you may be engaging to deliver custom program. These roles are critical in launching a successful program. Provided are typical activities

LEADERS	PRODUCT PARTNERS	FIELD CHAMPIONS	COE PARTNERS
• Attend program and potentially support lab and or peer role play activities • Provide coaching during and post program to ensure learners understand key concepts • Support PRACTICE and REINFORCE program activities • Provide ongoing coaching and promote awareness of available B2B resources	• Support customization of product training materials • Describe sales processes and resources available for implementing B2B products • Participate in training to answer questions and reinforce key concepts. • Potentially co-facilitate product specific content.	• Nominate top performing frontline sales representatives to act as subject matter experts and or facilitators • Share B2B success stories and best practices	*Your COE partners have supported you throughout the strategy and content development of your program.* *As you go through deployment, your COE partners will continue to support, and you should engage them as needed.*

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | Evaluate Program | Tools & Templates |

5.1

LAUNCH YOUR D2C PROGRAM

Background & Experts

Program Launch Management

Program Launch Management Tools

Now that you have prepared your facilitators, its time to launch you program. We have provided you with proven tools and templates curated access Global Field Enablement you can leverage as needed.

1	Training Deployment Project Plan
2	Scheduling & Participation Tracker
3	Resource 3
4	Resource 4
5	Resource 5

6	Resource 6
7	Resource 7
8	Resource 8
9	Resource 9
10	Resource 10

TOOLS & RESOURCES
GFE Program Launch Tools

Phase 1　　Phase 2　　**Phase 3**

SECTION 6:

Evaluate Your Program's Success

When a training program is implemented, you expect to gain improved productivity and overall skill development. After delivery, you should determine if learners have gained the relevant knowledge and skills, are they able to apply those skills to improve performance and if there are additional opportunities for improvement and ongoing development. The answers to these questions help you determine whether the training was worth the investment. This section of the playbook offers general strategies for accomplishing this.

➤ 6.1 [Analyze Program Data](#)

➤ 6.2 [Conduct Postmortem](#)

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | **Evaluate Program** | Tools & Templates |

6.1

ANALYZE PROGRAM DATA

Analyze Data

Analyze Data & Document Findings

Now that you have concluded your program, its time to gather and analyze the training data. Your *D2C E2E Assessment Plan* should outline the data and timeline for generating reporting both you and your COE partner agreed upon. **Program data can include both training metrics and behavioral observations**. You can use this data to help perform any postmortem activities including focus groups, after action reviews or leadership communications.

Linking Your Program Data to Results

REACTION	KNOWLEDGE	BEHAVIOR	RESULTS
How did the participants feel about the training experience?	*To what degree did the participants acquire the intended knowledge, skills, or attitudes?*	*To what degree did the participants acquire the intended knowledge, skills, or attitudes?*	*To what degree did business results improve as an outcome of the training?*
• Did learners indicate the training was a valuable use of their time? • Did learners indicate new skills learned will help them in their roles? • Did learners indicate they plan to use what they learned on the job?	• Did learners pass knowledge checks and assessments demonstrating an understanding of key concepts?	• Did leaders observe a change in learners' behaviors? • Looking at KPIs, was there a change in learners' performance like increased opportunities or increased PCV?	• How has the change in learners' performance contributed to the bottom line - like increased win rates and number of signings. • How are we seeing a return on investment?

TOOLS & RESOURCES

Completed E2E Assessment Plan Template

GLOBAL FIELD STRATEGY PARTNERS

COE, Strategy & Insights, XXXX

| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | **Evaluate Program** | Tools & Templates |

6.2

CONDUCT POSTMORTEM

Conduct After Action Review

Share Success

Conduct Your D2C After Action Review

A full program review is typically done "post-mortem" – or after the fact, You finish a program, and then you study it to determine what happened. From there, you decide what worked well and what you'll do differently next time. This study is called an *After Action Review (AAR)*.

AARs provide an opportunity to assess what happened and why. Conducting an *AAR* enables you to gather detailed feedback on end-to-end program effectiveness, share successes and lessons learned with stakeholders, identify areas of improvement, and formulate recommended corrective actions.

Planning an After Action Review	Conducting an After Action Review	Sharing the AAR Results
• Compile program data and analytics ((refer to your assessment strategy) • Identify appropriate AAR participants (i.e., Instructional Designers, Relevant Subject Matter Experts, Key Stakeholders) • Schedule the session, ideally, within 2 weeks of project completion.	Guide the AAR participants through a review of the project, using a standard set of questions: • What was expected to happen? • What actually occurred? • What went well and why? • What can be improved and how?	Summarize AAR Findings: • Provide a clear summary of concrete and actionable recommendations that will improve your program. • Identifying tasks and topics requiring leadership attention. • Share the AAR Findings with leadership and key stakeholders

TOOLS & RESOURCES

After Action Review Template

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| Get Started | Develop Program Strategy | Customize Content | Prepare Facilitators | Launch Program | **Evaluate Program** | Tools & Templates |

6.2

CONDUCT POSTMORTEM

Conduct After Action Review

Share Program Success

Share Your D2C Program Success

Now that you have completed your program, analyzed the data and conducted your After Action Review, its time to share your successes and lessons learned. Sharing the success communicates the positive impact of your program and demonstrates the change benefits for your audience

Provided are some suggestions for what you can share and how you can share it.

WHAT TO SHARE?

Provided are some examples of success metrics you might want to share.

Learner Satisfaction Results
Participation Metrics
Key Performance Indicators
Learner & Leader Verbatims
Peer Case Studies

WHERE TO SHARE?

Provided are some channels you might leverage to share your success stories.

- **Slack Channels** – Share your findings with the GFE team by posting on the #asf-global-programs channel. Additionally, consider using segment/regional channels to share your story with your business partners.

- **On Air Calls & Newsletters:** Leverage time on your On Air Call and space in your regular newsletter to share your program's success and promote upcoming learning opportunities.

- **Leadership Meetings:** Utilize discussion with leaders to share the success of the program and discuss opportunities for further development and coaching.

SECTION 6:

Access D2C Tools & Templates

Provided are the *D2C Tools and Templates* available to you through your program strategy development, content development and program deployment.

→ Access D2C Tools & Templates

Go-To-Market Manager D2C Playbook

ACCESS D2C TOOLS & TEMPLATES

Click on the quick links to access the available tools and templates available to you during strategy and content development.

D2C Customization Process	D2C Learning Needs Checklist	ASF QA Form on SLACK	D2C Program Strategy Template
D2C Detailed Design Document	Communications Manager D2C Playbook	Sample D2C E2E Assessment Matrix	E2E Assessment Plan Template
D2C SharePoint: Customization Tips & Requirements	Field PROS How-To Video	Field PROS Intake Form	GFE Program Launch Tools
After Action Review Template			