K12 *Insight*

Train the Trainer Facilitator Guide

Getting Started With
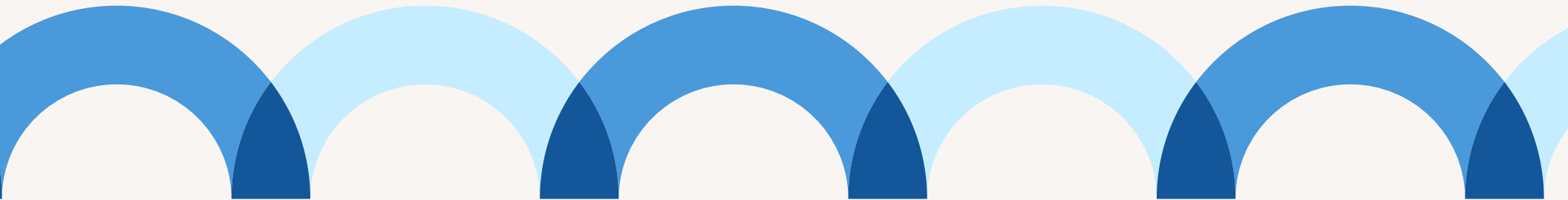
Let's Talk!®

Section I:
Facilitator Notes

This guide is designed to provide support to the facilitators of this session

Training Overview

A: Overarching Goal

Participants will develop a working understanding of how Let's Talk makes it easy to engage with school and district leaders on the topics that matter most. The solution helps us be efficient, proactive, and build trusting relationships with stakeholders — all while providing excellent customer service.

B: Session Objectives

The objectives of this training include:

- Seeing the connection between Let's Talk and district goals
- Understanding how Let's Talk applies to my role and streamlines my personal workflow
- Understanding key technical features such as:
    - Replying to a customer
    - Writing an internal comment and collaborating with colleagues
    - Changing who is in charge of a dialogue
    - Creating a dialogue
    - Accessing the dashboard
    - Accessing the Learning Center

C: Evidence of Learning

- Participants will have submitted practice dialogues
- Participants will understand how to loop in internal team members and how to switch assignments
- Participants will understand how to find dialogues in their inbox, use time-saving tips and tricks, and analyze data from their dashboard that relates to their topic.

## D. Timing: 45 minutes remotely/60-90 min. in person, per session

Agenda: (The agenda is intended for a half-day in-person session. However, you may need to accommodate accordingly.)

- Basic User Training: Introduction, Basic Navigation, Creating a Dialogue, Let's Talk Basics, including how to manage the inbox and customer service best practices
- Advanced User Training: Learn time-saving features such as response templates and bulk editing, leveraging data in the dashboard, merging/splitting dialogues, and creating tags for data segmentation

E. Session Materials

- Facilitator Guide
- User Training Slide Deck
- Asynchronous Slide Deck
- E-mail Templates to Send Out
- Best Practices One Pager
- Life of a Dialogue
- New User Cheat Sheet
- Technical Support Guidance and Resources
- Notes Page

Section II:
Facilitator Notes
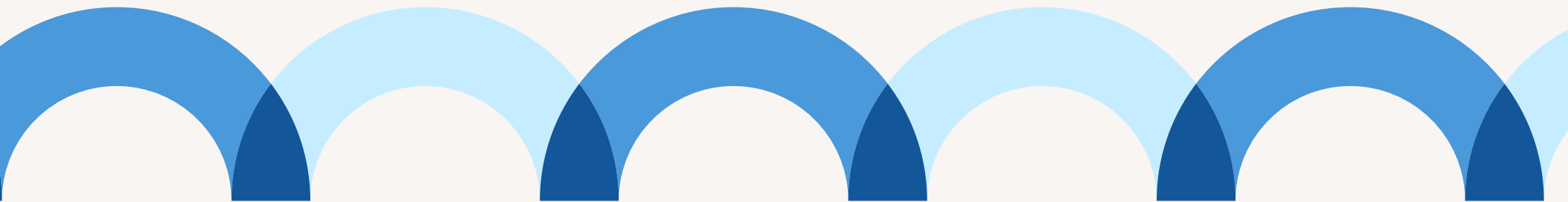
Once trained by the Client Success Manager:

Trainers: Use this checklist to ensure you are prepared for the sessions you will deliver to your designated departments and staff.

Send the pre-training e-mail (located below) and add the users a week prior so that they may get their account set up before the training starts. You can do this by going to **Settings>Users>Add User**

Session 1: Basic User Training

Session 2: Advanced User Training

Send Post Training Follow Up e-mail (located on next page) to attendees with reference materials.

Once you have trained your department or staff:

- **Post Launch Check-in:** Two weeks after you have launched with your department/new users, reach out to your department/new users to check in on their experiences and provide support if needed.
    - Consider resending out helpful resources (listed on pages 5-8)
    - Encourage users to utilize time-saving tricks such as response templates
- If you haven't given the Advanced User Training, schedule a time for users to be trained on these additional features.

After staff has been trained, consider these next steps:

- Encourage users to sign up for monthly training led by K12 Insight staff.
- Review which departments/users need additional or refresher training (think second semester, new school year, etc.) by utilizing comparison reports in the Let's Talk dashboard.

Presenter Tips

- This guide includes everything you will need to present to a large group of new users, but if you run out of time or only have a few users in need of training, please guide them to sign up for our monthly trainings hosted by K12 Insight staff or share the training recording link with them.

- Who does the training work best for?
  - Building principals, counselors, office support, communications specialists, social workers, transportation, and other roles.
  - Any role using Let's Talk to communicate with customers.

- You know your audience best, so tailor this training to what suits your staff and district goals.
  - Training can be done just from the slide deck, solely from within Let's Talk, or a mix between the two!

- If presenting remotely, having two monitors helps to present the slide deck on one screen and answer user questions on the other screen.

- There are speaker notes with each slide on the slide deck. Please print them out to reference at any time!

Pre User Training E-Mail

I am excited to be working with you as you begin using Let's Talk in your department. Ahead of your training on **(INSERT DATE HERE)**, please complete a few simple steps, which should take less than 10 minutes to complete.

- Please watch this introductory video, which offers a high-level view of the goals and functions of Let's Talk.
- You will receive your account information in a system-generated activation email. This email will allow you to activate your account, set your password, and review your personal information within the Let's Talk system.
- Once logged into your account, you'll be guided through Let's Talk Tour Mode. This tour will show you the process for responding to a customer using the system. Be sure to either finish or exit out of the tour mode before our training begins.
- On your smartphone, download the Let's Talk Admin App by searching "**K12 Let's Talk**" in the Play or App stores. Be sure you are able to log in on your phone, as well.
- Feel free to share this with anyone who is planning on attending the training.

It is best to log in from your own device to maximize your practice time in Let's Talk during our time together.

Feel free to reach out to me if you have any questions before our time together.

Best,

Post Training Follow Up E-Mail

Attention: _____

I wanted to thank you and your team for taking time during this busy season to join me for a Let's Talk training. I appreciate all of the work you have done to make this happen.
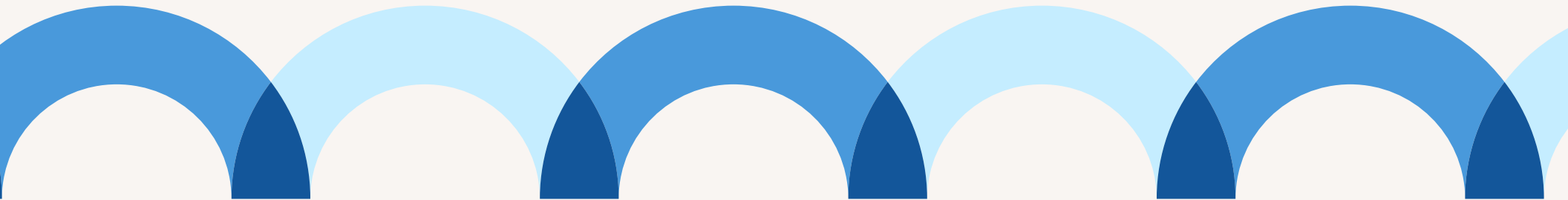
Attached, please find some resources to assist your team as they become familiar with the system.

- Let's Talk Life of a Dialogue Flow chart
- Let's Talk Best Practices One Pager
- Let's Talk User Cheat Sheet

The Let's Talk Learning Center is also a great resource. Let me know if you have any additional questions in the coming weeks.

Best,

Section III:
Resources

Best Practices and Helpful Links

Routing dialogues

Let's Talk helps you route dialogues to the right person in your school district. As the team owner of a dialogue, you manage the route of communication. Here's how:

You know the answer to the dialogue:
Reply.

Someone on your team knows the answer to the dialogue:
Add an internal comment to explain the transfer and transfer ownership to them.

The dialogue is related to your topic but you need to bring in another staff:
Keep the dialogue and add a new user to your team. Verify the person who should follow up is assigned as the owner.

The dialogue is unrelated to your topic:
Add an internal comment to explain the transfer and reassign the dialogue to the relevant topic.

Quality of response

Be sure to review every message — internal or external — to ensure it is thorough, accurate, and professional before posting or sending.

Response time matters. If a dialogue doesn't belong to you, reassign it as soon as possible. Lower feedback scores are often associated with longer response times.

Because you cannot respond to issues or questions submitted as anonymous dialogues, be sure to address hot topics using public communications, such as newsletters or social media.

Keeping track of outside communication

Sometimes, communication happens outside of Let's Talk. Below are steps for documenting these communications within Let's Talk to prevent information silos:

Email conversations

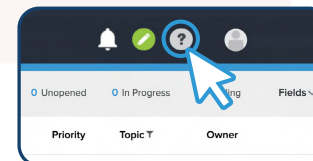Document conversation using the email to dialogue feature:

- **Inbound**: Forward the email to open@k12-lets-talk.com to open a Let's Talk dialogue.
- **Outbound**: Send the email to close@k12-let-talk.com to bring it into the system.

Phone calls, visits, observations, and letters

Record feedback using the recorder feature. Use internal comments to record any actions taken via phone call, in-person meeting, or social media.

? Need more help?

Whether you have technical questions or want to request training, our Client Services Team is here to help. Click the question mark in the top right corner of your Let's Talk account to request assistance.

Life of a Dialogue

Let's Talk!®

Here's what happens to your feedback in Let's Talk:

1. Feedback comes in
Customer (parent, guardian, student, teacher, staff, or community member) enters feedback through the district website or mobile app.

2. Thank you message sent
Customer receives an auto thank-you message via email, setting the expectation for a response.

3. Team owner notified
The team owner responsible for the dialogue is immediately notified and can prioritize the dialogue.

4. Dialogue assigned
The team owner assigns the dialogue to an individual or group to ensure a timely and accurate response.

5. Response created and sent
The assigned team member composes and sends a response from inside Let's Talk.

6. Customer notified
The customer receives an email with the district's response and a second email asking them to rate the quality of the response.

7. Feedback score received
The team owner checks their dashboard to measure their feedback score, average response time, and other customer experience data.

K12 Insight

Want to learn more? Visit the **Let's Talk Learning Center** at kc.K12insight.com.

k12insight.com   703-542-9600

Welcome to Let's Talk!®

What is Let's Talk?

Let's Talk helps your school district deliver superior customer experiences by streamlining inbound communications, identifying problems before they become crises, and making data-driven decisions — all while building trusting relationships with stakeholders.

Key players

Customers are members of your community (parents, guardians, students, teachers, and staff).

Team owners are responsible for answering dialogues submitted to their topic. They assign dialogues to team members or transfer dialogues to another topic as needed.

Team members get an alert when they are assigned a dialogue they are responsible for answering.

Recorders enter dialogues from channels outside of Let's Talk (social media, phone calls, in-person conversations, or emails) and assign them to the appropriate topic.

Dialogue: A question, comment, suggestion, concern, or compliment submitted to Let's Talk

Topic: The subject or area customers provide feedback about, such as specific departments (transportation, student safety, special education, etc.), school campuses, or other areas

When customer information isn't shown

There are two ways a customer can submit a dialogue without sharing their identity with your district.

Hidden customers provide an email and check the "Hide your contact information from the district" button. The district can still respond to the customer via Let's Talk but will not be given the customer's name or contact information. The system sends communications while keeping the customer's identity hidden to the district.

Anonymous customers leave the contact information fields completely blank. The district is unable to respond to the customer because the Let's Talk system is not given an email to send replies back to.

Next steps: Respond to the dialogue, and close out when the dialogue has been resolved.

Next steps: If the message requires some follow-up, re-assign it as usual. Add tags and internal comments to track any follow-up work completed.

Other considerations

Make it clear all feedback is welcome, but only messages including contact information will receive direct follow-up. Here's how:

- Remind people of their options (customer, hidden customer, or anonymous customer) before they submit their dialogue.
- Remind those who submit anonymously that they won't be receiving direct responses.

Make Let's Talk part of your routine

While it's a good idea to have Let's Talk open throughout the day, establishing regular touch points throughout your workday enables you to stay on top of incoming dialogues and ensures timely responses. Let's Talk is compatible with any computer, tablet, or smartphone — making it easy to respond to customers anytime, from anywhere. Try checking Let's Talk in the morning, after lunch, and before heading home to easily incorporate it into your day.

Monitoring dialogues

Get the updates you want — when and how you want them — by setting your notifications. Under your Settings, click Notifications to set email, web, or push (mobile) notifications.

Stay organized with status updates

When replying to a Let's Talk dialogue, be sure to select the correct status by clicking on the triangle to the right of the Send button.

Send as Closed
Use when a customer response is not anticipated. This is the default setting for the Send button.

Send as Pending Details
Use when asking the customer for additional information. This status stops the clock on a dialogue while you're waiting for a response.
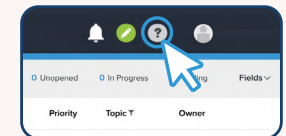
Send as In Progress
Use to update or check in with a customer while you're collaborating with colleagues.

Need more help?

Whether you have technical questions or want to request training, our Client Services Team is here to help. Click the question mark in the top right corner of your Let's Talk account to request assistance.

Check out the Let's Talk Learning Center

Visit **kc.k12insight.com** to find tips, tricks, and guidance

K12 Insight

k12insight.com   703-542-9600   @K12insight   linkedin.com/company/k12-insight

Technical Support

Guidance and Resources

Need a refresher?
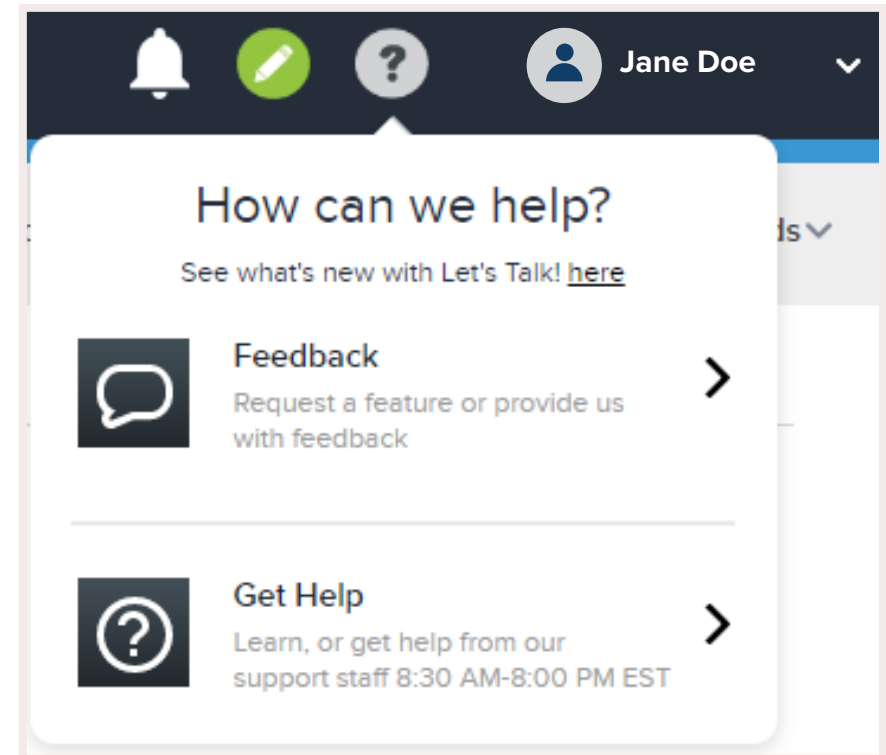
Click Profile in Settings and select Launch Tour Mode

Need more help?

Within your account, click on the gray question mark to the left of your name in the top right-hand corner of the screen.

Click Get Help then Contact Support and send them a message, or contact them directly at (703) 542-9601.

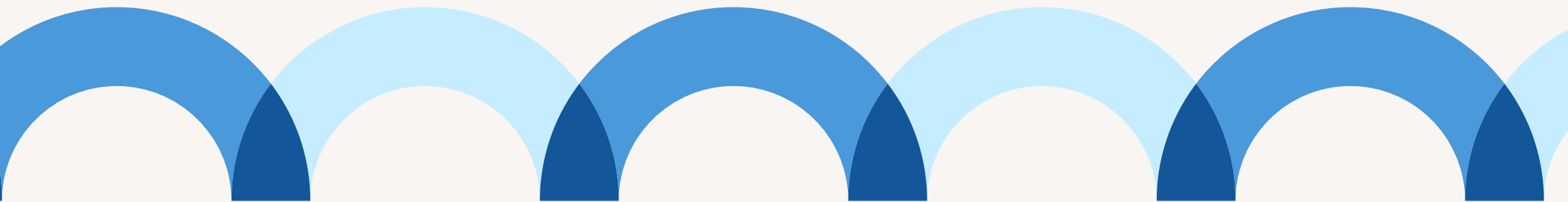Click Feedback to request a feature or provide us with Feedback.

Visit the Let's Talk Learning Center

Short articles and video tutorials for every feature!

Section IV:
Notes

K12 *Insight*

🌐 k12insight.com   📞 703-542-9600

🐦 @K12insight   in linkedin.com/company/k12-insight