

## Enablement Campaign Planning Guide

Enablement campaigns are designed to drive real behavior change on the job. Instead of relying on one-time training events or communications from HQ, a campaign-based approach coordinates multiple touchpoints over time to help frontline teams learn, retain, and apply their knowledge and capabilities when it matters most.

This guide helps you structure an enablement campaign that fits the reality of frontline work. You will define the outcome you want to achieve, identify the people who must change, and assess the workflow to find the moments where performance happens. From there, you will align the right mix of touchpoints, channels, and tactics to reinforce critical job knowledge and behaviors while rapidly building momentum for your operational change.

Use this guide when you need people to do something differently on the job, whether you are introducing a new product, updating a process, preparing for a seasonal shift, or improving performance in a specific area. The goal is simple: ensure your efforts translate into consistent action when it counts.

You will work through the following steps to plan and execute your enablement campaign:

1. Define success
2. Identify the audience
3. Map the workflow and key moments that matter
4. Align touchpoints and channels
5. Build the campaign cadence
6. Reinforce, measure, and adjust

### Step 1: Define Success

What should people do differently, and how will you know it's happening?

Start with the outcome. Be clear about what needs to change on the job.

Focus on:

- The specific behavior or task that must change
- What people should do differently next shift
- The business impact this change should drive

Keep it observable and measurable. Avoid vague goals like “increase awareness” or “improve knowledge.” Define what success looks like in terms of real actions and results.

<p><b>BUSINESS RESULT</b> What outcome are you trying to drive?</p>	
<p><b>SUCCESS METRIC(S)</b> How will you measure progress / impact?</p>	
<p><b>CAMPAIGN OBJECTIVE(S)</b> What must change to achieve the outcome?</p>	

<p><b>TARGET BEHAVIOR(S)</b>                  What do people need to do differently on the job to support this outcome?</p>	
<p><b>KEY TASKS / ACTIONS</b>                  What operational tasks / actions are connected to this job behavior?</p>	
<p><b>CURRENT VS DESIRED STATE</b>                  What's happening today vs what should happen moving forward post-campaign?</p>	
<p><b>TIMING / DEADLINE</b>                  When does this change need to take effect?</p>	

## Step 2: Identify the audience

Who needs to change, and what does their work actually look like?

Define the audience in practical terms so your campaign fits the reality of their role. Focus on who is expected to act differently and the conditions in which they operate every shift.

Focus on:

- The roles impacted by the change
- Experience level (new, tenured, management)
- Work environment constraints (time, tools, access)
- What a typical shift looks like for this audience

Be specific. Avoid broad labels that group too many people together. The more clearly you define the audience, the easier it is to design support that fits how they actually work.

<p><b>TARGET ROLE(S)</b> List specific roles expected to change their behavior.</p>	
<p><b>EXPERIENCE LEVEL(S)</b> Define whether this audience is new, tenured, management, or a combination.</p>	
<p><b>WORK ENVIRONMENT</b> Describe where the work happens and the conditions in which people operate every day.</p>	

<p><b>TOOLS / SYSTEMS USED</b> Identify the primary tools, equipment, and systems used to do these jobs.</p>	
<p><b>SHIFT REALITIES / CONSTRAINTS</b> Outline the pressures and friction points people face in these jobs, including common disruptions, access challenges, etc.</p>	
<p><b>SHIFT SNAPSHOT</b> Summarize what a normal shift looks like for the people doing these jobs – from start to finish.</p>	

### Step 3: Map the Workflow and Key Moments That Matter

When and where does this behavior show up during the work?

Anchor the campaign in the flow of work. Identify the moments where performance happens and where support will have the greatest impact. This ensures your campaign shows up at the right time, not just at launch.

Focus on:

- When the behavior or task occurs during a shift
- High-risk or high-impact moments
- Common mistakes or failure points
- Triggers that signal the need for action

Stay grounded in real situations. If your support tactics don't align to how the job actually gets done, they won't have the desired impact.

<p><b>KEY TASKS IN THE WORKFLOW</b> List the specific tasks included in the desired change behavior.</p>	
<p><b>CRITICAL MOMENTS THAT MATTER</b> Identify the points in the workflow when improved performance will have the greatest impact on the desired outcome.</p>	

<p><b>TRIGGERS FOR ACTION</b>                  Define how people know to complete these critical job tasks in the workflow.</p>	
<p><b>FREQUENCY OF THE TASK</b>                  Note how often these tasks occur during a shift or over a period of time.</p>	
<p><b>LEVEL OF DIFFICULTY OR RISK</b>                  Indicate how complex or high-stakes each task is.</p>	
<p><b>COMMON MISTAKES / FAILURE POINTS</b>                  Highlight where people tend to go wrong and why.</p>	

## Step 4: Align Touchpoints and Channels

How will support show up, and where will people access it?

Design the campaign experience before building assets. Define the types of interactions that will help people move from awareness to consistent execution, then match those touchpoints to channels that fit the workflow.

Focus on:

- The types of support needed across the experience
- How each interaction helps people take action
- Where people can realistically access support during a shift
- Using multiple touchpoints instead of relying on one method

Avoid defaulting to a single format. The goal is to create a connected experience that meets people where the work happens and reinforces critical job knowledge and behavior over time.

Core Touchpoints in an Enablement Campaign

- Awareness: Introduce the change and explain why it matters. Set expectations and create initial understanding.
- Skill-Building: Teach or refresh the specific task. Focus on what people need to do, not general knowledge.
- Application: Support people as they perform the task on the job. Include access to quick, on-demand help in the moment of need.
- Reinforcement: Repeat and strengthen the behavior over time. Build confidence and consistency through ongoing exposure.

Identify the channels available to reach your audience and assign each to the role(s) it will play across the campaign.

CHANNEL	AWARENESS	SKILL-BUILDING	APPLICATION	REINFORCEMENT
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Step 5: Build the Campaign Cadence

When will support happen, and how will you maintain momentum over time?

Plan how the campaign unfolds across time. Sequence your touchpoints so people are introduced to the change, supported as they apply it, and reinforced until the behavior becomes consistent.

Focus on:

- Spacing interactions over time instead of delivering everything at once
- Keeping each touchpoint short and focused
- Building from awareness to application to reinforcement
- Maintaining momentum beyond the initial rollout

Avoid relying on one-time events. The goal is sustained behavior change, not a single moment of exposure.

### Building Your Campaign Timeline

Use the following table to map how your campaign will unfold across each phase. The goal is to sequence support over time so people are introduced to the change, apply it on the job, and build consistency through reinforcement.

1. Start by reviewing the phases across the top. These represent how your campaign progresses from preparation to ongoing support.
  - a. Pre-Launch: Introduce the change and build awareness
  - b. Launch: Deliver initial enablement and prompt action on the job
  - c. Early Support: Help people apply the change and navigate early challenges
  - d. Sustainment: Strengthen habits and maintain consistent performance over time
2. For each touchpoint, add the key activities planned for that phase. Keep entries short and focused on what people will experience or do.
3. Ensure each phase includes the right mix of support. Avoid concentrating every key activity during the launch period.
4. Look across each row to confirm there is continuity over time, not just a single interaction.
5. Look down each column to ensure the experience is balanced and not overloaded in any one phase.

This is a planning tool, not a detailed project plan. Focus on sequencing and coverage to maintain momentum and support performance over time.

TOUCHPOINTS	PRE-LAUNCH	LAUNCH	EARLY SUPPORT	SUSTAINMENT
AWARENESS				
SKILL-BUILDING				
APPLICATION				
REINFORCEMENT				

### Step 6: Reinforce, Measure, and Adjust

How will you ensure the change sticks?

Plan how you will sustain the behavior, track progress, and refine the campaign based on what’s happening in the workflow. The goal is to keep the change visible, supported, and improving beyond the initial rollout.

Focus on:

- Tracking both engagement and on-the-job performance
- Continuing to surface the behavior through reminders, practice, and real-world application
- Gathering feedback from managers and employees
- Adjusting the campaign based on what’s working and what isn’t

Avoid treating the campaign as complete after launch. Behavior change requires ongoing attention and iteration.

METRIC	TARGET	CURRENT	ACTION

<p><b>FEEDBACK SOURCES</b> How will you collect input from employees and managers regarding the value of your campaign?</p>	
<p><b>PLANNED ADJUSTMENTS</b> How will you coordinate changes to your campaign based on feedback and metric performance?</p>	
<p><b>ONGOING SUPPORT PLAN</b> How will you continue to support consistent performance over time?</p>	
<p><b>REVIEW CADENCE</b> How often will you assess metric performance and collect feedback on campaign value?</p>	