

Data Entry

Protocols Example

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# Consultation Manager

## Document Purpose

This document forms part of the Consultation Manager system training and maintenance suite. Its purpose is to outline the protocols for data entry and management of the stakeholder database. Staff members will regularly use Consultation Manager for recording stakeholder details, interactions and actions, as well as reporting on top issues and trends.

It is therefore important that data entry is done in accordance with this document to keep the database consistent and manageable for all teams throughout the lifecycle of each of our projects, including as projects move into delivery. Accurate data entry is critical for successful and correct reporting.

## Background

Consultation Manager is the stakeholder management database system we use to keep records of all interactions (known as ‘Events’) with various stakeholders across our projects.

We use Consultation Manager to **record ALL our interactions with our stakeholders** for reporting and record-keeping purposes. Consultation Manager is also used to **raise, track and close actions** arising from interactions with stakeholders.

We also use Consultation Manager to **identify and organise our stakeholders** by interest groups, geographical region and project site interests. We will regularly **run reports on our stakeholder data** to identify key issues, stakeholder involvement and trends over time, as well as briefings before meetings, and to track Action KPI’s.

### Responsibilities

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| **Customer Experience Team** | * Establish and maintain protocols for data entry * Assist project teams with Consultation Manager troubleshooting * Approve structural changes to projects within Consultation manager |
| **Stakeholder Relations and Communications Team, including Land Engagement Team** | * Manage their respective project database within the Consultation manager system * Record all interactions with stakeholders in accordance with the Consultation Manager data entry protocols within 24 hours * Record all Actions resulting from above interactions in Consultation Manager in accordance with the data entry protocols within 24 hours * Regularly update and maintain Consultation Manager with accurate contact details for each stakeholder |
| **Customer Service Centre Team** | * Record any interactions with stakeholders in accordance with the Consultation Manager data entry procedure within 20 minutes for calls, 2 hours for high priority emails and 12 hours for low priority emails * Record any actions resulting from above interactions in Consultation Manager in accordance with the data entry protocols within 20 minutes for calls, 2 hours for high priority emails and 12 hours for low priority emails * Update and maintain Consultation Manager with accurate contact details for each stakeholder |

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# Key Principles

For the Stakeholder database to operate efficiently, the following key principals must be followed by **ALL** team members, including future contractors and delivery team staff.

* **ALL interactions** with Stakeholders are recorded in Consultation Manager, as ‘Events’
* Record all interactions within 24 hours of the contact/activity occurring or receiving the correspondence
* Data should be entered carefully to ensure accuracy and reporting consistency
* Prevent duplicates by first searching for the Stakeholder’s various details (such as address and phone number) if their name returns no search results
* Create a new Stakeholder record for every Stakeholder you interact with (if they don’t already exist on the database) provided they don’t wish to remain anonymous
* Create Properties only where they are affected by our works
* Every event must be linked to at least one Stakeholder
* Every event must have at least one ‘Issue’ selected
* Every event must have an associated Sentiment recorded
* Correct incorrect spelling or contact details when you see them
* Do not use anagrams- please use full business names and street names (including ‘Road’ not ‘Rd’)
* Do not delete duplicate stakeholder records, instead, merge stakeholders

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# Database set-up

## Stakeholders

A Stakeholder is anyone who is impacted by or has an interest in the project during planning, construction and post-completion.

Every Stakeholder we interact with **MUST** be added to Consultation Manager.

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### Stakeholder Groups

|  |  |
| --- | --- |
| **Group Types** | **Explanation** |
| **Local Government** | Local government groups such as councils |
| **Community Groups** | Community groups can be various stakeholder groups formed of residents and traders who have a similar interest or motivation for influencing or being involved in our projects |
| **Businesses** | Owners or businesses impacted by our works |
| **Residents** | Owners and tenants of properties in areas located near works |
| **Schools** | Schools involved in our projects or located near works |
| **Media** | Media outlets interested in works |

## Properties

A Property record is created for parcels of land affected by the program of works during planning, and construction.

### When should you should add a property

Properties affected by acquisition (whole or partial) should be added to the database. Properties that are in close proximity to works should be added and linked to the owner/occupier.

### Property Groups

Properties can be grouped based on certain features, such as affected by acquisition. There are currently no pre-determined property groups as factors differ depending on project and location.

Please discuss Property Group requirements with your manager and the Consultation Manager Enterprise Administrator before creating any groups.

## Event types (Interactions)

Consultation Manager uses the term ‘Events’ to encompass the variety of interaction types project teams have with our Stakeholders. Every interaction with a Stakeholder is recorded as an Event and is classified as an Event ‘type’. The type of Event recorded helps reporting by providing the number and type of different interactions we have with our Stakeholders. **DO NOT** add any additional Event types, please talk to your Consultation Manager administrator before making any changes.

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| --- | --- |
| **Event Type** | **Explanation** |
| **1800 Number** | When a call is received by the contact centre from a stakeholder via the 1800 number |
| **Phone Call** | Phone call between stakeholder and project team staff member, this can be incoming or outgoing. Excludes calls received via the 1800 number |
| **Meeting** | Pre-arranged meeting with an individual stakeholder or a group of stakeholders |
| **Face to Face** | Face to face conversation with a stakeholder, such as meeting a stakeholder at a pop up or informally. |
| **Community Consultation Session** | Pre-planned and organised community consultation session such as a public briefing or information session |
| **Letter** | Letter provided to the stakeholder, usually in the form of a letterbox drop. Information provided with the intent that there is **no face-to-face contact**. Please note: not a door knock |
| **Door knock** | Cold call visit to a stakeholder’s property where you physically knock on their door with the intent to provide written or verbal information on the project |

## Issue Categories

For every Event that is added to the database**, one or more** Issues must be selected to describe the topic of the interaction. This information is used to run statistical reports to reveal the key issues affecting stakeholders.

|  |  |
| --- | --- |
| **Issue** | **Definition** |
| **Community Engagement** |  |
| Communication Materials | Materials used in the engagement/consultation process such as notifications, fact sheets and other collateral |
| Engagement Activities | Activities undertaken as part of the engagement process, such as community information sessions |
| **Construction** |  |
| Safety | Safety hazards identified by member so the public or project teams |
| Noise | Noise associated with construction |
| Services Disruption | Utilities such as water/gas/electricity |
| Privacy | Changes to previous privacy levels because of construction work in the area |
| **Environment** |  |
| Cultural Heritage | Protection and maintenance of culturally significant aspects of the project area |
| Drainage/flooding/runoff | Issues with or changes to the existing drainage conditions during construction or after project completion |
| Flora and Fauna | Changes to flora and fauna in the project area such as proposed fauna species in design |

## Sentiment

For every Event that is added to the database, a sentiment must be selected to describe the Stakeholder’s overall feeling in this interaction. This information is used to run statistical reports to reveal the main issues that result in negative, positive, neutral or mixed responses from Stakeholders.

To determine what purpose should be selected for interactions, please see definitions associated with each below:

|  |  |
| --- | --- |
| **Sentiment** | **Definition** |
| **Negative** | An expression of dissatisfaction, annoyance and anger; e.g. a complaint |
| **Neutral** | Emotion is removed, e.g. a stakeholder wants to receive information on upcoming events. Is neither critical nor positive |
| **Positive** | Encouraging and supportive comments or feedback |
| **Mixed** | A combination of positive and negative sentiment, e.g. stakeholder is supportive of how the work is going, but wishes to complain about the number of days of occupation |

Notes: