

Instructional Design Document

Project Name: Help PJ Enterprises

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Purpose

The purpose of this instruction is to help Telephone Operators at PJ Enterprises improve their interactions with customers by developing skills in telephone etiquette, de-escalation, order taking and the formal escalation process. Currently, two out of three respondents on a customer service survey complain about Operators' lack of product knowledge and telephone etiquette and Operators' inability to promptly solve issues without redirecting them to a supervisor. This training will directly address those concerns by helping Operators learn how to consistently and efficiently handle common customer requests, including complaints.

Target Audience

The target audience of this instruction are Telephone Operators at PJ Enterprises. The operators who are undergoing training vary in gender and age range. The workers also vary in experience. While current operators have previous experience in the field, data from poor customer reviews indicates a need across the board to improve interactions with customers. Operators who will be participating in this training will be completing it onsite at the call center via computer-based instruction.

Learner Characteristics

The learners are Telephone Operators at PJ Enterprises. In order to complete the training, they will need to have basic computer skills and literacy, as well as be proficient in speaking English on the telephone, as well as be proficient in reading and listening to English in order to complete the training. In addition to basic computer skills, they will need to be able to navigate the LMS used to deliver the training.

Application of Learning Theory

The target audience for this training consists entirely of busy, working adults who may need to complete training during their regularly scheduled working hours. Because of this, andragogy figures largely in the design of this training. Since the training will be computer-based and learners will need to absorb a lot of information relatively quickly, cognitive load theory will also strongly influence the design.

Adult learners are more engaged and perform better when training is problem-centered, and the content is relevant to immediate needs. Instructional strategies will rely heavily on how to apply content to real-world interactions with PJ Enterprises customers, including interactive scenarios and evaluations of recorded interactions. Adult learners also respond better to training when their prior knowledge and experience is acknowledged and can be applied to the instruction. In addition to applying their new skills to pre-recorded scenarios, learners will be prompted throughout the training to make connections to interactions they've had with customers and to brainstorm how what they've learned may benefit them on the job.

In an effort to support effective and efficient learning, the instructional design team will follow cognitive load principles when designing the computer-based modules and any accompanying job aids. Most notably, designers will reduce redundancy by avoiding background noise and excessive use of purely decorative images. In addition, information that is complex and/or required for interpreting later content will be presented in a permanent form, such as a hardcopy job aid or electronic reference materials. Finally, creating computer-based modules will allow the designers to take advantage of the modality effect by presenting information graphically and verbal information via audio. Using audio instead of text in appropriate situations will lighten learners' cognitive load by reducing how much information they must take in visually.

Training Format

The training will be delivered asynchronously via the Learner Management System that PJ Enterprises is currently using. The training will be SCORM-compliant. This will allow the LMS to record learner progress through the training program. The learners will be able to work through the modules at their own pace. The lessons include interactivity and quiz questions to engage learners and assess their learning.

Learning Environment

Since the training content will be delivered asynchronously via the Internet, learners can participate in the training modules from any location that has dependable Internet access and moderate bandwidth. Training modules are web-based so that learners can use any browser-enabled device, including desktops, laptops, and tablets. Since the content is designed to be delivered asynchronously, there is no real-time interaction with an instructor or with peers. However, the content can also be used in small or large group instruction where peer feedback and instructor interaction would be available.

Alignment Chart

1. Terminal Objective: When presented with several customer scenarios, execute appropriate de-escalation methods such that at least 75% of those interactions conclude without escalating to a supervisor.			
Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Operator will correctly determine if a customer is in a heightened emotional state.	Animated Presentation Overview of emotional states. Identify verbal cues that reflect a variety of customer emotional states. Audio clips of customer interactions.	Drag and Drop Drag labeled icons representing identifiers that match an emotionally heightened state.	Rhetorical Questions Text entry box 1) Why do you think it's important to correctly determine if a customer is in a heightened emotional state?
	Recorded Example Play full recording of simple customer interaction to demonstrate a variety of customer emotional states.		
	Assessment: --	Assessment: Drag and Drop Drag labeled icons representing identifiers that match an emotionally heightened state.	Assessment: --
Operator will match each technique with its definition.	Animated Presentation Overview of de-escalation techniques	Matching Match de-escalation techniques with its definition.	Reflection Operators apply module content to scenarios and determine whether they agree and explain why.

	Assessment: --	Assessment: Matching Match de-escalation techniques with its definition.	Assessment: Reflection Operators apply module content to scenarios and determine whether they agree and explain why.
Operators will identify appropriate de-escalation techniques to productively engage the customer.	Animated Presentation Overview of which techniques are appropriate for a specific situation. Audio clips of steps during customer interactions.	Matching Match de-escalation techniques with the type of de-escalation that needs to occur.	Choose Your Own Adventure Operators will be presented with a real-world scenario and receive immediate feedback based on their choices as they progress through the activity.
	Recorded Example Play full recording of simple customer interaction to demonstrate a variety of de-escalation events.		
	Assessment: --	Assessment: Matching When presented with a variety of scenarios, match the appropriate de-escalation techniques with the type of de-escalation that needs to occur.	Assessment: Choose Your Own Adventure Operators will be presented with a real-world scenario and receive immediate feedback based on their choices as they progress through the activity.
2. Terminal Objective: When presented with several customer scenarios, execute the Call Flow in the correct order by choosing the appropriate responses from a given list.			
Enabling Objectives	Absorb Activity	Do Activity	Connect Activity

Operator will arrange the Call Flow steps in sequential order.	Animated Presentation Overview of entire Call Flow. Present each Call Flow step with general description.	Sequence (Drag and Drop) Drag labeled icons representing each step of the Call Flow into sequential order. Sequence (Drag and Drop) Drag labeled icons representing each step of the Call Flow into sequential order.	Rhetorical Questions 1) Learner asked to identify things they say and do repeatedly across calls. Text entry box 2) Why do you think it's important for you to follow the Call Flow steps in order?
	Recorded Example Play full recording of simple customer interaction to demonstrate the entire Call Flow. Assessment: --		Assessment: --
Operator will match each step of the Call Flow with its associated tasks.	Animated Presentation Review entire Call Flow. Present each Call Flow step with descriptions of tasks commonly involved in each step. Audio clips of steps during customer interactions.	Matching (Drag and Drop) Match each Call Flow step with the set of tasks completed in that step.	Cite an Example Learners prompted at each step to find an example of a similar task they routinely perform at PJ Enterprises.

	Assessment: Pick One Knowledge Check Learners presented with a set of tasks. They must click the Call Flow step in which those tasks belong.	Assessment: Matching (Drag and Drop) Match each Call Flow step with the set of tasks completed in that step.	Assessment: --
Operator will determine which Call Flow steps are missing from recorded customer interactions.	Animated Presentation: Review entire Call Flow. Each step is presented with text and animation describing what happens in specific step.	Multiple-Choice Quiz: Operators are shown (4) full length video clips of a call with a customer, with one step missing from the call flow in each clip. They must then determine which step is missing from the choices.	Discussion Post: After completing the multiple-choice quiz, operators will be prompted with a text entry box with this prompt: What do you think are some of the consequences of skipping steps in the Call Flow?
	Video Clips Multiple Choice: Short video clips of specific scenes are played out of order. Each video clip is a prompt where operator must select from 4 choices which step is being shown.		
	Assessment: Video Clips Multiple Choice: Short video clips of specific scenes are played out of order. Each video clip is a prompt where operator must select from 4 choices which step is being shown.	Assessment: Multiple-Choice Quiz: Operators are shown (4) full length video clips of a call with a customer, with one step missing from the call flow in each clip. They must then determine which step is missing from the choices.	Assessment: After completing the multiple-choice quiz, operators will be prompted with a text entry box with this prompt: What do you think are some of the consequences of skipping steps in the Call Flow?

Assessment Summary

Some assessments for the training will be formative, while others will be summative. Assessments that prompt learners to make connections between the content and their work will be formative. These assessments are geared more toward helping learners move the new information into their long-term memory by integrating it with what they already know. Assessments associated with Absorb and Do activities more directly measure learners' mastery of the content. Learners' scores for these assessments will be recorded and that training cannot be completed without achieving a predetermined score. Learners will be given the opportunity to review material and try again as many times as needed.

Generally, final assessments will take the form of interactive scenarios in which learners must apply the principles they have learned to real-world customer interactions. Learners will decide the best course of action or the best response to the given situation. These scenarios will mimic the questions and issues learners will handle most often at PJ Enterprises, which will aid learning transfer.

Quality Evaluation Plan

Formative

- Focus groups with Telephone Operators of varying experience levels (several groups)
- Focus groups with Customer Service Supervisors
- Check in with key stakeholders at milestones and get approval or revision suggestions
- Make necessary revisions during development stage

Summative

- Training evaluation surveys for Telephone Operators
- Data collection and analysis on performance evaluations for customer service complaints, escalations and sales
- Make revisions based on summative evaluation data

Confirmative

- Data collection and analysis on performance evaluations for customer service complaints, escalations and sales
- Data collection and analysis on customer retention, sales volume, sale size, and profits