

## Design Document

**Project Name:** Reviving PJ Enterprises

**Prepared by:** Fourward Design, Inc. Julie Cabaniss, Rebecca Schweitzer, Michael Marolla, Cheley Gieseler

**Date:** 8/18/18

### *Target Audience:*

The target audience for this project includes both the phone operators who handle all customer calls as well as their managers.

**General learner characteristics:** The age range for the operators spans multiple generations, from ages 22 to 65 years old. Both genders are represented, but the women outnumber the men by a ratio of 2 to 1. The education level for the operators is generally at the high school level with some operators having a little post-secondary education or training. The managers are also generally high school educated but have worked their way up in the organization and some of them have or are pursuing some higher education or training.

The level of comfort with the computer and software varies greatly among the operators, with the younger generation being digital natives and the older workers needing a bit more guidance and practice to help them build the skills and confidence they need to navigate the software efficiently. Overall, however, all operators are proficient to a level of at least a low intermediate (able to click and double click, mouse, and type at 35-40 wpm).

Many of the operators have families to take care of and a number of them are single parents. They have a lot of stress in their lives as they are in the low to middle low income bracket and trying to raise children. Many of the operators have another job in addition to the one they have at PJ Enterprises. Some of the younger operators may not have the family stressors but they are time-poor as well as low-paid. As a result of these stressors, many are always looking for better opportunities.

### *Application of learning theory:*

**Adult Learning Theory:** According to Malcolm Knowles, there are four main principles to adult learning theory and they include the following (these are taken from the e-learning industry website:

<https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles>)

1. Adults need to be involved in the planning and evaluation of their instruction.
2. Experience (including mistakes) provides the basis for the learning activities.
3. Adults are most interested in learning subjects that have relevance and impact to their job or life.
4. Adult learning is problem-centered rather than content-centered.

In the case of PJ Enterprises, this would mean that the operators and managers are consulted in advance as to what needs to change in their learning environment and process. This is covered as part of our planning analysis and is the foundation on which we will build the new learning resources. Also, learners will be learning via task-oriented activities throughout the training, which supports the experiential learning tenet in the theory. The relevance of this training is obvious, if the operators and managers are able to use the resources available to them in a more effective way, their job

success and satisfaction will greatly increase. Finally, this training is entirely problem centered as it is being designed to address current problems in the customer service process.

### *Training format:*

The training format will be blended format, realistic scenario lessons with prompt feedback from peers and the instructor.

### *Learning Environment*

#### **Organizational:**

The operators and managers that handle all of the customer calls sit on one side of the corporate building and the rest of the staff and leadership sit on the other side. This is very representative of the division between the customer service department and the rest of the management and staff. The managers of the operators report to the vice president of the company on a weekly basis but that is it. The operators don't know the other managers or employees, they just know their direct, immediate managers. There is no effort to build a culture of camaraderie or caring amongst the operator staff. They just show up, punch in, do their job and punch out. There is no daily debriefing or check-in by the manager unless there is a problem.

#### **Physical:**

Every operator has a computer at their desk, they sit in cubicles to reduce noise interference. They are equipped with headsets for the calls that come in and they have comfortable chairs with rollers on the legs. Each operator has a spacious desk, unlimited pens, paper, any office supplies they need. There is a kitchen within a few yards of each caller with a water cooler and refrigerator for any food they bring in to work. They are given a 15-minute break twice during the day and also a 30-minute break for lunch or dinner, depending upon their shift.

The manager of the operators is available at all times to help when needed. The managers have their own office but it is close to where the operators are and when the operators need immediate help, they push a button that lights up a beacon on the top of their cubicle so that the manager knows he/she is needed immediately. There are different colors for the beacon that indicate whether the manager needs to dial into the call or is needed physically at the operator's desk.

**1. Terminal Objective:** Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Demonstrate ability to log in to the database, locate search function, listen for product title or product ID number and effectively search for product.	Watch a screenshare video that demonstrates how to use the search function on the database.	Info Gap Worksheet: Search for 15 items on the worksheet given the information provided. First seven items are product IDs. Learner must fill in the product title. The other seven items are product titles. Learner fills in the ID.	Log into the database and listen to five calls. Learner will identify a product title or ID number to search based on call dialogue and pull up the correct product in the database within 30 seconds of the caller giving the ID or title.
	Assessment: n/a	Assessment: 100% of worksheet items are correct within 15 minutes.	Assessment: Learners are instructed to raise a hand upon completion with correct product displayed on their screen. Instructor will visually check for accuracy. 80% (4 of 5 call scenarios) accuracy within 30 seconds per scenario.
Identify product via key words in customers description.	Watch a screenshare video that demonstrates an operator effectively listening for key words and searching for a product in the new database.	Worksheet: Match written description with a new product.	Log into the database. Listen to a call. Learners determine keywords from the conversation on the call and search for correct product within 20 seconds.
	Assessment: n/a	Assessment: 9/10 of the worksheet items are correct within 10 minutes.	Assessment: Learners will complete 90% accuracy (9/10) scenarios when given 20 seconds per scenario.
Effectively communicate product information.	Watch a screen share video/audio of a call that demonstrates an operator effectively searching for a product, identifying related products (as listed in product description) and upselling related products to a customer.	Activity: Product Jeopardy In teams, learners will be quizzed on products based on keywords that they need to search for or customer scenarios for upsell.	Roleplay: Information Gap - Customer calls - groups of three. Sitting back to back, pairs will roleplay while one person observes with a rubric for feedback. Each roleplay participant has limited information about the situation and a goal. (Operators goal is to identify product based on keywords and upsell related products.) Assessment: Learners will evaluate each other as an operator using a rubric while they are in the observer role in the triad.
	Assessment: n/a	Assessment: Each team should end with a minimum of three correct questions.	

**2. Terminal Objective: Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.**

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.	Watch 3 training scenario videos. Each video will have different operator responses and strategies applied. Video will explain both the correct and incorrect strategies.	Learners will read through transcripts of their own calls and try to identify what they did right and wrong.	With a partner, learners will come up with different scenarios to “test” their partner. The duo will work together to assess the strategy.
	Assessment:	Assessment: Identify at least 80% of correct and incorrect strategies in your own calls.	Assessment: Learners will fill out a self-assessment when finished with this activity.
Identify why certain strategies are incorrect.	Listen to customer feedback about why their experience was not good. *Feedback will be focused specifically on the strategies taken by the operators*	In small groups, discuss why the targeted responses are incorrect and brainstorm on what could have made the experience better and why. Once completed, instructor will explain the reasoning of correct and incorrect strategies to the group.	Individually, the learner will be given a random call that did not go well. They will need to explain why the strategy taken was wrong and suggest a better strategy. They will need to backup their response with 2 reasons.
	Assessment: n/a	Assessment: learners are able to confer in small groups and discuss their experience.	Assessment: Learners are able to explain the “why?” of both the correct and incorrect strategy as defined on the rubric.
Properly identify the correct strategies on your own.	Instructors will explain the instructions for the final assessment of knowledge.		Learners will be acting out 5 live scenarios with a member of the instructional team. They will need to respond correctly to a variety of calls.
	Assessment:	Assessment:	Assessment: Learners must identify and respond correctly to at least 4 of the 5 scenarios. The score will come from a rubric designed by the instructional team.



## Assessment Summary

**Assessment summary** -We have decided to use formative assessment where learners are able to demonstrate their proficiency with the task at hand. Learners who fail to master the skills will be redirected back to review the scenarios and content so that they can retake the formative assessments to master the process and information.

Evaluation - How are you evaluating the work you are doing to ensure the course will do the work you need it to do?

## Evaluation Plan

### Formative

Formative evaluation of the development of the learning solutions would be conducted throughout the project. It will consist initially of presenting the stakeholders with an outline and any prototype (a storyboard) of computer assisted training - scenarios for instance - to get their feedback and reaction. They will be asked to give unbridled feedback and will be encouraged to be honest because they will end up using this training in the end. (Instructional designers will not be offended:)

After this initial feedback, stakeholders that can provide ongoing feedback will be identified and approached to assist the Fourward ID, Inc. designers as the project proceeds. They will be allowed to stop their customer work and focus on the feedback when it is needed. They will be paid their hourly rate to do so and their quotas for customer service will be adjusted to account for their time away from the phones.

Future users/stakeholders will be asked to try and use/understand the portion developed that week, and give feedback that will inform continuing development or revision of the developed portions.

It is expected that oftentimes the designers will solicit feedback more frequently than once a week as they develop working relationships with the stakeholders.

When the first draft of the entire course is completed, the stakeholders will be asked to go through the entire training for a final review before it is implemented.

### Summative

**Summative** Evaluation: This is the final evaluation - did the course meet the objectives finally? If not then that will be something to work on in the future.

The summative evaluation will be done a week and then again a month after implementation of the training. It will consist of the following:

- Survey of the operators and managers that hones in on their feelings about their job performance and satisfaction before and after the training.
- Data Analysis: Managers and Fourward Instructional Design will look at the customer satisfaction data, call volume and resolution and finally bottom line sales figures after the training.
- In addition, course completion by employee will be documented and compared to the change in their performance.
- Any changes that need to be made will be documented and shared with management, with a recommendation and cost estimate as to when and how they could be done.

**Confirmative**

Six months after the training has been implemented, it is recommended that another, abbreviated analysis be conducted to be sure the training had the intended outcomes on an ongoing basis. This confirmative evaluation will consist of the same items as the summative evaluation but the survey will be shorter. The data analysis will still be done, however and recommended changes from the summative evaluation will be revisited.