



CCC New Hire Project Needs Analysis & Design

**Acme Incorporated and E-Learning
Engine, LLC**

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Table of Contents

EXECUTIVE SUMMARY	1
Findings	2
Needs Analysis	3
Design Document.....	3
Conclusions	4
INTRODUCTION.....	5
NEEDS ANALYSIS	6
Current Performance.....	6
Target Performance	10
GAP Analysis.....	16
Learning Objectives	17
DESIGN DOCUMENT	18
Instructional Strategy.....	18
Course Material Grouping and Sequencing	18
Instructional Methods & Tactics.....	18
Assessments.....	19
Course Delivery Method	19
Delivery Strategies.....	19
Instructor-led Courses (ILT).....	19
Computer Based Training (CBT)	19
Mentoring.....	19
Cross-Training.....	20
Nesting.....	20
Learning Aids.....	20
Instructional Design Document	21
Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios	42
Delivering Quality Care	42
Emotional Intelligence Training	44
Soft Skill Scenarios.....	47
CONCLUSION AND SIGNATURES	48
APPENDIX A:.....	49
Bibliography	49
APPENDIX B:.....	50
Performance Standards – New Hire for CCC.....	50
APPENDIX C:	51
Visual and Navigational Examples	51
APPENDIX D:	52
Sample ILT Materials	52



APPENDIX E:.....	53
Sample Monitoring Form	53
APPENDIX F:.....	56
Rewards and Incentives	56



Executive Summary

Using our proven, proprietary methodology—E-Learning Engine integrates processes and tools to create high-impact, powerful learning solutions designed to meet the strategic goals of client organizations as well as the unique workforce performance needs of teams and individuals.

Our methodology enables us to analyze an organization's strategic business objectives and design learning and performance solutions to maximize knowledge transfer and retention. Employees are empowered to apply their new knowledge, skills and information to their jobs. This results in the assimilation of information into targeted business processes, creating an increased return on clients' investments in both training and technology.

During one-to-one interviews with personnel responsible for defining and developing this document a Training Manager – (LMS), a Training Manager – (CST) and a Training Specialist determined that E-Learning Engine, LLC (E-LEARNING ENGINE, LLC) was engaged by Acme Incorporated to conduct a needs analysis and prepare a design document.

During these conversations, it was determined that the scope of this document will address Quality Care issues including Critical To Quality elements (CTQ). Analysis and recommendations of these issues will be examined and integrated into a practical working plan.

Furthermore, Acme Incorporated requested that the scope of this document provide a foundation from which a “premier” Customer Call Center can be established. This task will be performed by researching the best practices in training, knowledge management, and current call center training activities. Analysis and recommendations of these issues will be examined and integrated into the practical working plan as well.



Findings

A paradigm shift is taking place within the company with respect to the way New Hire employees are going to be trained and used. This shift in emphasis will require New Hire personnel to work as “virtual employees” across traditional company lines. Furthermore, New Hire employees will be trained on newly developed online educational support systems that promote quality interactions.

Training and support of new hire personnel will shift from the traditional model of training and support to a new interaction within the technical bounds of the company’s resources.

The new educational methodologies used to implement these efforts include the integration of pre-existing materials into a newly developed Computer Based Training (CBT) model, entitled AAA, and supported by Instructor Lead Training (ILT) techniques.

The paradigm shift negates the need of a survey instrument to analyze quantitative data. Rather, the Needs Analysis indicates the new business practice will revolve around the promotion of established technical resources currently found within the company’s structure.

To determine the current status of resources and personnel with respect to training in the Customer Call Center a needs analysis was conducted.

The needs analysis included the following activities:

- ◆ E-LEARNING ENGINE, LLC and Acme Incorporated conducted telephonic conferences and one-to- one interviews with onsite personnel. One-to-one interviews took place with: managers, supervisors, team leaders, customer service representatives, back office personnel, emergency response team personnel, marketer resolutions personnel, customer relations personnel, and quality, training and workforce specialists. During these phone conferences, Acme Incorporated personnel provided existing documentation for New Hire training. This material included PowerPoint presentations, manuals, internal technical documents, forecasts, and inter-agency communications in the form of emails.

The design phase included the following activities:

- ◆ E-LEARNING ENGINE, LLC instructional designers studied the documentation provided by Acme Incorporated during these phone conferences and interviews and developed a foundational blueprint.



Needs Analysis

The primary objective of the needs analysis and design phase is to determine the current state of preparedness for New Hire personnel within the Customer Call Center.

E-LEARNING ENGINE, LLC completed the needs analysis by focusing on the following:

1. Identifying the goals and scope of the needs analysis for New Hires in the Customer Care Center.
2. Identifying current performance levels, instructional methodologies and current techniques used to handle informational data for New Hire personnel within the Customer Care Center.
3. Identifying target performance levels and instructional methodologies for New Hire employees that will identify new techniques and venues to handle informational data within the technical bounds of the organization's structure.
4. Analyzing the gap between target and current performance to identify causes.
5. Reporting on findings and conclusions, including recommendations for closing the performance gap.

Design Document

E-LEARNING ENGINE, LLC completed the design phase by focusing on the following:

1. Investigating current and targeted Quality Care issues within the Customer Call Center
2. Researching best practices of training, knowledge management, and current call center development plans.
3. Planning the instructional strategy for training
4. Selecting the course format(s)
5. Writing an instructional design document



Conclusions

A review of the literature (See Appendix A) reveals complex interactions take place within Customer Call Center facilities. In reality, the Customer Call Center is not simply a place that processes data and information; it taps into the tacit and subjective insights and intuitions of their personnel.

Quality Care issues (sometimes referred to as soft skills and emotional intelligence) are paramount for Customer Service Representatives (CSRs). It is estimated that between 5.6 and 16.8 billion dollars are lost by businesses that do not address the social and emotional competences of their adult learners. Currently, it is estimated that only 25% of organizations address this issue.

In order to address this matter, the organization must be willing and able to become a “learning organization”. In that way it can capture and discriminate an individual’s innovation and shared learning experiences into practical techniques and applications.

Developing emotional competence requires “unlearning” old habits of thought, feeling and action. However, such a process takes motivation, effort, time, support and sustained practice.

Great attention must be given to the creation of an organizational environment which is centered around an employees concept of his/her recognition and fair treatment, employment security, hiring practices, compensation based upon the organization’s performance, and extensive training procedures.

Implementation of the targeted performance level will provide a more manageable and assessable method of delivering training to New Hire employees. Additionally, it will greatly increase the speed and access to valuable information that can help maintain quality of service and facilitate the company’s technological and instructional goals.

The consolidation and new methods of delivering instructional materials to New Hire employees will facilitate future educational endeavors and promote the services of participating staff and business units.



Introduction

The primary objective of the needs analysis and design document is to provide Acme Incorporated a foundation from which it may achieve its goal to impart Quality Care issues and become a premier Customer Call Center facility

In order to gain this status, research indicates (See Appendix A) that an organization must commit to building a learning organization. A learning organization is an organization skilled at creating, acquiring, and transferring knowledge and modifying its behavior to reflect new knowledge and insights.

The most salient challenge to building a learning organization is the acknowledgment that Knowledge Management (KM) plays a critical role within the organization. For the purpose of this document, KM is the way organizations generate, communicate and leverage their intellectual capital.

The foremost hurdle when implementing a Knowledge Management plan is getting organizational leadership to acknowledge the threat and potential impact of lost knowledge.

As older workers leave, the retention of lost knowledge presents organizations with significant challenges and opportunities. The reality of demographic trends indicate that the baby-boomer retirement from the workforce and many mid-career transitions for Generation X, will end result in massive quantities of invaluable, irreplaceable, and specialized knowledge leaving the workforce.

Fortunately, human resource departments and workplace learning and performance professionals can play leading roles in the retention and supply of critical knowledge for their organizational needs.



Needs Analysis

Current Performance

To identify the current performance level, subject matter experts provided information from their experiences. SMEs for the needs analysis included: managers, supervisors, team leaders, customer service representatives, back office personnel, emergency response team personnel, marketer resolutions personnel, customer relations personnel, and quality, training and workforce specialists.

Background

Customer Call Center representatives perform their duties for Southern Pipeline, Northern Pipeline, Western Pipeline and Canadian Pipeline Incorporated. Presently, each training group is trained for specific placement within each of the company's various gas markets as well as placement within the Emergency Response Team.

Customer Call Center representatives are supported by ancillary departments. These departments include: Back Office Support Team, Marketer Resolutions Team, Customer Relations Team, the Emergency Response Team and the Performance Solutions Group (Quality Care and Training).

In order to provide a construct for current performance of New Hires, the following subjects have been reviewed:

- ◆ **Pre-qualifications**
- ◆ **Training Schedule**
- ◆ **Delivering Quality Care**
- ◆ **Educational Venues**
- ◆ **Continual Learning Constructs**
- ◆ **Cross Training**
- ◆ **Rewards and Incentives**
- ◆ **At Risk Activities**



Pre-qualifications

New Hire Customer Call Center personnel are pre-qualified by an outside staffing firm. The criteria for personnel's acceptance for interview with Acme Incorporated include: general clerical skills, including spelling, name/number comparison, filing and math. A minimum typing skill of 40 w.p.m is also required. A minimum proficiency in a Call Center environment is preferred; however similar customer service environment applicants may qualify for an interview with Acme Incorporated. Behavioral questions provided by Acme Incorporated are also given to the interviewee. Basic computer skills and knowledge of popular software programs are required.

New Hire staffs are initially considered temporary to permanent employees. A small portion of New Hire employees are initially employed as permanent employees.

Training Schedule

Currently New Hires are recruited and scheduled into classes by market demands.

Delivering Quality Care

A Quality Care component is taught within this initial 4-6 week training period. It is usually about 8 hours in length and taught within the first week but oftentimes is rescheduled to accommodate the availability of the Quality Care Representatives (QCR).

Educational Venues

Currently, New Hire Customer Call Center personnel are subject to various educational venues. These venues include: an orientation, training on Quality Care issues, systems training and supplementary educational activities.

Instructions for these activities include instructor lead and computer based training found within Acme Incorporated facilities. The location of the training migrates within this facility as various rooms become available.

Nested and Observational training is also an educational venue for New Hires. Observational training is scheduled for New Hires with CSR personnel and usually lasts 8 hours. This event is day long activity. Currently, nested training takes place at the end of the course and is 2 weeks in length. Nested training is done within a controlled environment (computer classrooms) and under the supervision of the trainer.

In theory, each New Hire CSR is trained on all processes. However, due to service demands, New Hire CSRs are not fully trained on all processes.

New Hire personnel destined for the Emergency Response Team are trained specifically for that area. A dedicated training program is in place that underscores specific requirements for this department's



needs. Due to demands, oftentimes their training does not provide for a global training on all modules.

All companies have New Hire training programs. New Hire employee training programs can take up to 6 weeks to be completed. Completion times vary according to specific company requirements.

Continuing Educational Constructs

None to date.

Cross Training Experience

Acme personnel are offered an opportunity to participate in a “Walk a Mile” program that encourages all staff to visit various departments within the organization.

Evaluations

The Quality Workforce Team reviews individual Quality Care performance on a monthly basis by monitoring CSR calls. Once a month, a one-to-one interview with the CSR is scheduled by the Quality Service Representative to review his/her performance.

Rewards and Incentives

Current CSR personnel are able to bid on openings within the center. The criteria for selection are determined by 20% seniority and 80% performance.

At Risk Activities

No current activities are perceived as at risk activities.



An Overview of the Current Instruction for New Hires is as follows:

	Type of Training	Length of Training
Orientation	▪ Instructor Lead Training	8 hours
CustomerCare	▪ Instructor Lead Training	8 hours
Systems Training	▪ Computer Managed Instruction including: Instructor Lead Training, practice exercises, group presentations, role playing, games and observation. Summative and formative evaluations are given within this training period.	Up to 240 hours (up to 6 weeks)
	▪ Nested Training	8 hours (Included within 240 hour figure)
	▪ Call Observation Training	80 hours (Included within 240 hour figure)
Ancillary Educational Venues	▪ Customer Logistics Training	1 hour
	Safety & Operations Training	1 hour
	Outlook Training	½ hour
	Workforce Planning	1 hour
	Supervisor's Scorecard	1 hour
	Code of Business Conduct	1 hour
	Sexual Harassment	1 hour
	Workplace Violence	1 hour
	Understanding Natural Gas Regulation & Deregulation	1 hour
	Pipeline Physical Delivery System	1 hour
	Why Pipeline Prices are so high	1 hour



Target Performance

Due to the open-ended request of Acme Incorporated to provide a foundation from which a “premier” Customer Call Center can be established, the target performance standard was developed by reconciling current performance standards with a the review of GAP analysis.

Analysis of the data indicates that targeted activities and techniques will re-arrange and consolidate current forms of instruction as well a produce new training materials and methods for New Hires. The end goals for this new targeted performance will be a more efficient method of training that highlights and encourages quality soft skill techniques and provide the customer service center an opportunity to achieve a best-in class status.

The most salient issues associated with this target performance involve the integration of current New Hire educational materials within the newly developed AAA courseware. Additional training events and venues will be needed to secure the targeted goals requested by Acme Incorporated.

All additional computer based training modules should conform to the current design and navigational standards developed by Acme University. (See Appendix B)

In order to provide goals for target performance of New Hires, a more detailed examination of the following elements is required:

- ◆ **Pre-qualifications**
- ◆ **Training Schedule**
- ◆ **Delivering Quality Care**
- ◆ **Educational Venues**
- ◆ **Continual Learning Constructs**
- ◆ **Cross Training**
- ◆ **Rewards and Incentives**
- ◆ **At Risk Activities**



Pre-qualifications

Recruit the best. Pre-qualifications activities should include personnel with call center experience only. Utility experience is preferred. Basic computer skills and knowledge of popular software programs should be required.

Utilize personality-assessment instruments, such as Myers-Briggs Type Indicator (MBTI[®]) to evaluate if prospective employees meet the current personality preferences found within Customer Call Center workforce.

Training Schedule

Training of New Hire employees should take place only during “off season” times. Training during “peak seasons” should be avoided.

Training should be presented within an uninterrupted setting. Additionally, when possible, training for students who learn at a slower rate might extend an employees training experience by a week.

Delivering Quality Care

In order to gain a competitive advantage, organizations need to make sure their personnel know how to manage themselves during work hours and how to interact with their customers and peers. From showing empathy and optimism to listening skills and asking probing questions, Customer Call Center representatives must utilize these competencies to successfully complete the call. To achieve this goal, E-LEARNING ENGINE, LLC suggests the following components:

Emotional Intelligence Training

E-LEARNING ENGINE, LLC suggests an Emotional Intelligence (EI) training program be developed that includes modules that build rapport and establish the right culture for customer service initiatives. (This training was formally known as Tone, Technique & Overall Professionalism and was found within CustomerCare Training endeavors). For the purposes of developing target performance, this portion is being expanded to encompass a full day of training.

Analysis of SME interviews suggest the following topics be highlighted for Emotional Intelligence Training should include:

- ◆ Listening Skills
- ◆ Questioning and Probing Procedures
- ◆ Positive Speaking Skills
- ◆ How to Handle Irate Customers
- ◆ How to Provide the Customer with Options



“Woven” Training Modules

Learn by doing. First and foremost adult learners must be provided with practical methods that provide for optimum performance opportunities within “real world” settings that interweave content with systems and soft skills. These modules should be presented at the beginning of the training period. Subsequently, as training proceeds, additional modules should be introduced that build upon previously learned skills.

E-LEARNING ENGINE, LLC suggests that learning modules be created that provide a cohesive “packet” of information that binds system training and soft skill activities. The mantra for all training material within these packets should be: discover, apply, observe (mentoring), discuss, and evaluate.

Example of “Woven” Training Module

“Woven” Training Module See Instructional Design Document for greater detail	AAA Training	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training
	Soft Skill Training	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training
	Mentoring	<ul style="list-style-type: none"> ▪ On the job training with Champion CSR
	Discussion	<ul style="list-style-type: none"> ▪ Instructor Lead Training
	Evaluation	<ul style="list-style-type: none"> ▪ Summative and formative scenario based

Educational Venues

New Hire Customer Call Center personnel must be exposed to a variety of techniques and venues that stimulate interest and provide for personal growth. Activities should include: Computer Based Training, Instructor Lead Training, Mentoring activities, Cross-Training experiences, Nesting, and utilization of Learning Aids when needed.



Continual Learning Constructs

Promote life long learning skills. New Hire personnel should also have the opportunity to “sharpen” their skills with additional educational material after initial training has taken place. Topics should include updated activities & materials culled from periodic research that might affect Customer Call Center services.

Additionally, specific training courses should be developed and offered to Supervisors and Team Leaders. Topics for these personnel should include best practice managerial techniques and skills. They should be delivered when needed.

Cross Training

In addition to the current “Walk a Mile” program offered by Acme Incorporated, an inter-departmental (Back Office Support Team, Marketer Resolutions Team, Customer Relations Team, the Emergency Response Team and the Performance Solutions Group) cross-training program should be offered to New Hires and all Customer Call Center personnel.

Rewards and Incentives

Rewards and incentives should be in place that complement, compensate and recognize their outstanding achievements and skills in a meaning manner. For examples see Appendix E.

At Risk Activities

Currently, New Hire personnel trained for the Emergency Response Team do not have the depth of training nor the experience required to be placed in such a weighty position. Their actions and decisions can risk customer’s lives and place the organization at great legal risk.

E-LEARNING ENGINE, LLC recommends that placement within this department consist of “seasoned” employees who have global experience. The nature of this operation (24/7) and its redundant tasks will require rewards and incentives for veteran personnel to participate. Participation in this unit should be presented as an elevation in status for these employees.

Policies that permit “one strike and you are out” mistakes should be eliminated. These policies should be modified to include a more reasoned approach when reviewing and correcting job performance.



Overview of Educational Venues for Target Instruction

Topic	Type of Training										
Orientation	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training 										
Emotional Intelligence Training (EIT) This is expanded instruction. Portions of this content were formally found in CustomerCare's: Tone, Technique & Overall Professionalism teaching segment.	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training 										
“Woven” Training Module See Instructional Design Document for greater detail	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td data-bbox="727 682 1023 808">AAA Training</td> <td data-bbox="1023 682 1445 808"> <ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training </td> </tr> <tr> <td data-bbox="727 808 1023 924">Soft Skill Training</td> <td data-bbox="1023 808 1445 924"> <ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training </td> </tr> <tr> <td data-bbox="727 924 1023 1008">Mentoring</td> <td data-bbox="1023 924 1445 1008"> <ul style="list-style-type: none"> ▪ On the job training with Champion CSR </td> </tr> <tr> <td data-bbox="727 1008 1023 1071">Discussion</td> <td data-bbox="1023 1008 1445 1071"> <ul style="list-style-type: none"> ▪ Instructor Lead Training </td> </tr> <tr> <td data-bbox="727 1071 1023 1260">Evaluation</td> <td data-bbox="1023 1071 1445 1260"> <ul style="list-style-type: none"> ▪ Summative and formative scenario based </td> </tr> </table>	AAA Training	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training 	Soft Skill Training	<ul style="list-style-type: none"> ▪ Computer Based Training ▪ Instructor Lead Training 	Mentoring	<ul style="list-style-type: none"> ▪ On the job training with Champion CSR 	Discussion	<ul style="list-style-type: none"> ▪ Instructor Lead Training 	Evaluation	<ul style="list-style-type: none"> ▪ Summative and formative scenario based
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Ancillary and Cross-Training venues in greater detail

Cross-Training Activities

- Observing a Field Service Representative
- Observing Customer Logistics Representative
- Observing Construction Operations
- Observing Corporate Headquarter Operations

Ancillary Training Topics

- Customer Logistics Presentations
 - Safety & Operations Presentations
 - Outlook Training
 - Workforce Planning Presentations
 - Supervisor's Scorecard Presentations
 - Code of Business Conduct
 - Sexual Harassment
 - Workplace Violence
 - Understanding Pipeline Regulation & Deregulation
 - Pipeline Physical Delivery System
 - Why Pipeline Prices are high
-



GAP Analysis

In reality, the Customer Call Center is not simply a place that processes data and information; it taps into the tacit and subjective insights, intuitions and insights of their personnel.

Learning Organization

Thus the organization must be willing and able to become a “learning organization” in order to capture and discriminate individual innovation and shared learning experiences into practical tasks.

Research indicates (See Appendix A) that managerial decisions that overlap employees within teams, increase the continuity of contact, provide for joint learning experiences and enhance informal information sharing reinforce project goals and develop continuous mechanisms that can update the organization’s knowledge base.

Techniques, such as strategic rotation of individual employees among different technological areas and among departments makes organizations more fluid and enables Knowledge Management to grow within the organizational system.

Essential face-to-face communication must take place among all employees, rather than relying purely on technological communication, such as emails, in order to insure that the promise Knowledge Management becomes reality.

Great attention must be given to the creation of an organizational environment which is centered around an employee’s concept of his/her recognition and fair treatment, employment security, hiring practices, compensation based upon the organization’s performance, extensive training procedures, and egalitarian principles.

Generational GAP

A review of the Needs Analysis reveals an attitudinal and emotional gap between older and younger employee’s skills and abilities. Initial training should include an Emotional Intelligence (EI) component. Emotional Intelligence indicates a kind of intelligence or skill that involves the ability to perceive, assess and positively influence one's own and other people's emotions.

It is possible for people of all ages to become more socially and emotionally competent. Developing emotional competence requires that we unlearn old habits of thought, feeling, and actions that are deeply ingrained, and develop new ones. Such a process takes motivation, effort, time, support, and sustained practice.

To address the generational gap issue, E-LEARNING ENGINE, LLC suggests an amplified training period be developed for the “Tone, Technique and Professionalism” section currently found within Customer Care training. Additionally, E-LEARNING ENGINE, LLC suggests



“Woven” Training Modules be developed within the training plan that will promote the enhancement of Emotional Intelligence of New Hires.

Learning Objectives

At the end of the training schedule, New Hires will be able to acquire and transfer knowledge that process customer requests using quality care methodologies in a timely and efficient manner within organizational guidelines.



Design Document

Instructional Strategy

The instructional strategy for New Hires should be a blended learning experience that constantly reinforces knowledge learned within “real world” experiences. Adult learners must be provided with practical opportunities that test their systems and soft skills capabilities.

In a majority of the training segments, instructional content should be presented in the following manner: discover, apply, observe (mentoring), discuss, and evaluate.

Additionally, ancillary and cross-training experiences will be offered to New Hires.

Course Material Grouping and Sequencing

Course material will be presented orderly manner.

Activities will include: pragmatic problem solving, experimentation with new approaches, the ability to learn from past mistakes, learning from best practices of others and being able to transfer knowledge quickly and functionally throughout the organization.

As training proceeds, content, in the form of “Woven” Training Modules should be introduced that build upon previously learned skills..

Instructional Methods & Tactics

Instructional methods will include: Computer Based Training, Instructor Lead Training, Mentoring activities, Cross-Training experiences, Mentoring, and utilization of Learning Aids when needed. A “seasoned” champion CSR should be identified and be paired with each New Hire throughout their training period.



Assessments

Evaluations should be summative and formative in nature. Performance standards can be found by reviewing Appendix B.

Course Delivery Method

Delivery Strategies

E-LEARNING ENGINE, LLC recommends a blended training strategy for New Hires: Computer Based Training, Instructor Led Training, and Mentoring, Cross-Training, Nesting, and Job Aids.

Instructor-led Courses (ILT)

- ◆ This format allows for immediate instructor intervention for learners who may struggle with the material being presented. It is easy to implement given available resources. Instructor Led Training may include practice exercises, group presentations, role playing, games and observation as well as online conferencing. Summative and formative evaluations will be given when required.

Computer Based Training (CBT)

- ◆ Sometime referred to as E-Learning offers instruction where a computer program provides motivation and feedback. CBT can be delivered via dedicated programs on a student's computer, CD-ROM, LAN or Internet.

Mentoring

- ◆ Desk side support with on-the-job reinforcement of the concepts and skills by selected mentoring champions. Each New Hire should have a designated champion that will assist them during his/her entire training period. Champions should be rewarded for his/her efforts.



Cross-Training

- ◆ Cross-training experience gives New Hires a frame of reference for how their actions can and do impact the jobs being performed by others. The goal of this training is to produce a more conscientious, resourceful and knowledgeable employee that is capable of delivering exceptional customer service on a consistent basis.

Nesting

- ◆ New Hires are provided “real world” experience to test out newly learned skills within a controlled environment. Monitored by the trainer, it provides the last review and evaluation of the student by the trainer.

Learning Aids

- ◆ Online or hard copy quick reference guides and knowledge repositories that can provide the user with clear and quick answers. These referral guides should provide well defined procedural steps which characterize those activities being requested. These learning aids should encompass all processes and subsequent procedures CSRs might encounter. The use of these aids will help the CSRs to deliver consistent information in a timely manner. See Appendix C for an example.



Instructional Design Document

Note: The proposed document should be thought of as a constantly evolving product. Its parts and elements are constantly under strain from pressures from within and out the customer call center. Thus, modifications to this document are required from time to time to allow for training corrections and garnering of lessons learned from previous and current activities.

Current review of AAA Modules reveals a 15 minute average for Computer Based Training (CBT) element and approximately 1 ½ hours for associated Instructor Lead Training element (ILT). Times may vary according to specific module requirements.

Observations with Champion CSR's are generally 1 hour in length unless otherwise stated.

Woven Training Modules training times varies from process to process.

Ancillary Training Topics and Cross-training experiences may be re-arranged that might closely compliment daily training activities.

Development of Delivering Customer Care Component can be found within the Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios section.

Development of Emotional Intelligence Training can be found within the Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios section.

Development of the Soft Skill Scenarios can be found within the Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios section.

Evaluations will be summative and formative in nature. During the initial training period for New Hires, two summative evaluations will be given. During the last week of training an evaluation will be administered that randomly selects 4 phone calls for each student and grades their performance against the sample monitoring form standards. Additionally, a pen and paper test will be administered to provide quantitative data for future studies.

Summative evaluations utilize scenario and observational based methodologies. For performance evaluations see Appendix B.

Formative evaluations utilize scenario based methodologies and Multiple Choice, T/F, Fill in the blank, and matching questions. For performance evaluations see Appendix B.



For formatting and developing the following training materials, please review Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios section.

Week 1
Day: Monday
Topics: AM – Orientation, Meet and Greet, Online Orientation, Tour of Facilities PM - Introduction to Critical To Quality elements (CTQ) & Emotional Intelligence Training
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: Group Meetings, E-Learning, Instructor Lead Training
Activates: Workshop with Role-playing
Cross- Training Activities: None
Additional Educational Venues: Outlook Training
Learning Objectives: AM - Orientate new personnel to Acme Incorporated environment and leaders PM – Analyze components that comprise CTQ, Identify CTQ’s evaluation considerations, Discuss the components of Emotional Intelligence Training

AM Activities	
Meetings	Face-to-Face Orientation, Meet & Greet, Online Orientation, Tour of Facility
PM Activities	
ILT	Examine CTQ components : Connect, Assess, Resolve, End Evaluation considerations: Connect, Assess, Resolve, End Examine components of Emotional Intelligence Training
Ancillary Training Topic	Outlook Training
ILT	Summary of Today's Activities



Week 1
Day: Tuesday
Topics: AM – Delivering Quality Care Training – Connect, Assess PM - Delivering Quality Care Training – Resolve, End
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training
Activates: Workshop with Role-playing
Cross- Training Activities: None
Additional Educational Venues: None
Learning Objectives: AM – Examine, discuss and demonstrate connect component Examine, discuss and demonstrate assess component PM – Examine, discuss and demonstrate resolve component Examine, discuss and demonstrate end component

AM Activities	
ILT	Review of yesterday's Activities
CBT – Discover ILT - Evaluate	Examine, discuss and demonstrate connect component Summative scenario based
CBT – Discover ILT - Evaluate	Examine, discuss and demonstrate assess component Summative scenario based
PM Activities	
CBT – Discover ILT - Apply Evaluate	Examine, discuss and demonstrate resolve component Summative scenario based
CBT – Discover ILT - Apply Evaluation	Examine, discuss and demonstrate end component Summative scenario based
CBT – Discover ILT - Evaluate ILT	Discuss and demonstrate how to handle customer complaint Summative scenario based Summary of Today's Activities



Week 1
Day: Wednesday
Topics: AM – Emotional Intelligence Training – Listening Skills, Questioning and Probing Procedures, Positive Speaking Skills PM - Emotional Intelligence Training – How to handle irate customers, Providing the customer with options
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training
Activates: Workshop with Role-playing
Cross- Training Activities: None
Additional Educational Venues: None
Learning Objectives: AM – Identify, discuss and demonstrate listening skill Identify, discuss and demonstrate questioning and probing skills Identify, discuss and demonstrate speaking skills PM - Identify, discuss and demonstrate how to handle irate customer skills Examine, discuss and demonstrate how to provide customer with options skills

AM Activities	
ILT	Review of yesterday's Activities
CBT – Discover	Identify, discuss and demonstrate listening skill
ILT - Apply	Summative scenario based
Evaluate	
CBT – Discover	Identify, discuss and demonstrate questioning and probing skills
ILT - Apply	Summative scenario based
Evaluate	
CBT – Discover	Identify, discuss and demonstrate speaking skills
Evaluate	Summative scenario based
PM Activities	
CBT – Discover	Identify, discuss and demonstrate how to handle irate customer skills
ILT - Apply	Summative scenario based
Evaluate	
CBT – Discover	Examine, discuss and demonstrate how to provide customer with options skills
ILT - Apply	Summative scenario based
Evaluation	
ILT	Summary of Today's Activities



Week 1
Day: Thursday
Topics: AM/ PM - AAA Start
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: None
Learning Objectives: AM – Illustrate E-Learning log-on and navigational features Demonstrate Learning Aids Log into the AAA Application Navigate in the AAA Application Describe the AAA Home Screen and its functions PM – Start a call

AM Activities					
ILT	Summary of Yesterday's Activities				
CBT & ILT	Pre-class E-Learning				
CBT & ILT	Introduction to Learning Aids				
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover AAA Start Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion	Action: Apply ILT Reviews Observations with class	Summative Scenario Graded against Monitoring Tool
PM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover AAA Start Module 2	Action: Apply Soft Skill Scenarios Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion	Action: Apply ILT Reviews Observations with class	Summative Scenario Graded against Monitoring Tool
ILT	Ancillary Training Topic Code of Business Conduct				



Week 1
Day: Friday
Topics: AM/PM – Billing – Modules 1, 2, 3
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: Code of Business Conduct, Sexual Harassment
Learning Objectives: AM – Make arrangements based upon credit history Update credit history Enroll, change or stop the customer in the Budget Bill Program Set up payment options for customers Review payment history: including locating missing payments Enroll, cancel or lower the customers automatic draft payment PM - Understand how to set charge off details for bad debt View a pending financial request Adjust and reissue a bill Issue a credit & issue a refund

AM Activities					
Summary of Yesterday's Activities					
Introduction to Learning Aids					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
	AAA Billing Module 1	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
Ancillary Training Topic	Code of Business Conduct				
PM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
	AAA Billing Module 2	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 3	ILT Reviews content with class	Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
	AAA Billing Module 3	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
Ancillary Training Topic	Sexual Harassment				
ILT	Summary of Today's Activities				



Week 2
Day: Monday
Topics: AM/PM – Billing – Modules 4, 5, 6, 7, 8, 9
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: None
Learning Objectives: AM – Make arrangements based upon credit history Update credit history Enroll, change or stop the customer in the Budget Bill Program Set up payment options for customers Review payment history: including locating missing payments Enroll, cancel or lower the customers automatic draft payment Understand how to set charge off details for bad debt View a pending financial request Adjust and reissue a bill Issue a credit & issue a refund

AM Activities					
Summary of Yesterday's Activities					
Introduction to Learning Aids					
Woven Training Module	CBT Training	Action : Discover	Mentoring	Discussion	Evaluation
	ILT Training	Action: Apply	Action: Discover	Action: Apply	Summative After Module 9
Woven Training Module	AAA Billing Module 4	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	CBT Training	Action : Discover	Mentoring	Discussion	Evaluation
Woven Training Module	AAA Billing Module 5	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	CBT Training	Action : Discover	Mentoring	Discussion	Evaluation
Woven Training Module	AAA Billing Module 6	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	CBT Training	Action : Discover	Mentoring	Discussion	Evaluation
Woven Training Module	AAA Billing Module 7	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	CBT Training	Action : Discover	Mentoring	Discussion	Evaluation



AM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative After Module 9
	AAA Billing Module 8	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
	AAA Billing Module 9	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation after Module 9	ILT Reviews content with class	Scenario Graded against Monitoring Tool
PM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
			3 Hours Observation with CSR Champion	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
ILT	Summary of Today's Activities				

Week 2

Day: Tuesday

Topics: AM – Billing – Modules 10, 11, 12, 13

Overall Learning Approach: Cognitive, Psychomotor, Affective

Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)

Activates: Scenarios: Role-playing, Practice Exercises

Cross- Training Activities: Observing a Customer Logistics Representative

Additional Educational Venues: None

Learning Objectives: AM – Make arrangements based upon credit history

- Update credit history
- Enroll, change or stop the customer in the Budget Bill Program
- Set up payment options for customers
- Review payment history: including locating missing payments
- Enroll, cancel or lower the customers automatic draft payment
- Understand how to set charge off details for bad debt
- View a pending financial request
- Adjust and reissue a bill
- Issue a credit & issue a refund



AM Activities				PM Activities									
ILT	Summary of Friday's Activities				Woven Training Module	Evaluation	Discussion	Mentoring	ILT Training	CBT Training	Mentoring	Discussion	Evaluation
	CBT & ILT	Introduction to Learning Aids											
Woven Training Module	CBT Training	Action : Discover	ILT Training	Action: Apply	Mentoring	Action: Discover	Discussion	Action: Apply	CBT Training	Action : Discover	Mentoring	Action: Discover	Summative
	AAA	Observation with CSR Champion after Module 13	Soft Skill Scenarios: Connect, Asses, Resolve, End	ILT Reviews content with class	Observation with CSR Champion after Module 13	Scenario Graded against Monitoring Tool	Summative After Module 13	Summative After Module 13			Observation with CSR Champion	ILT Reviews Observations with class	Graded against Monitoring Tool
	Billing Module 10												
Woven Training Module	CBT Training	Action : Discover	ILT Training	Action: Apply	Mentoring	Action: Discover	Discussion	Action: Apply	Summary of Today's Activities	Summary of Today's Activities	Summary of Today's Activities	Summary of Today's Activities	Summary of Today's Activities
	AAA	Observation with CSR Champion after Module 13	Soft Skill Scenarios: Connect, Asses, Resolve, End	ILT Reviews content with class	Observation with CSR Champion after Module 13	Scenario Graded against Monitoring Tool	Summative After Module 13	Summative After Module 13					
	Billing Module 11												
Woven Training Module	CBT Training	Action : Discover	ILT Training	Action: Apply	Mentoring	Action: Discover	Discussion	Action: Apply					
	AAA	Observation with CSR Champion after Module 13	Soft Skill Scenarios: Connect, Asses, Resolve, End	ILT Reviews content with class	Observation with CSR Champion after Module 13	Scenario Graded against Monitoring Tool	Summative After Module 13	Summative After Module 13					
	Billing Module 12												
Woven Training Module	CBT Training	Action : Discover	ILT Training	Action: Apply	Mentoring	Action: Discover	Discussion	Action: Apply					
	AAA	Observation with CSR Champion after Module 13	Soft Skill Scenarios: Connect, Asses, Resolve, End	ILT Reviews content with class	Observation with CSR Champion after Module 13	Scenario Graded against Monitoring Tool	Summative After Module 13	Summative After Module 13					
	Billing Module 13												



Week 2
Day: Wednesday
Topics: AM – Order Activity – Modules 1, 2
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: Workforce Planning Presentation
Learning Objectives: AM – Review Order Activity from the Customer Care Center View Review Order Activity from the Field Operations View Amend/Void from Suspend Order Activity from the Customer Care Center View Amend/Void from Suspend Order Activity from the Field Operations View

AM Activities				
Summary of Yesterday's Activities				
Woven Training Module	CBT Training	ILT Training	Mentoring	Evaluation
	Action : Discover AAA Order Activity Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion after Module 2	Action: Apply Summative After Module 2 Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Evaluation
	Action : Discover AAA Order Activity Module 2	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observations with CSR Champion	Action: Apply Summative Scenario Graded against Monitoring Tool
Mid-Term Examination				Formative
PM Activities				
Ancillary Training Topics	Workforce Planning Presentations			
Cross-Training Activities	2 Hour New CSR Representative			
ILT	Review of CSR Observations with new CSR			
ILT	Summary of Today's Activities			



Week 2
Day: Thursday
Topics: AM/PM
Overall Learning Approach: Cognitive , Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: Observation of a Field Service Representative
Additional Educational Venues: None
Learning Objectives: AM/PM <p style="text-align: center;">To experience the pressures and demands placed upon a Field Service Representative</p>

AM Activities	
ILT	Review of Yesterday's Activities
Ancillary Training Topic	Observing a Field service Representative
PM Activities	
Ancillary Training Topic	Observing a Field service Representative
ILT	Summary of Today's Activities



Week 2
Day: Friday
Topics: AM – Finish Caller Request/Call End – Module 1, PM – General Account Inquiry – Module 1, 2
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: Supervisors Scorecard Presentation
Learning Objectives: AM – Identify, discuss and demonstrate skill at ending a call Write notation on account PM - Accept payment via Payment Options View the Lead History Escalate an account related issue Close a call Send Correspondence Complete a request for Action form

AM Activities				
Summary of Yesterday's Activities				
ILT	CBT Training	ILT Training	Mentoring	Evaluation
Woven Training Module	Action : Discover AAA Finish/End Call Module 1 Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion after module 2 General Account Inquiry	Summative After Module 2 General Account Scenario Graded against Monitoring Tool
Ancillary Training Topics	Supervisors Scorecard Presentation			
PM Activities				
Summary of Today's Activities				
Woven Training Module	CBT Training	ILT Training	Mentoring	Evaluation
Woven Training Module	Action : Discover AAA General Account Inquiry Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion after module 2	Summative After Module 2 Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Evaluation
	Action : Discover AAA General Account Inquiry Module 2	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion	Summative Scenario Graded against Monitoring Tool
ILT	Summary of Today's Activities			



Week 3
Day: Monday
Topics: AM – General Account Inquiry – Module 3, 4, 5, 6
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: Group Meeting, E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues:
Learning Objectives: AM /PM - Accept payment via Payment Options View the Lead History Escalate an account related issue Close a call Send Correspondence Complete a request for Action form

AM Activities					
ILT	Summary of Yesterday's Activities	ILT Training	Mentoring	Discussion	Evaluation
Woven Training Module	CBT Training Action : Discover	ILT Training Action: Apply	Action: Discover	Action: Apply	Summative after module 6
	AAA General Account Inquiry Module 3	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion After module 6	ILT Reviews content with class	Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training Action : Discover	ILT Training	Mentoring	Discussion	Evaluation
	AAA General Account Inquiry Module 4	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion After module 6	Action: Apply	Summative module 6
				ILT Reviews content with class	Scenario Graded against Monitoring Tool



PM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative module 6
	AAA General Account Inquiry Module 5	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion after Module 6	ILT Reviews content with class	Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
	AAA General Account Inquiry Module 6	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion	ILT Reviews observations with class	Scenario Graded against Monitoring Tool
ILT	Discussion on suggestions improvements of training course				
ILT	Summary of Today's activities				



Week 3
Day: Tuesday
Topics: AM – Issue Turn On, Off, Transfer, and Reconnect – Module 1, 2, 3, 4
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: None
Additional Educational Venues: Understanding Natural Gas Regulation & Deregulation
Learning Objectives: AM /PM - Identify the Various Turn-on Orders Prepare the various Turn-on Processes Explain the Delayed Match Order Identify the various Turn-off Orders Prepare the various Turn-off Orders

AM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover AAA Turn on, Off, Transfer, Reconnect Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion after Module 2	Action: Apply ILT Reviews content with class	Summative After Module 2 Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training Action : Discover AAA Turn on, Off, Transfer, Reconnect Module 2	ILT Training Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Mentoring Action: Discover Observation with CSR Champion	Discussion Action: Apply ILT Reviews Observations with class	Evaluation Summative Scenario Graded against Monitoring Tool
Ancillary Training Topics	Understanding Natural Gas Regulation & Deregulation				



PM Activities					
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover AAA Turn on, Off, Transfer, Reconnect Module 3	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion after Module 4	Action: Apply ILT Reviews content with class	Summative After Module 4 Scenario Graded against Monitoring Tool
Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
	Action : Discover AAA Turn on, Off, Transfer, Reconnect Module 4	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation CSR Champion	Action: Apply ILT Reviews Observations with class	Summative Scenario Graded against Monitoring Tool
Ancillary Training Topics	Understanding Natural Gas Regulation & Deregulation				
ILT	Review of Today's Activities				



Week 3
Day: Wednesday
Topics: AM – Issue Turn On, Off, Transfer, and Reconnect – Module 5, 6
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: Observing Corporate Operations
Additional Educational Venues: Safety and Operations Presentations
Learning Objectives: AM /PM - Identify the Various Turn-on Orders Prepare the various Turn-on Processes Explain the Delayed Match Order Identify the various Turn-off Orders Prepare the various Turn-off Orders

AM Activities						
Review of Yesterday's Activities						
ILT	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative After Module 6
		AAA Turn on, Off, Transfer, Reconnect Module 5	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion after Module 6	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
		AAA Turn on, Off, Transfer, Reconnect Module 6	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
	Ancillary Training Topics	Safety and Operations Presentations				
PM Activities						
	Cross- Training Activity	Observing Corporate Operations				
	ILT	Review of Today's Activities				



Week 3
Day: Thursday
Topics: AM/PM – Maintenance, Miscellaneous and No Gas Orders – Modules 1, 2, 3, 4
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities: Observing Corporate Operations
Additional Educational Venues: Safety and Operations Presentations
Learning Objectives: AM /PM - Recognize and be able to complete all Maintenance Orders Recognize and be able to complete all Miscellaneous Orders Recognize and be able to complete all No Gas Orders

AM Activities						
Review of Yesterday's Activities						
ILT	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover AAA Maintenance, Miscellaneous and No Gas Orders Module 1	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observations with CSR Champion after Module 2	Action: Apply ILT Reviews Content with class	Summative After Module 2 Scenario Graded against Monitoring Tool
		Action : Discover AAA Maintenance, Miscellaneous and No Gas Orders Module 2	Action: Apply Soft Skill Scenarios: Connect, Asses, Resolve, End	Action: Discover Observation with CSR Champion	Action: Apply ILT Reviews Observations with class	Summative Scenario Graded against Monitoring Tool



PM Activities						
Review of Yesterday's Activities						
ILT	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative After Module 4
		AAA Maintenance, Miscellaneous and No Gas Orders Module 3	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation With CSR Champion after Module 4	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
		AAA Maintenance, Miscellaneous and No Gas Orders Module 4	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with CSR Champion	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
	ILT	Summary of Today's Activities				



Week 3
Day: Friday
Topics: AM – Customer Information Update, Issue Leak and Carbon Monoxide Order
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: E-Learning, Instructor Lead Training, Mentoring, Learning Aids (When Applicable)
Activates: Scenarios: Role-playing, Practice Exercises
Cross- Training Activities:
Additional Educational Venues: Safety and Operations Presentations
Learning Objectives: AM - Update customer information Change customer name Add, change or delete customer address Add, change or delete customer password Add, change or delete customer phone numbers Add spouse's name

AM Activities						
Review of Yesterday's Activities						
ILT	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative After Issue Leak and Carbon Monoxide Order Module
		AAA Customer Information Update	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with Champion CSR after Issue Leak and Carbon Monoxide Order Module	ILT Reviews content with class	Scenario Graded against Monitoring Tool
	Woven Training Module	CBT Training	ILT Training	Mentoring	Discussion	Evaluation
		Action : Discover	Action: Apply	Action: Discover	Action: Apply	Summative
		AAA Issue Leak and Carbon Monoxide Order Module	Soft Skill Scenarios: Connect, Asses, Resolve, End	Observation with Champion CSR	ILT Reviews Observations with class	Scenario Graded against Monitoring Tool
PM Activities						
ILT		Discuss how training might be improved				
ILT		Summary of Today's Activities				



Week 4
Day: Monday, Tuesday, Wednesday, Thursday, Friday
Topics: Nesting
Overall Learning Approach: Cognitive, Psychomotor, Affective
Instructional Media Choices: Computer Based Training, Instructor Lead Training
Activates: Answering customer phone calls
Cross- Training Activities: None
Additional Educational Venues: None
Learning Objectives: AM /PM - Utilizing skills learned during training period

AM Activities Monday thru Friday	
*Evaluation	Students answer customer phone calls
PM Activities Monday thru Friday	
*Evaluation	Students answer customer phone calls
<p>* Evaluations will be summative and formative in nature. During the week, the trainer will randomly select 4 phone calls for each student and grade their performance against sample monitoring form standards. Additionally, a pen and paper test will be administered to provide quantitative data for future studies. See Appendix B for Performance standards.</p>	



Delivering Quality Care/Emotional Intelligence Training/Soft Skill Scenarios

Delivering Customer Care

Module 1	Connect
CBT	Overview Objectives Introduction Discover - Scenario: <ul style="list-style-type: none">◆ Greet the Customer◆ Verify caller/information
ILT	Apply – Exercises, role-playing in Workshop setting
Summary	Scenario based summative evaluation

Module 2	Assess
CBT	Overview Objectives Introduction Discover - Scenario: <ul style="list-style-type: none">◆ Listen for feelings and facts◆ Ask questions to clarify◆ Reflect by acknowledging feeling with empathy and summarize the facts
ILT	Apply – Exercises, role-playing in Workshop setting



Summary	Scenario based summative evaluation
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Module 3	Resolve
CBT	Overview Objectives Introduction Discover - Scenario: <ul style="list-style-type: none">◆ Provide help by offering information and exploring options◆ Set realistic expectations◆ Get agreement on the course of action
ILT	Apply – Exercises, role-playing in Workshop setting
Summary	Scenario based summative Evaluation

Module 4	End
CBT	Overview Objectives Introduction Discover - Scenario: <ul style="list-style-type: none">◆ Check for satisfaction◆ Link◆ Close◆ Follow-up
ILT	Apply – Exercises, role-playing in Workshop setting
Summary	Scenario based summative evaluation



Emotional Intelligence Training

The following major topics were developed through analysis of current interviews with SMEs. The following instructional modules are developed using established instructional methodologies.

Module 1	Listening Skills	
	Overview	To be formulated during Development Phase
	Objectives	To be formulated during Development Phase
	Importance	To be formulated during Development Phase
	Discover Technique - CBT	To be formulated during Development Phase
	Apply Technique - ILT	To be formulated during Development Phase
	Discover Technique – CBT Repeat Technique as needed	To be formulated during Development Phase
	Apply – ILT Repeat Technique as needed	To be formulated during Development Phase
	Summary - ILT	To be formulated during Development Phase
	Evaluation Summative - Scenario Based	To be formulated with CSRs & Team Leaders during Development Phase See Appendix B for Performance Standards



Module 2	Questioning and Probing Procedures	
	Overview	To be formulated during Development Phase
	Objectives	To be formulated during Development Phase
	Importance	To be formulated during Development Phase
	Discover Technique - CBT	To be formulated during Development Phase
	Apply Technique - ILT	To be formulated during Development Phase
	Discover Technique – CBT Repeat Technique as needed	To be formulated during Development Phase
	Apply – ILT Repeat Technique as needed	To be formulated during Development Phase
	Summary - ILT	To be formulated during Development Phase
	Evaluation Summative - Scenario Based	To be formulated with CSRs & Team Leaders during Development Phase See Appendix B for Performance Standards

Module 3	Positive Speaking Skills	
	Overview	To be formulated during Development Phase
	Objectives	To be formulated during Development Phase
	Importance	To be formulated during Development Phase
	Discover Technique - CBT	To be formulated during Development Phase
	Apply Technique - ILT	To be formulated during Development Phase
	Discover Technique – CBT Repeat Technique as needed	To be formulated during Development Phase
	Apply – ILT Repeat Technique as needed	To be formulated during Development Phase
	Summary - ILT	To be formulated during Development Phase
	Evaluation Summative - Scenario Based	To be formulated with CSRs & Team Leaders during Development Phase See Appendix B for Performance Standards



Module 4	How to handle irate customers	
	Overview	To be formulated during Development Phase
	Objectives	To be formulated during Development Phase
	Importance	To be formulated during Development Phase
	Discover Technique - CBT	To be formulated during Development Phase
	Apply Technique - ILT	To be formulated during Development Phase
	Discover Technique – CBT Repeat Technique as needed	To be formulated during Development Phase
	Apply – ILT Repeat Technique as needed	To be formulated during Development Phase
	Summary - ILT	To be formulated during Development Phase
	Evaluation Summative - Scenario Based	To be formulated with CSRs & Team Leaders during Development Phase See Appendix B for Performance Standards

Module 5	Providing the customer with options	
	Overview	To be formulated during Development Phase
	Objectives	To be formulated during Development Phase
	Importance	To be formulated during Development Phase
	Discover Technique - CBT	To be formulated during Development Phase
	Apply Technique - ILT	To be formulated during Development Phase
	Discover Technique – CBT Repeat Technique as needed	To be formulated during Development Phase
	Apply – ILT Repeat Technique as needed	To be formulated during Development Phase
	Summary - ILT	To be formulated during Development Phase
	Evaluation Summative - Scenario Based	To be formulated with CSRs & Team Leaders during Development Phase See Appendix B for Performance Standards



Soft Skill Scenarios

Upon conclusion of CBT portion of AAA process, a scenario(s) will be presented to the student. These scenarios should be developed by current CSRs and Team Leaders to replicate customer service calls. The format for these scenario(s) is as follows:

Connect Phase	Customer Comments:	To be filled in during Development Phase
	CSRs Response:	Student answers and is graded against Sample Monitoring Form (See Appendix E)
Assess Phase	Customer Comments:	To be filled in during Development Phase
	CSRs Response:	Student answers and is graded against Sample Monitoring Form (See Appendix E)
Resolve Phase	Customer Comments:	To be filled in during Development Phase
	CSRs Response:	Student answers and is graded against Sample Monitoring Form (See Appendix E)
End Phase	Customer Comments:	To be filled in during Development Phase
	CSRs Response:	Student answers and is graded against Sample Monitoring Form (See Appendix E)



Conclusion and Signatures

By choosing E-Learning Engine, LLC as a partner, Acme Incorporated can take full advantage of our pool of quality, experienced instructional designers, curriculum developers and Professional Services consultants. E-Learning Engine, LLC has the resources, expertise, and proven track record in working with major corporations, and meeting their specific training objectives. E-Learning Engine, LLC believes in cultivating and maintaining long-term partnerships with all of our clients, and we look forward to establishing such a partnership with Acme Incorporated.

Thank you for the opportunity to analyze your training needs. Should you have any questions or need further clarification on any component of this analysis, please contact Michael Smith or Ken Jones.

Accepted:

Acme Incorporated Authorized Agent

Date:

Accepted:

E-Learning Engine, LLC Authorized Agent

Date:



Appendix A:

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Appendix B:

Performance Standards – New Hire for CCC

Quality Training – Summative and Formative evaluations will be scored independently and requires an overall average of 85% for successful completion.

A trainee, whose test scores are lower than 85% on any of the required tests and exams, will be subject to disciplinary action up to and including termination of their participation in the training program.



Appendix C:

Visual and Navigational Examples

The screenshot shows a slide from an e-learning course. At the top right, it says "AAA TRAINING" and "Help". On the left is a vertical navigation menu with the following items: Overview (selected), Objectives, Introduction, Roles & Responsibilities, Delegation of Services, Documentation, Prescription Refills, Postoperative Contacts, After Hours & Hand-Offs, Informed Consent, Protective Measures, and Summary. The main content area features a video player showing a woman in a purple shirt talking on a mobile phone. At the bottom left is the "ACME INCORPORATED" logo, and at the bottom right is a "1 of 5" indicator with navigation arrows.

The screenshot shows a slide from an e-learning course. At the top right, it says "AAA TRAINING" and "Help". On the left is a vertical navigation menu with the following items: Overview (selected), Objectives, Introduction, Roles & Responsibilities, Delegation of Services, Documentation, Prescription Refills, Postoperative Contacts, After Hours & Hand-Offs, Informed Consent, Protective Measures, and Summary. The main content area features a slide titled "Documentation" with a list of three bullet points: "Every practice needs written guidelines", "Documenting your encounter and decision making process is your foundation against malpractice claims", and "The use of contact forms and screening guidelines enable you to develop policies and procedures that are specific to your office". At the bottom left is the "ACME INCORPORATED" logo, and at the bottom right is a "1 of 5" indicator with navigation arrows.



Appendix D:

Sample ILT Materials

- ◆ Sample instructor guide and student manual:



samplemnl.pdf

E-Learning Engine, LLC typically creates instructor guide and student manual chapters in the same Microsoft Word file. Instructor notes and demos are entered into text boxes in page margins, inline with the content that is included in both the instructor guide and student manual. The text boxes are suppressed when the student manual is printed.

- ◆ Sample Quick Reference card:



"Outlook
2003-IE.pdf"

Quick Reference cards include simple step-by-step instructions for completing specific tasks. They can be customized easily with the company logo.



Appendix E:

Sample Monitoring Form

1.0 Connect (9%)	
1.1 Is the CSR ready to assist caller?	
1.2 Does the CSR use the required greetings?	
1.3 Does the CSR update appropriate data?	
1.4 Does the CSR obtain caller's name if not provided?	
1.5 Does the CSR verify required information?	
2.0 Assess (25%)	
2.1 Does the CSR permit the customer to complete their thought or sentence?	
2.2 Does the CSR stop and listen when the customer begins to speak?	
2.3 Does the CSR avoid distractions?	
2.4 Does the CSR refrain from asking the customer to repeat information that has been clearly stated?	
2.5 Does the CSR identify areas for further research?	
2.6 Does CSR ask appropriate questions that are relevant to the call to determine the root cause?	
2.7 Does the CSR determine the correct applications or resources to assess the customer's concerns?	



3.0 Resolve (30%)	
3.1 Does the CSR utilize the correct applications or resources to resolve customer's concern?	
3.2 Does the CSR complete appropriate fields on application, forms and systems?	
3.3 Does the CSR update appropriate data?	
3.4 Does the CSR route the request to the proper place?	
3.5 Does the CSR utilize correct business policy and procedures during the call?	
3.6 Does the CSR take personal ownership to resolve customers' concern?	
3.7 Does the CSR strive for first call resolution for the customer and company?	
3.8 Does the CSR provide 100% accurate information?	
3.9 Does the CSR provide complete information?	
3.10 Does the CSR check for the caller's understanding regarding resolution?	
4.0 End (6%)	
4.1 Does the CSR provide a complete summary of actions?	
4.2 Does CSR offer additional assistance, when applicable, to ensure all of the caller's needs are met?	
4.3 Does the CSR end the call on a positive note by using a soft close?	



5.0 Tone, Technique and Overall Professionalism (30%)	
5.1 Does CSR use warm and caring tone?	
5.2 Does CSR identify customer's communication style and respond using appropriate diction, volume and speed?	
5.3 Does CSR use standard English and display overall professionalism?	
5.4 Does CSR use "we" rather than "them/they?"	
5.5 Does CSR follow proper hold procedures?	
5.6 Does CSR address customer appropriately?	
5.7 Does CSR use appropriate questioning technique?	
5.8 Does CSR acknowledge customer's feelings first and offer empathy as needed?	
5.9 Does the CSR appropriately assure the caller they are paying attention?	
6.0 Bonus	
6.1 Does CSR go above and beyond required aspects of the Connect and End stages?	
6.2 Does CSR go above and beyond required aspects of the Assess stage?	
6.3 Does CSR go above and beyond required aspects of the Resolve Stage?	
6.4 Does CSR go above and beyond required aspects of Tone, Technique and Professionalism?	
Key Indicator for the Form	
Disqualified Call = Key Indicator (zero for the form)	



Appendix F:

Rewards and Incentives

- ◆ Personal thank you notes from supervisors.
- ◆ Coupons for tea/coffee shops.
- ◆ Create a monthly newsletter that mentions what people are accomplishing.
- ◆ Employee of the month nominated by employees. Winners receive a plaque and a \$50.00 gift certificate.
- ◆ Attendance awards. 4 consecutive months with no absenteeism or lateness earns paid time off
- ◆ Monthly attendance awards.
- ◆ Summer Thank-You barbecues.
- ◆ Thank you notes, letters and emails from customers are all posted on a bulletin board.
- ◆ Prizes awarded for top quality monitoring scores.
- ◆ STAR program where reps can earn Gold and Silver Stars. Awarded by customers and other employees.
- ◆ Recognition events where customer letters are read aloud and recipients are rewarded.
- ◆ Wheel of Fortune. Spin the wheel and you can win various prizes worth different amounts.
- ◆ Recognizing reps that have been in the Center for 5 years. Helps with retention.
- ◆ Call of Fame. Calls are taped and ones that are deemed excellent are played at breakfast meetings and the rep is awarded with a plaque.
- ◆ Referral programs. Monetary rewards are given for bringing new reps into the center.
- ◆ Seasonal contests with appropriate prizes.
- ◆ Cash bonus for highest productivity.
- ◆ Cash bonus for highest quality.
- ◆ Awards for people who make the place a more fun place to work.