

E-LEARNING BRIEF WORKSHEET *ENRICHING CUSTOMER SERVICE*

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PROJECT SUMMARY:

CLIENT NAME: ASCEND HOSTING	CONTRACTOR/VENDOR: JTS EDUCATION
PROJECT OVERVIEW: This demo project is a scenario-based training for customer support staff in the Billing and IT department at a web hosting company. This course simulates real-world consequences in a no-risk setting. The demo features realistic customer interactions in which the learner must select the most appropriate responses from multiple answer options (multiple-choice questionnaire). The learner also gets to experience the consequences of their answers and is offered feedback.	COURSE LENGTH: N/A
	TARGET AUDIENCE Businesses onboarding new customer service staff Businesses retraining their customer service staff
	LEARNING ENVIRONMENT <input type="checkbox"/> ILT <input type="checkbox"/> VILT <input checked="" type="checkbox"/> E-learning <input type="checkbox"/> Blended
COURSE GOAL(S)/LEARNING OUTCOME(S)	INTERACTIVITIES IN E-LEARNING <input type="checkbox"/> Level 1

<p>Upon the completion of this course, the learner will improve customer interaction and satisfaction by 1) leveraging socio-emotional intelligence (empathy and validation) to facilitate more productive interactions and stronger connections; 2) asking probing questions to provide clarity and improve understanding, and 3) using company resources to streamline customer issues and solve problems.</p>	<p> <input type="checkbox"/> Level 2 <input checked="" type="checkbox"/> Level 3 <input type="checkbox"/> Level 4 </p>
<p>DELIVERABLES</p> <ul style="list-style-type: none"> ▪ Project Brief ▪ Action Map ▪ Script ▪ Wireframes ▪ Text-based Storyboard ▪ Visual Mockups ▪ Visual Storyboard ▪ Interactive Prototype ▪ Final Product 	<p>TIMELINE: 6.5 weeks</p> <p>Project Brief: 01/05/2022</p> <p>Action Map: 01/05/2022</p> <p>Ideation: 01/05/2022</p> <p>Storyboard Kickoff: 01/06/2022</p> <p>Wireframes: 01/10/2022</p> <p>Visual Mockups: 01/14/2022</p> <p>Visual Storyboard: 01/19/2022</p> <p>Interactive Prototype: 02/04/2022</p> <p>Final Product: 02/18/2022</p>
<p>PROBLEM and SOLUTION</p>	

The client expressed growing performance issues with their customer support staff for the last three months. Most of the Help Desk representatives have struggled to resolve issues with the more demanding customers. This problem has led to an upsurge in prolonged resolution stints, poor customer service reviews, and increased workloads for senior staff. The client disclosed that the issues stem from a lack of formalized training, and therefore reached out to discuss an educational solution.

I proposed an e-learning course to help their customer service staff cultivate a more methodical approach for evaluating situations, identifying customer needs, and responding properly.

LEARNER PERSONA

New customer support staff and those who struggle with difficult customer interactions



Jake Andrews

Age: 22

Location: Austin, Texas

Status: Single

Occupation:

Customer Service Representative

BIO:

Jake is a student, computer science, and full-time Customer Service Representative. He aspires to become an Information Systems Security Manager. He struggles with customer service interactions and has received feedback from managers on improving his interpersonal skills. Jake is hardworking, adaptable, and time-efficient.

FRUSTRATIONS:

- gets frustrated with unresolved customer issues
- is discouraged by poor customer reviews
- is frustrated by lack of direction on how to navigate customer interactions and interpersonal skills
- gets irritated by lengthy training

GOALS:

- to improve interpersonal skills and customer interactions
- to gain leadership skills
- to develop analytical and problem-solving skills
- to better relate to customers

LEARNING PREFERENCES:

- experiential learning
- bite-sized learning
- online training

MOTIVATORS:

Achievement	●	●	●	○	○
Power	●	●	●	○	○
Incentive	●	●	●	○	○
Fear	●	●	●	●	○
Growth	●	●	●	●	●
Social	●	●	●	●	○

CONTENT

FUNDAMENTAL UNDERSTANDINGS *Content, Skills, and Concepts*

Learners will know the following content:

1. Learners will learn about good/bad customer service practices.
2. Learners will learn about validating, invalidating responses, and empathetic statements.
3. Learners will learn about probing questions and paraphrasing customer issues.
4. Learners will learn about company resource utilization.

Learners will develop the following skills:

1. Learners will be able to differentiate between good and bad responses to customers.
2. Learners will be able to leverage socio-emotional intelligence (empathy and validation) to foster stronger connection and facilitate more productive interactions
3. Learners will be able to propose practical solutions in consideration of customer situation
4. Learners will be able to ask probing questions and paraphrase/restate customer issues to improve understanding, provides clarity, and helps resolve issues
5. Learners will be able to leverage company resources (e.g., materials, tools) to help customers/employees understand and solve problems; refer to peers and supervisors to address challenging problems

Learners will grasp the following concepts:

1. Learners will understand that social-emotional intelligence (empathy and validation) helps to foster stronger connections and affords more productive interactions
2. Learners will understand that leverage probing questions and paraphrasing improves understanding, provides clarity, and helps resolve issues
3. Learners will understand that utilizing resources can improve knowledge and streamline customer issues

<p>APPROACHES TO LEARNING</p> <p><input checked="" type="checkbox"/> Thinking</p> <p><input type="checkbox"/> Social</p> <p><input checked="" type="checkbox"/> Communication</p> <p><input checked="" type="checkbox"/> Self-management</p> <p><input type="checkbox"/> Research</p> <p>Details:</p> <p>DIFFERENTIATION</p> <p><input type="checkbox"/> Affirm identity—build self-esteem</p> <p><input checked="" type="checkbox"/> Value prior knowledge</p> <p><input type="checkbox"/> Scaffold learning</p> <p><input checked="" type="checkbox"/> Extend learning</p> <p>Details:</p> <p>EXTENSION</p> <p><i>Helpful Articles</i> complementary resources</p>	<p>INSTRUCTIONAL ACTIVITIES <i>What activities will the learners engage in (e.g., readings, quizzes, learner reflections)?</i></p> <ul style="list-style-type: none"> ▪ Quizzes (multiple-choice questionnaire) ▪ Customer Responses and Rating (learner reflection) ▪ Customer Care Expert Feedback (learner feedback) ▪ Helpful Articles (optional extended learning) <hr/> <p>LEARNING OBJECTIVES</p> <ol style="list-style-type: none"> 1. Learners will understand that social-emotional intelligence (empathy and validation) helps to foster stronger connections and affords more productive interactions 2. Learners will understand that leveraging probing questions and paraphrasing improves understanding, provides clarity, and helps resolve issues 3. Learners will understand that using resources can improve knowledge and streamline customer issues 4. Learners will be able to differentiate between good and bad responses to customers. 5. Learners will be able to leverage socio-emotional intelligence (empathy and validation) to foster stronger connections and facilitate more productive interactions 6. Learners will be able to ask probing questions and paraphrase/restate customer issues to improve understanding, provide clarity, and help resolve issues
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7. Learners will be able to leverage company resources (e.g., materials, tools) to help customers/employees understand and solve problems; refer to peers and supervisors to streamline customer issues

COURSE OUTLINE

No.	SCENARIO	SECTION OUTLINE	ASSESSMENT
1	Customer Ticket: <i>Closed Account</i> Customer Empathy and Validation	<p>Key Concepts: – empathy and validation work together to help foster stronger connections and affords more productive interactions</p> <p>Key Skills: empathize with customer, identify validating/invalidating and discrediting responses; demonstrate active listening; propose a practical solution in consideration of customer issue</p> <p>Key Content: validating, invalidating/discrediting statements, empathetic statements</p>	<p>Formative Assessment: scenario-based multiple-choice questionnaire</p> <ul style="list-style-type: none"> - answer selection
2	Customer Ticket: <i>Misinformation</i> Get on the Same Page	<p>Key Concepts: leveraging probing questions and paraphrasing improves understanding, provides clarity, and helps resolve issues</p> <p>Key Skills: paraphrase/restate customer situations, ask probing questions</p>	<p>Formative Assessment: scenario-based multiple-choice questionnaire</p> <ul style="list-style-type: none"> - answer selection

		Key Content: probing questions, paraphrasing, restating	
3	Customer Ticket: <i>Website Issues</i> Utilizing Resources	Key Concepts: utilizing resources can improve knowledge and streamline customer issues Key Skills: leverage company resources (e.g., materials, tools) to help customers/employees understand and solve problems; refer to peers and supervise to address challenging problems Key content: company resources	Formative Assessment: scenario-based multiple-choice questionnaire - answer selection

COURSE EQUIVALENCY *Activities, methods tools substitutions*

IN-PERSON TRAINING	E-LEARNING COURSE
On the Job Training Workshop Customer-Representative Scenario Training	Scenario-based Learning, Problem Based: <i>Help Desk</i> Customer Ticket Simulation (multiple-choice)
Customer Reviews	Customer Review (learner reflection; formative)
Work Evaluations	Mentor Feedback (learner feedback; formative)

TECHNICAL REQUIREMENTS

LMS/LRS COMPATIBILITY

LMS

LRS

Value for LMS/LRS:

Passed

Failed

Complete

Incomplete

ADDITIONAL TECH DETAILS

OTHER:

- xAPI Enabled: track activity info and quiz results with xAPI statements
- JavaScript: generate course certificate
- Section 508/ADA Compliant:

Yes. If yes, please specify.

- Color contrast, navigation, keyboard access (tabs key), consistency, color, structure, alt-text, audio captions

No

AUTHORING TOOL: Storyline 360

TESTING & ASSESS

PRE-TEST

POST TEST

<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> Yes. If yes, please specify. <input type="checkbox"/> No <ul style="list-style-type: none"> ▪ How many attempts per question? 1 ▪ Randomized? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ▪ Can they leave in the middle? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No ▪ Can they go back and change an answer? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ▪ Do they see feedback after answering or only at the end? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No ▪ Can they review? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ▪ Can they retry? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ▪ Passing score? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
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PROJECT MANAGEMENT

NAME	ROLE	ORGANIZATION
Tim Sterling	Project Manager	Vendor
Jai'mie Terry	Writer / Instructional Designer	Vendor
Jai'mie Terry	Developer	Vendor
Cassandra Fawler	Production Coordinator	Vendor

Irene Robinson	QC Editor/Editor/Reviewer	Vendor
John Lark	Project Manager	Client
Jonathan Krause	Subject-Matter Expert	Client
Ana McMahon	LMS/LRS Integration Specialist	Client

KICKOFF DATE: 01/03/2022

ONLINE MEETING ROOM:	966 XXXX XXXX
CONFERENCE DIAL IN NUMBER:	+1 253 XXX-XXXX

WEEKLY MEETING INFORMATION:

MEETING TOPIC	MEETING GOALS	DATE	TIME
Project Brief Review and Stakeholders	<ul style="list-style-type: none"> - Ice Breaker Games (introductions) - Delegate Tasks - Set priorities - Understand how to use communication mediums - Understand problem escalation and contingency plans 	01/03/2022	10:00-10:45 AM Break 11:10-11:55 AM

Action Mapping	<ul style="list-style-type: none"> - Explicitly identify learning outcomes - Adapt learning outcome into specific tasks - Establish course blueprint for scenario-based training 	01/04/2022	10:00-10:45 AM Break 11:00-11:55 AM
Sketching – Ideation Deliverables	<ul style="list-style-type: none"> - Outline and product visual concept (mood board and content design concepts) - Generate ideas Validate vision 	01/05/2022	10:45-11:30 AM
Storyboard Kickoff	<ul style="list-style-type: none"> - Script writing review - Solidify learning content - Solidify learn resources and materials 	01/06/2022	11:10-11:45 AM
Wireframing	<ul style="list-style-type: none"> - Discuss logic of navigation - Introduce changes - Check system functionality 	01/10/2022	10:30-11:15 AM
Visual Mockups	<ul style="list-style-type: none"> - Decide visual details - Approve visual details - Present Brand's visual style 	01/14/2022	11:15-12:00 PM

Storyboard Review with Visuals	<ul style="list-style-type: none"> - visual presentation of course flow with programming notes review 	01/19/2022	10:00-10:20 PM
Storyline Follow-up	<ul style="list-style-type: none"> - Questions, Issues, Concerns 	TBA	TBA
Interactive Prototype Presentation	<ul style="list-style-type: none"> - Prototype presentation and review - Evaluate product logic and appearance - Full estimate for development - Full product design 	02/04/2022	11:10-11:55 AM
Final Product Presentation And Signoff	<ul style="list-style-type: none"> - Product review and handoff 	02/18/2022	TBA