

ID Project Part Five: Instructional Strategy

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Sequence and Clustering of Objectives

CLUSTER	OBJECTIVES	TIME
1	Customer Request Types 1.2 1.0	5 minutes
2	Online Reference Materials 2.6.A 2.6.B 2.6 2.0 3.0	10 minutes
3	Inform the Customer 4.1.2.A 4.1.2.B 4.1.2 4.1.3 4.1	10 minutes
4	Determine Next Steps 4.2 4.3	15 minutes
5	Complete the Interaction 4.4.5.A 4.4.5 4.4	15 minutes
6	Terminal Objective	30 minutes

Preinstructional, Assessment, and Follow-Through Activities

PREINSTRUCTIONAL ACTIVITIES
<p>Motivation:</p> <p>Attention: Gain learner attention by asking if they agree that there is a need for customers to perform self-service on certain common loyalty program issues.</p> <p>Relevance: State that helping customers perform self-service when possible can potentially reduce the volume of these annoyances and allow the learners to focus on more rewarding tasks.</p> <p>Confidence: State that the learners already have the quality Customer Service skills necessary to make the goal a success.</p> <p>Satisfaction: State that the learners could achieve higher job satisfaction by being in a position of helping customers help themselves whenever possible.</p>

<p>Objectives: Because informing the learners of every objective would be time-consuming and overwhelming, first direct the learners to the overall goal statement printed in the participant workbook. This sets the context for the entire training session and expresses the organization's intent. Next, since the learning and performance contexts are very similar, make a brief statement that ties together the goal statement and terminal objective by indicating how the learners will be able to perform these same action steps on the job.</p>
<p>Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will involve a PowerPoint presentation of key points, live lecture, and a copy of the goal statement in a participant workbook.</p>
<p>ASSESSMENT</p>
<p>Pretest: Learner Analysis reveals the learners already possess the entry skills. This was based on the comparison of identified entry skills and the list of performance competencies. Learners are already evaluated on their possession of these skills based on their performance evaluations. If it becomes clear a learner does not meet the competencies (and thus does not have the entry skills), that learner will be rescheduled to take the lesson at a later time after the competencies have been attained.</p>
<p>Practice Tests: Provide a practice opportunity after each cluster to ensure each objective is rehearsed and feedback is provided.</p>
<p>Posttest: After the terminal objective is covered, have the learners walk through a live performance of all the goal steps (in the learning context) as a small group activity.</p>
<p>Student Groupings and Media Selection: Some practice tests will be individually-based, others will be in groups of two learners due to the social interaction naturally found in Customer Service. For the posttest, students will work in groups of two in order to emulate the performance context. Media will primarily involve paper and pencil activities (in a participant workbook), lecture, class discussions, and live performances, as well as access to the online reference materials, Customer Relationship Management (CRM) software, and self-help documentation.</p>
<p>FOLLOW-THROUGH ACTIVITIES</p>
<p>Memory Aids: The online reference materials and self-help documentation will serve as job aids for the learners to reference when needed. Remind the learners of the importance of referring to these resources on the job and checking them often for the most updated content.</p>
<p>Transfer: Facilitating application of the skills will primarily focus on maintaining emphasis on the benefits the learners will realize when they accomplish the goal. State that the learners will have the full support of mentors and supervisors on the job.</p>
<p>Student Groupings and Media Selection: Follow-through activities will involve the learners grouped as a whole. Media will primarily consist of a PowerPoint presentation and live lecture.</p>

Content Presentation and Student Participation

OBJECTIVE: 1.2	1
CONTENT PRESENTATION	
Content: Explain that customer calls specific to the loyalty program have been studied by the organization and can be broken down according to those that customers can handle themselves and those that Customer Service must handle for them.	
Examples: Customers can redeem rewards and enter adjustments themselves online without any Customer Service involvement. Non-Example: They cannot, however, perform more complex tasks such as linking accounts or refreshing transaction history.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will involve projected display of the list of request types found on the self-service documentation materials and a matching activity in the participation workbooks.	
STUDENT PARTICIPATION	
Practice Items: Learners will complete the matching activity in their participant workbooks.	
Feedback: Discuss the answers with the group, soliciting responses from various learners and providing feedback as necessary.	
Student Groupings and Media Selection: Learners will complete the activity individually and the feedback discussion will involve the entire group. Media will include the projected display of the list of request types and participant workbooks containing the printed activity.	

OBJECTIVE: 1.0	2
CONTENT PRESENTATION	
Content: Describe how customer loyalty program calls often have characteristics that make them quickly stand out as either self-service or standard Customer Service handling. Explain the importance of listening for characteristics that identify a call as self-service or Customer Service-handled.	
Non-Example: If a customer says, "I lost my membership card," this is a function that must be handled through Member Services, which means the customer cannot perform this action himself/herself.	
Example: If a customer says, "Please credit my account for a recent purchase," this is an adjustment request and is something the customer can perform online.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include projected display of the list of request types found on the self-service documentation materials and a fill-in-the-blank activity in the participation workbooks.	
STUDENT PARTICIPATION	
Practice Items: Learners will complete the fill-in-the-blank activity in their participant workbooks.	
Feedback: Review the answers with the group and provide positive or negative feedback as appropriate.	
Student Groupings and Media Selection: Learners will complete the activity individually and the feedback discussion will involve the entire group. Media will involve the projected display of the list of request types and participant workbooks containing the printed activity.	

OBJECTIVE: 2.6.A	3
CONTENT PRESENTATION	
Content: Explain that, for purposes of this training and all other activities in the organization, the intranet refers to the internal portal that connects all individuals and groups across the organization. It is the central information warehouse.	
Examples: Provide a few examples of how the intranet is already important to the learners, such as for accessing benefits information and quality assurance standards.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include brief lecture and class discussion.	
STUDENT PARTICIPATION	
Practice Items: Ask the learners to define intranet and/or describe ways they use it today.	
Feedback: Provide verbal feedback to the learners as individuals volunteer to answer the question. Guide the discussion toward the definition provided in the online glossary.	
Student Groupings and Media Selection: Learners will complete the activity as an entire group, volunteering (or being selected) to respond to the question. Media will include group discussion and the online glossary, as needed.	

OBJECTIVE: 2.6.B	4
CONTENT PRESENTATION	
Content: Demonstrate to the learners a quick overview of the online reference materials by exploring them on the projector.	
Examples: Point out the key elements of the online reference materials to help the learners understand what the online reference materials are.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include projected display of the online reference materials as the facilitator demonstrates their key components.	
STUDENT PARTICIPATION	
Practice Items: Learners will summarize in their own words a definition of online reference materials based on the demonstration and the online glossary.	
Feedback: Ask the group for responses, provide immediate feedback, and guide any resulting instruction toward the definition provided in the online glossary.	
Student Groupings and Media Selection: Learners will complete the activity individually as they write their response in their participant workbooks. Then the entire group will be addressed as a whole, seeking individuals to explain their definition. Guide the discussion toward the definition provided online. Media will include the use of the participant workbooks and the online glossary, as needed; as well as group discussion.	

OBJECTIVE: 2.6	5
CONTENT PRESENTATION	
Content: Discuss the importance of using the online reference materials for the most current processes and procedures. Demonstrate on the projector where to find the link to the appropriate materials.	
Examples: The online reference materials should be used as a guide every day on the job. Provide examples of why this is true (e.g. a procedure could have changed slightly). Also demonstrate to the learners where to find the online reference materials they need.	
Student Groupings and Media Selection: Students will be grouped as a whole class. Media will include projected display of clicking on the appropriate link and a computer for each learner.	
STUDENT PARTICIPATION	
Practice Items: Learners will be asked to access the corporate intranet site and click on the appropriate link for the online reference materials.	
Feedback: A brief walk around the room will ensure every learner has accessed the appropriate materials. Provide assistance to anyone needing it and reinforce the importance of using the site on a daily basis.	
Student Groupings and Media Selection: Learners will complete the activity individually. The feedback will involve individual learners as the facilitator walks around the room to ensure everyone is on the appropriate page. Media will include an Internet-enabled computer for each learner.	

OBJECTIVE: 2.0	6
CONTENT PRESENTATION	
Content: Demonstrate to the learners how to access the self-service documentation by clicking the link within the online reference materials.	
Examples: No examples are necessary – simply demonstrate the proper link to access.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include projected display of clicking on the appropriate link and a computer for each learner.	
STUDENT PARTICIPATION	
Practice Items: Learners will be asked to click the link to the self-service documentation.	
Feedback: A brief walk around the room will ensure every learner has accessed the appropriate materials. Provide assistance to anyone needing it and reinforce the importance of the self-service documentation for completion of the training and to support the new initiative of helping customers help themselves.	
Student Groupings and Media Selection: Learners will complete the activity individually. The feedback will involve individual learners as the facilitator walks around the room to ensure everyone is on the appropriate page. Media will include an Internet-enabled computer for each learner.	

OBJECTIVE: 3.0	7
CONTENT PRESENTATION	
<p>Content: Remind the learners that at this point of the process, we have identified a customer's type of request and accessed the self-service documentation. Explain that the next step in order to help the customer is to choose what kind of question or issue the customer has called about. Explain that this is important because it determines what information we will be providing the customer later in the process. Demonstrate selection of a self-service request type.</p>	
<p>Examples: Remind learners of the differences between customer requests that can be handled by customers online and requests that Customer Service must handle for them. Name some of the examples and non-examples mentioned previously.</p>	
<p>Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include brief lecture, projected display of self-service documentation, and a computer for each participant.</p>	
STUDENT PARTICIPATION	
<p>Practice Items: Learners will be asked to select a self-service request type in the self-service documentation.</p>	
<p>Feedback: A brief walk around the room will ensure every learner has accessed the appropriate materials. Provide assistance to anyone needing it and reinforce the importance of using the site on a daily basis.</p>	
<p>Student Groupings and Media Selection: Learners will complete the activity individually. The feedback will involve individual learners as the facilitator walks around the room to ensure everyone has made the appropriate selection. Media will include an Internet-enabled computer for each learner.</p>	

OBJECTIVE: 4.1.2.A	8
CONTENT PRESENTATION	
<p>Content: Discuss that the very nature of the customer loyalty program means that these customers perceive themselves to be highly valued as the company's "top" customers. Explain that, in the company's view, all customers are highly valued, but to align with the customer's perception, three standards have been developed to provide the ideal customer experience. Display the standards on the projector.</p>	
<p>Examples: For each of the three protocols, provide an example and a non-example. Use the listing of the protocols on the intranet site to describe the company's expectations in this regard.</p>	
<p>Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include PowerPoint and/or projected display of the standards as listed on the intranet site.</p>	
STUDENT PARTICIPATION	
<p>Practice Items: Before providing examples of each protocol, ask the learners as a group if they can think of any examples or of any non-examples. Have the learners write down their examples in their workbooks and solicit responses from random learners to prompt discussion.</p>	
<p>Feedback: Provide feedback as the learners present their responses and guide the discussion toward the standard protocols as defined on the intranet site.</p>	
<p>Student Groupings and Media Selection: After completing the activity individually, the learners will discuss the responses as a whole group. Media will include participant workbooks and an Internet-enabled computer for each learner.</p>	

OBJECTIVE: 4.1.2.B	9
CONTENT PRESENTATION	
Content: Ask the learners what it means to actively listen to someone. Guide the discussion toward the definition provided in the online glossary. Display the definition after the discussion.	
Examples: Non-Example: Provide an example of a customer call scenario in which the Customer Service Agent does not listen attentively to the customer and does not rephrase customer responses to ensure understanding. Example: Then, provide an example of a customer call scenario in which the Customer Service Agent actively listens to the customer by rephrasing customer responses.	
Student Groupings and Media Selection: Learners will be grouped as a whole class. Media will include projected display of the definition of active listening found in the online glossary and prerecorded customer call simulations including an example and a non-example (embed into the PowerPoint).	
STUDENT PARTICIPATION	
Practice Items: During content delivery, ask the learners what they think it means to actively listen. Be sure to guide the discussion toward the definition provided in the online glossary.	
Feedback: Compile student responses on a flipchart or other device, and then compare the overall response to the definition provided in the online glossary. Provide feedback throughout the discussion as needed.	
Student Groupings and Media Selection: Learners will complete the activity as a group by volunteering their thoughts on what active listening means. Media will include a flipchart or other device for compiling student responses and access to the online glossary, if needed.	

OBJECTIVE: 4.1.2	10
CONTENT PRESENTATION	
Content: Explain that now that we've clarified what is meant by active listening, we will put the skill to practice because it is essential for meeting our customers' expectations.	
Examples: Reiterate the differences between the situations previously covered in which one Customer Service Agent used active listening and the other did not.	
Student Groupings and Media Selection: Divide the learners into groups of two. Media will include the participant workbooks and a PowerPoint slide outlining the instructions for the activity.	
STUDENT PARTICIPATION	
Practice Items: Learners will participate in role-play scenarios in their small learning groups. Have the learners create a brief role-play scenario with one learner acting as a customer and the other acting as the Customer Service Agent. After allowing a few moments, have each group present its role play scenario and discuss as a group.	
Feedback: Walk around and provide feedback or assistance to groups as needed. After each group delivers its role play, provide feedback and guide the class discussion to ensure learners have grasped the essence of active listening.	
Student Groupings and Media Selection: Learners will perform this activity in groups of two. They will work within their groups to create a simple role-based scenario demonstrating active listening. They will then present their scenarios to the entire class. Media will include the participant workbooks for planning the scenario and live performances of the role play scenarios.	

Lesson Allocation

Due to scheduling constraints for Customer Service Agents, time is limited to two hours. This seems appropriate for the content involved in the lesson; therefore it will be broken into two sessions separated by a 15 minute break.

SESSION	EVENTS AND OBJECTIVES	TIME
1	Preinstructional Activities Introduction of Memory Aids (used both in learning & performance) Cluster 1 – Customer Request Types (1.2, 1.0) + Practice Cluster 2 – Online Reference Materials (2.6.A, 2.6.B, 2.6, 2.0, 3.0) + Practice	45 minutes
2	Cluster 3 – Inform the Customer (4.1.2.A, 4.1.2.B, 4.1.2, 4.1.3, 4.1) + Practice Cluster 4 – Determine Next Steps (4.2, 4.3) + Practice Cluster 5 – Complete the Interaction (4.4.5.A, 4.4.5, 4.4) + Practice Terminal Objective / Assessment Transfer Discussion / Conclusion	60 minutes

Consolidation of Media Selections and Choice of Delivery System

SESSION	OBJECTIVES	TYPE(S) OF LEARNING	MEDIA SELECTIONS & STUDENT GROUPINGS	DELIVERY SYSTEM(S)
1	1.2, 1.0, 2.6.A, 2.6.B, 2.6, 2.0, 3.0	<ul style="list-style-type: none"> Intellectual Skills > Concrete Concepts Verbal Information Intellectual Skills > Discrimination 	<ul style="list-style-type: none"> Learners grouped as whole class for individual learning PC for facilitator Projector PC for each participant Participant Workbook Online Reference Materials Online Glossary Self-Help Documentation Flipchart PowerPoint Presentation 	<ul style="list-style-type: none"> Classroom delivery
2	4.1.2.A, 4.1.2.B, 4.1.2, 4.1.3, 4.1, 4.2, 4.3, 4.4.5.A, 4.4.5, 4.4, Terminal Objective	<ul style="list-style-type: none"> Verbal Information Intellectual Skills > Concrete Concepts Intellectual Skills > Defined Concepts Intellectual Skills > Discrimination 	<ul style="list-style-type: none"> Learners grouped as whole class for most objectives Learners divided in groups of two for some components PC for facilitator Projector Pre-recorded customer calls PC for each participant Participant Workbook Online Reference Materials Online Glossary Self-Help Documentation 	<ul style="list-style-type: none"> Classroom delivery

			<ul style="list-style-type: none">• CRM Software• Flipchart• PowerPoint Presentation	
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