

Portfolio Project Design Document

Project Name: PJ Enterprises Customer Service/Staff Development Plan

Prepared By: Team 2 Enterprises

Purpose

Performance deficiencies identified by PJ Enterprises management, sales performance data, and numerous customer service surveys provide the requirement for this instruction. The first deficiency is a performance-related issue that addresses the need for improved customer service. Specifically, there is a need for telephone operators to better understand and use proper telephone etiquette. The second performance-related issue focuses on new employee recruitment and hiring strategy.

This customer service/staff development training introduces telephone operators to concepts and skills that collectively combine to improve customer service and increase sales. The information and knowledge provided act like tools to enhance the learner's ability to apply proper phone etiquette, improving the telephone operator's ability to interact effectively with the customer during call center activities.

Target Audience

The Target Population (TP) for this instruction is PJ Enterprises Telephone Operators performing customer-service call center duties, as described in the employee handbook.

Learner Characteristics and Prerequisite Knowledge

- Primary audience - Telephone Operators identified as adult learners
- Secondary audience - Customer Service Supervisors identified as adult learners
- General learner characteristics - Both male and female learners who are between 18 and 60 years of age, are culturally diverse, multilingual, well-educated, have no visual or audio deficiencies, and have varying levels of experience as a customer service telephone operator.

Application of Learning Theories

The proposed instruction aligns with the Morrison's Prescriptions for Teaching Interpersonal Skills (Morrison et al., 2019). Morrison's first prescription is recall. The first terminal objective asks trainees to identify. Identify aligns with recall because identify is a type of recollection in which a person names a particular concept through discrimination (Gagne, 1992). In the proposed instruction, trainees identify different ways of producing etiquette. The second terminal objective asks trainees to speak with etiquette or apply the first terminal objective. In accordance with Morrison et al. (2019), the second terminal objective's 'do' phase asks trainees to mentally

rehearse, covertly practice and overtly practice speaking with etiquette. In addition, the 'do' phase includes a spatial organizer, which Reid and Morrison (2014) identify as a generative strategy.

The proposed delivery of instruction also aligns with recommendations of the six principles of Cognitive Load Theory. First, Cognitive Load Theory recommends the multimedia principle, which asserts that text and images in contrast to text alone leads to better learning outcomes. The instruction of the first terminal objective includes text and images. The delivery media of the first terminal objective, which is Computer-based Training, provides easy integration of text and images. Second, Cognitive Load Theory advises against split attention in which audio and text are presented simultaneously. The instruction of the first terminal objective avoids audio and text presented simultaneously. This occurs in the 'absorb' phase of the instruction. Third, Cognitive Load Theory recommends segmentation of information in a single modality. In the 'absorb' phase, there will be no more than 100 words on each slide (Ayres and Paas, 2012).

The proposed instruction aligns with the principles of reflective teaching in several ways. In designing the training, there was a recognition that there is no "one size fits all" method that will be applicable to all learners. The four components of reflective teaching are reflected in the design and implementation of the overall training program: sensitivity to context, which impacts the content; fluid planning, which impacts the delivery and format (providing asynchronous learning for the CBT to accommodate differing schedules); professional and personal knowledge, which is demonstrated through the collaboration with SMEs; and professional development, which is reflected in the goal of the training to improve PJ Enterprises' customer service standards (Schunk, 2012).

The design and implementation of the training program also aligns with several principles underlying constructivism. During the classroom-based training, learners are asked to participate in role-playing activities to practice using phone etiquette with customers in a variety of situations. Rather than having the learners passively absorb material by reading about each scenario, they will actively be involved in the process through these activities. These small group activities, along with time for reflection, allow the learners to construct their knowledge of phone etiquette in an active rather than passive way (Schunk, 2012).

References

- Ayres, Paul and Paas, Fred (2012) Cognitive Load Theory: New Directions and Challenges *Applied Cognitive Psychology* Vol. 26 Pages 827–832.
- Gagné, R. (2000) Chapter 2: Learning Hierarchies in *The Legacy of Robert Gagné* edited by Richie, Rita. Harcourt Brace Jovanovich College Publishers: New York, N.Y.

Morrison, G. R., Ross, S. M., Morrison, J. R., & Kalman, H. K. (2019) *Designing effective instruction*. Hoboken, NJ: Wiley.

Reid, A. J., & Morrison, G. (2014). Generative learning strategy use and self-regulatory prompting in digital text. *Journal of Information Technology Education: Research*, 13, 49-72. Retrieved from <http://www.jite.org/documents/Vol13/JITEv13ResearchP049-072Reid0549.pdf>

Schunk, Dale (2012) *Learning Theories: An Educational Perspective 6th Edition* Boston, M.A.: Pearson Education

Training Format

Instructional Delivery Method for Course (overall)

Problem-based Blended Learning environment:

- Instructor-led discussions, scenario-based role-play, and computer-based training (CBT) delivered in a fully equipped modernized classroom, with twenty individual fully functional web-enabled computer workstations.

Learning Environment

Brick and mortar classrooms, managed by HR; both classes have known physical environments, IT capabilities. and scheduling processes.

- Up-to-date computer, mouse, browser
- Speakers/headset
- LCD projector compatible with a notebook computer and cables for proper connection (e.g., InFocus or similar make)
 - Whiteboard for class
 - Desk/seating area
 - Notepad and pen for taking notes
 - Scheduling – Monday-Friday, 8:00 am – 12 am (2 possible deliveries based on shifts).
 - Lighting - Overhead fluorescent lights (accessible by the instructor).
 - Noise - Free of unwanted noises/distractions.
 - Temperature - Central heat and air (thermostat is accessible by the instructor)
 - Seating - Adequate seating exists to facilitate the training, and the option to reconfigure the floorplan if needed).
 - Accommodations - The classrooms are handicap-accessible, and handicap available bathrooms are nearby.
 - Equipment - Both classrooms have enough CBT work stations available to facilitate the training.

- Transportation - No special transportation requirements exist.
- Technology Inventory - All CBT workstations have fully operational audio / video capabilities and are web-enabled.
- Flip chart with at least 16 markers (4 black, 4 blue, 4 red, 4 brown)
- Web-enabled CBT workstations.
- Training will be delivered via instructor-led activities and CBT.
- All technology requirements for the instructor have been verified prior to beginning design.
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Terminal Objective 1			
Given customer scenarios (ask question, place order), identify acceptable examples of telephone etiquette with at least 80% accuracy.			
Enabling Objective 1 Telephone operators will identify customer-friendly language	Absorb Learners will listen to a realistic story that demonstrates why it is important to perform proper etiquette with each customer interaction.	Do Learners will respond to five personal-response scenario simulations that require them to identify unacceptable examples versus acceptable examples	Connect Questioning activity using a real-world situation requiring the learner to think through their response—If the customer becomes abusive during the call, what actions should you take?
Assessment		Multiple Choice Quiz 80% correct to pass	Complete / Incomplete
Enabling Objective 2 Telephone operators will recognize appropriate versus inappropriate tone and inflection	Absorb Learners will listen to realistic examples of phone calls that demonstrate acceptable tone/inflection and examples of unacceptable tone/inflection.	Do Correctly identify four out of five audio examples that demonstrate correct tone.	Connect Questioning activity using a real-world example phone call (heavy accent). How could the telephone operator ask questions to better understand the customer's

			needs, increase sales, and/or improve revenue?
Assessment		True/ False 80% correct to pass	Complete / Incomplete
Enabling Objective 3 Telephone operators will identify strategies to eliminate most interruptions and distractions	Absorb Learners will watch a short video depicting a realistic customer service call in which a distraction occurs.	Do Identify operator actions to reduce distractions during phone calls. (Matching Game)	Connect Ponder activity on how you will tactfully handle a distraction from a customer (barking dog, etc.) and distractions in your own work area (such as loud conversation coming from the desk next to you).
Assessment		Matching Game 80% correct to pass	Complete / Incomplete

Terminal Objective 2			
Given a job aid (QRG) while answering a customer's call, respond with etiquette with a 80% positive customer service score.			
Enabling Objective 1 Respond with customer-friendly language (Application)	Absorb Live Training Demonstration Trainees will listen to a model recording of a Telephone Operator and Customer call that demonstrates telephone etiquette. Verbal Imaginal Model Visual-Spatial Organizer Trainees will fill out a	Do Covert Practice: Trainees will complete an individual controlled practice of first saying polite utterances. Then, they will say the polite utterances with polite tone and inflection. Overt Practice Trainees will adopt roles as a customer	Connect Work Document Trainees will create a work document from their verbal-imaginal model. This document will record what telephone etiquette is and how to communicate with etiquette. This document may be saved to assist on-the-job performance.

	visual-spatial about polite words and inflection while listening to a model recording of Telephone Operator and Customer call. Rationale This 'absorb' phase follows the recommendations of Morrison (2019) for teaching interpersonal skills. The proposed instruction provides trainees with the opportunity to observe how the content from the first terminal objective is integrated in the second terminal objective. Trainees will record and organize this integration on a verbal imaginal model, which for this instruction will be a Visual-Spatial Organizer. This visual-spatial organizer also serves as a generative strategy.	and telephone operator. In this practice, the customer role will provide a statement or question. The telephone operator role must respond with etiquette appropriately.	Ponder Trainees will reflect on their daily work challenges.
Assessment	Assessment The assessment will be the complete visual-spatial organizer for placing orders in the 'absorb' phase. Trainees will use a checklist to	Assessment: The overt practice will act as the assessment for placing orders in the 'do' phase. The 'customer' role will track and evaluate	

	evaluate their visual-spatial organizer. This checklist will provide parameters for quality and quantity. For quality, the checklist will determine what etiquette is and how to deliver etiquette. For quantity, the checklist will provide the amount that trainees need to record. In addition to the checklist, a visual-spatial organizer exemplar will be provided.	the performance of the customer 'role'. Each prompt in the overt practice will have a brief analytic score of the quality the 'telephone operator' response. For example, the telephone operator might respond by saying 'Would you like to add anything else to your order?'. This question would be evaluated based on quality, such as modality to communicate an indirect request as well as intonation. The 'customer' role would rate the response based on three-point scale: clear, somewhat clear and not clear or present.	
Enabling Objective 2 Respond with customer-friendly intonation (Application)	Absorb Video Training Demonstration Trainees will listen to a model recording of a Telephone Operator and Customer call that demonstrates telephone etiquette. Verbal Imaginal Model Visual-Spatial Organizer Trainees will fill out a visual-spatial about tone and polite words while listening	Do Covert Practice Trainees will complete an individual controlled practice of first saying polite utterances. Then, they will say the polite utterances with polite tone and inflection. Overt Practice Trainees will adopt roles as a customer and telephone operator. In this practice, the	Connect Work Document Trainees will create a work document from their verbal-imaginal model. This document will record what telephone etiquette is and how to communicate with etiquette. This document may be saved to assist on-the-job performance

	to a model recording of Telephone Operator and Customer call.	customer role will provide a statement or question. The telephone operator role must respond with etiquette appropriately.	
Assessment	Assessment The assessment will be the complete visual-spatial organizer for customer questions in the 'absorb' phase. Trainees will use a checklist to evaluate their visual-spatial organizer. This checklist will provide parameters for quality and quantity. For quality, the checklist will determine what etiquette is and how to deliver etiquette. For quantity, the checklist will provide the amount that trainees need to record. In addition to the checklist, a visual-spatial organizer exemplar will be provided.	Assessment: The overt practice will act as the assessment for customer questions in the 'do' phase. The 'customer' role will track and evaluate the performance of the customer 'role'. Each prompt in the overt practice will have a brief analytic score of the quality the 'telephone operator' response. For example, the telephone operator might respond by saying 'Would you like to add anything else to your order?'. This question would be evaluated based on quality, such as modality to communicate an indirect request as well as intonation. The 'customer' role would rate the response based on three-point scale: clear, somewhat clear and not clear or present.	
Enabling Objective	<u>Absorb</u>	<u>Do</u>	<u>Connect</u>

3 Respond to challenges with customer-friendly language and intonation during customer calls	Video Training Demonstration Trainees will listen to a model recording of a Telephone Operator and Customer call that demonstrates telephone etiquette. Verbal Imaginal Model Visual-Spatial Organizer Trainees will fill out a visual-spatial about tone and polite words while listening to a model recording of Telephone Operator and Customer call.	Covert Practice Trainees will complete an individual controlled practice of first saying polite utterances. Then, they will say the polite utterances with polite tone and inflection. Overt Practice: Trainees will adopt roles as a customer and telephone operator. In this practice, the customer role will provide a statement or question. The telephone operator role must respond with etiquette appropriately.	Work Document Trainees will create a work document from their verbal-imaginal model. This document will record what telephone etiquette is and how to communicate with etiquette. This document may be saved to assist on-the-job performance.
Assessment	Assessment The assessment will be the complete visual-spatial organizer for customer challenges in the 'absorb' phase. Trainees will use a checklist to evaluate their visual-spatial organizer. This checklist will provide parameters for quality and quantity. For quality, the checklist will determine what etiquette is and how to deliver etiquette. For quantity, the checklist will provide	Assessment: The overt practice will act as the assessment for customer challenges in the 'do' phase. The 'customer' role will track and evaluate the performance of the customer 'role'. Each prompt in the overt practice will have a brief analytic score of the quality the 'telephone operator' response. For example, the telephone operator might respond by saying 'Would you like to add anything	

	the amount that trainees need to record. In addition to the checklist, a visual-spatial organizer exemplar will be provided.	else to your order?'. This question would be evaluated based on quality, such as modality to communicate an indirect request as well as intonation. The 'customer' role would rate the response based on three-point scale: clear, somewhat clear and not clear or present.	
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Assessment

- TLO1: Terminal assessment will include five scenario-based questions that require 80% accuracy.
- TLO2: Terminal assessment will include a performance-based assessment that requires 80% competency on language, prosodic, and strategic markers.

Quality Evaluation

Formative

- Conduct Needs Assessment—A needs assessment determines the training need, who will receive the training, and what might work to resolve the issue.
- Conduct Task Analysis—A process of analyzing and articulating the kind of learning students are expected to know how to perform.
- Conduct Design Review—This takes place after each stage of design.
- Conduct Usability test—A usability test performed on the prototype of the computer-based training (CBT) module to check the CBT functionality, and ensure it meets ADA/508 standards.

Summative

- Pre-instruction Knowledge Check and Post-instruction Knowledge Check (Complete/Incomplete)
- The aggregate of data will be used for summative evaluation purposes

Confirmative

- Meeting Business Goals
 - Maintain profitability reviewed annually
 - Increased customer list reviewed annually
 - Ten percent increase of customer service scores
 - Ongoing Management Evaluations
 - Supervisors use rubric to evaluate select telephone operators' use

of etiquette on customer calls.

- Rubrics evaluate telephone operators' use of language, intonation and inflection and strategies.
- Annual Aggregate Results
- Ongoing Management Evaluations
- Activity Reporting Results
- Increased sales
- Increased customer lists